

**REQUEST FOR PROPOSALS FOR ASSESSING SERVICES FOR THE
CITY OF DELAVAN, WISCONSIN
2016 - 2018**

NOTICE IS HEREBY GIVEN THAT proposals will be received by the City of Delavan, Walworth County, Wisconsin for statutory assessment services for the years of 2016-2018. The City of Delavan reserves the right to extend the contract for an additional two years. The 2015 assessed value of locally assessed property was \$512,257,700; 2015 assessed value of all property was \$544,747,300. The 2015 assessment roll parcel count was as follows:

Total Real Estate Parcels (including manufacturing):	3,215
Residential Improved:	2,471
Commercial:	336
Exempt:	186
Personal Property:	364
2015 Assessment Ratio:	.990718401

Said proposals shall be received at the office of the City Clerk, 123 South Second Street, P.O. Box 465, Delavan, Wisconsin 53115, until 4:00 o'clock p.m. on 20th day of November, 2015. Common Council consideration of proposals at their December 8, 2015 City of Delavan Council meeting is anticipated. Interviews and presentations to the Common Council are anticipated and will be on an invitation basis.

The City of Delavan reserves the right to reject any or all proposals on any basis and without disclosure of any reason. The failure to make a disclosure shall not result in accrual of any right, claim or cause of action against the City. The City also reserves the right to waive or not waive any informality in the request for proposal process. The Common Council shall select the proposal that is most advantageous to the City of Delavan.

REIMBURSEMENTS: There is no expressed or implied obligation for the City of Delavan to reimburse responding person(s), firms or entities for any expenses incurred in preparing proposals in response to this request.

SCOPE OF WORK:

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the City of Delavan in accordance with applicable requirements of the Wisconsin State Statutes and the Wisconsin Property Assessment Manual, as amended each year.
2. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
3. Assessor will review and assess new construction, new plats and remodeling as January 1st of the current year.

4. City of Delavan currently has two (2) TID districts. Assessor shall be required to complete all TID D.O.R. reports regarding valuations relating to these districts within the required reporting period. The Assessor will also keep the City Administrator apprised of any significant assessment changes within these Districts.
5. Assessor will print and mail out state approved blotters to all holders of personal property in the City, audit the returned personal property forms and place the new values in the assessment roll. Doorage assessments will be made on any personal property account that has not sent in a return unless it is documented that the business is no longer in operation.
6. Assessor will account for all buildings destroyed or demolished.
7. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue and complete all applicable reports.
8. Assessor will process annexations, attachments, parcel splits and new plats.
9. Assessor will correct legal descriptions as needed.
10. Assessor will take digital photographs of new construction and also during the review process if needed. Said photographs shall be linked to the appropriate address and tax parcel number for display on the computer along with building sketches and data sheets.
11. Assessor will file electronically building permits or copies of such in property record files.
12. Assessor will notify the Building and Zoning Administrator and the City Clerk of missing building permits or apparent errors in property record files.
13. Assessor will post assessments to real estate transfer returns and record sale information to property record cards. Assessor will transmit sales information to the Wisconsin Department of Revenue as required.
14. Assessor will post assessments from property cards to the assessment roll.
15. Assessor shall send notice to each property owner of any change in assessment. The notice form used shall be that prescribed by the Wisconsin Department of Revenue, and include the time and place the open book conference(s) will be held. Mailings of change in assessment shall not be less than fifteen (15) days prior to the first day of the conferences.
16. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. Open Book shall be held in May or June each year. Board of Review will be held within statutory time frame each year. The assessment roll will be available for public inspection prior to the Open Book session(s).
17. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of June each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
18. The assessor shall conduct a sales ratio analysis (ratio between assessed values and sales prices) to ensure that current appraisals are within the parameters established by the State of Wisconsin.

19. Assessor will be responsible for providing all assessment data to Walworth County's Tax Listing Department and ensuring that the County's assessment roll after the information is posted balance to the records submitted by the assessor. Assessor will provide printed copy of the assessment roll to the City of Delavan.
20. Assessor will be responsible for completing and signing the real estate and personal property assessment rolls.
21. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of Review meeting.
22. Assessor will also provide contact information for City of Delavan officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
23. Assessor shall maintain a computerized database of property assessment records, including digital photographs of each property with access provided to City of Delavan. The City of Delavan currently uses Market Drive software for its' residential properties. Proposer should indicate what program it will use and any potential additional costs to the City such as license fees.
24. Assessor will supply to the City of Delavan a complete set of computer property assessment records (including digital photographs of each property) that are compatible with the City of Delavan's computer equipment and software. Assessment data should have the capability to be provided to the City in a database format such as Access or a spreadsheet such as Excel. This is to allow the City of Delavan and/or Walworth County to easily query the data and map the housing stock information.
25. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the City's assessment computer shall be updated within fourteen (14) days of the final adjournment of the Board of Review.
26. Assessor shall communicate openly, timely and professionally with City staff and the public when handling appeals. A positive professional image in both dress and conduct while interfacing with staff and the public, especially during appeals, is required.
27. Assessor will also perform all other duties incidental to the normal duties of an Assessor.

ITEMS TO BE PROVIDED BY THE CITY OF DELAVAN:

The City of Delavan will provide some clerical services to aid the assessor. City support may include:

1. Answering routine phone requests for assessment data.
2. The City shall provide a working space at the City of Delavan Municipal Building at no cost to the assessor.

SPECIAL CONSIDERATIONS:

If the person(s), firm or entity believes that any question in this Request for Proposal is unclear or susceptible to more than one interpretation, that person(s), firm or entity should submit a written request for clarification.

SUBCONTRACTING:

If the person(s), firm or entity responding to this Request for Proposal is considering subcontracting portions of the engagement to other firms, the name of the proposed subcontracting firms must be clearly identified in the proposal. Following the award of the contract, no additional subcontracting will be allowed without the express prior written consent of the City.

INSURANCE:

The Assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action, arising from any act or omission of the Assessor, his/her agents and employees in the execution of work. Certificates of insurance, naming the City as an additional insured, issued by a company authorized to transact business in the State of Wisconsin shall be supplied to the City of Delavan. All insurance coverage shall contain a ten (10) day advance notice of cancellation to the City of Delavan. Assessor shall timely pay all insurance premiums.

Limits of liability shall not be less than:

- Workers Compensation – Statutory
- General Liability - \$1,000,000 per occurrence
- Automobile - \$250,000/\$500,000
- Professional Liability - \$1,000,000

STANDARDS:

Work shall be performed in accordance with generally accepted standards as well as any and all standards issued by the State of Wisconsin or the Federal government governing such work. The person(s), firm or entity awarded this contract shall keep fully informed of all Federal, State and Local laws, ordinances and regulations and all orders and decrees of authorities having any jurisdiction or authority which, in any manner, affect those engaged or employed on the work, or which, in any way, affect the conduct of the work. The person(s), firm or entity shall protect and indemnify the City of Delavan and its representatives against any claim or liability arising from or based on the violation of any such law, ordinance, regulation, order or decree, whether by the firm, entity or him or herself, or any of the firm, entity's or his or her employees.

The person(s), firm or entity awarded this contract agrees that in the hiring of employees for the performance of work under this contract or any subcontract hereunder, no contractor or subcontractor, nor any person acting on behalf of such contractor or subcontractor, shall, by reason of race, sex, or creed discriminate against any citizen of the

United States in the employment of labor or against any worker who is qualified and available to perform the work to which the employment relates. Further, the person(s), firm, or entity awarded this contract shall pay all claims for labor performed for these services at rates at least equal to the minimum wage rate.

GENERAL PROPOSAL REQUIREMENTS:

To be considered, two (2) copies of the proposal must be received at the address provided below, before the close of business on November 20, 2015. Clearly mark the envelope in the lower-left hand corner "Proposal".

Proposals will be evaluated by City of Delavan staff and the Common Council, with the final selection subject to approval of the City of Delavan Common Council. During the evaluation process, the City reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. At the discretion of the City, person(s), firms or entities submitting proposals may be requested to make oral presentations, as part of the evaluation process. If selected for an oral presentation, the representative that will be assigned the work for the City of Delavan must appear.

Each person(s), firm or entity may submit only one (1) proposal.

SUBMITTALS WITH PROPOSAL:

1. A brief statement of the proposer's understanding of the work to be done, a project approach plan to demonstrate an understanding of the project requirements and including the full scope of services.
2. Describe the person(s), firm or entity's quality control procedures that will ensure compliance with the contract.
3. Commitment to perform the work within the specified time period.
4. Proof of insurances outlined herein.
5. Summary of the person(s), firm or entity's qualifications and experience. Identify the principal supervisory and management staff, including engagement partners, managers, other supervisors and specialists who would be assigned to the work; provide information on each staff person's experience that will be responsible for performing the work requested. Personnel may be changed if those personnel leave the firm, however the City retains the right to approve or reject replacements.
6. References are required. The proposals shall identify five (5) references from municipal clients for which the proposer has provided assessment and/or revaluation services within the past three years. References must include the name, title, address and phone number of the contact person for each municipal client listed.
7. Certification that the person signing the proposal is entitled to represent the firm or entity (if an individual is not submitting the proposal), empowered to submit the bid and authorized to sign a contract with the City of Delavan.
8. Total not exceed fee for each year of the proposed contract (2016, 2017 and 2018) to include all labor, materials, transportation costs, meals, lodging, and Board of Review expenses. A list of rates by personnel and/or hours for each as well as all anticipated

direct and indirect costs shall also be provided. All expense reimbursements will be charged against the total all-inclusive maximum fee submitted by the firm. A desired payment schedule should also be outlined in the proposal.

9. Rates for additional work. If the City should require additional services, such additional work shall be performed only if documented with an addendum to the contract between the City and the person(s), firm or entity awarded the contract. Any such additional work agreed to between the City and the person(s), firm or entity awarded the contract shall be performed at the same rates set forth in the schedule of fees and expenses included in the compensation proposal.
10. List all contractual requirements that the person(s), firm or entity may have.
11. Time line for each proposed phase of the project.
12. The proposals shall address the specific services required as listed above. If the proposer is unable to meet any of the required services they shall specifically address their inability within the proposal and the alternative method for addressing that item.
13. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
14. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the Department of Revenue, and shall maintain certification throughout the duration of this assignment.
15. Bidders are advised to carefully inspect the community, the entire records and facilities of the City of Delavan and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for consideration set forth in this proposal.
16. The City of Delavan is currently seeking proposals for annual assessment maintenance. However, the City staff and the Common Council would like the proposal to include an estimate of the cost for a revaluation for a City comparable in size to the City of Delavan. Please include a separate estimate for interior and exterior inspections.

REVIEWS:

Proposals that meet the qualifications contained in this request for proposal will be reviewed by City staff for completeness of response, references, qualifications of the proposer, and the qualifications of staff assigned to serve the City of Delavan scope of services and costs.

EVALUATING CRITERIA:

The following evaluation criteria will be used to review the Assessment Services Proposals that are timely received and which meet the general quotation requirements:

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size.

2. Past experience with providing assessment revaluation services.
3. Demonstration of a high level of accuracy in assessment work for municipal clients.
4. Ability to provide and maintain a computerized database of property assessment records to the City.
5. Cost of assessment services.
6. Evidence of positive customer interaction.

RIGHT TO REJECT:

The City of Delavan reserves the right to reject any and all proposals, waive formalities or to accept the proposal which best serves the interest of the City.

TENTATIVE SCHEDULE:

Proposals received by: November 20, 2015

Staff reviews and recommendation to the Common Council by: December 4, 2015

Final Selection by the Common Council by: December 8, 2015 (Alternative date would be December 15, 2015)

Contract execution by: December 31, 2015

INQUIRIES:

Inquiries concerning this request for proposal should be directed to:

Susan Kitzman, City Clerk
City of Delavan
123 South Second Street, P.O. Box 465
Delavan, WI 53115
(262) 728-5585
Fax: (262) 728-4566

PROPOSER'S CERTIFICATION STATEMENT

I hereby certify that responses and statements contained within this Request for Proposal, and any addenda to it, are true, complete and correct to the best of my knowledge and are made in good faith. I understand that knowing and willful false statement(s) on any portion of the Request for Proposal can be grounds for rejection.

Signature: _____

Printed Name: _____

Date: _____