



October 7, 2009

Re: Proposal Request for City Assessment Services

The City of Delafield is entertaining proposals from qualified individuals or firms to provide assessment services for the City of Delafield, Wisconsin (hereafter, referred to as "City"). We are providing the following information to assist you with your quotation proposal:

Background Information

The City is located in Waukesha County with an estimated 2009 population of 6,934. The 2009 Equalized Value (including manufacturing) for the City is \$1,403,546,100. The City's last city-wide reassessment was in 2007. A reassessment shall be conducted every three to five years or as designated by the Wisconsin Department of Revenue.

Specific Services Required

1. 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.
2. Assessor will review and assess all properties that were under partial construction as of January 1 of the previous year.
3. Assessor will review and assess new construction as of January 1 of the current year.
4. Assessor will mail out state approved blotters to all holders of personal property in the City, audit the returned forms and place the new values in the assessment roll.
5. Assessor will account for all buildings destroyed or demolished.
6. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
7. Assessor will process parcel splits and new plats.

8. Assessor will correct legal descriptions as needed.
9. Assessor will take digital photographs of new construction, also on the review process if needed.
10. Assessor will file building permits or copies of such in property record files.
11. Assessor will maintain property owner lists, with current name and address changes.
12. Assessor will post assessments to real estate transfer returns and record sale information to property record cards.
13. Assessor will be responsible for maintaining recent plat and subdivision maps and aerial photographs on file and updated accordingly.
14. Assessor will annually update all property owner record cards with new legal description labels.
15. Assessor will mail Notices of Increased Assessment, form PR-301A.
16. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes.
17. Assessor will be responsible for insuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of July each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of review meeting.
19. Assessor will conduct office hours at the Delafield City Hall as necessary on the first and third Tuesdays of each month from 8:00 AM to 12:00 noon. Alternate hours may be considered by the City.
20. Assessor will also provide a local or toll-free phone number for City officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
21. Assessor shall coordinate with city volunteers and employees to prepare a computerized data base of property assessment records, including digital photographs of each property.
22. Assessor will supply to the City a complete set of computer property assessment records (including digital photographs of each property) that are compatible with the

City's computer equipment and software. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the City's assessment computer shall be updated within fourteen (14) days of the final adjournment of the Board of Review.

23. Assessor will also perform all other duties incidental to the normal duties of Assessor.

General Quotation Requirements

1. Proposals shall include no more than twenty (20) pages, 8½ inches by 11 inches.
2. All quotations must identify the firm name, address and specific assessment services 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 reevaluation process; identify experience with assessment evaluation of potential tax-exempt properties and any specific assessment experience with evaluation of medical facilities; demonstrate accuracy of assessment work; and provide examples of going above and beyond the "call of duty", with respect to serving the community and its property owners.
3. 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. The City will pay the annual compensation rate in equal monthly installments. Additionally, the proposal shall include costs to complete a city-wide re-evaluation.
4. 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.
5. The proposals shall identify five references from municipal clients for which the bidder has provided assessment and/or revaluation services within the past three (3) years. References must include the name, title, address and phone number of the contact person.
6. The proposals shall also identify any and all contractual requirements that the bidder currently has.
7. Identify the date when the firm would be available to begin providing assessment services to the City.

8. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the department of Revenue, and shall maintain certification throughout the duration of this assignment.
9. Bidders are advised to carefully inspect the community, the entire records and facilities of the City of Delafield and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for consideration set forth in this bid.
10. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
11. The successful bidder will have three to five years experience in municipal government assessing, including re-evaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
12. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the solicitation and is the most advantageous to the City of Delafield, considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received.
13. If a proposal is accepted, the Assessor shall provide a certificate naming the City as additionally insured for the purposes of general and professional liability protection. Said certificate shall be in a form acceptable to the City Attorney.

Other Information

The Assessor will be selected and hired by the City Council. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected. The original copy of the Assessment Services Proposal must be received at the address listed below by no later than 4:00 PM on October 26, 2009. Proposals will be opened at 4:00 PM on October 26, 2009 and a recommendation made to the Common Council at the November 2, 2009 Common Council meeting.

Proposals shall be submitted to:

Tim Schuenke
City Administrator
500 Genesee St.
Delafield, WI 53018
(Phone) 262-646-6220
(Fax) 262- 646-6223
tschuenke@ci.delafield.wi.us

Evaluation Criteria

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

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size, particularly with lake properties.
2. Past experience with providing assessment re-evaluation services.
3. Demonstration of a high level of accuracy in assessment work for municipal clients.
4. Cost of assessment services.
5. Evidence of positive customer interaction.

Thank you for your interest in this project!