

**VILLAGE OF WINDSOR
VILLAGE BOARD RESOLUTION 2019-80**

AUTHORIZING A REQUEST FOR PROPOSALS FOR ASSESSMENT SERVICES

WHEREAS, the Village Board finds that the Village of Windsor has a need to acquire professional assessment services; and

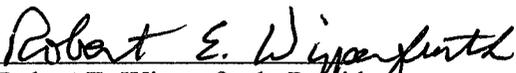
WHEREAS, the current contract for assessment services for the Village expires December 31, 2019; and

WHEREAS, the Village desires to provide assessment services that include GIS mapping and digital assessment records, including web access;

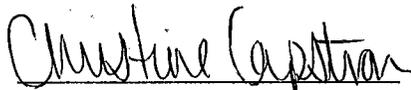
NOW THEREFORE, BE IT RESOLVED, by the Village Board of the Village of Windsor that it hereby authorizes staff to request proposals for assessment services as outlined in the attached Exhibit A.

The above and foregoing resolution was duly adopted at a meeting of the Village Board of the Village of Windsor, Dane County, Wisconsin, on August 1, 2019, by a vote of 5 in favor and 0 opposed.

VILLAGE OF WINDSOR

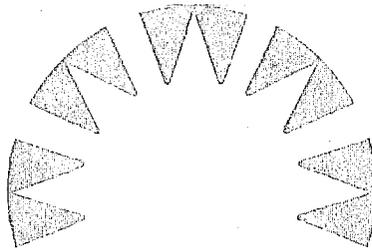

Robert E. Wipperfurth, President

Attested by:


Christine Capstran, Clerk

INCORPORATED BY REFERENCE:

Exhibit A: Request for Proposals for Village Assessment Services



Windsor

Growing Forward

Request for Proposals

Village Assessment Services

August 1, 2019

Introduction

The Village of Windsor, Dane County, WI (hereafter, referred to as "Village") invites proposals from qualified individuals or firms to provide assessment and reassessment services. The Village seeks services for a three-year term to commence January 1, 2020 through December 31, 2022.

Scope of Work

The awarded Request for Proposal recipient will be the statutory Assessor for the Village pursuant to Chapter 70 of the Wisconsin Statutes (as amended from time to time) and complete, in a professional manner, all the work required under this proposal in accordance with Wisconsin State Statutes, Wisconsin Department of Revenue regulations, and the Wisconsin Property Assessment Manual. The Company shall report and be accountable to the Village Administrator or her designee.

Within fifteen (15) days following the award of a contract, the selected Assessor shall furnish the Village with a performance bond or other instrument of security acceptable to the Village, equal in value to the sum of the contract. Said security instrument shall guarantee faithful and timely performance of the duties of the statutory Assessor and the delivery/redeliver/ surrender of all records, data, software, and assessment work product, which shall collectively be deemed work for hire and shall remain at all times the property of the Village.

The Assessor shall commence work January 1, 2020 or earlier as mutually agreed.

Computer software used shall be comprehensive software, as mutually agreed upon, and will be provided by the assessment firm. Ideally, the software would be capable of integration into the Villages ESRI GIS.

Background Information

The Village population, as of the 2010 Census, was 5,942. The population estimate for 2018, by the Wisconsin Department of Administration, Demographic Services was 7,795.

The current Assessor uses Market Drive software. The Village last completed a village-wide reassessment in 2017. The assessment ratio, as of January 1, 2019, is approximately 95%. The Village anticipates that a village-wide reassessment will occur during the term of this contract.

The 2019 Real Estate and Personal Property Assessed Value (excluding manufacturing real estate and personal property) is \$906,080,700, see Exhibit A for breakdown.

Specific Services Required

1. Assessor will perform all of the work required to properly and professionally assess the Village in accordance with applicable Wisconsin State Statutes, Wisconsin Department of Revenue regulations, Wisconsin Property Assessment Manual, etc.
2. Assessor will review and assess all properties that were under construction as of January 1 of the previous year.
3. Assessor will review and assess new construction as of January 1 of the current year.
4. Assessor will mail out state approved forms to all holders of personal property in the Village, audit the returned forms, and place the new values in the assessment roll. Doomage assessments will be made on any property account that has not sent in a return, and otherwise maintain the Village's assessment roll as required by Chapter 70 of the Wisconsin Statutes.
5. Assessor will account for all buildings destroyed and/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 subdivisions, lot line adjustments, new plats and any other land divisions.
8. Assessor will correct legal descriptions as appropriate.
9. Assessor will take digital photographs of new construction on or about January 1 annually, also during the review process if needed.
10. Assessor will maintain property owner lists, with current name and address changes.
11. Assessor will post assessments to real estate transfer returns. Said records are the property of the Village and are subject to open record requests and the Assessor must comply with those type of requests.
12. Assessor will be responsible for maintaining recent plat and subdivision maps and aerial photographs on file and update accordingly.
13. Assessor will mail Notices of Increased Assessment to property owners and others.
14. Assessor will coordinate with the Clerk and attend Open Book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare a written statement regarding Open Book dates and times, at least one month prior to the first open book session.

15. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the beginning of June each year, unless the Village Board determines otherwise. Assessor will also attend the Board of Review meeting, defending valuations and work product.
16. Assessor will be responsible for providing Dane County, who then provides to the Wisconsin Department of Revenue, with both preliminary and final reports of assessed valuations in accord with Wisconsin State Statutes.
17. The Village currently has one (1) Tax Increment Financing District (TID). The Assessor shall be required to complete all State of Wisconsin Department of Revenue TID reports regarding valuations on time.
18. Assessor will supply to the Village a complete set of computer property assessment records, including digital photographs and drawings of each property, as required by the Wisconsin Department of Revenue.
19. Assessor will provide copies of photographs with comparable properties in preparation of Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability.
20. Assessor will ensure the Board of Review has all available information to render its decision. Prepare, attend and serve as staff with the annual Board of Review hearing as required by the Wisconsin Statutes. The Assessor shall be responsible for working with the Village staff to arrange for the hearings. The Assessor shall also promptly and adequately follow up and respond to any appeals made at the Board of Review hearings, incorporating assessment modifications as approved.
21. Assessor shall update the Village's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
22. Assessor shall communicate openly and in a timely fashion with the proper Village personnel and the public in the handling of all appeals to ensure the Board of Review has all available information to render its decisions.
23. Assessor is expected to present a positive professional image in both dress and conduct while interfacing with Village Staff, Boards and Property Owners.
24. Assessor is encouraged to interface with the business and residential community to provide greater clarity of the Assessor's role in the property taxation process and communicate assessment scheduling.
25. Assessor shall update market values on Village owned land and public buildings. Said information obtained shall be used for insurance purposes, depreciation and to establish

lease values.

26. Assessor shall be available to attend meetings on an as needed basis.
27. Assessor shall be familiar with the responsibilities of complying with Wisconsin's open records law and proper administration of that law with respect to assessment records.
28. Assessor will also perform all other duties incidental to the normal duties of the Assessor.
29. 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.
30. Assessor shall supply all of Assessor's field representatives with identification cards, including the name, company, telephone number, certification from WI-DOR, and photograph of the employee.
31. Assessor shall perform field review as it deems necessary on sale properties and properties for which no building permit has been issued.

Assessing Software and Staffing

1. **Use of assessing software.** Computer software to be used shall be generally used and recognized, comprehensive and compatible software as mutually agreed upon and will be provided by the Assessor.
 - a. The software must have the ability to electronically export the completed assessment roll to the Dane County Treasurer.
 - b. The software must have the ability to import "start-up" data from Market Drive.
 - c. The software must give the user the ability to search multiple fields such as House Number, Street, etc.
2. **Staffing.** The Assessor's office should be available to speak with residents during business hours. Village staff currently assist with:
 - a. Answering routine phone requests for assessment data.
 - b. Providing Assessor contact information to residents as needed.
 - c. Providing copies of all assessment documents as requested such as building permits and commercial plans.
3. **The Assessor will be tasked with the following:**
 - a. Printing, mailing, etc. any mailers, which are approved by the Village to be sent out.
 - b. All filling of assessment records.
 - c. All assessment data entry.
 - d. Scheduling/e-scheduling all assessment related appointments.

- e. Creating basic drawings as needed.
- f. Coordinating with the Clerk for publishing public notices at appropriate times.

General Proposal Requirements

1. The successful RFP recipient will have at least five (5) years' experience in municipal government assessing, including reassessment, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
2. Proposals shall include no more than twenty (20) pages, 8 ½ inches by 11 inches.
3. All proposals 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 Village's point of contact for the work to be performed; experience with conducting a reassessment process; demonstrate accuracy of assessment work.
4. The proposal for services, as listed in this RFP, shall include the total annual compensation rate for 2020, 2021 and 2022. Note: the annual compensation rate will be paid in equal quarterly installments.
5. The proposal shall include all expense reimbursements, in a not to exceed sum.
6. The proposals shall identify three (3) references from municipal clients for which the Assessor and the person or person to be assigned as the Village's point of contact for the work to be performed has provided assessment and/or reassessment services within the past two (2) years. References must include the name, title, and address and business phone numbers of the contact person.
7. The proposals shall also identify all contractual requirements that the Assessor currently has.
8. 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 this assignment. Evidence of current certification and satisfaction of continuing certification requirements shall be filed with the Village Administrator with the proposal and annually during the term of the contract.
9. Assessors are advised to carefully inspect the community, the entire records and facilities of the Village 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 RFP recipient 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 proposal.

10. The successful RFP recipient is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the Village Board.
11. The proposals will be reviewed and awarded to the Assessor whose proposal is the most responsive to the solicitation and is the most advantageous to the Village, considering experience, price and other factors.
12. 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 Village, listing the Village 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 \$1,000,000 per occurrence, combined single limit.
- c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit.
- d. In addition to all other insurance required of the Assessor, Assessor shall purchase and maintain, during the term of the Assessment Contract, a professional errors and omissions policy of insurance to protect against claims, demands, actions and causes of action, arising from any act or omission of the Assessor, his agents and employees in the execution of the work, in the total amount of \$1,000,000.00.

Any Assessor may withdraw its proposal at any time prior to the submittal deadline. Proposals should be emailed to tina@windsorwi.gov and must be received later than 12:00 pm on August 30, 2019.

Term of Engagement

This proposal is for the term beginning January 1, 2020 and expiring December 31, 2022.

The following is a list of key dates:

Request for proposal issued:	August 5, 2019
Due date for proposal:	August 30, 2019 (12:00 pm)
Interview of Finalists:	Week of September 9-13, 2019
Village Board approval:	September 19, 2019
Selected firm notified (anticipated):	September 20, 2019
Coverage beginning date (no later than):	January 1, 2020

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 include:

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size.
2. Experience in appraisal and evaluation of properties.
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.
6. The proposal addresses all specific services required, special conditions to be assessed and general quotation requirements in this request for proposals.
7. Ability to provide and maintain a computerized database of property assessment records accessible to the public.

Right to Reject Proposals

By responding to the RFP the respondent accepts the process outline in this RFP and fully acknowledges that the final determination of the Village of Windsor is binding and without appeal.

The Village reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the Village. In addition, the Village 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 Village of Windsor reserves the right to accept the proposal considered most advantageous to the Village, 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.

Contact Information

All requests for further information and proposal submissions should be directed to:

Tina Butteris
Village Administrator
4084 Mueller Road
DeForest, WI 53532
tina@windsorwi.gov

Thank you for your interest in providing assessment services for the Village of Windsor.

DANE COUNTY
 2019 REAL ESTATE VALUATION SUMMARY

REPORT #: SRVALSUM1ST
 RUN DATE: 05/23/2019
 RUN TIME: 02:19:43 PM

THE OPTIONS BELOW WERE USED FOR THIS REPORT:

Property Type	Real Estate & Personal Property
Tax Year	2019
Municipalities	196 - VILLAGE OF WINDSOR
Summary for Districts	
Limit to Properties marked Assessed	Yes
Limit to Properties marked Taxed	No
Print Certification of Values message	No
Duplex printing will be used when printing this report	Yes

DANE COUNTY
2019 REAL ESTATE VALUATION SUMMARY
VILLAGE OF WINDSOR
ALL DISTRICTS

REPORT #: SRVALSUM1ST
RUN DATE: 05/23/2019
RUN TIME: 02:19:44 PM
PAGE: 1

CODE	-----PARCEL COUNT-----			IMPROVE VALUE	LAND VALUE	IMPROVE VALUE	TOTAL VALUE	TOTAL ACRES
	TOTAL	LAND	IMPROVE					
REAL ESTATE GENERAL PROPERTY TAX:								
G1	2756	2756	2558	576,952,700	202,389,600	779,342,300	2,037.349	
G2	130	130	107	70,872,800	21,900,000	92,772,800	356.034	
G3	8	0	0	0	0	0	19.454	
G4	1042	1042	0	0	3,361,600	3,361,600	12,049.930	
G5	312	312	0	0	1,328,500	1,328,500	961.776	
G5M	49	49	0	0	493,800	493,800	140.945	
G6	4	4	0	0	95,600	95,600	13.655	
G7	112	112	110	18,652,200	8,078,200	26,730,400	226.378	
TOTAL	4413	4405	2775	666,477,700	237,647,300	904,125,000	15,805.521	
WOODLAND:								
W1	0	0	0	0	0	0	0.000	
W2	0	0	0	0	0	0	0.000	
W3	0	0	0	0	0	0	0.000	
W4	0	0	0	0	0	0	0.000	
W5	0	0	0	0	0	0	0.000	
W6	1	1	0	0	77,000	77,000	11.000	
W7	0	0	0	0	0	0	0.000	
W8	1	1	0	0	77,000	77,000	11.000	
W9	0	0	0	0	0	0	0.000	
TOTAL	2	2	0	0	154,000	154,000	22.000	
EXEMPT:								
X1	1	0	0	0	0	0	1.200	
X2	25	0	0	0	0	0	24.146	
X3	5	0	0	0	0	0	0.171	
X4	331	0	0	0	0	0	830.155	
X5	0	0	0	0	0	0	0.000	
TOTAL	362	0	0	0	0	0	855.672	
** FINAL TOTAL **								
							4407	16,683.193
ACTUAL PARCEL COUNT							4287	

DANE COUNTY
2019 REAL ESTATE VALUATION SUMMARY
VILLAGE OF WINDSOR
ALL DISTRICTS

REPORT #: SRVALSUM1ST
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** TOTALS BY DISTRICT **

STATE CODE	DISTRICT NAME	USER CODE	PARCEL COUNT	LAND VALUE	IMPROVEMENT VALUE	TOTAL VALUE
	REGULAR SCHOOL DISTRICTS:					
1316	DFOREST SCHOOL DIST	011	4,247	234,052,000	653,843,200	887,895,200
5656	SUN PRAIRIE SCHOOL DIST	027	40	3,595,300	12,634,500	16,229,800
	TOTAL		4,287	237,647,300	666,477,700	904,125,000
	DRAINAGE DISTRICT DISTRICTS:					
DD11	DRAINAGE DISTRICT 11	DD11	168	7,501,000	22,216,900	29,717,900
DD25	DRAINAGE DISTRICT 25	DD25	69	4,250,700	8,855,900	13,106,600
DD30	DRAINAGE DISTRICT 30	DD30	2	24,000	0	24,000
	TOTAL		239	11,775,700	31,072,800	42,848,500
	LAKE REHABILITATION DISTRICTS:					
8020-1	LK WINDSOR LAKE DIST	34L10	340	20,490,600	64,983,800	85,474,400
8030-1	TOKEN CREEK LAKE DIST	34L20	19	2,458,000	6,479,800	8,937,800
8050-1	OAK SPRINGS LAKE DIST	34L30	29	1,712,100	5,736,700	7,448,800
	TOTAL		388	24,660,700	77,200,300	101,861,000
	METRO SEWERAGE DISTRICTS:					
5150-Q	MADISON METRO SEWER DIST	34MMS	2,531	130,943,400	395,717,900	526,661,300
	TOTAL		2,531	130,943,400	395,717,900	526,661,300
	OTHER DISTRICT DISTRICTS:					
3401-N	TRASH P/U 01	3401X	2,381	180,612,000	537,441,100	718,053,100
3402-N	TRASH P/U 02	3402X	97	8,003,100	19,502,200	27,505,300
3403-N	TRASH P/U 03	3403X	3	202,100	788,900	991,000
3404-N	TRASH P/U 04	3404X	12	1,002,600	4,148,400	5,151,000
3405-N	TRASH P/U 05	3405X	1	45,700	218,400	264,100
3482-2	MMSD ONLY	3482S	18	950,400	2,188,800	3,139,200
	TOTAL		2,512	190,815,900	564,287,800	755,103,700
	TECHNICAL COLLEGE DISTRICTS:					
0400	MADISON TECH COLLEGE	VOC1	4,287	237,647,300	666,477,700	904,125,000
	TOTAL		4,287	237,647,300	666,477,700	904,125,000
	TIF/TID DISTRICTS:					
3401	TIF 01	3401T	9	2,416,700	17,320,200	19,736,900
	TOTAL		9	2,416,700	17,320,200	19,736,900

DANE COUNTY
 2019 PERSONAL PROPERTY VALUATION SUMMARY
 VILLAGE OF WINDSOR
 ALL DISTRICTS

REPORT #: SRVALSUM1ST
 RUN DATE: 05/23/2019
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PERSONAL PROPERTY GENERAL PROPERTY TAX:

	CODE	RECORD COUNT	QUANTITY	VALUE
BOATS	P1	0	0	0
MACHINERY, TOOLS & PATTERNS	P2	4	0	0
FURNITURE, FIXTURES, & EQUIP.	P3	69	0	1,317,200
ALL OTHER PERSONAL PROPERTY	P4A	46	0	638,500
IMPROVEMENTS ON LEASED LAND	P4B	0	0	0
MOBILE HOMES	P4C	0	0	0
TOTAL		119	0	1,955,700

OCCUPATIONAL:

MINK FARM	O1	0	0	0
COAL DOCKS	O2A	0	0	0
COAL DOCKS	O2B	0	0	0
GRAIN ELEVATORS & WAREHOUSES	O4A	0	0	0
GRAIN ELEVATORS & WAREHOUSES	O4B	0	0	0
PETROLEUM REFINERIES	O5	0	0	0
IRON ORE CONCENT.	O6	0	0	0
TOTAL		0	0	0

ACTUAL PARCEL COUNT

82

DANE COUNTY
2019 PERSONAL PROPERTY VALUATION SUMMARY
VILLAGE OF WINDSOR
ALL DISTRICTS

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** TOTALS BY DISTRICT **

STATE CODE	DISTRICT NAME	USER CODE	RECORD COUNT	TOTAL VALUE
REGULAR SCHOOL DISTRICTS:				
1316	DEFOREST SCHOOL DIST	011	82	1,955,700
	TOTAL		<u>82</u>	<u>1,955,700</u>
TECHNICAL COLLEGE DISTRICTS:				
0400	MADISON TECH COLLEGE	VOC1	82	1,955,700
	TOTAL		<u>82</u>	<u>1,955,700</u>
TIF/TID DISTRICTS:				
3401	TIF 01	3401T	5	285,700
	TOTAL		<u>5</u>	<u>285,700</u>