

**REQUEST FOR PROPOSAL
FOR
ASSESSMENT SERVICES
FOR THE
CITY OF MARSHFIELD, WISCONSIN**

DUE DATE: OCTOBER 14, 2016, AT 12:00 PM

CITY OF MARSHFIELD
REQUEST FOR PROPOSAL FOR
ASSESSMENT SERVICES
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I. INTRODUCTION

Purpose of Document

The City of Marshfield is seeking proposals from qualified assessment firms/individuals to provide annual assessment services for the City of Marshfield, Wisconsin, (hereafter, referred to as “City”) located in Wood and Marathon County, for the years 2017 through 2019. The City is seeking a firm/individual to serve as its statutory assessor and to provide annual maintenance work in a competent, timely, efficient, and cost effective and customer service-oriented manner.

Background Information

The City has a population of 19,186, and it is located in both Wood County and Marathon County, WI. The City’s 2016 Equalized Value (including manufacturing and TID) is \$1,462,938,600. The City has 7 active Tax Incremental Financing districts and one Business Improvement District. The assessment ratio for 2016 was 98.02% in Wood County, and 98.09% in Marathon County.

The City has the following parcel counts (from 2016 Statement of Assessment for Wood County and Marathon County):

	<u>Total Land</u>	<u>Improvements</u>
Residential	6,513	6092
Commercial	753	640
Manufacturing	72	63
Agricultural	68	0
Undeveloped	24	0
Agricultural Forest	4	0
Forest Lands	23	0
Other	<u>3</u>	<u>3</u>
Total	7460	6798
Exempt Value for PFP (Public Fire Protection roll)	364	188

Personal Property Accounts: For 2016, 949 accounts, including 13 buildings on leased land and airport hangars. In addition, there are 5 mobile home parks located in the city, with a total of 458 home sites.

A city-wide market revaluation was completed in 2010.

Due Date of Proposal

Proposals must be received by Jennifer Rachu, Human Resources Manager/Assistant to the City Administrator, by 12:00 p.m. on October 14, 2016. The effective date when the contract work is to begin is January 1, 2017.

Jennifer Rachu, Human Resources Manager/Assistant to the City Administrator
630 South Central Avenue
Marshfield, WI 54449

Cost of Information Preparation

The costs of developing and submitting a proposal, discussions required to clarify items related to the proposal, and/or future interviews is entirely the responsibility of the applicant. All proposals and other information provided to the City become the property of the City. The City reserves the right to use such proposals and other material or information and any of the ideas presented therein without cost to the City.

Acceptance/Rejection Process

The City may schedule discussions with applicants submitting proposals if it becomes necessary to clarify elements of the proposal. The City will award the contract for assessment services based upon the proposal that the City determines is in the best interests of the City.

The City reserves the right to reject any and/or all proposals received. The City will reject any proposal that does not meet all of the terms, services, and conditions requested in this RFP.

Amendments and Withdrawal

The City reserves the right to amend or withdraw this RFP at any time at its sole discretion prior to the due date of the RFP. If it becomes necessary to amend any part of the RFP, an addendum will be provided. **Responders must include acknowledgment of all addenda as part of the RFP.** Any withdrawal is effective upon issuance of such notice.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the respondent of the conditions contained in this RFP, unless clearly and specifically noted in a subsequent contract between the City and the selected applicant.

Questions/Surveying Premises

No pre-proposal meetings shall be scheduled. Questions regarding desired services or general operations are to be directed to:

Jennifer Rachu, Human Resources Manager/Assistant to the City Administrator
City of Marshfield
630 South Central Avenue
Marshfield, WI 54449
Ph: (715) 486-2004
Fax: (715) 384-9310
Email: jennifer.rachu@ci.marshfield.wi.us

All site visits must be scheduled in advance and confirmed by contacting the Human Resource Manager/Assistant to the City Administrator.

Applicants are encouraged to carefully inspect the community and facilities of the City, and judge for themselves, the circumstances affecting the cost of the work and the time requirements for its completion. Failure to do so will not relieve the assessor of the

obligation to furnish and perform the work, to carry out the provisions of the contract or to complete the contemplated work for the consideration set forth in the proposal in a timely manner.

Term of Engagement

This proposal is for the term beginning January 1, 2017 and ending July 1, 2020.

II. TIME REQUIREMENTS

The following is a list of key dates up to and including the date proposals are due to be submitted:

Due date for proposals:	October 14, 2016
Selected firm notified (anticipated):	November 23, 2016
Coverage beginning date (no later than):	January 1, 2017

III. SPECIFIC SERVICES REQUIRED

1. The assessor will perform all of the work required to properly and professionally assess the real and personal property of the City in accordance with applicable Wisconsin State Statutes and in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue. The assessor shall designate a qualified and responsible employee to supervise the operation of the assessor's staff for the entire contract period. The individual shall be certified Assessor Level II. The individual designated as such shall be available to the City for the entire contract. Should the project supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

The assessor shall be accountable to the City Council, with frequent reporting to the City Administrator or his/her designee. The assessor shall meet with the City Administrator or designee on a regularly scheduled basis as applicable (not less than monthly to discuss the progress of the work and to review the data and the reports completed. The City reserves the right to inspect the data and the progress of the work performed at any time without limitation.

2. The assessor and his/her City-approved designee(s) will maintain regular office hours at the Marshfield City Hall Plaza, 630 South Central Avenue, Marshfield, WI 54449, for at least eight (8) hours per week. (NOTE: City Hall will relocate to 207 West 6th Street sometime during 2018.) Office hours shall be during 8:00 AM to 5:00 PM Monday through Friday. Additional hours should be planned after assessment notices are sent out, during the open book review, and prior to the Board of Review. In addition, the assessor may be required to attend city meetings as requested.
3. The assessor shall oversee and assist in all assessment-related clerical duties and customer service, as needed.

4. The assessor will provide a phone number for City officials to contact the assessor during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
5. The assessor will assist in the field review and assessment of all properties that were under partial construction as of January 1st of the previous year.
6. The assessor will assist in the field review and assessment of new construction as of January 1st of the current year.
7. The assessor will assist in the performance of interior inspections on all newly constructed homes, partially constructed homes from the previous year, any interior remodeling including kitchen, bath, basement remodeling, and additions.
8. The assessor will assist in the field visit and measurement of all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning and other miscellaneous permits.
9. The assessor will assist in the field review, as deemed necessary, for properties that have been sold, for which a building permit has not been issued.
10. The assessor will be diligent in discovering and assessing all personal property. Assessor will assist in the field visit of all personal property accounts annually to discover new accounts and account for business that may have closed prior to the assessment year. Assessor will cross reference personal property account with the corresponding real property and parcel number.
11. The assessor will oversee the mailing out of State approved Personal Property Forms to all holders of personal property in the City by January 15th of each year, audit the returned forms, and place the new values in the assessment roll. Assessor will assist in the collection of the name and address of each personal property contact person, separate from the business name. The assessor shall keep on file in the office a doorage listing prior to open book review.
12. The assessor will assist in the accounting of all buildings destroyed or demolished.
13. The assessor will assist in the implementing of use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
14. The assessor will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
15. The assessor will assist in the processing of parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps, and any other land divisions – forwarding any changes to the City's GIS Coordinator.
16. The assessor will assist in taking digital photographs of new construction on or about January 1st annually, and also during the review process if needed.

17. The assessor will assist in maintaining and annually updating property owner lists, with current name and address changes.
18. The assessor will assist in validating sales and providing assessment data through the Department of Revenue PAD System, and recording of sales information to property record cards electronically.
19. The assessor will annually update all property owner information with new legal descriptions electronically.
20. The assessor will assist in the mailing of Notice of Assessment to property owners and others as required by Wisconsin Statutes.
21. The assessor shall notify the City Clerk for the publication of open book and Board of Review notices prior to open book – at least 40 days prior to a revaluation year, or 25 days in a maintenance year.
22. The assessor will conduct open book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare a written record of open book contacts to file with the State required AAR (Annual Assessor’s Report).
23. The assessor will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes. The assessor shall work with the City Clerk to arrange for the hearings. The assessor will prepare an annual report of assessment roll changes for the Board of Review. The assessor will attend the Board of Review hearings, serve as City staff at the hearings and defend the assessor’s valuations and work products. The assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.
24. The assessor shall assist in the updating of City’s assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.

The assessor shall oversee updating the City’s assessment computer data. Assessment roll summaries and totals shall be forwarded to the City Clerk, Finance Director, City Administrator, and County Treasurers.
25. The assessor will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
26. The assessor will assist in valuing all mobile homes as required by law.
27. The assessor will assist in valuing all airport hangers and buildings on leased land as required by law.
28. The assessor will assist in the coordination with the Register of Deeds/ Real Property Listing offices of both Wood and Marathon County to facilitate the digital and manual transfer of data and values.

29. The assessor will ensure all exempt properties are assessed at market values for purposes of PFP (Public Fire Protection).
30. The assessor shall also perform all other duties incidental to the normal duties of the assessor.
31. The assessor will be required to provide 100% performance bond or stand-by letter of credit to the City prior to the start of the contract in the amount of the full contract price.
32. All assessment files and records created and data collected by the assessor shall remain the property of the City. Records removed for work in progress shall be returned to the City offices.
33. The assessor shall communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. The assessor is encouraged to interface with the business and residential community and the media to provide greater clarity of the assessor's role in the property taxation and valuation process.
34. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
35. All assessment personnel shall carry proper photo identification provided by the city to assure the public of their identity and purpose for gaining access to private property.
36. The assessor is not permitted to assign, subcontract, or transfer the work without the written permission of the City.
37. All personnel providing services requiring Wisconsin Department of Revenue Certifications shall be currently certified in compliance with Wisconsin Statute Chapter 73.09 as prescribed in the Wisconsin Property Assessment Manual.
38. The assessor will provide and update the City with a listing of all personnel assigned. All personnel shall be approved by the City. Copies of each employee's certificate shall be supplied to the City.
39. The assessor shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the assessor's employees to be unsatisfactory, the assessor shall remove such employee(s) from working for the City upon written request from the City.
40. The assessor shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error, or omission of the assessor, their agents and employees in the execution of work. Further, the assessor shall be responsible for any and all of their agents while performing acts under the terms of this contract. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City, listing the City as an additional insured.
 - Limits of Liability shall not be less than:
 - a. Workers compensation statutory limits

- b. Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$2,000,000 per occurrence, combined single limit
 - c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$2,000,000 per occurrence, combined single limit
41. The assessor agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as assessor's records in process under this agreement, which are in possession of the assessor. The assessor shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the City.
 42. The assessor shall be responsible for the proper completion of the assessment roll in accordance with State law. Final assessment figures for each property shall be provided by the assessor to the Register of Deeds/Land Description offices of Wood and Marathon Counties. All necessary measures and cooperation shall be exercised to balance said roll between the county and assessor. The assessor shall prepare and submit the Municipal Assessment Report (MAR) and the TID Assessment Reports to the Department of Revenue in a timely manner.
 43. It is the responsibility of the Assessor to produce and present the Annual Assessment Report (AAR) as required by the Wisconsin Department of Revenue.
 44. The assessor shall insure that employees maintain strict confidence regarding all privileged information received by reason of this contract. Disclosure of this or any appraisal information to any individual, firm, or corporation other than appropriate public officials or their authorized agents is expressly prohibited.
 45. The assessor shall be required to execute a contract with the City that incorporates the information included in this RFP.
 46. If during the term of the contract state statutes are amended regarding regulatory reporting for assessment liability, the contract may be altered or amended.

IV. ASSESSMENT SOFTWARE

The City of Marshfield is in the process of licensing Market Drive software for its assessment purposes. Conversion is currently taking place for future assessment roll work. The transition is from GVS (Global Valuation Systems). The City is also currently licensed to use APEX sketching software and the Marshall Valuation program from Core Logic.

V. CITY OBLIGATIONS

1. The City currently employs two full-time employees, currently a property appraiser and an administrative assistant. The property appraiser has an Assessor II Certification.

Currently, the property appraiser completes the field work and value for residential properties with oversight by the assessor. The City will consider alternate Assessing Department staffing models as recommended by the consultant.

2. The City shall furnish adequate space at City Hall at no cost to the assessor. Office space may include desks, tables, chairs, file cabinets, computer, printer, copier, fax machine, heating, lighting, telephone, and janitorial services.
3. The City shall allow access by the assessor to City records including, but not limited to, prior assessment rolls, sewer and water layouts, building permits, tax records, building plans, records of special assessments, plats or any other maps and property files at no cost.
4. The City shall furnish the name and correct address of the owner and block and lot number size or other identifying description of each parcel to be appraised.
5. The City shall furnish the name and correct address, if known, to the assessor for notices to be sent for changes in assessed values.
6. The City shall aid the assessor with a reasonable promotion of public information concerning the work under this agreement.
7. Postage and envelopes, with the City's return address, will be provided by the City, along with the typical office supplies.

VI. GENERAL PROPOSAL REQUIREMENTS

1. Submit six (6) copies of proposal, with one being unbound and single-sided.
2. All proposals must identify the firm name, address, and specific assessment service experience in Wisconsin. The proposals shall also include: the names, educational background, and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed; experience with conducting a revaluation process; identify experience with assessment evaluation of potential tax-exempt properties, demonstrate accuracy of assessment work.
3. The proposal shall include a listing of Wisconsin municipalities with a population that is reasonably comparable to the City of Marshfield for which your firm currently provides assessment services. Please indicate whether your firm provides the municipality with general annual assessment services, revaluation services, or both.
4. The proposal shall include the total annual compensation rate to provide the assessment services described in the above "Specific Services Required" and in accordance with the laws of the State of Wisconsin for assessment years 2017, 2018, and 2019, beginning not later than January 1, 2017. The City will pay the annual compensation pro-rata on a monthly basis.

5. Proposals shall clearly list the fee for each assessment year of the proposed contract 2017, 2018, and 2019 in a not-to-exceed sum to include all of the assessor's costs including but not limited to: labor, materials, supplies, equipment, transportation costs, meals, lodging, computer software, and Board of Review expenses. All expense reimbursements will be the responsibility of the firm/individual.
6. The assessor must keep regular office hours of at least eight (8) hours per week. These hours shall be during normal business hours of 8:00 AM – 5:00 PM Monday through Friday.
7. For future planning, the assessor shall provide a cost estimate for a future revaluation of City property. The assessor shall have successfully completed a revaluation in a municipality of similar size and stature. The assessor shall have Assessor Level II or higher staff competent to perform such a revaluation of commercial and residential property. The revaluation will not be part of the services for this contract, as this would be through a separate agreement.
8. 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.
9. The proposal shall identify five (5) references from Wisconsin municipal clients of a size similar to the City of Marshfield for which the assessor and the person/persons to be assigned as the City's point of contact for the work to be performed and has provided assessment and/or revaluation services with the past two (2) years. References must include the name, title, address, and business phone number of the contact person.
10. The assessor shall provide a detailed resume of the person or persons assigned as the City's statutory assessor/point of contact for the work to be performed.
11. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the Wisconsin Department of Revenue, and shall maintain certification throughout the duration of the assignment, and a valid driver's license.
12. The assessor is advised to carefully inspect the community, the assessment records, and facilities of the City of Marshfield 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 the consideration set forth in this bid on a timely basis.
13. The assessor is not permitted to assign, subcontract, or transfer the work of providing assessment services, without the prior written approval of the City.

14. The successful assessor will have five (5) years' experience in Wisconsin municipal government assessing, including re-evaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
15. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the RFP and is the most advantageous to the City of Marshfield considering experience, price, and other factors. The City reserves the right to accept or reject any and all proposals received.
16. If a proposal is accepted, the assessor shall provide a certificate of insurance naming the City as additionally insured for the purposes of general and professional liability protection.
17. The assessor shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error or omission of the assessor, their agents, and employees in the execution of work. Further, the assessor shall be responsible for any and all of their agents and employees while performing acts ostensibly under the terms of this contract. Certificates of Insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City, listing the City as an additional insured.

Limits of Liability shall not be less than:

- a) Worker's compensation Statutory Limits
- b) Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$2,000,000 per occurrence, combined single limit.
- c) Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$2,000,000 per occurrence, combined single limit.

VII. OTHER INFORMATION

A "sealed" original (unbound and single-sided) and five (5) copies of the Assessment Services Proposal must be received at the address listed below by no later than 12:00 PM on October 14, 2016. Sealed envelopes shall be marked: City of Marshfield Assessor Services Proposal.

Include the dollar cost bid in a separate sealed envelope marked as follows: Sealed Dollar Cost Bid Proposal for City of Marshfield Assessment Services 2017, 2018, 2019.

Proposals shall be submitted to:

City of Marshfield
Attn: Jennifer Rachu, Human Resources Manager/Assistant to the City Administrator
630 South Central Avenue
Marshfield, WI 54449

VIII. EVALUATION CRITERIA

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

1. Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the City of Marshfield.
2. Personnel management experience.
3. Past experience with providing assessment and revaluation services.
4. Ability to provide and maintain a computerized database of property assessment records.
5. Demonstration of a high level of accuracy in assessment work for municipal clients.
6. Cost of Assessment Services.
7. Evidence of positive customer interaction.

IX. FINAL SELECTION

The City Council will select an assessment firm based upon the recommendation of the selection committee. It is anticipated that a firm will be selected on approximately November 23, 2016. Following notification of the respondent selected, it is expected a contract will be executed between both parties prior to January 1, 2017. It is anticipated that the work under the contract will begin on January 1, 2017. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected.

X. RIGHT TO REJECT PROPOSALS

By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the City is binding and without appeal.

The City reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the City. In addition, the City reserves the right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty.

The City reserves the right to accept the proposal considered most advantageous to the City, which, in its opinion, meets the specifications of the RFP regardless of whether or not the terms are the lowest cost.

All respondents accept the preceding terms and procedures in submitting a proposal.