

Request for Proposal – Issued June 1, 2022

ASSESSOR SERVICES
Town of Grant, Portage County
Proposal Requested

The Town of Grant, Portage County, invites proposals to provide ongoing assessment services for the period of January 1, 2023, to December 31, 2025. A town-wide revaluation was last completed in 2020.

Project Background

The Town of Grant (hereafter referred to as "Town") is located in Portage County with a 2020 census population of 1979 and total assessed real estate and personal property value of \$188,269,900.

The 2020 assessment included the following parcels:

- Residential 1009
- Total Parcels 3067
- Total Improved 1058
- Personal Property 24

Estimated Timeline

RFP issued	June 1, 2022
Questions due	June 24, 2022 12:00 PM
Proposals due	June 30, 2022 5:00 PM
Interview date	July X, 2022 5:30 PM or later-TBA
Anticipated award date	After July X, 2022-TBA
Town Board approval of contract	August Monthly Board Meeting

The above schedule for review by the Town is subject to change. The Town will not be legally obligated to adhere to interviews, recommendations, or award dates.

Interviews

Interviews may be required of selected finalists at the respondent's expense. However, an award may be made without discussion with the respondents. Therefore, respondents are cautioned that proposals should be submitted initially on the most favorable terms, from both a technical and cost standpoint.

If an interview is required, the selected finalists will be notified of the date and time of the interview process in accordance with the above timeline. Chosen vendors must be available on the day noted for interviews.

Communications

This RFP is issued on behalf of the Town by the Town Clerk. The Town Clerk is the point of contact during this process. The clerk may be contacted via e-mail at grantclerk@wctc.net or by phone at 715.213.7370. Written questions will be answered in writing and will be available to all proposers. Proposer's questions and the Town's responses will become open records and available upon request. The Town of Grant prohibits communication relative to this proposal initiated by a proposer with any Town elected official or employee prior to the time a decision has been made, except as provided for in this proposal. Violation of this section is grounds for disqualification.

Clarifications/Amendments

If you discover any significant ambiguity, error, omission or other deficiency in the RFP, immediately notify the Town Clerk in writing. All other questions, clarifications, or exceptions regarding the RFP document must be raised prior to the submission of the proposal. All questions must be submitted to the Town Clerk in writing via e-mail at grantclerk@wctc.net. Questions must be submitted by 12 PM CST on June 24, 2022.

If it becomes necessary to clarify or revise any part of this RFP, amendments will be sent via e-mail. It is the responsibility of prospective vendors to provide the Town with a contact e-mail address for any amendments prior to the deadline for proposal questions. All amendments must be acknowledged on the RFP signature page of the proposal. Failure to do so may result in your response being rejected. All respondents should use this written document, its attachments, and any amendments as the sole basis for responding.

Scope of Services

Obligations of the Town:

The Town will perform limited clerical services to assist the Assessor, including:

- Answer general correspondence concerning assessment-related inquiries that Town can answer.
- Provide information as to how to contact the Assessor by mail, e-mail, or telephone.
- Provide updates of assessor data on the town website.
- Provide copies of all building permits and commercial plans, previous assessment rolls, and records as requested at no cost.
- Publish public notices at appropriate times during the assessment and revaluation process.
- Provide adequate space for assessment personnel for Open Book hours.
- Maintain current Town map, including lot sizes, parcel numbers, and addresses.

Obligations of the Vendor:

General Assessment Services:

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the Town in accordance with applicable Wisconsin State Statutes.
2. Assessor will review and assess all properties that were under partial construction as of January 1 of the previous year.
3. Assessor will review and assess new construction as of January 1 of the current year.
4. Assessor will mail out state-approved forms to all holders of personal property in the Town, audit the returned forms and place the new values in the assessment roll. Doomage assessments will be made on any personal property account that do not submit a return.
5. Assessor will account for all buildings moved, destroyed, or demolished.
6. All property records shall be updated as needed.
7. Assessor will make arrangements to correct legal descriptions as needed.
8. Assessor will record assessment data, prepare appointment mailers, stuff envelopes, and mail notices, and schedule and reschedule appointments as necessary.
9. Assessor will mail the notices of changed/increased assessments.
10. Assessor will be responsible for completing the real estate and personal property assessment rolls.
11. Assessor will stay informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Assessor will also stay informed about court decisions, Department of Revenue advisories and other governmental decisions that impact value.

12. All data will be the property of the municipality.
13. All office supplies, postage, and other supplies necessary to perform the duties of the contract shall be borne by the Assessor.
14. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes.
15. Property owners will be given sufficient notice of changes in assessment and will be provided the opportunity to meet with the Assessor to discuss changes. The assessment roll will be available for public inspection prior to the Open Book session.
16. The Board of Review will be conducted prior to June 30 except for the year of the Revaluation or as approved by the Town Board.
17. Assessor will attend the Board of Review meetings and testify under oath while defending any Assessor's valuation and work products. In the event of an appeal to the courts, it is agreed that the Assessor will be available to furnish expert testimony in defense of any of the assessed values.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue with all assessment related reports per DOR regulations.
19. Assessor will supply to the Town a complete set of computer property assessment records that are compatible with the Town's computer equipment and software. (Computer records should be updated within thirty (30) days of the final adjournment of the Board of Review.)
20. Assessor or Assessor's team will be available by phone to provide information to town residents as needed and return phone calls within three business days, 95% percent of the time. When this three business day timeline is not possible, Assessor will use a messaging system that provides an approximate timeline of response.
21. Assessor will also perform all other duties incidental to the regular duties of Assessor.
22. Complete Revaluation services are not expected to be performed during the 2023-2025 contract term.

The Assessor, having familiarized himself/herself with the local conditions affecting the cost of the work to be done and the most current Wisconsin Property Assessment Manual, pursuant to Chapter 70, Wisconsin State Statutes, will perform everything required to be performed, and to complete in a professional manner, all the work required to be completed, to value Real and Personal Property within the Town in accordance with all the applicable Wisconsin State Statutes during the period of January 1, 2023 through December 31, 2025. Services will include maintaining the assessment roll and individual property classifications within 10% of equalized value, Open Book, Board of Review and possible future revaluation.

1. For the valuation of all real estate properties, the Assessor will use a Computer Assisted Appraisal System.
2. For the valuation of personal property, the Assessor will follow the procedures outlined in Volume 1 of the Wisconsin Property Assessment Manual.
3. The Assessor will reconcile existing property record card data with data maintained in electronic form as required by the State of Wisconsin. Data is currently in Market Drive.
4. The Assessor will review all recent property sales, perform an exterior inspection to verify property attributes, and take digital color photographs of all current sales as needed.
5. The Assessor will mail new notices of assessment along with a letter of explanation to all property owners.
6. Prior to the Open Book hearing period, a time for public inspection of the proposed roll will be allowed.

7. The Open Book period should be scheduled to comply with appropriate Statutes and ensure notice to affected properties.
8. The Assessor will hold a sufficient number of "Open Book" meetings with taxpayers, allowing enough time for those taxpayers wishing to ask questions or provide evidence supporting a different value. (This is generally one session per year on a non-revaluation year in the Town of Grant.)
9. The Board of Review will be scheduled at the mutual convenience of the Assessor, Board of Review, and the Town Clerk.
10. The Assessor will attend the "Board of Review" to provide testimony supporting the assessment.
11. The Assessor will defend assessed values should a taxpayer challenge their assessment after the board of review at no additional cost to the Town.

Proposal Content

The proposal should not exceed ten (10) single-sided pages and should address the following:

1. Transmittal Information.
 - a. Firm's name, address, telephone number and contact person.
2. Understanding. Firm's confirmation of understanding of the scope of services and commitment to provide the appropriate personnel to perform the services as defined in this document.
3. Personnel Experience. For each service group project team member please submit a brief description of the following:
 - a. Name
 - b. Proposed responsibilities
 - c. Professional registrations
4. Firms Experience.
 - a. Qualifications of the Firm and why the Firm is a good fit for the Town of Grant.
 - b. Description of related experience, particularly experience of a similar capacity on projects of comparable size and/or scope.
5. Methodologies. Please provide a description of the methods utilized for assessment services and analysis.
 - a. Describe your approaches used in developing commercial valuations.
 - b. Specifically, describe your methods for "discovering" personal property accounts.
 - c. Detail your procedures relative to those properties that are improved but unfinished as of the assessment date.
 - d. Describe the process you utilize to update annual assessments outside of the revaluation years.
 - e. When reviewing building permits, when do you feel it is necessary to conduct a physical inspection of the property in order to determine an updated value for the property which was issued a building permit?
 - f. During a revaluation year, what percentage of your Firm's disputes are reduced prior to Board of Review?
 - g. What is your overall philosophy of being a municipal assessor?
 - h. How would you define good customer service?
6. Cost / Fee structures.
 - a. The proposal should have a flat fee for each assessment cycle. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the contract rates.

- b. The Town desires a level fee per year over the term of the contract.
- 7. Contract
 - a. Please attach a copy of your standard contract for these types of services in the e-mail submitting the proposal.
- 8. Insurance
 - a. The proposal must include either a description of the Firm's insurance or a certificate of insurance outlining the Firm's insurance policies which evidence compliance with the requirements noted in the Terms and Conditions section of this RFP.

Terms and Conditions

Payment Terms

All invoices for services will be processed within 30 days, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement.

Insurance

The successful Firm shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Town. Such insurance shall be primary. Prior to the execution of the written contract, the successful Firm shall furnish the Town with a Certificate of Insurance listing the Town as an additional insured and, upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Town's discretion.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin, or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the Firm without the written consent of the Town. If all or a portion of the contract work is proposed to be assigned or subcontracted, the name of the individual(s) to complete the work, address and Firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The Firm agrees that it is an Independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with

respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits

The Firm agrees to indemnify, hold harmless, and defend the Town, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the Firm, its employees, agents or subcontractors.

Contract Period

The term of this contract will be: January 1, 2023 – December 31, 2025

Termination of Contract

To be defined in the contract document.

Professional Services Contract

If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the Firm's technical and price proposals, and any other written offers/clarifications made by the Firm and accepted by the Town, will be incorporated into a contract between the Town and the Firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the Firm has carefully investigated all conditions, has full knowledge of the scope, nature, and quality of work required, and is familiar with all applicable State, Federal, and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Town Board, execution of the contract by the proper Town officials, and delivery of the fully-executed contract to the Firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful Firm. The contract may be amended only by written agreement between the Firm and the Town of Grant.

Selection Criteria

Town Board will consider the following in the evaluation of the proposals:

1. Quality and content of the written proposal.
2. Past record of performance of the Firm and team proposed for services.
3. Experience and technical competence of the firm and project team assigned to the Town.
4. General understanding of and agreement with the Firm's approach to providing services, including the Town's confidence in the Firm's ability to satisfactorily perform the work and communicate efficiently.
5. Cost

Instructions to Firms

Submittal Instructions

1. Please provide (1) digital copy via e-mail and (3) hard copies to:
Vicky Zimmerman, Town Clerk
grantclerk@wctc.net
Identify proposal name into the subject line of the e-mail: Assessment Services
Deadline: Monday, December 5, 2022, at 5:00 PM
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly but will be provided to the Town Board in advance of the December 7 public review and discussion of submittals.
3. Questions regarding this RFP should only be directed to the contact identified above. Contact with other elected officials is grounds for disqualification.

This RFP does not commit the Town to award a contract, pay any costs incurred in the preparation of a response to this request, or procure or contract for services or supplies. The Town reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP if it is in the best interest of the Town of Grant to do so.

Proposals may be withdrawn only in total and only by a written request to the Town.

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 - a. Firm's name, address, telephone number and contact person.
2. UNDERSTANDING. Firm's confirmation of understanding of the scope of services and commitment to provide the appropriate personnel to perform the services as defined in this document.
3. PERSONNEL EXPERIENCE. For each service group project team member please submit a BRIEF description of the following:
 - a. Name
 - b. Proposed responsibilities
 - c. Professional registrations
4. FIRMS EXPERIENCE.
 - a. Qualifications of the Firm and why the Firm is a good fit for the Town of Grant.
 - b. Description of related experience, particularly experience of a similar capacity on projects of comparable size and/or scope.

5. **METHODOLOGIES.** Please provide a description of the methods utilized for assessment services and analysis.
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PROPOSAL, submitted by _____ BIDDER

Of (firm) _____

On this date _____