

Request for Proposals

Assessment Services

To Provide Statutory Assessor, Annual Maintenance, Software Services, and City-Wide Revaluation Services

Released May 10, 2019

Revised May 21, 2019

City of Kaukauna
144 West Second Street
Kaukauna, WI 54130



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I. Introduction

The City of Kaukauna, Wisconsin is requesting proposals from qualified Appraisers to perform the duties of Assessor for the City for the years 2020-2022 and a city-wide revaluation to be completed in time for the 2021 tax levy year.

The City of Kaukauna is requesting proposals from qualified assessment firms (“Consultant”) to provide annual assessment services for the City of Kaukauna, Wisconsin (hereafter, referred to as “City”) for the years 2020-2022. The City is seeking a firm 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. The City is also seeking a firm to provide and use appropriate CAMA software and to facilitate any needed data conversion from the City’s existing system to any proposed new system. In addition to these core services, the City is also requesting bid for a City-wide revaluation which is explained in more detail in a below section

A. Program Goals

The following statement of goals outlines the City’s overall desires for the results of its tax assessment program.

1. Provide tax assessment services that are **technically sound** – free from errors and defensible from an equity standpoint.
2. Utilize consultant services in a way that meets the needs for both ongoing maintenance and revaluation in a **cost-effective** manner. This may mean that large revaluation projects are avoided completely by more aggressively maintaining equity on an ongoing basis.
3. Provide a level of **customer service that is consistent** with the expectations for other City services. Consultants will endeavor to work seamlessly with City staff to achieve this.

B. Addenda, Rejection, Cancellation, Preparation Cost

The City reserves the right to revise any part of this RFP by issuing an addendum at any time prior to the submittal deadline. The City reserves the right to accept or reject, in whole or part, all proposals submitted and/or to cancel this announcement if any such action is determined to be in the City’s best interest. All materials submitted in response to this RFP become the property of the City. The City will not be responsible for costs associated with preparing proposals. By submitting a proposal, each Consultant agrees to be bound in this respect and waives all claims regarding such costs and fees.

II. City Background

The City of Kaukauna, in Outagamie County, has an estimated 2018 population of 16,049, with an anticipated annual growth of 1.5-2.0%. The 2018 Equalized Value (including manufacturing and TID) for the City is \$1,088,410,600. The City has seven active Tax Incremental Financing Districts. The assessment ratio for 2018 was 0.9168 in total for all property classes.

The City has the following parcel counts (Preliminary 2019 Statement of Assessment):

	Total Parcels	Improved
Residential	5,788	5,416
Commercial	434	350
Manufacturing	51	42
Agricultural	94	
Undeveloped	0	
All Others	0	
Total	6,367	5,808

The 2018 Municipal Assessment Report indicates that the City has 326 Personal Property accounts with an assessed value of \$9,037,900. The City has 340 Tax exempt Properties.

The last full, City-wide revaluation was completed in 2009. No exterior or interim market updates have been conducted since then.

III. Anticipated Scope of Assessment Services Work

The City of Kaukauna desires to form a strategic partnership with the selected Consultant in a way that best utilizes City resources and creates a seamless delivery of service from the perspective of our customers.

The Appraiser shall be the statutory assessor for the City of Kaukauna and complete in a professional manner all the work required under this proposal in accordance with the Wisconsin State Statutes. The Appraiser shall complete the assessment work of all taxable real and personal property within the City for 2020, 2021, and 2022 assessment rolls. It is anticipated that the selected Appraiser will begin work under contract October 1, 2019 and continue through September 30, 2022.

The city is open to recommendations and alternative options to the scope listed below. This may include multiple alternatives, as long as each alternative also includes a cost estimate as an option. Some of the alternatives may include various methods and timing for accomplishing equitable valuations throughout the City, from aggressive yearly maintenance to neighborhood-level market updates, or anything in between. These options should be called out separately and have a separate cost associated with each one.

A. Specific Assessor Services Required

1. Consultant 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 Consultant shall designate a qualified and responsible employee to supervise the operation of the Consultant's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. The individual designated as such shall be available to the City for the entire contract. Should the supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

- The Consultant shall report to and be accountable to the Finance Director or his/her designee. The Consultant shall meet with the Finance Director on a regular basis 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. Consultant or his/her City-approved designee will maintain regular office hours at Municipal Service Building from 8:00 AM to 12:30 PM every Monday. (Additional time will be spent in the City to perform other responsibilities, but this is the minimum commitment for on-site office hours.) Additional office hours should also be planned after assessment notices are sent out, during the Open Book review, and prior to the Board of Review.
 3. The Consultant shall be available, either on-site during regular office hours or remotely via telephone and email, to assist City staff when needed with assessment related clerical duties including:
 - a. Answering routine telephone calls
 - b. Walk-in requests for assessment data
 - c. Assist in scheduling assessment-related appointments
 - d. Providing copies of all assessment-related open records requests
 - e. Preparing appointment mailers, stuffing envelopes and mailing all notices
 - f. Filing of all assessment property records cards and any other assessment-related records
 - g. Preparing the Assessor related information for the creation of any Tax Increment District (TID)
 - h. All assessment data entry
 4. Consultant will provide an email address and a local (or toll free) phone number for City officials and customers to contact the Consultant during regular business hours, Monday through Friday, and shall return emails and calls within one business day.
 5. Consultant will field review and assess all properties that were under partial construction as of January 1st of the previous year.
 6. Consultant will field review and assess new construction as of January 1st of the current year.
 7. Consultant will perform 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. Consultant will field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning, and other miscellaneous permits.
 9. Consultant will field review as deemed necessary sale properties and properties for which no building permit has been issued.
 10. The Consultant will be diligent in discovering and assessing all personal property. Consultant will field visit all personal property accounts annually to discover new accounts and account for businesses that may have closed prior to the assessment

- year. Consultant will cross reference personal property accounts with the corresponding real property and parcel numbers.
11. The Consultant will mail out 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. Consultant will collect the name and address of each personal property contact person, separate from the business name. The Consultant shall provide a doornage listing to the Finance Director or his/her designee prior to the Open Book review.
 12. Consultant will account for all buildings destroyed or demolished.
 13. Consultant will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
 14. The Consultant will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status. In addition, the Consultant will ensure all exempt properties are assessed at market values for purposes of PFP (Public Fire Protection) and for future reference.
 15. Consultant will assist City staff to process parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps, and any other land divisions.
 16. Consultant will take digital photographs of new construction on or about January 1st annually, and also during the review process if needed.
 17. Consultant will maintain and annually update property owner lists with current name and address changes.
 18. Consultant will post assessments to real estate transfer returns and record sale information to property record cards electronically.
 19. Consultant will electronically update all property owner record cards with new legal descriptions on at least an annual basis.
 20. Consultant will mail Notice of Assessment to property owners and others as required by State Statutes.
 21. Consultant will conduct Open Book sessions in accordance with Wisconsin State Statutes. Consultant shall prepare a written statement regarding Open Book dates, times, and instructions on how to set up an appointment for an Open Book session, at least fifteen (15) days prior to the first Open Book session.
 22. The Consultant will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to May of each year. The Consultant shall work with the City Clerk to arrange for the hearings. The Consultant will attend the Board of Review hearings, serve as City staff at the hearings and defend the valuations and work products. The Consultant will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as

approved.

23. The Consultant shall update the assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
24. The Consultant will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
25. Consultant will coordinate with the Outagamie County Real Property Listing office to facilitate the digital and manual transfer of data and values.
26. Consultant will place property assessment records on the web for access to the public. This may be accomplished through the City's existing online resources or through the Consultant's software package.
- ~~27. The Consultant shall update market values on City owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation, and/or establishing lease values.—(5/21/19 wvr – Do not need this value)~~
28. The Consultant shall also collaborate with City staff to perform all other duties incidental to the normal duties of the assessor, including, but not limited to, reports necessary for the tax incremental financing districts (TIDS), coordinating payments in lieu of tax and a top taxpayer report with the Finance Department, tracking omitted property values for future rolls, work associated with ag use conversion notices, and municipal boundary agreements.
29. All assessment files and records created and data collected by the Consultant shall remain the property of the City. Records shall not be removed from City premises without the written permission of the City.
30. All records shall be converted to and stored in a digital format
31. The Consultant shall be available to attend, upon the request of the Finance Director, other department head, or Mayor, other prescribed meetings upon reasonable prior notice. Such meetings are expected to average two (2) hours per month.
32. The Consultant shall communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. The Consultant 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.
33. The Consultant is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
34. All Consultant personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.
35. The Consultant is not permitted to assign, subcontract, or transfer the work without the written permission of the City.

36. All Consultant personnel providing services requiring Wisconsin Department of Revenue Certificates shall be currently certified in compliance with Wisconsin Statute 70 and Administrative Rules of the Wisconsin Department of Revenue.
37. The Consultant will provide an update to 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.
38. The Consultant shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the Consultant's employees to be unsatisfactory, the Consultant shall remove such employee(s) from working for the City upon written request from the City.
39. The Consultant shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error, or omission of the Consultant, their agents and employees in the execution of work. Further, the Consultant 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. Said certificates shall be in a form and amount acceptable to the City Attorney.
40. The Consultant agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as Consultant's records in the process under this agreement which is in the possession of the Consultant. The Consultant shall not be responsible for the loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the City.
41. The Consultant 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 Consultant to Outagamie County in the appropriate electronic format, and the roll shall be totaled to exact balance between the County and the Consultant. The Consultant shall prepare and submit the Municipal Assessment Report (MAR) and the TID Assessment Reports to the Department of Revenue in a timely manner.
42. The Consultant shall ensure that employees maintain strict confidentiality 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.
43. Materials and supplies, other than standard office supplies and postage identified below as City Obligations, necessary to perform the duties of the contract shall be the responsibility of the Consultant.
44. The Consultant shall assist with the City Attorney and the City's outside legal counsel with any legal challenges to property values, including claims for excessive assessment.
45. The successful Consultant shall be required to execute a contract with the City that incorporates the information included in this RFP.

B. Assessment Software

The City of Kaukauna currently utilizes Market Drive (version 2017.1 (Build 199)) assessment software. The City is seeking Consultant proposals, if different than Market Drive, that includes an updated system of the Consultant's preferred/recommended choice. Assessment software proposed by Consultant must have the following attributes and abilities:

1. A statistical package that includes descriptive statistics and regression analysis. The Consultant should be able to state that the values produced from the system are created from regression analysis and identify clients that have used these essential tools for valuation.
2. Comparative sales reports that can be used to support individual assessments with adjustments shown to be derived from the regression analysis.
3. Flexible cost and depreciation tables that can be adjusted to capture specific markets. For commercial properties, a system generated income approach to value.
4. The ability to electronically export the completed assessment roll to the Outagamie County Real Property Listing office in the format required, eliminating any manual data entry of the completed roll.
5. The ability to import "start-up data" from the City's existing databases to avoid time/cost consuming initial data entry.
6. Ability to communicate with City's existing building permit record keeping which is maintained in MY GOV
7. Sales data that can be kept, stored and accessed.
8. Maintains an ownership history.
9. Maintains a separate sales listing file to record and store data on sale properties as of the date of sale.
10. Has the ability to create a wide range of reports, including Assessment Roll, Assessor's Final Report; and neighborhood attributes and values.
11. Has the ability to run queries to locate specific data.
12. Has an electronic sketch for each property.
13. Uses standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages and managed by Microsoft Sequel (SQL) Server.
14. Consultant will collaborate with the City to maintain the database used, together with file maps and descriptions, and all associated digital photos. This database will remain the property of the City.

15. Hard copy printouts for all parcels shall be provided and placed in existing hardcopy property record cards. The printout's format and data provided shall be approved by the Department of Revenue and should contain the same data fields as shown on the PA-500 property record card as a minimum.
16. The data should be capable of being uploaded to the City's GIS system.

Recommend Software: Within the proposal, the Consultant should clearly identify what software platform it intends to use during the engagement. In addition, the proposer shall clearly state the following if something different than Market Drive is being proposed:

- a) Cost of Software
- b) Cost of licensing or annual maintenance and who will be responsible for the same
- c) Software's ability to interface with the current software and records
- d) Consultant's ability to convert the current data to the proposed software

IV. Anticipated Scope of Revaluation Work

A. Background and Details

The last full, City-wide revaluation was completed in 2009. The 2018 City Residential property assets class assessment ratio was 89.7%. The City is seeking a consultant to do a full City wide revaluation in time for the 2021 Tax Levy (2022 Budget year).

Within (30) days following award, the selected Appraiser must furnish the City with a performance bond, or other instrument of security acceptable to the City, equal in value to the sum of the revaluation contract. Said security instrument shall remain in force through the duration of the contract period and will be retained by the City until completion of the contract.

B. Basic Scope

Consultant understands that the project requires the complete reappraisal and revaluation of all taxable and non-taxable real property within the corporate limits of the City of Kaukauna, Wisconsin. This data will be noted on the individual property record cards. All data and programs gathered will become the property of the Municipality.

All work will be carried out and all forms, materials and supplies utilized by Consultant in this project shall conform to, and be carried out in accordance with, the Wisconsin Statutes.

The values to be determined shall be the present true and actual value of each parcel of real property as that term is used in Chapter 70 of the Wisconsin Statutes. They shall be based upon recognized methods of appraisal and conform to Uniform Standards of Professional Appraisal Practices, as required by Wisconsin Statutes for the licensing and certification of all individuals involved in the appraisal of real estate.

C. Specific Revaluation Service Requirement

1. **The firm shall physically inspect 100% of the properties exteriors to be appraised and will carefully measure and list all improvements to be appraised. If the property**

*owner requests the appraiser to view the interior, the appraiser will oblige.
(5/21/2019 Wvr – the way it was worded it appeared to be full interior and exterior valuation. We
only want exterior unless owner requests an interior when appraiser is on site.)*

- a. The Appraiser will provide a list of all properties which were not viewed on the inside. The Appraiser will check all improvements and furnish a complete outline sketch to scale of the major buildings showing all additions, porches and appendages with dimensions and necessary identification on the existing record cards. All pertinent construction data of improvements will be entered on the appropriate property card. The date of inspection of all major buildings will be indicated on the record cards. If the Appraiser is refused by the owner or occupant to inspect the interior of a major building, the Appraiser will list and value the improvements according to the best information he can practically obtain and will place a damage assessment on such property.
- b. Valuation of Improvements:
 - 1) The Appraiser shall consider the Cost Approach, Market Data Approach and Income Approach in the valuation of all improvements.
 - 2) In valuing improvements by the Cost Approach, replacement costs shall be derived from computer operated pricing systems approved by the City
 - 3) In using the cost approach for agricultural outbuildings, the current replacement cost shall be determined for all sound buildings. Buildings in poor conditions having little or no value shall be physically described and listed as having "No Value" or given an appropriate sound physical value.
 - 4) In using the cost approach for commercial improvements, or a computer-generated calculator, proper base costs shall be selected as appropriate and adjusted to adequately reflect variations from base building costs.
 - 5) Local modifiers shall be used in determining all current replacement costs. Local modifiers and costs appearing in the Assessor's Manual shall be adjusted when documented by an analysis of local current construction costs and market sales data. Records shall be prepared and left with the Municipality to account for any adjustments made.
 - 6) All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence, must be accurately documented by the market and deducted from current replacement costs
 - 7) In the valuation of improvements by the Income Approach, adequate records shall be prepared for each improvement so valued showing the determination of value, a reconstruction of income and expenses, estimate of remaining economic life and capitalization rate. Capitalization rates used shall be accurately documented by the market.
- c. Determining Land Values:
 - 1) Unit value ranges per acre for each grade of agricultural land and swamp and timber land shall be determined from an analysis of sales and other available market data. Soil surveys and maps where available shall be used in the development of land unit values for agricultural lands. In the analysis of Unit

value ranges per acre for each grade of fallow agricultural land, agricultural forest land, and undeveloped and productive forest land shall be determined from an analysis of sales and other available market data. Agricultural forest land and undeveloped land values shall be adjusted to 50 percent of full market value, per sec. 70.32(4), Wis. Stats. Soil surveys, where available, shall be used in the classification of land. Agricultural land shall be valued according to use, per sec. 70.32, Wis. 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 municipality.

- 2) Aerial photographs shall also be used in the evaluation and classification of agricultural, swamp and forest lands. GIS layers, where available, should be provided, showing ownership lines and acreage. The minimum acceptable product under this specification shall be the most recent aerial photographs available from the county, along with soil classification and grading lists and a listing of the unit values used (use-value units for class 4 lands, market value units for fallow tillable and idle pasture, class 5, class 6 and class 7 lands). Aerial photographs shall be supplied, where necessary, by the appraiser and shall be left with the municipality, along with classification and unit values documentation.
 - 3) 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 municipality.
 - 4) Having determined basic unit values the appraiser 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.
 - 5) For residential and commercial lands, maps and schedules shall be prepared to indicate unit values used: e.g., by neighborhoods, and locations thereof to be left with the municipality.
 - 6) A copy of all charts, schedules, and tables, not previously referred to, including depth factor tables used in the valuation of the land shall be left with the municipality.
- d. The Appraiser shall send property owners a postcard in advance, to give notice of when the inspection will take place on their property.

- e. Inspections / Appointments will be conducted between the hours of 8:00 A.M. and 7:00 P.M. Monday through Saturday, excluding holidays.
- f. The Appraiser shall use existing individual record cards for each parcel to be revalued. New cards approved by the Department of Revenue will be created during the revaluation
- g. All property owners will be given sufficient notice of changes in assessment, with an opportunity to review and discuss these changes with the Appraiser at informal hearings at City Hall.
- ~~h. The Appraiser will set regular office hours in City Hall a minimum of two four hour periods per month and any additional hours that may be necessary during revaluation to answer questions or meet with property owners. (5/21/2019 Wvr –most questions are assumed to come during board of reviews. We are looking to save the cost and allow more time in the field expecting that the appraiser will leave contact info after completing onsite inspection)~~
- i. The Appraiser will target the revaluation at 100% of the full value in 2021 tax levy to meet statutory mandates.
- j. The Appraiser will 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. In the event of an appeal to the courts, it is agreed that the Appraiser will be available to furnish expert testimony in defense of any of the assessed values.
- k. The Appraiser shall make a reasonable explanation to the City Staff throughout the revaluation in the use of procedures, standards, and records used for making property appraisals.
- l. The firm will provide a digital photograph of each improved and vacant parcel. Any unique or unusual properties may require more than one picture.
- m. All office supplies, postage and other supplies necessary to perform the duties of the contract shall be borne by the Appraiser. The use of City supplies under this section will be invoiced to the Appraiser and paid by the Appraiser prior to the final payment under the contract.

D. City Obligations

- 2. With guidance and support from the Consultant, the City Clerk shall publish required notices with the local media. This applies to Open Book and any other required notices.
- 3. The City shall furnish adequate space at Kaukauna Municipal Service Building (MSB) at no cost to the selected Consultant. Office space will include desks, tables, chairs, file cabinets, heating, lighting, telephone, and janitorial services, along with other office machinery, equipment and computers that are utilized in MSB.

4. The City shall allow access by the Consultant 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.
5. 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.
6. The City shall furnish the name and correct address, if known, to the Consultant for notices to be sent for changes, in assessed values.
7. The City shall aid the Consultant with a reasonable promotion of public information concerning the work under this agreement.

V. Proposal Requirements

A. Proposal Content and Organization

To achieve a uniform review process and a degree of comparability, the proposals should be organized in the following order and contain all of the following information:

1. **Firm and Contact Information:** Identify the firm name and address. Provide the name(s) of the person(s) authorized to make representations for your firm, their title, address, email address, and telephone number(s). If different, also provide the name, title, address, email address, and telephone number of the qualified and responsible individual that will be designated as the key contact person and that will supervise the operation of the Consultant's staff for the entire contract period.
2. **Individual Qualifications:** Include the names and resumes, including educational background, municipal assessment experience, and current Wisconsin Department of Revenue certification level, of the person or persons to be assigned to perform the Scope of Work. Include the key contact person's experience with conducting a revaluation process and experience with assessment evaluation of potential tax-exempt properties.
3. **Firm Qualifications:** Include with your proposal a summary of the firm experience that identifies the following for Wisconsin municipalities for which your firm currently provides assessment services:
 - a. Name of municipality
 - b. Population
 - c. Equalized value
 - d. Total parcel count
 - e. Whether Statutory Assessor services are provided
 - f. Whether Maintenance services are provided
 - g. Whether Revaluation services are provided
 - h. Evidence of the accuracy of the firm's assessment work for that municipality
4. **Work Proposal:** In order to be considered as complete, proposals shall acknowledge and respond to each point in the above Scope of Work.

5. **Assessor Service Cost:** State the total annual compensation rate to provide the services described in the above Scope of Work and in accordance with the laws of the State of Wisconsin for assessment years 2020, 2021, and 2022 beginning not later than November 1, 2019. The City will pay Quarterly as invoiced on the basis of the percentage of work completed. Clearly, list the fee for each year of the proposed contract in a not-to-exceed sum including all of the Consultant's costs, but not necessarily limited to: labor, materials, supplies, equipment, transportation, meals, lodging, computer software, and Board of Review expenses. All expense reimbursements will be the responsibility of the firm.
6. **City-wide Revaluation Cost:** Consultants shall provide a total amount in a not-to-exceed sum for a revaluation of City property. The consultant should begin City-Wide revaluation no later than October 1, 2019, and have revaluation completed in time for the 2021 tax levy year. The City will pay progress payments for the revaluation. Details on this will be in the contract awarded to the selected consultant.
7. **Software Recommendation:** If software recommendation is different than Market Drive, provide the details as requested at the bottom section III.B.16 above.
8. **References:** Identify a reference and provide contact information for at least five references from Wisconsin municipal clients, including at a minimum all those municipalities listed for item 3 above. References should be of a size similar to the City of Kaukauna for which the firm 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, email address, and business phone number of the contact person.

B. Submittal Requirements

Proposals must be received by the City of Kaukauna by 4:30 PM on **Friday, June 14, 2019**. Submissions can come in the form of postal or email. If postal, it is recommended that all proposals be submitted via certified mail or other commercial courier services in order that the Consultant will have a written record of the delivery.

The following requirements must be completed in full for postal delivery:

1. Five (5) original hard copies of the completed proposal
2. At least one (1) electronic copy via email to will@kaukauna-wi.org
3. Please send the identified information to the City of Kaukauna at the address listed below:
City of Kaukauna
Attn: Finance / Assessor
144 W Second Street
Kaukauna, WI 54130

VI. Selection Criteria and Process

A. Selection Criteria

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

1. Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the City of Kaukauna.
2. The qualifications of key personnel and past experience with providing assessment and revaluation services for both Residential and Commercial properties.
3. Ability to provide and maintain a computerized database of property assessment records meeting the requirements of the RFP.
4. Demonstration of a high level of accuracy in assessment work for municipal clients.
5. Cost of Assessment Services.
6. Evidence of the Consultant's capacity to do the work and evidence of positive customer interaction.

The proposals will be reviewed and awarded to the Consultant whose quote is the most responsive to the RFP and is the most advantageous to the City of Kaukauna considering experience, price, and other factors. The City reserves the right to accept or reject any and all proposals received.

B. Selection Process

The Consultant selection process will involve the following primary steps.

1. **Proposal Review:** Proposal review will be based on a comparative assessment and scoring of each document in accordance with the identified Selection Criteria. The City will then select one or more finalist firms to advance in the selection process.
2. **Interviews:** The City will determine whether interviews are needed, or it may make a selection based on the proposals alone. If determined necessary by the City, the finalist firms will be requested to present their experience, qualifications, software package, and personnel in an interview to members of the City's selection team. (Further interview instructions will be provided to the selected finalist firm(s).) The City will then review the presentation(s) and select a Consultant to advance in the process.
3. **City Approvals:** Based on the results of the selection process, the City's selection team will recommend to the Kaukauna Finance Committee and the Kaukauna Common Council a Consultant for approval. It is anticipated that such approvals would occur in the month of July so that work on the City-wide revaluation could begin in August and City Assessing service begin in November.
4. **Contract Negotiation:** The selected Consultant will submit a proposed scope of services, then work cooperatively with the City to develop the final scope and project cost. Proof of the required insurance coverage will also be required at that time. Refer to Sections C and D below for further details related to insurance, contract award, and notification.

C. Selection Timeline

The following is the anticipated schedule for Consultant selection but is subject to change.

Submittal Deadline	June 14
Interview Scheduling	June 17-19
Consultant Interviews (if needed)	June 20-27
Consultant Selection	July 8-10
Finance and Council Confirmation	July 16
Contract Negotiation	July 16-26
Contract Award by Council	August 6*

* Or sooner with a Special Meeting

D. Rules Governing Competitive Evaluation

1. **Examination of Request for Proposals:** Consultants are advised to carefully inspect the community, the assessment records, and facilities of the City of Kaukauna, 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 Consultant 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 RFP on a timely basis.
2. **Proposal Acceptance Period:** The selection of a Consultant with which to begin contract negotiation is expected to occur within five weeks of the submittal deadline. Short-listing of Consultants for interview and Consultant interviews will take place within this time period.
3. **Contract Negotiations:** The highest-ranked Consultant will enter into negotiations with the City. If an agreement cannot be met, the City will notify the Consultant and stop negotiations. Then the second highest-ranked Consultant will enter into negotiations. This process may continue until a successful negotiation occurs. The City reserves the right to cease any negotiations with any Consultant should it be in the City’s best interest.
4. **Personnel Changes:** Prior to the execution of any contract for the requested services, the Consultant shall notify the City, in writing, of changes in key staff. The City shall have the right to terminate or renegotiate the contract if these changes will affect any work product or agreed upon timetables.
5. **Compensation:** Compensation will be based upon a negotiated fee between the Consultant and the City determined by the actual unit cost for items of work required to perform a specific task. The Consultant will not be permitted to assign, subcontract, or transfer the work of providing assessment services, without the prior written approval of the City.
6. **Contract Time:** The Consultant shall proceed with the services specified after the execution of the contract and upon written notice from the City. The estimated contract duration for the requested services is two years. The actual duration will be specified in the contract

along with options for renewal and extension.

7. **Insurance Requirements:** The successful Consultant will be required to provide proof of required insurance coverage, naming the City as an additional insured, to the City Attorney prior to the start of work. The minimum requirements include at least \$2,000,000 general liability on an occurrence basis, evidence of automobile liability, and statutory workers compensation.
8. **Performance Bond:** Within (30) days following the award, the selected Appraiser must furnish the City with a performance bond, or other instruments of security acceptable to the City, equal in value to the sum of the revaluation contract. Said security instrument shall remain in force through the duration of the contract period and will be retained by the City until completion of the contract.

E. Addenda Cancellation, Preparation Cost

The City reserves the right to revise any part of this RFP by issuing an addendum at any time prior to the submittal deadline. The City reserves the right to accept or reject, in whole or part, all proposals submitted and/or to cancel this announcement if any such action is determined to be in the City's best interest. All materials submitted in response to this RFP become the property of the City. The City will not be responsible for costs associated with preparing proposals. By submitting a proposal, each Consultant agrees to be bound in this respect and waives all claims regarding such costs and fees.

F. Questions and Comments

All questions shall be submitted in written form to the contact information provided below. Answers will then be provided, via the City website, in written form as a part of an addendum to this RFP. No pre-proposal meeting is anticipated at this time, but can be added to the schedule if deemed necessary by the City.

City of Kaukauna
Attn: Finance/Assessor
144 W Second Street
Kaukauna, WI 54130
Email: will@kaukauna-wi.org
Phone number: (920)766-6372

For additional context on the City of Kaukauna, its tax assessment program, and the digital version of this RFP, please visit our website at www.cityofkaukauna.com/