

**THE CITY OF KENOSHA, WISCONSIN  
REQUEST FOR PROPOSALS (RFP)  
FOR**

**CITY ASSESSOR SERVICES**

**PROPOSAL NO. 08-22**

**ISSUED: Monday, August 15, 2022**

**1. INTRODUCTION.** The City of Kenosha Assessor's Office requests proposals for the completion of a property revaluation, or parts thereof, of all taxable real estate parcels within its jurisdiction for the 1 January 2023 Assessment Roll. Proposals shall specify bid costs for component parts as well as aggregate activities. The overall approach to revaluation may be tailored to any imposed funding limitations.

**2. GENERAL COMMUNITY INFORMATION.** Kenosha is located in southeastern Wisconsin, midway between Milwaukee, WI and Chicago, IL. The current population is 100,052 with an annual growth rate of approximately .05%. Parcel counts associated with the 2022 assessment roll were as follows:

<b>2022 PARCEL COUNTS</b>	<b>TOTAL</b>	<b>IMPROVED</b>
Residential Class (includes 6 Other Class Parcels)	28,739	27,978
Commercial Class	2,450	1,924
Agriculture, Undeveloped and Forest	54	0
<b>Total Locally Assessed Real Estate Parcels (excludes Manufacturing)</b>	<b>31,243</b>	<b>29,902</b>

The total count increases annually by 200 +/- with 95% of the new parcels being Residential Class. The City currently uses an in-house CAMA system. The last revaluation occurred with the 1 January 2018 Assessment Roll. Following is a history of Assessment Ratios as established by the Wisconsin Department of Revenue.

<b>YEAR</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
<b>RATIO</b>	.975	.92	.88	.82	.75

**3. PURPOSE.** In accord with Wisconsin State Statute the City of Kenosha must complete a revaluation of property with its 2023 Assessment Roll. In order to accomplish that task the City is soliciting proposals for the purpose of obtaining assistance from Respondents qualified to provide the requisite mass appraisal services. We request that interested Respondents provide Bid costs for the component activities as if they were to be completed in isolation and also for aggregate activities.

**4. DEFINITIONS**

- A. "Respondent" shall mean an individual, partnership, corporation or any other business entity responsible for completing revaluation functions outlined.
- B. "DOR" shall mean the Wisconsin Department of Revenue.
- C. "City" shall mean the municipal governmental organization of the City of Kenosha.

- D. "WPAM" shall mean the "Wisconsin Property Assessment Manual," Volumes I and II as issued by the DOR for the State of Wisconsin together with all material designated as being part of or supplemental to the WPAM.
- E. "Parcel" means an individual legal description for a tract of land and shall include not only the land itself but all buildings and improvements thereon.
- F. "Real Estate Parcel Count" shall mean the total number of individual real estate descriptions assessed locally on the City's real estate assessment roll for the assessment year specified.
- G. "Property Record Cards" shall mean the current versions of the residential, agricultural and other, and commercial property record cards or equivalents, approved by the DOR for use within the City of Kenosha and used for the purpose of making a record to support and substantiate the value conclusion for each parcel.
- H. "CAMA" – the City's Computer Assisted Mass Appraisal system used to record, store, analyze, calculate and display data used in the development of assessments.

**5. SUBMITTAL AND PROPOSAL CONTENT.** Respondents interested in this request should present the following information to the City of Kenosha:

- A. Title Page; specify the following:
  - a. Project Name: Request for Proposals, City Assessor Services Proposal no. 08-22
  - b. DEADLINE: Proposals shall be sealed and will be accepted by the City of Kenosha, Wisconsin, in the Department of Finance, Municipal Office Building, Room 208, 625-52nd Street, Kenosha, Wisconsin, until 4:00 p.m. on Friday, September 30, 2022.
  - c. Submitted by: (Respondent/Company Name)
  - d. Authorized by: (Signature of Authorized Representative)
  - e. Printed name of Authorized Representative
  - f. Indicate the classification or position that the Authorized Representative holds in the company
- B. Contact Person for this project; specify the following:
  - a. The person's title and level in the organization
  - b. Office address
  - c. Telephone and fax numbers
  - d. Email address at which the person can be reached
  - e. Highlights of the respondent's qualifications and ability to perform the project services
- C. Company Overview; specify the following:
  - a. The Respondent's name, E-mail address, business address, phone number, and fax number
  - b. The year the Respondent was established and former names of the Respondent, if applicable
  - c. Organization structure (e.g., corporation, limited liability company, partnership).
  - d. The type of ownership and parent company, if applicable
  - e. An indication of the Respondent's licensing to do business in the State of Wisconsin
  - f. The location of the office or offices that would provide the project services
  - g. A brief statement of the Respondent's background, demonstrating longevity, capability, and financial ability
  - h. Include the name and phone number of the person in the organization authorized to negotiate the Successful Respondent Services Agreement with the City of Kenosha.
- D. Project team – Start this section by introducing the designated project manager, relevant project management techniques, and the project team. For each key person that you would assign to the project, include a one or two-page résumé that includes a summary of relevant professional qualifications, relevant project experience, education, DOR Certification including a copy of their registration card and any professional registration.

- E. A list of all revaluations completed within years 2016 – 2021 by the Respondent and those currently in progress.
- F. Current references and phone numbers for all referenced projects.
- G. A list of any current or pending litigation against the Respondent or individual project team members related to the provision of any services in the property assessment field including those related to assessment systems and software and also a list of any similar litigation that the Respondent or individual project team members may have been involved in inclusive for the years 2011 – 2021.
- H. Project proposal for the City Assessor Services.
- I. If any of the requirements in this request for proposal create a disproportionate increase in the overall cost that will be quoted, the City invites Respondents to submit, along with the original proposal submission, a second proposal that addresses the requirement as an optional alternative.
- J. Please address submittals of qualifications as follows **Proposals will be accepted by the City of Kenosha, Wisconsin in the Department of Finance, Municipal Office Building, until 4:00pm on Friday, September 30,2022.**  
**Responses should be submitted in a sealed envelope/box marked Request for Proposal City Assessor Services Proposal no. 08-22.** Submit one (1) original, three (3) copies, and (1) USB drive to the following address:

City of Kenosha  
Finance Department  
625 52<sup>nd</sup> Street  
Room 208  
Kenosha, WI 53140

**Responses received after the deadline will not be considered. Any faxed proposals or other electronically-communicated submission will not be accepted or considered.**

Questions regarding this RFP should be sent electronically to the Assessor's Office at [assessor@kenosha.org](mailto:assessor@kenosha.org).

**6. PROJECT CALENDAR AND PROCESS.** The Revaluation must be completed for the 2023 Assessment Roll. We desire that the valuation work be completed no later than May 1, 2023 and that the review (Open Book) and appeal process (Board of Assessors and Board of Review) be completed by July 28, 2023. The Respondent should discuss and present their proposed schedule and their ability to deliver projects in the timeframe anticipated. The schedule and the Respondent's ability to deliver will be a significant factor in the selection process. Following is a tentative schedule for the Successful Respondent selection and start and stop dates of a contract if one is established.

- August 15, 2022: Request for Proposals issued
- August 15, 2022: City Staff available for interviews/research. Please contact the Assessor's Office @ 262-653-4480.
- September 30, 2022 @ 4:00 p.m. CST: Deadline for submittal of proposals.
- TBD: Respondent Interviews if needed, to be determined
- TBD: Respondent Selection Decision, to be determined
- TBD: Final Contract Negotiated and Signed, to be determined
- January 1, 2023: Project Commenced
- May 1, 2023: Valuations Completed and Notices Mailed
- July 28, 2023: Open Book and Board of Review Completed

**7. INTERVIEWS** City Staff will review all RFPs and may select one or more finalists for interviews. Additionally, Staff may request submission of supplemental materials. Respondents submitting responses to the “Request for Proposals” must be available to schedule an interview with applicable City Staff at a time to be determined. The interview will be approximately one-hour long. Presentations by the Respondent will be limited to the initial 30 minutes with the remaining time reserved for follow-up discussion and questions initiated by City Staff.

**8. RESPONDENT SELECTION** The Successful Respondent will be the one that in the judgement of the City Staff best demonstrates the ability to provide the broadest range of high-quality assessment services in the most cost-effective manner. The selection committee will consider the following criteria when evaluating written proposals and information obtained during an interview.

**A. Organization**

- a. Ability to complete the project within the time frame as outlined.
- b. Responsiveness to the terms and conditions of the RFP.
- c. No political or organizational conflicts of interest contrary to law, federal contracting regulations, or City policies.

**B. Project Approach and Proposal Quality**

- a. Quality and content of the written proposal.
- b. General understanding and agreement with the Respondent’s approach to the project including the selection committee’s perception of confidence in the Respondent’s understanding of the City’s requirements and the Respondent’s ability to perform.

**C. Personnel and Experience**

- a. Past performance of the Respondent and project team on similar projects.
- b. Specialized experience and technical competence of the Respondent and project team including any subcontractors and associate Respondents as they relate to the specific needs of this project.

**D. The City is not obligated to take the lowest proposal. The City reserves the right to accept the proposal deemed by the City to be most advantageous to the City. The City reserves the right to reject any and all proposals. The City reserves the right to negotiate with one or a multiple number of Respondents.**

**9. SCOPE OF SERVICES** The Respondent must fulfill all duties imposed by the Statutes, Ordinances, and Property Assessment Manual on an Assessor. The following scope of services outlines Assessor and revaluation tasks. In order to match services to potentially available funding the final scope of services will be established with a contract for services should one be forthcoming. Any such contract will be based on a number of considerations including but not limited to bid costs, proposed completion schedules and available funding. The following considerations will apply to all tasks ultimately included in the contract for services.

**A. ASSESSOR 3 STATUTORY DUTIES – A1**

The Respondent shall serve as the City’s Statutory Assessor 3, and complete in a professional manner all of the work required under this proposal in accordance with Wisconsin State Statutes. A member of the Respondent’s staff to be identified and appointed as the City Assessor by the City Council for 2023.

General listing of Major Tasks to be completed by the Respondent:

1. Determination of whether an organization or individual meets the requirements for tax exemption status.
2. Submittal of signed Assessor’s Affidavit to the City Clerk and the Board of Review with the completed 2023 Assessment Roll.
3. Submittal of Corrections of Errors to be reported to the City Clerk.
4. Submittal of the Municipal Assessor’s Report to the DOR.

5. Maintain office hours at the Kenosha Municipal Building, 625 52<sup>nd</sup> St, Room 107, Kenosha, WI 53140 from 8:00 AM to 4:30 PM at least three (3) days per month. Full-time office hours, Monday – Friday, from 8:00 AM to 4:30 PM shall be maintained after assessment notices are sent out, during the open book review, and prior to the Board of Review.
6. During office hours, the Respondent may be responsible for, but not limited to:
  - Answering routine phone calls
  - Walk-in requests for assessment data
  - Providing copies of all assessment-related open records requests
7. Respondent's staff that is appointed as City Assessor shall serve as a member of the Board of Assessors.
8. Ensure that all procedures are properly completed for Board of Assessors and Board of Review.
9. Become and remain informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Become and remain informed about court decisions, Department of Revenue advisories, and other governmental decisions that impact value.

## **B. COMMERCIAL REVALUATION – C1**

### Inspection and Valuation of Commercial Parcels

#### General listing of Major Tasks to be completed by the Respondent:

1. Analyze all recent sales based on sale qualifications completed by the City Assessor's Office or the Respondent, when so required, for use in all aspects of the revaluation process.
2. Review and analyze existing Commercial Class neighborhoods, types of properties, and current trends and modify neighborhoods as required.
3. Determine and build appropriate land value tables and influence factors.
4. Field review and assess Commercial Class properties that were under partial construction as of January 1<sup>st</sup> of the prior year.
5. Field review and assess new Commercial Class construction as of January 1, 2023, including any additions, remodels or alterations to existing facilities.
6. Field review and measure, as deemed necessary, all Commercial Class Parcels with building permits for exterior remodeling, detached buildings and other miscellaneous permits.
7. Field review, as deemed necessary, Commercial Class parcels with no sale or building permit issued.
8. Review and revise parcel classifications as required based on data collected.
9. Review for accuracy parcel subdivisions, lot line adjustments, new plats and any other land divisions or combinations.
10. Implement use value assessments of Agricultural Class lands per specifications set forth by the Wisconsin Department of Revenue.
11. Analysis of Income and Expense information collected by the City Assessor's Office for all improved Commercial Class parcels. Collected data will be used by the Respondent to develop appropriate income and expense models to be associated with types of structures and land uses, to develop appropriate capitalization rates and to apply the principals of the income approach. Data analyzed for income producing properties shall include rental rates, leasehold improvements, vacancy rates, and income and expense data. This information shall be maintained in a secure location at the City Assessor's Office.
12. Independently determine the value of Commercial Class parcels using standard approaches to valuation.
13. Complete open book conferences.
14. Defend values through the appeal process beyond Open Book, Board of Assessors, Board of Review, and any subsequent appeals.

15. Upon request, develop proposals with the City's TIF districts for the purpose of estimating the potential valuation of the project and to provide City Staff with comments regarding the reasonableness of the real estate market assumptions included within the development proformas.

### **C. RESIDENTIAL REVALUATION – R1**

Partial Review and Full Valuation of Residential Parcels

General listing of Major Tasks to be completed by the Respondent:

1. Analyze all recent sales based on sale qualifications completed by the City Assessor's Office.
2. Review and analyze existing neighborhoods, types of properties, and current trends and modify neighborhoods as required.
3. Determine and build appropriate land value tables and influence factors.
4. Review and revise parcel classifications as required based on a review of data collected.
5. Independently determine the value of Residential Class parcels using standard approaches to valuation.
6. Review for accuracy parcel subdivisions, lot line adjustments, new plats and any other land divisions or combinations.

**10. CONFORMANCE TO STATUTES.** All work shall be accomplished in accord with the laws of the State of Wisconsin and in full compliance with all the rules and regulations officially adopted and promulgated by the Wisconsin DOR, including the Wisconsin Property Assessment Manual and local ordinance.

**11. PERSONNEL** (a) All personnel providing services shall be currently certified in compliance with WI Statutes 70.055 and 73.09 and the administrative rules prescribed by the DOR. (b) The Successful Respondent shall review any complaint relative to the conduct of their employee(s) and report the findings to the City. If the City deems the performance of any of the Successful Respondent's employees to be unsatisfactory, the Successful Respondent shall, for good cause, remove such employee(s) from work upon written request from the City, such request stating reasons for removal. (c) Prior to commencing the revaluation, the Successful Respondent shall file with the City's Assessor's Office the names of all employees to be performing work and the type of work to be performed by each, excepting non-appraisal office clerical help. The Successful Respondent shall indicate the person(s) designated as responsible for the assessment and to be appointed as the City Assessor. All persons on file are to carry a current photo identification card issued by the Successful Respondent. Said identification card shall be worn in an obvious visible manner by all of the Successful Respondent's employees while in the conduct of their employment and tasks.

**12. PREPARATION OF RECORD CARDS.** The Successful Respondent shall use appropriate record cards as provided by the City in the evaluation and collection of data for residential, commercial, and exempt properties and other improvements. All information relating to improvements shall be obtained and shown as provided on the respective forms.

**13. APPROACHES TO VALUE.** (a) The Successful Respondent shall consider the cost, market, and income approaches in the valuation of all vacant and improved parcels of property. (b) The Successful Respondent shall analyze all available sales data for the City in order to become familiar with prevailing market conditions, market activity, and specific transactions which may be utilized in determining the market value of properties throughout the City. All public records, notes and data generated and/or utilized by the Successful Respondent shall become and remain the property of the City. (c) Sales analysis shall include sales identified on an appropriate map, analysis and verification for time adjustments, neighborhood boundaries and descriptions. It may be necessary, as part of the analysis, to field a sale and measure and list the improvements of the

properties that have sold. (d) In valuing income producing properties, where appropriate, the Successful Respondent shall collect information from owners, tenants, realtors, financial institutions, and any other necessary sources, for use in the valuation process. Data to be analyzed shall include economic rents for each type of property, typical vacancy rates, and typical operation expense ratios. All data shall be properly documented and adequate records shall be prepared for each parcel showing the determination of value by the income approach. For improved parcels this shall include a reconstruction of income and expenses, an estimate of remaining economic life, and the capitalization rate applied. Capitalization rates shall be accurately documented by information obtained from the market.

**14. IMPROVEMENTS – DATA COLLECTION.** All attempts at property inspection shall be conducted consistent with current City practices. The Successful Respondent may propose changes to such practices for consideration by the City but no modifications may be implemented without prior approval by the City and at the City’s sole discretion.

**15. IMPROVEMENT VALUATION – COST APPROACH.** (a) The Successful Respondent shall value improvements in accordance with the Wisconsin Property Assessment Manual, using generally accepted appraisal practices. (b) In using the cost approach for residential improvements, the prescribed form or computer generated data sheet, or its equivalent as approved by the DOR, shall be used in determining replacement costs. The property record card shall be completed as recommended for use with Volume 2. (c) The cost approach for commercial improvements shall be based on Marshall & Swift and adjusted to adequately reflect variations from base building costs. (d) Current local modifiers and costs appearing in the approved cost calculator shall be adjusted where necessary and documented by an analysis of local construction costs and market sales data. (e) All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence, must be accurately documented by the market and deducted from current replacement costs. (f) All improvements shall be valued at market value as of January 1. (g) The statutory Assessor shall be responsible for collecting all other required information in regard to personal property, determining values on assessable personal property not used for production of income, and completing all necessary forms in relation thereto.

**16. VALUATION – LAND.** (a) Unit value ranges per acre for agricultural forest, undeveloped, productive forest and “other” classes of land shall be determined from an analysis of sales and other available market data in accordance with the Wisconsin Property Assessment Manual, using generally accepted appraisal practices. Agricultural forest land and undeveloped land values shall be adjusted to 50% of full market value, per s. 70.32(4), WI Stats. In the analysis of sales, work forms shall be prepared for recording data on each sale analyzed and for correlating price data from the sales for the various classes of land and noting if land qualifies for use value or is fallow. Such forms shall be left with the City. (b) Basic unit values shall be determined for residential and commercial lands from an analysis of sales, rents, leases, and other available market data. In the analysis of market data, adequate records shall be prepared showing data collected and unit value determinations. Such records shall be left with the City. (c) Having determined basic unit values the Successful Respondent shall apply such to each parcel, making adjustments to account for the particular characteristics of the parcel. Land computations shall be properly shown for each parcel on the property record cards, or computer-generated data sheets. (d) For residential and commercial lands, maps and schedules shall be prepared indicating unit values used: e.g. by neighborhoods, and locations thereof to be left with the City. (e) A copy of all charts, schedules and tables, not previously referred to, including depth factor tables used in the valuation of land shall be left with the City.

**17. FINAL FIELD REVIEW.** Prior to the open book conference, the Successful Respondent shall make a final review of identified parcels. In the final review process, the indicated value of the

improvements and the indicated value of the land shall be compared against sales information concerning the same parcel or comparable parcels. For income producing properties where a determination of value has been made via the income approach, this value shall also be reviewed to make the proper correlation of values between the cost, market and income approaches. The review shall cover each parcel so as to eliminate errors in computations that may have occurred, to insure uniformity in record card and form completion by various personnel, to verify building classification and depreciation estimates regarding physical, functional and economic obsolescence, and to be sure that all lands and improvements are properly accounted for.

**18. NOTICES OF ASSESSMENT CHANGE AND OPEN BOOK CONFERENCES.** (a) Upon completion of the assessments and prior to the completion of the assessment rolls, the Successful Respondent shall hold Open Book conferences for the purpose of enabling property owners or their agents to review assessed values. (b) The City shall designate the place, dates and hours for Open Book conferences consistent with City practices. (c) The City shall then send a notice by first class mail to each property owner at the last known mailing address. The notice form used shall be the same prescribed by the DOR for notice required under s. 70.365 or an alternative approved for use by the DOR. Said mailing shall be fifteen (15) days prior to the first day of the Open Book conferences for the convenience of the property owners. Expenses related to the notices shall be paid by the City. (d) The minimum number of days for Open Book conferences shall be set by the City, the number of days being specified in the contract. (e) Open Book conferences shall be held within the completion date specified in the contract. In the event the City requests that the Open Book conferences be held at a date beyond the contracted completion date, the contract shall be extended. Such extension shall be in writing and signed by both the City and the Successful Respondent.

**19. BOARD OF ASSESSORS.** Following the Open Book conferences, a member of the Successful Respondent's staff shall serve as a member of the Board of Assessors per Wisconsin Statute 70.075 and attend all meetings of the Board of Assessors to explain and defend assessed values.

**20. COMPLETION OF ASSESSMENT ROLL.** Following completion of the Open Book conferences and any assessment revisions resulting from that and Board of Assessors, the Successful Respondent shall prepare the Assessment Rolls according to current statutes. The Successful Respondent shall present the Assessment Roll and the signed Assessor's Affidavit to the City Clerk and the Board of Review.

**21. BOARD OF REVIEW: SUBSEQUENT APPEARANCES.** (a) The Successful Respondent's staff shall attend all meetings of the Board of Review to explain and defend the assessed values and be prepared to testify under oath in regard to such values. Compensation shall be as specified in the contract. (b) In the event of appeal to the DOR or to the courts, it is agreed that the Successful Respondent's staff shall be available upon written request from the City to furnish testimony in defense of the values established by the revaluation in all cases which might arise. Compensation shall be as specified in the contract.

**22. INSURANCE – LIABILITY, WORKER'S COMPENSATION.** (a) The Successful Respondent shall maintain insurance coverage to protect against claims, demands, actions and causes of action, arising from any act or omission of the Successful Respondent, his agents and employees in the execution of work. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City. Limits of liability shall not be less than:

General Liability:       \$1,000,000 per Occurrence  
                                  \$2,000,000 Aggregate



Auto Liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit

Worker's Compensation – Statutory Limits

Employer's Liability:

\$500,000.00	Each Accident
\$500,000.00	Disease, Each Employee
\$500,000.00	Disease, Policy Limits

Cyber Liability: \$1,000,000 aggregate including third party damage coverage, no encryption coverage and regulatory fines, and penalties coverage.

Umbrella liability Coverage: \$2,000,000 over the primary insurance coverages listed above.

Crime Liability Coverage: \$1,000,000

Errors and Omissions (Professional Liability): \$2,000,000 single limit

**23. INSURANCE – VALUABLE PAPER.** (a) Successful Respondent agrees to carry proper and sufficient insurance to cover loss of City's records withdrawn from City for Successful Respondent's use as well as Successful Respondent's records in process under this agreement which are in possession of the Successful Respondent. (b) The Successful Respondent shall not be responsible for loss of records destroyed by fire, theft, or Act of God while kept in office space supplied by City.

**24. PUBLIC RELATIONS.** (a) As required by the City, during the course of the revaluation the Successful Respondent shall participate in any public information program or campaign established by the City in a manner dictated by experience to be the most effective and productive and of such a nature in which to allow the Successful Respondent to actively participate. (b) The Successful Respondent agrees to meet monthly or upon request, with the governing body of the City to discuss areas of work such as, but not limited to progress, procedures, valuations, and problems.

**25. QUALITY CONTROL AND PROJECT INSPECTION.** The Successful Respondent will provide a quality control plan specifying the quality control procedures they will utilize to insure and demonstrate to the City and property owners that the project is being conducted and completed in accord with the requirements of Section 10. Said plan will contain a report to be submitted monthly in accord with Section 25 demonstrating compliance with Section 10. The quality control plan must be approved by the City. The City reserves the right to inspect the work being done by the Successful Respondent at various intervals during the contract.

**26. CITY ADMINISTRATION AND CITY ASSESSOR'S OFFICE TO BE INFORMED.** The Successful Respondent shall prepare and include with their response a preliminary project plan including a timeline for completion of the revaluation specifying intermittent dates for milestone achievements. If offered a contract, the Successful Respondent shall finalize the project plan and schedule and it shall become part of the Contract. Following commencement of the project, the Successful Respondent shall provide to the City a Monthly Project Status Report specifying adherences and deviations from the plan and schedule. For any deviation the Successful Respondent shall specify their approach to getting back on schedule. The monthly status report shall be submitted to City Administration and the City Assessor's Office on the first Monday of each month during the term of the contract.

**27. CONFIDENTIALITY.** The Successful Respondent shall ensure that all its employees maintain strict confidence regarding all privileged information received by reason of this agreement in accord with all applicable State and Local laws, ordinances, policies, practices and procedures.

**28. OFFICE SPACE AND TRANSPORTATION.** (a) The City shall furnish adequate office space at no cost to Successful Respondent in or near the municipal building. Office space shall include desks, tables, chairs, file cabinets, heating, lighting, computer equipment for access to the City CAMA system and normal janitorial services. (b) As determined by the City, unique or extraordinary supplies required by the Successful Respondent shall be at their expense. (c) The Successful Respondent shall be responsible for providing safe and reliable transportation of its employees requiring transportation to complete their assigned tasks.

**29. ACCESS TO RECORDS.** The City shall allow access and make available to the Successful Respondent City records such as, but not limited to, previous assessment rolls and records, sewer and water layouts, building permits, tax records, records of special assessments, plats, and any other maps currently in the possession of the City, at no cost to the Successful Respondent. The City may limit such access to electronic formats if such are available and sufficient for revaluation purposes. Upon completion of the project, all documentation provided by the City in support of the project shall be returned to the City. The Successful Respondent shall not retain information provided by the City in any format.

**30. PROVISION OF FORMS.** The City shall provide usual and customary forms, binders, record cards, assessment notice forms, and other materials as necessary for the completion of the revaluation. The Successful Respondent shall include in its contract a list of the forms it expects from the City such that an estimate of the cost to provide said forms shall be possible. The City reserves the right to limit the number of duplicate copies of information if such are requested by the Successful Respondent.

**31. MAPS.** The City shall provide access to its electronic mapping to the Successful Respondent for use during the revaluation process. Hard copy of maps may be provided at the City's discretion or if mandated by the Successful Respondent, at the Successful Respondent's cost.

**32. COMPLETION OF WORK.** (a) The Successful Respondent shall have completed all work under the contract, except for appearing at the Board of Review and any necessary subsequent appearances as per the contract, on or before the completion date referred to in the contract. This date of completion may be extended, if necessary, and by mutual consent. (b) That in the event the revaluation cannot for any reason be completed within the time originally specified, the Successful Respondent shall provide written notification to the City, stating the reasons for not completing the revaluation by the contracted completion date, so that the situation may be timely remedied and the revaluation completed in substantial compliance with law.

**33. ASSIGNMENT OF CONTRACT.** The Successful Respondent is not permitted to assign, subcontract or transfer the contract or any part of the contract without written approval from the City.

**34. COMPENSATION UPON EFFORT.** Compensation is based upon effort required to complete the work in an acceptable manner under the contract, and not upon the whole value or any part of the value of the City.

**35. METHOD AND TERMS OF PAYMENT.** (a) Payment for services rendered under the Contract for services shall be as specified within the Contract. Generally, payment shall be on a monthly basis except in the instance of a legitimate dispute. The monthly statements shall reflect the percentage of work completed less ten percent (10%) that shall be retained by the City. (b) All

statements shall be submitted to the City Administrator and the City Assessor's Office on the first Monday of each month for services performed the preceding month. After review and procuring any needed corrections therein, the City will pay such statements. (c) All compensation paid to the Successful Respondent shall be by check mailed to the address indicated in the Contract.

**36. TURN OVER OF RECORDS.** Within 14 days of the final adjournment of the Board of Review, the Successful Respondent shall turn over to the City the following items if such are in their possession; (a) all records prepared for the revaluation including, but not limited to property record cards, maps and any other schedules, code tables or forms, (b) all records and materials obtained from the City and not previously returned to include maps and assessor's records, and (c) materials specifically obtained and/or used for the performance of assessment work for the City under contract to include aerial photos, maps, depth factor tables, copies of leases and copies of real estate transfer returns, and (d) if your assessment record system is computerized, at a minimum, provide that the software be able to create an exportable file of the data in a format specified by the City. This file shall then be left with the City, along with a field definition file to describe the various data fields in the file.

**37. CONTRACT.** Any agreement/contract between the City and the selected Successful Respondent shall be governed by the laws of the State of Wisconsin. All disputes shall be resolved in a court of competent jurisdiction in the County of Kenosha, State of Wisconsin. All of the City's rights and remedies for breaches, defaults and conflicts hereunder shall be cumulative and not exclusive."

## CITY ASSESSOR SERVICES

### COST SUMMARY SHEET

<b>ASSESSOR 3 STATUTORY DUTIES – A1</b>	<b>\$</b>
General listing of major duties:	
Tax exemption reviews	
Signed Assessor’s Affidavit presented to Board of Review and Clerk	
Corrections of errors	
Municipal Assessor’s Report	
Office hours	
Board of Assessors member and procedures	
Board of Review procedures	
<b>COMMERCIAL REVALUATION – C1</b>	<b>\$</b>
General listing of major duties:	
Review and analyze sales	
Review and analyze neighborhood trends	
Determine and build land value tables	
Review and assess partial construction	
Review and assess new construction	
Permit reviews	
Misc. reviews	
Parcel classification changes	
Review land divisions, combinations, lot line adjustments, new plats	
Agricultural Class land valuation	
Income and expense analysis	
Commercial Class valuation	
Open Book conferences	
Valuation defense	
TIF district data review	
<b>RESIDENTIAL REVALUATION – R1</b>	<b>\$</b>
General listing of major duties:	
Analyze sales	
Review and analyze neighborhood trends	
Determine and build land value tables	
Review and revise parcel classifications	
Residential Class valuation	
Review land divisions, combinations, lot line adjustments, new plats	
List in detail any other costs the City may incur over the course of the proposed project.	
Provide a list hourly rates of all staff that would be involved with fulfilling the requirements of the proposed project.	