



**335 N. Nine Mound Road
Verona, WI 53593-1035**

THE TOWN OF VERONA IS SEEKING PROPOSALS FOR THE FOLLOWING WORK:

Statutory assessment services for a two-year period beginning November, 2014. It is expected that November and December 2014 will be spent transitioning records and becoming familiar with Town of Verona properties. Regular maintenance work will begin January 1, 2015 and continue until December 31, 2017.

BACKGROUND INFORMATION:

The 2014 assessed value is as follows: Real Property \$272,205,850 (1.278 parcels), Personal Property \$2,191,369 (42 personals)

REIMBURSEMENTS:

There is no expressed or implied obligation for the Town to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

SCOPE OF WORK:

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the Town in accordance with applicable Wisconsin State Statutes and Volumes I and II of the Wisconsin Property Assessment Manual
2. Assessor will review and assess all properties that were under partial construction as of January 1st of the current year.
3. Assessor will review and assess new construction, new plats and remodeling as of January 1st of the current year. Square footage sketches and calculations will need to be updated.
4. Assessor will print, mail, and audit the returned personal property forms and place the new values in the assessment roll. Assessor will track the dates of sent mailings and received replies.
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 and complete all applicable reports.
7. Assessor will account for annexations, attachments, parcel splits and new plats.
8. Assessor will correct legal descriptions as needed.
9. Assessor will take digital photographs of new construction and also during the review process if needed.
10. Assessor will file building permits or copies of such in property record files (electronic or paper).
11. Assessor will post assessments to real estate transfer returns and record sale information to property records. Assessor will transmit sales information to WI DOR as required.
12. Assessor will post assessments from property records to assessment roll.
13. Assessor will create, print, and mail Notices of Increased Assessment, form PR-301A. Copies of the Notices or a spreadsheet of the parcel numbers, value changes, and date(s) sent will be provided to the Municipal Clerk.
14. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. Open Book shall be held in April or May each year. Board of Review will be held within statutory time

frame each year. Copies of Open Book Determination Notices or a spreadsheet of the parcel numbers, value changes, and date(s) sent will be provided to the municipal clerk.

15. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
16. Assessor will be responsible for providing all assessment data to Dane County's Tax Listing Department and ensuring that the County's assessment roll after the information is posted balance to the records submitted by the assessor. Assessor will provide printed copy of assessment roll to the Town.
17. Assessor will be responsible for providing the Wisconsin Department of Revenue (WI DOR) with final reports of assessed valuations after the Board of Review meeting.
18. Assessor will provide contact information for Town officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls and emails within forty-eight (48) hours.
19. Assessor shall maintain a computerized database of property assessment records, including digital photographs and square footage sketches of each property. Site plan sketches for agricultural operations will also be required. Town staff will need access to all sketches. The Town currently uses Market Drive software for its real and personal properties and would like to continue to use that software.
20. Assessor will create an electronic record of all work done in the Market Drive CAMA software.
21. Assessor will create/file the Municipal Assessment Report (MAR), TID Assessment Report (TAR) and Exempt Computer Report (ECR) using the Market Drive CAMA software.
22. Assessor will create the Annual Assessment Report (AAR) using the Market Drive CAMA Software.
23. Assessor will supply to the Town a complete set of computer property assessment records (including digital photographs of each property) that are compatible with the Town's computer equipment and software. Assessment data should have the capability to be provided to the Town in a database format such as a spreadsheet in Excel.
24. Assessor will provide digital photographs and values with comparable properties in preparation for Board of Review hearings and determinations(s) so that the Board and the petitioner have evidence of comparability.
25. Assessor shall communicate openly, timely and professionally with Town staff and the public when handling appeals. A positive, professional image in both dress and conduct while interfacing with staff and the public, especially during appeals, is required.
26. Assessor will perform all other duties incidental to the normal duties of Assessor.
27. Assessor shall update assessment values to www.assessordata.org upon completion of the final assessment roll. The Town will pay the annual fee to Assessment Technologies to host the data.
28. The assessor will be responsible for producing the Omitted Property Roll and providing the values to the municipal clerk necessary to generate Omitted Tax Bills. Likewise, the assessor is responsible for providing values to the municipal clerk for Correction of Errors by Assessor so that the clerk can prepare a refund request for Town Board review and a Chargeback Request for the Department of Revenue.

ITEMS TO BE SUPPLIED BY TOWN:

The Town will provide some clerical services to aid the assessor. The Town support may include:

1. Answering routine phone requests for assessment data.
2. Mailing of notices.
3. Payment to Assessment Technologies to host assessment information on www.assessordata.org.
4. A spreadsheet summary of building permits issued by the Town of Verona.

The Town shall furnish work space at the Town Hall, if needed, at no cost to the assessor.

SPECIAL CONSIDERATIONS:

If the vendor believes that any question in this RFP is unclear or susceptible to more than one interpretation, the vendor should submit a written request for clarification. Answers will be shared with all known potential proposers.

SUBCONTRACTING:

If firms are considering subcontracting portions of the engagement to other firms, then the name of the proposed subcontracting firms must be clearly identified in the proposal. Following the award of the contract, no additional subcontracting will be allowed without the express prior written consent of the Town.

INSURANCE:

The firm awarded the contract shall take out and maintain \$2 million of insurance during the life of the contract, such as Professional Liability and Public Liability (Bodily Injury and Property Damage) [note: should also have proof of Wisconsin Driver's License and proof of vehicle(s) insurance; proof of insurance and licensure should also include any additional individuals who assist with the assessment work-the Town should be supplied with the names of those individuals, title, license level, copy of license, training status, and their contact information] ; insurance to protect the firm and any subcontractor performing work covered by the contract from claims for damages for personal injury, including accidental death, as well as from claims for property damage which may arise from operations under the contract, whether such operations be by himself or by any subcontractor or by anyone directly or indirectly employed by either of them. The Town shall be named as an additional insured. Proof of insurance must be included with proposal and current proof of insurance shall be provided annually for the duration of the contract.

STANDARDS:

Work shall be performed in accordance with generally accepted standards as well as any and all standards issued by the State of Wisconsin or the Federal government governing such work (standards also set by USPAP and IAAO). The firm shall keep fully informed of all Federal, State and Local laws, ordinances and regulations and all orders and decrees of authorities having any jurisdiction or authority which, in any manner, affect those engaged or employed on the work, or which, in any way, affect the conduct of the work. The firm should be familiar with Dane County Zoning. The firm shall protect and indemnify the Town and its representatives against any claim or liability arising from or based on the violation of any such law, ordinance, regulation, order or decree, whether by himself or his employees.

The firm agrees that, in the hiring of employees for the performance of work under this contract or any subcontract hereunder, no contractor or subcontractor, nor any person acting on behalf of such contractor or subcontractor, shall, by reason of race, sex, or creed discriminate against any citizen of the United States in the employment of labor or worker who are qualified and available to perform the work to which the employment relates.

The assessor will work closely and cooperatively with Town officials. The assessor will share information openly and respond to any question or concerns in a timely fashion.

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 the assignment.

PROPOSAL REQUIREMENTS:

General Requirements

To be considered, six (6) copies of the proposal must be received at the above address by 10:00 a.m. CST, Monday, September 8th, 2014. Clearly mark the envelope in the lower left hand corner "Proposal".

Proposals will be evaluated, and subject to approval by the Town Board. During the evaluation process, the Town reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. At the discretion of the Town, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

Each firm may submit only one (1) proposal.

Submittals with proposal

- A brief statement of the proposer's understanding of the work to be done, a project approach plan to demonstrate an understanding of the project requirements and including the full scope of services.
 - Describe the firm's quality control procedures that will ensure compliance with the contract.
 - Outline a commitment to perform the work within the specified time period.
- Proof of insurance.
- Summary of Firm's Qualifications and Experience
 - Identify the principal supervisory and management staff, including engagement partners, managers, other supervisors and specialists who would be assigned to the work; provide information on each staff person's experience that will be responsible for performing the work requested. Personnel may be changed if those personnel leave the firm, however the Town retains the right to approve or reject replacements.
 - Provide examples of going above and beyond the call of duty with respect to serving the community and its property owners.
- References and related work
 - List the most significant related work references in the last three (3) years. Indicate the scope of services, dates of service and contact information of the client.
 - Identify three references from Municipal clients for which the bidder has provided assessment services within the past three years. Reference must include the name, title, address and phone number of the contact person.
- Certification that the person signing the proposal is entitled to represent the firm and empowered to submit the bid and authorized to sign a contract with the Town.
- List of all other current contractual requirements the firm may have.
- A copy of an Annual Assessment Report produced by the firm submitting the proposal.
- Five samples of Assessment Records (at least one commercial, one improved agricultural, one unimproved agricultural, and one residential) with supporting photo(s), sketches, other building improvement site sketch(es).
- A general timeline for service to be provided each year.
- Rates by personnel and/or hours for each, all direct and indirect costs and total all-inclusive maximum compensation proposal for the term of the proposal. List costs for maintenance only each year.
- The proposals shall address the specific services required as listed above. If the proposer is unable to meet any of the required services they shall specifically address their inability within the proposal and the alternative method for addressing that item. The proposer shall also outline any perceived or real conflict of interest, should they exist.

Bidders are advised to carefully inspect the community, the entire records and facilities of the Town of Verona 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.

REVIEWS:

Proposals that meet the criteria contained in this request for proposals will be reviewed by Town staff and the Town Board for completeness of response, references, qualifications of firm, qualifications of staff assigned, scope of services, and costs.

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.
2. Demonstration of a high level of accuracy in assessment work for municipal clients.
3. Ability to provide and maintain a computerized database of property assessment records to the Town
4. Cost of assessment services.
5. Evidence of positive customer interaction and coordination with municipal government representatives.

RIGHT TO REJECT:

The Town reserves the right to reject any and all proposals, waive formalities or to accept the proposal which best serves the interests of the Town.

TENTATIVE SCHEDULE:

RFP issued	August 11, 2014
Proposals received	September 8, 2014
Committee interviews, if necessary	September 15-19, 2014
Final selection by Town Board	October 7, 2014
Drafting of contract	October 13 – 24, 2014
Contract start date	November 1, 2014

INQUIRIES:

Inquiries concerning this Request for Proposal should be submitted in writing and be directed to:

John Wright
 Clerk/Treasurer
jwright@town.verona.wi.us
 335 N. Nine Mound Rd.
 Verona, WI 53593