

****All present are expected to conduct themselves in accordance with our City's Core Values****



OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

Meeting of the:	COMMITTEE OF THE WHOLE
Date/Time:	Monday, January 9, 2017 @ 5:00 pm
Location:	City Hall (407 Grant Street) - Council Chambers
Members:	Pat Peckham, Romey Wagner, David Nutting, Tom Neal, Gary Gisselman, Becky McElhaney, Lisa Rasmussen (C), Karen Kellbach, Joe Gehin, Sherry Abitz, Dennis Smith, and Mayor Mielke, ex-officio

AGENDA ITEMS FOR CONSIDERATION/ACTION

- 1 Discussion and possible action on provision of assessment services: retaining in-house assessment services compared to contract assessment services. (Presentation on results of cost benefit analysis of options)
- 2 Discussion and possible action on selection of vendor for the provision of assessment software

Adjournment

Lisa Rasmussen
City Council President

This Notice was posted at City Hall and emailed to the Daily Herald newsroom on 1/5/2017 @ 2:15 PM

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For information or to request this service, contact the City Clerk at (715) 261-6620.

Item #1

CONTRACT RENEWAL FOR
THE 2016 – 2020
ASSESSMENT SERVICES
OF REAL AND PERSONAL PROPERTY
IN THE
CITY OF SCHOFIELD
MARATHON COUNTY, WISCONSIN.

Return Signed Proposal To:

CITY OF WAUSAU

ANNE JACOBSON – CITY ATTORNEY

407 GRANT STREET

WAUSAU, WI 54403

ASSESSMENT SERVICES CONTRACT

THIS AGREEMENT by and between CITY OF WAUSAU hereinafter called the "Assessor," and the CITY OF SCHOFIELD, MARATHON COUNTY, WISCONSIN, hereinafter called the "Municipality" pursuant to Wisconsin Statutes 66.0301(2), this Agreement is an intergovernmental cooperative agreement between the two stated municipalities for the receipt by the City of Schofield and the providing of services by the City of Wausau through its Assessment Department, of full assessment services for the length of time specified in the contract. WITNESSETH: The Assessor and Municipality for the consideration stated herein agree as follows:

ARTICLE I

Section I

SCOPE OF WORK: The assessor, having become familiar with the local conditions affecting the cost of the work, and the Specifications for Assessment of General Property in the State of Wisconsin pursuant to Chapter 70, Wisconsin Statutes (Specifications), hereby agrees to perform everything required to be performed and to complete in a professional manner all of the work required to assess the real and personal property of the Municipality as of January 1, of each of the contract years 2016 - 2020 in accordance with applicable Wisconsin Statutes and this contract, and other documents constituting a part hereof. Included within the Scope of Work is one Revaluation of all properties within the Municipality, which shall be completed no later than 2020, and shall include any Board of Review hearings which shall be subject to Article II, Section III(1).

Section II

VALUATION: For the valuation of residential and agricultural properties, the appraiser shall use a Computer Assisted Appraisal System:

- Sungaard Hte Appraisal Plus, Version 8.0.2.0.02*
- Marshall & Swift Commercial Cost Estimator
- NADA Manufactured Housing Cost Software

For the valuation of commercial properties, the appraiser shall use a Computer Assisted Appraisal System:

- Sungaard Hte Appraisal Plus, Version 8.0.2.0.02*
- Marshall & Swift Commercial Cost Estimator

**The City of Wausau – Assessment Department has contracted with Vision Government Solutions to provide advanced CAMA software. This new software will continue to provide all services required per the terms of this contract with no additional cost to Municipality.*

For the valuation of personal property, the appraiser shall follow procedures outlined in Volume 1 of the Wisconsin Property Assessment Manual.

ARTICLE II

COMPENSATION: The Municipality shall pay to the Assessor for the performance of this contract the following compensation:

Section I

For assessment services of real estate and personal property as per the Specifications for Assessment the base compensation of EIGHTEEN THOUSAND Dollars (\$ 18,000.00) per assessment year, such amount based on the following counts obtained from the last Assessment Roll(s).

Totals from 2015 Assessment Roll:

	Assessment Roll(s)
Residential Parcels	792
Commercial Parcels	212
Other Parcels	N/A
Total Parcels	1004
REAL ESTATE PARCEL COUNT (includes Private Forest Crop and Managed Forest land Parcels)	1004
Personal Property Count	243
Mobile Home Parcel Count (Vacant and Improved)	69
TOTAL (w/o Manufacturing)	1316

Section II

For the providing of additional services required by the Supplemental Specifications described in the Addenda, total compensation shall be included in Article II, Section I compensation.

ADDENDA NO.	SUPPLEMENTAL SPECIFICATIONS (Brief Description)	COMPENSATION
1.	Entry of the Manufacturing assessment roll into the Marathon County Land Records Systems when received from the Department.	Included per Article II, Section I
2.	The minimum number of days for open book referred to in the Specifications, Par. 24 (d) to be held in the meeting space provided per Par. 32 of the Specifications shall be 2 days.	Included per Article II, Section I

Total Base Compensation summarized as follows:

Article II, Section I	\$ <u>18,000.00 per Assmt year</u>
Article II, Section II	<u>INCLUDED</u>
Total	\$ <u>18,000.00 per Assmt year</u>

SECTION III

For the providing of services described below the following compensation:

1. For attendance at all meetings of the Board of Review beyond the first 2 scheduled hours the Assessor shall be paid per hour to explain and defend the assessed values and to testify under oath in regard to such values.

\$ 75.00 per hour

2. For furnishing testimony in defense of the value established by the assessment maintenance on appeals to the Department of Revenue or the courts as required in the Specifications, Para. 26. The Assessor shall be paid a four-hour minimum per day.

\$ 75.00 per hour

3. For the correction of legal descriptions as provided in the Specifications, Para. 15.

\$ 0.00 per correction

4. For additional real estate parcels, both vacant and improved, in excess of those stated in Article II, Section I of the Contract, due to annexations, omitted property, new plats, and land splits.

\$ 0.00 per parcel

5. For additional personal property accounts in excess of those stated in Article II, Section I.

\$ 0.00 per account

6. For additional mobile home parcels, both vacant and improved, subject to the monthly mobile home parking permit fee, including those exempt from the fee, in excess of those stated in Article II, Section I of the Contract.

\$ 0.00 per parcel

ARTICLE III

GENERAL AGREEMENTS:

1. If Assessor contract is accepted, a 100% performance bond must be furnished in an amount equal to the sum of Section I and II, Article II of the contract from a Surety licensed to do business in the State of Wisconsin. Such bond shall be filed within thirty (30) days after the award of the contract and no work shall be performed prior to the filing of said bond. In lieu of a performance bond, a bank letter of credit is acceptable. Such performance bond or letter of credit must cover the entire length of the contract, including any approved extensions.
2. Work will start upon filing of a performance bond or bank letter of credit with the Municipality and be contingent upon the approval of the common council of the Assessor and shall be completed upon adjournment of the Board of Review of the 2020 assessment year.
3. The Municipality reserves the right to reject any or all proposals.
4. Assessor agrees to complete a REVALUATION as described by the Wisconsin Property Assessment Manual during one of the five years of this contract.
5. Payments required per the Specifications, Para. 43 shall be made payable as follows or as otherwise invoiced: CITY OF WAUSAU – TREASURER, 407 GRANT STREET, WAUSAU, WI 54403.

ARTICLE IV

COMPONENT PARTS OF THIS CONTRACT:

This contract consists of the following component parts:

1. Contract Renewal for the 2016-2020 Assessment Services of Real and Personal Property in the City of Schofield, Marathon County, Wisconsin.
2. Specifications for Assessment of General Property in the State of Wisconsin pursuant to Chapter 70, Wisconsin Statutes.

Dated this 10 day of November, 2015.

CITY OF SCHOFIELD
SCHOFIELD, WISCONSIN

By: Kregg Hoehn

Name: KREGG HOEHN

Title: MAYOR

By: Lisa Quinn

Name: LISA QUINN

Title: CITY CLERK/TREASURER

CITY OF WAUSAU
ASSESSMENT DEPARTMENT
WAUSAU, WISCONSIN

By: James E. Tipple

Name: JAMES E. TIPPLE

Title: MAYOR

By: Toni Rayala

Name: TONI RAYALA

Title: CITY CLERK

Specifications for Assessment of General Property Pursuant to Chapter 70, Wisconsin Statutes

*These specifications shall be used for assessment work performed
under ss. 70.055, s. 70.75(1) and 70.75(3)*

DEFINITIONS

1. "Assessor" shall mean the City Assessor employed by the City of Wausau together with the designated staff employed by the City of Wausau Assessment Department and shall be responsible for the overall assessment function.
2. "Manual" shall mean the "Wisconsin Property Assessment Manual," Volumes I and II, prepared and issued by the Wisconsin Department of Revenue for the State of Wisconsin together with all material designated by the Department as being part of or supplemental to the Property Assessment Manual.
3. "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.
4. "Real Estate Parcel Count" shall mean the total number of individual real estate descriptions assessed locally on the municipality's real estate assessment roll for the assessment year specified in Article II, Section I of the contract.
5. "Personal Property Count" shall mean the total number of completed personal property lines or accounts listed in the municipality's personal property assessment roll for the assessment year specified in Article II, Section I of the contract.
- 5a. "Mobile Home Parcel Count" shall mean the total number of individual mobile home lots, both vacant and improved, subject to the monthly mobile home parking permit fee, including those exempt from the fee, listed for the assessment year specified in Article II, Section I of the contract.
6. "Major Building" shall mean any and all houses on residential parcels, the buildings representing the major use of commercial parcels, and any and all houses on agricultural land.
7. "Property Record Cards" shall mean the current versions of the residential, agricultural and other, and commercial property record cards or equivalents, approved by the Department of Revenue and used for the purpose of making a record to support and substantiate the value conclusion for each parcel. A state-approved property record card should be maintained on every parcel of property in the municipality.
8. "Local Modifier" shall mean that mathematical factor necessary to convert the basic cost estimate derived from the Wisconsin Property Assessment Manual or other cost manual to current cost in the municipality.
9. "Municipality" shall mean the City of Schofield, in which general property taxes are levied and collected.
10. "Department" shall mean Department of Revenue, Bureau of Equalization, 2135 Rimrock Rd., PO Box 8971, Madison, Wisconsin 53708-8971.

AGREEMENTS – ASSESSOR

Scope of Service Assessor to Provide

11. **CONFORMANCE TO STATUTES.** All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with all the rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue.
12. **OATH OF OFFICE.** The assessor shall be required to take and subscribe to an oath or affirmation supporting the Constitution of the United States and of the State of Wisconsin and to faithfully perform the duties of assessor. The oath shall conform to Section 19.01 and be filed with the municipal clerk prior to undertaking any of said duties.
13. **PERSONNEL** (a) All personnel providing services shall be currently certified in compliance with s. 70.055 and 73.09 and the administrative rules prescribed by the Department.

(b) The assessor shall review any complaint relative to the conduct of his employee(s). If the municipality deems the performance of any of the assessor's employees to be unsatisfactory, the assessor shall, for good cause, remove such employee(s) from work upon written request from the municipality, such request stating reasons for removal.

(c) Prior to commencing the contract the assessor shall file with the municipal clerk names of all employees to be performing work and the type of work to be performed by each, excepting non-appraisal office clerical help. All persons on file are to carry an up-to-date identification card and a letter of introduction from the municipality or the Department when the Department is supervising the assessment.
14. **ASSESSMENT MANUAL.** The assessor shall make all assessments in accordance with the property assessment manual as specified in sections 70.32 and 70.34.
15. **ACCURATE PARCEL IDENTIFICATION.** The assessor shall review all legal descriptions as listed in the assessment roll for imperfections to include, but not restricted to errors, incorrect acreages, omissions, overlap, or failure to close. In the event that such discrepancies exist, the assessor shall correct or cause the same to be corrected. Additional compensation, if any, shall be as specified in Article II, Section III of the contract.
16. **PREPARATION OF RECORD CARDS.** (a) The assessor shall prepare individual record cards and computer-generated data sheets for each parcel to be assessed on forms currently approved by the Department. If the assessor and/or municipality shall have reason to use forms not currently approved, such use shall be contingent upon Department approval.

(b) Record cards shall be completed for each parcel, labels with the property owners name and address as provided in Section 70.17, and the following information as listed in the assessment roll: legal description of the property, parcel number and size of land parcel when available.

(c) Appropriate record cards shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and other improvements. All information relating to improvements shall be obtained and shown as provided on the respective forms.

(d) Maintain all assessment records in an electronic format as required by the Department. All assessment data, such as parcel attributes, sketches, and photographs, must be stored in an electronic format.

17. **APPROACHES TO VALUE.** (a) The assessor shall consider the cost, market, and income approaches in the valuation of all vacant and improved parcels of property.

(b) The assessor shall collect and analyze all available sales data for the municipality 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 municipality. Data gathered shall either be noted on the property record cards, or contained within supplements to the records (e.g. copies of real estate transfer returns, leases, computer-generated data sheets, etc.). All data so gathered shall become and remain the property of the municipality.

(c) Sales analysis shall include sales identified on a map, analysis and verification for time adjustments, neighborhood boundaries and descriptions and other (agricultural) improvements. 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 assessor 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 documented and 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.

18. **IMPROVEMENTS – DATA COLLECTION.** (a) The assessor shall accurately measure to the nearest foot all improvements and prepare a complete outline sketch to scale (top view) of the major buildings showing all additions, porches, and appendages with dimensions and necessary identifications on the property record cards.

(b) The assessor shall photograph all residences, and all major commercial improvements and all major buildings on agricultural land classified as other. The assessor will make available all photos to the municipality to include as part of its Emergency Management Initiative, if such Initiative has been initiated.

(c) Upon discovery or notice of changes made to major buildings of each class of improvements, the assessor shall inspect the interior and exterior of such buildings when necessary, so as to note the features on the property record card, and shall provide an accurate and complete listing for each improvement based on the actual view or the best information the assessor can practicably obtain.

(d) For a Full Revaluation of all properties within the municipality, the assessor shall endeavor to inspect the interior and exterior of all major buildings of each class of improvements, unless recently inspected under 18(c), so as to note the features on the property record card, and shall provide an accurate and complete listing for

each improvement based on the actual view or the best information the assessor can practicably obtain.

(e) The date of inspection or listing of all major buildings shall be indicated on the record cards.

(f) Upon failure to gain entrance to a major building after reasonable attempt, the assessor shall attempt to contact the property owner or occupant by ordinary mail to arrange an appointment for the purpose of viewing and listing the interior.

(g) If the assessor's request to inspect a major building is refused by the owner or occupant, the assessor shall make a request by registered mail to inspect the building; such written request shall state the purpose of the inspection, the desired time of inspection and shall advise the owner or occupant that their refusal shall constitute a loss of appeal of the assessment to the local board of review and further appeal avenues; should the requests to inspect major buildings be denied, the assessor shall list and value the improvements according to the best information practicably obtainable.

19. **IMPROVEMENT VALUATION – COST APPROACH.** (a) The assessor shall value improvements in accordance with Wisconsin Property Assessment Manual, using generally acceptable appraisal practices and cost manuals.

(b) In using the cost approach for residential improvements, the prescribed form or computer generated data sheet, or its equivalent as approved by the Department, shall be used in determining replacement costs. The property record card shall be completed as recommended for use with Volume 2 or other cost manual, with proper base costs selected as appropriate for each improvement and adjusted base building costs.

(c) In using the cost approach for other (agricultural) outbuildings, the current replacement costs should be determined for all buildings. Buildings in poor condition having little or no value shall be physically described and listed as having "no value" or given an appropriate sound physical value.

(d) In using the cost approach for commercial improvements proper base costs shall be selected as appropriate and adjusted to adequately reflect variations from base building costs.

(e) Current local modifiers and costs shall be adjusted where necessary and documented by an analysis of local construction costs and market sales data.

(f) All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence, must be documented and deducted from current replacement costs.

(g) All improvements shall be valued at market value as of January 1.

(h) The 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.

(i) The Assessor shall value mobile homes subject to the monthly mobile home parking permit fee and perform other duties specified in s. 66.0435 where necessary.

20. **DATA COLLECTION – LAND.** (a) The assessor shall gather and note on the property record card or computer-generated data sheet for each parcel information including, but not limited to size, area, frontage, width, depth, shape, topography, productivity, site improvements, utilities, access, zoning and location. This information shall include a land sketch.

(b) The assessor shall collect data concerning sales of land and sales of improved parcels which may indicate the residual value of land. From these and other sources the assessor shall become familiar with land values throughout the municipality.

21. **VALUATION – LAND.** (a) Unit value ranges per acre for each grade of fallow agricultural land, agricultural forest land, undeveloped land 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% of full market value, per s. 70.32(4), WI Stats. Soil surveys, where available, shall be used in the classification of land. Agricultural land shall be valued according to use, per s. 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.

(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 municipality.

(c) Having determined basic unit values the assessor 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 municipality.

(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 municipality.

22. **VALUATION, ASSESSMENT OF TAXABLE PERSONAL PROPERTY.** (a) Taxable personal property shall be valued and assessed by the statutory assessor in compliance with Chapter 70, Wisconsin Statutes and with recommended procedures in Volume 1 of the Wisconsin Property Assessment Manual.

(b) The assessor shall compile an updated list of all personal property accounts in the municipality. Such list shall be reviewed to ensure that all accounts have been discovered.

(c) To aid in determining the amount and value of personal property used in the production of income, the assessor shall require such property owners to furnish information on personal property forms as to the value of personal property owned by them or in their possession as provided in Section 70.35. Such forms shall be mailed or delivered to property owners by the assessor.

(d) The 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, including the value of exempt computers and completing all necessary forms in relation thereto.

(e) All forms used in the valuation of personal property shall be approved by the Department and shall be returned to the municipality at the end of the contract.

23. **FINAL FIELD REVIEW.** Prior to the open book conference, the assessor shall make a final field review. Each parcel shall be reviewed at the property location. In the final review process, the indicated value

of the structure 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.

24. **OPEN BOOK CONFERENCE.** (a) Upon completion of the assessor's review of assessments and prior to the completion of the assessment rolls, the assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values.

(b) The municipality shall designate the place for open book conferences with both the municipality and assessor mutually agreeing upon the date(s) and hours.

(c) The assessor shall send a notice by first class mail to each property owner at the last known mailing address as required under s. 70.365. Expenses related to the notices, including form supply, preparation of the forms, and postage, shall be paid by the assessor.

(d) The minimum number of days for open book conferences shall be set by the municipality, the number of days being specified in the addenda.

(e) Open book conferences shall be held within the completion date specified in the contract. In the event the municipality requests that the open book conferences be held at a date beyond the contracted completion date, and provided the assessor agrees to such, the contract shall be extended commensurate with the lapse of days between the originally contracted completion date, and the revised date for open book conferences. Such extension shall be in writing and signed by both the municipality and the assessor.

25. **COMPLETION OF ASSESSMENT ROLL.** The Assessor shall be responsible for the proper completion of assessment rolls according to current statutes. The assessor shall where necessary enter into said rolls all newly established assessments, both real and personal, and the names of those to whom personal property is assessable; each roll shall also be totaled to exact balance by the assessor. For computer prepared assessment rolls, it shall be sufficient for the assessor provide a list of all assessments at market value in the format required for data entry.

26. **BOARD OF REVIEW: SUBSEQUENT APPEARANCES.**

(a) The assessor and/or responsible member(s) of the assessor'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 Department or to the courts, it is agreed that the assessor and/or qualified representative(s) shall be available upon written request from the municipality to furnish testimony in defense of the values established by the assessment in all cases which might arise within one (1) year of the completion date specified for the assessment. Compensation shall be as specified in the contract.

GENERAL AGREEMENTS

27. **INSURANCE – LIABILITY.** (a) The assessor shall maintain insurance coverage 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 work. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the Municipality with the Municipality as an additional insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall timely pay all insurance premiums. Limits of liability shall not be less than:

General Liability:			
Bodily Injury	Per Person	\$	500,000
	Per Occurrence	\$	1,000,000
Property Damage	Each Occurrence	\$	250,000
Comprehensive Auto Liability Including:			
Non-Ownership Coverage			
	Each Person	\$	100,000
	Each Occurrence	\$	300,000
Property Damage	Each Occurrence	\$	50,000

(b) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the assessor within the municipality shall be assumed by the assessor and the assessor shall indemnify and hold harmless the municipality against all claims, actions, proceedings, damages, and liabilities, including reasonable attorney's fees, arising from or connected with the assessor's activities in connection with the services provided to the municipality, including but not limited to, any acts or omissions of the assessor, the assessor's employees, agent, representatives, and any other person doing business with assessor. This paragraph is not to be in conflict with Wis. Stat. §893.89(4).

28. **VALUABLE PAPER.** (a) Assessor agrees to cover loss of municipality's records withdrawn from municipality for assessor's use as well as assessor's records in process under these agreements which are in possession of the assessor.

(b) The assessor shall not be responsible for loss of records destroyed by fire, theft, or Act of God while kept in office space supplied by municipality.

29. **PUBLIC RELATIONS.** (a) During the course of the assessment the assessor shall carry on a suitable program of public information in a manner dictated by experience to be the most effective and productive and of such a nature in which to allow the municipality to actively participate.

(b) The assessor agrees to meet upon request, with the governing body of the municipality to discuss areas of work such as, but not limited to progress, procedures, valuations, and problems.

(c) The assessor agrees to respond to all assessment inquiries within one business day.

(d) The assessor agrees to provide an internet link for placement on the municipalities "Assessor's Information" webpage which would direct users to an "Assessment Search" feature to view property assessment data.

30. **INFORMATION TO THE DEPARTMENT.** The assessor shall complete and submit to the Supervisor of Equalization: (a) the Municipal Assessment Report (MAR) and all applicable worksheets when the assessment is completed or upon completion of the assessment roll(s) each year. If work is in progress on the second Monday in May, a tentative report shall be submitted on the status of the real estate and personal property existing as of January 1. The tentative report shall be submitted by the second Monday in May. The report shall provide the following information relating to real estate: increases in valuation due to annexations, new construction, and property formerly exempt and now assessed, losses in value due to annexation, demolitions, and property becoming exempt and shifts in class. For personal property the report shall provide information on estimated values of all personal property by class. A completed final Municipal Assessment Report shall be filed each year at the end of the assessment in addition to this tentative report.

(b) A list showing the value of any buildings on leased land and whether they are assessed as real estate or personal property, as well as the use and occupancy of each. Such list shall be submitted upon completion of the assessment roll(s).

(c) The Computer Exemption Report no later than May 1.

(d) The Tax Incremental District Assessment Report (TAR) and all applicable worksheets when the assessment is completed or upon completion of the assessment roll(s). If work is in progress on the second Monday in May, a tentative report shall be submitted on the status of the real estate and personal property existing as of January 1. The tentative report shall be submitted by the second Monday in May. The report shall provide the following information relating to real estate: increases in valuation due to annexations, new construction, and property formerly exempt and now assessed, losses in value due to annexation, demolitions, and property becoming exempt and shifts in class. For personal property the report shall provide information on estimated values of all personal property by class. A completed final Municipal Assessment Report shall be filed at the end of the assessment in addition to this tentative report.

(e) The Annual Assessors Report (AAR) and all applicable addendums when due. The report shall be compliant with the Uniform Standards of Professional Appraisal Practice guidelines. (USPAP).

(f) Electronically submit Property Assessment Data (PAD) for all sales when due.

31. **MISCELLANEOUS GENERAL AGREEMENTS.** (a) The assessor shall ensure that employees maintain strict confidence regarding all privileged information received by reason of this agreement.

(b) The assessor shall supply all equipment necessary to perform their responsibilities under these specifications.

(c) The assessor and the municipality anticipate no significant law changes or Department policy directive changes will affect the assessment. Should such changes occur, an amendment shall be made to the contract specifying the new obligations of the municipality and the assessor and any additional compensation, if required.

OBLIGATIONS OF THE MUNICIPALITY

32. **MEETING SPACE.** The municipality shall furnish adequate meeting space at no cost to assessor in or near the municipal hall for purposes of conducting the required Open Book meetings and Board of Review hearings. Meeting space shall be furnished with high-speed network or internet access for purposes of obtaining electronic records.

33. **ACCESS TO RECORDS.** (a) The municipality shall allow access and make available to the assessor municipal records such as, but not limited to, previous assessment rolls and records, sewer and water layouts, building permits, building blueprints, tax records, records of special assessments, plats, and any other maps currently in the possession of the municipality, at no cost.
- (b) The municipality shall submit or deliver electronic or paper copies of all issued building and sign permits to the assessor within 10 business days of issuance, at no cost to the assessor.
- (c) The municipality shall submit or deliver electronic or paper copies of all received FORM PA-118 *Mobile Home Statement of Monthly Parking Permit Fee* within 10 business days of receipt, at no cost to the assessor.
34. **PROPERTY IDENTIFICATIONS.** The municipality shall furnish the owner's name, situs address and mailing address of the owner and the block and lot number, size or other identifying description of each parcel to be appraised.
35. **PROVISION OF FORMS.** Municipality shall provide approved forms, binders, record cards, adhesive backed labels, assessment notice forms prescribed by the Department as required under s. 70.365, and other materials as necessary for the completion of the agreement.
36. **MAPS.** The municipality shall furnish two (2) sets of all plat maps, section maps, and any other maps currently in the possession of the municipality, to the assessor, at no cost. The assessor will obtain access to electronic Geographic Imaging Systems (GIS) from the County at no cost to the municipality.
37. **MISCELLANEOUS GENERAL AGREEMENTS.** (a) That the necessary funds are available and will be provided by the municipality as agreed herein and in the standard contract.
- (b) The municipal governing body shall refrain from interfering with, or influencing any value estimate by the assessor.
- (c) The municipality shall aid the assessor in a reasonable promotion of public information concerning the work under this agreement.
41. **FAMILIARIZATION WITH LOCAL CONDITIONS.** The assessor is generally familiar with access throughout the municipality, maps and other pertinent records available and the degree of difficulty of the work under this agreement within the municipality.
42. **AWARD OF CONTRACT.** The awarding of this agreement is contingent upon the proper filing of a 100% performance bond by the assessor. Such bond shall be filed with the municipal clerk within thirty (30) days after the award of the contract and no work shall be performed under this agreement prior to the filing of said bond. In lieu of a performance bond, a bank letter of credit is acceptable.
43. **METHOD AND TERMS OF PAYMENT.** (a) Payment for services rendered under Article II, Sections I and II of the Contract shall be in four equal quarterly installments. Additional compensation provided under Section III (except item No. 2) shall be paid upon final adjournment of the Board of Review on detailed statements. Item No. 2 shall be payable by statement and in full upon completion of services.
- (b) All statements shall be submitted to the municipal clerk/Department on the first day of each quarter for services performed the preceding quarter. After review and procuring any needed corrections therein, the municipality/Department shall endorse their approval and promptly pay such statements.
- (c) All compensation paid to the assessor shall be by check mailed to the address indicated in the Contract.
44. **TURN OVER OF RECORDS.** Upon expiration or termination of this agreement, the assessor shall turn over to the municipality; (a) all records prepared for the assessment including, but not limited to property record cards, personal property forms, maps and any other schedules or forms, (b) all records and materials obtained from the municipality 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 municipality 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 text file of the data. This text file shall then be left with the municipality, along with a field definition file to describe the various data fields in the text file.

GENERAL TERMS

38. **COMPLETION OF WORK.** (a) The assessor shall have completed all work under this agreement, except for appearing at the Board of Review and any necessary subsequent appearances as per this agreement, on or before the completion date referred to in Article III, number 2. This date of completion may be extended, if necessary, and by mutual consent.
- (b) That in the event the assessment cannot for any reason be completed within the time originally specified, the assessor shall provide written notification to the municipality, stating the reasons for not completing the assessment by the contracted completion date, so that the situation may be timely remedied and the assessment completed in substantial compliance with law.
39. **ASSIGNMENT OF CONTRACT.** That the assessor is not permitted to assign, subcontract or transfer this agreement or any part of this agreement without written approval from the municipality.
40. **COMPENSATION UPON EFFORT.** That the compensation is based upon effort required to complete the work under this agreement in an acceptable manner, and not upon the whole value or any part of the value of the municipality.

Wausau Assessment Staff Certification

<i>Name</i>	<i>Title</i>	<i>Certification</i>
Robert Mayer	Property Appraiser	Assessor 1
Kristeen Quale	Property Appraiser	Assessor 1
Daniel Hampson	Property Appraiser	Assessor 2
Sandra Lipscomb	Technician	Assessment Technician

Assessment Department Staffing Levels

Historic Staffing Levels:

Staffing Level = 7-Person

- 1 City Assessor
- 1 Commercial/Residential Appraiser
- 3 Property Appraisers
- 1 Property Appraisal Technician
- 1 Office Technician
- ~~2 Part-time Appraisers (Retired Appraisers from Wausau)~~

Retirement of Property Appraisal Technician in 2014 – Worked with HR Director, Michael Loy
Exchanged Property Appraisal Technician position for another Property Appraiser position
Staffing Level = 7 Person

- 1 City Assessor
- 2 Senior Appraisers
- 3 Property Appraisers
- 1 Property Appraisal/Office Technician*

Retirement of City Assessor on 3-1-2016

Staffing Level = 6 Person

- 1 Interim City Assessor
- 1 Senior Appraisers
- 3 Property Appraisers
- 1 Property Appraisal/Office Technician*

Nan Giese contract as Interim City Assessor on 7-20-2016

Staffing Levels = 7 Person

- 1 Interim City Assessor
- 2 Senior Appraisers
- 3 Property Appraisers
- 1 Property Appraisal/Office Technician

Current Organization

Staffing Levels = 5 Person

- 1 Temporary Interim City Assessor
- 0 Senior Appraisers
- 3 Property Appraisers
- 1 Property Appraisal/Office Technician

7 Person Scenario

Optimal Staffing – Coverage for Vacations, Sick, and any increase in workload as the economy continues to strengthen can be handled. Limited Overtime due to appropriate staffing

Option A

1 City Assessor:	1-40
1 Deputy Assessor*	1-40
1 Senior Appraiser	2,3,5,7-11, 15-20, 22, 23, 25, 26, 28-40
3 Property Appraisers	2, 3, 5, 8-11, 15-20, 22, 23, 25, 26, 28, 30, 32-40
1 Property Appraisal Technician*	3, 5-7, 13, 17, 19-23, 26, 28-30, 32-34, 37, 39, 40

6 Person Scenario

Proficient Staffing – Compromise between personnel and cost. Adequate coverage for Vacations and Sick time but possibility of increased Overtime with any increase in workload as the economy continues to strengthen.

Option B

1 City Assessor	1-40
1 Deputy Assessor *	1-40
3 Property Appraisers	2, 3, 5, 8-11, 15-20, 22, 23, 25, 26, 28, 30, 32-40
1 Property Appraisal Technician*	3, 5-7, 13, 17, 19-23, 26, 28-30, 32-34, 37, 39, 40

Option C

1 City Assessor	1-40
1 Deputy Assessor*	1-40
1 Senior Appraiser	2, 3, 5, 7-11, 15-20, 22, 23, 25, 26, 28-30, 32-40
2 Property Appraisers	2, 3, 5, 8, 9, 11, 15-20, 22, 23, 25, 26, 28, 30, 32-37, 39, 40
1 Property Appraisal Technician*	3, 5-7, 13, 17, 19-23, 26, 28-30, 32-34, 37, 39, 40

5 Person Scenarios

Adequate Staffing – Requires specific requirements for City Assessor and also requires the most efficient software. Definite personnel savings but more Overtime should be expected, and if workloads increase dramatically, staff may lag behind.

Option D

1 City Assessor - Experienced**	1-40
1 Deputy Assessor *	1-40
2 Property Appraisers	2, 3, 5, 8- 11, 15-20, 22, 23, 25, 26, 28, 30, 32- 40
1 Property Appraisal Technician*	3, 5-7, 13, 17, 19-23, 26, 28-30, 32-34, 37, 39, 40

Option E

1 City Assessor - Experienced**	1-40
3 Property Appraisers*	1-5, 7-23, 25, 26, 28-40
1 Property Appraisal Technician*	3, 5-7, 13, 17, 19-23, 26, 28-30, 32-34, 37, 39, 40

*Position needs potential re-class

**Experienced City Assessor has:

1. Total Understanding/Knowledge of Marathon County Land Records System
2. Knowledge of our Current CAMA Software- ie; H.T.E. Appraisal Plus & its Tables and Calcs
3. Knowledgeable on City of Wausau Housing & Commercial Stock
4. Knowledge of the Businesses/Personal Property in the City of Wausau
5. Established Relationships with business owners in the City of Wausau
6. 10+ Years of Experience in Residential, Commercial and Personal Property Valuations
7. Experienced with Departmental Operating Policies
8. Experienced in Auditing Personal Property Accounts in the City of Wausau

Job Duties – Not All Inclusive

- 1 Administrative
- 2 Analyze Blue prints
- 3 Apply Rational Judgement
- 4 Assessment Rolls
- 5 Attends Mandated Training from WIDOR
- 6 Bill Paying
- 7 Commercial
- 8 Comparison Sheets
- 9 Contamination Issues
- 10 Cost Approach
- 11 Defend Values – OB & BOR
- 12 Exemptions
- 13 File Creation
- 14 Final Reports
- 15 GRMs
- 16 Income Approaches
- 17 Inspections
- 18 Knowledge of Case Law
- 19 Knowledge of Construction Terminology
- 20 Land Values – Research
- 21 Listor for City of Wausau, Marathon County
- 22 Market Trends
- 23 Measuring
- 24 Media
- 25 New Neighborhood – Develop Values
- 26 PAD State Sales Report
- 27 Payroll
- 28 Permits
- 29 Personal Property (PP)
- 30 Photos
- 31 Public Engagements
- 32 Real Estate Sale Ads
- 33 Residential
- 34 Sales
- 35 Sales Approach
- 36 Sketches
- 37 Special Requests
- 38 Statistical Studies
- 39 Tract Mortgages
- 40 Verify Owner Names & Mailing Addresses

SURVEY DATA

	Municipality	TVC	County	Assessor or Firm	C/A	C/H YR	EST POP	CLS	EQV \$	RES \$	COMM \$	MAN \$	# PARCELS	# RES	# # COMM	# MAN	# PP	PP \$	% SALES	%	TOTAL	IH	IH	IH	IH	IH	CONTRACT	CONTRACT	CONTRACT	REVAL	REVAL HELP
																			REVIEW'D	PERMITS REVIEW'D	BUDGET INCL CONTRACT	FTE	PTE	APP'R	TECH / AIDE	ASSESS / DEP ASSESS	SERVICES	\$	FTE	(YRS)	\$
1	APPLETON	C	OUTAGAMIE, CALUMET, WINNEBAGO	DEANN BROSMAN	A	-	72,623	2	\$ 4,938,725,300	\$ 3,392,464,300	\$ 1,226,865,500	\$ 137,742,100	25,425	23,535	1,684	125	1,905	\$ 99,338,000	52	12	\$ 529,079	5	2	3	2	1/0	N	\$ -	0	4	N/NA
2	BELOIT	C	ROCK	TYLER TECHNOLOGIES	H	2014	36,966	3	\$ 1,593,559,300	\$ 876,884,100	\$ 468,709,400	\$ 164,585,500	12,813	11,920	731	65	895	\$ 82,867,100	?	?	\$ 200,253	2	0	1	1	0/0	Y	\$ 50,000	1	?	??
3	BROOKFIELD	C	WAUKESHA	ALLAN LAND ASSESSOR	A	-	38,000	2	\$ 6,712,615,100	\$ 4,610,585,500	\$ 1,924,365,400	\$ 50,750,000	14,911	14,111	697	37	2,400	\$ 177,000,000	75	100	\$ 661,900	7	0	5	1	0/0	N	\$ 95,000	1	2-4	N/NA
4	EAU CLAIRE	C	EAU CLAIRE, CHIPPEWA	HEIDI ENDER	A	-	66,000	2	\$ 4,872,721,700	\$ 2,821,024,900	\$ 1,712,084,300	\$ 161,547,500	22,370	20,146	2,203	91	2,195	\$ 178,012,700	100	100	\$ 527,200	5	0	4	1	1/0	N	\$ -	0	3-4	N/NA
5	FOND DU LAC	C	FOND DU LAC	GROTA APPRAISALS	C	2013	43,021	2	\$ 2,662,872,500	\$ 1,596,529,800	\$ 810,590,200	\$ 125,547,400	15,026	13,322	1,286	93	1,664	\$ 128,040,160	?	?	\$ 304,948	0	0	0	0	0/0	Y	\$ 331,238	0	4±	Y/\$237,500
6	GREEN BAY	C	BROWN	RUSSELL SCHWANDT	A	-	105,000	2	\$ 6,500,000,000	\$ 4,500,000,000	\$ 1,500,000,000	\$ 400,000,000	38,000	33,000	3,000	200	2,600	\$ 320,000,000	50	100	\$ 564,684	4	0	3	0	1/0	Y	\$ 50,000	1	AS NEEDED	Y/NA
7	JANESVILLE	C	ROCK	JEF MUELVVER	A	-	65,000	2	\$ 4,165,074,300	\$ 2,590,134,400	\$ 1,081,263,800	\$ 160,559,100	24,000	22,258	1,573	102	3,661	\$ 136,429,540	100	100	\$ 500,000	6	0	3	1	1/1	N	\$ -	0	4	N/NA
8	KENOSHA	C	KENOSHA	MIKE HIGGINS ASSESSOR	A	-	100,000	2	\$ 5,754,024,000	\$ 3,685,905,600	\$ 1,818,846,300	\$ 143,000,000	32,331	29,700	2,450	101	2,300	\$ 250,000,000	100	100	\$ 650,000	6	0	3	1	1/1	N	\$ -	0	2	N/NA
9	LA CROSSE	C	LA CROSSE	MARK SCHLAFER	A	-	53,000	2	\$ 3,329,000,000	\$ 1,602,500,000	\$ 1,181,200,000	\$ 128,300,000	15,984	13,608	2,200	125	2,831	\$ 207,500,000	65	100	\$ 703,000	8	0	6	1	1/0	N	\$ -	0	1	N/NA
10	MARSHFIELD	C	MARATHON, WOOD	JOAN SPENCER	A*	-	19,186	3	\$ 1,461,314,300	\$ 806,086,800	\$ 512,475,600	\$ 55,328,700	7,460	6,513	753	72	949	\$ 86,752,500	?	?	\$ 267,651	3	0	1	1	1/0	N	\$ -	0	AS NEEDED	??
11	OSHKOSH	C	WINNEBAGO	LUKE ALGER	H	2013	66,555	2	\$ 3,781,663,205	\$ 2,213,663,051	\$ 1,203,544,038	\$ 232,302,991	21,802	18,850	1,992	144	1,718	\$ 87,787,686	100	100	\$ 548,000	5	.8	3	2	0/1	Y	\$ 82,000	1	10	Y/\$127,500
12	RACINE	C	RACINE	BILL BOWERS ASSESSOR	A	-	78,100	2	\$ 3,112,849,700	\$ 2,179,361,700	\$ 806,088,800	\$ 127,399,200	26,808	24,010	1,930	139	1,663	\$ 99,510,300	35	60	\$ 558,400	5	1	4	1.5	1/0	N	\$ -	0	1	N/NA
13	SHEBOYGAN	C	SHEBOYGAN	GROTA APPRAISERS, MIKE GROTA	H	2016	49,288	2	\$ 2,500,000,000	\$ 1,560,000,000	\$ 670,000,000	\$ 150,000,000	16,973	15,480	1,369	112	1,673	\$ 97,000,000	70	100	\$ 460,000	2	0	1	1	0/0	Y	\$ 270,000	3	4	N/NA
14	STEVENS POINT	C	PORTAGE	STEVE SHEPRO	H	2013	27,037	3	\$ 1,643,950,000	\$ 768,652,000	\$ 644,707,900	\$ 46,428,000	9,070	7,329	893	34	1,118	\$ 66,939,700	?	70	\$ 229,083	2	0	2	1	0/1	Y	\$ 50,000	1	10	Y/\$250,000
15	SUPERIOR	C	DOUGLAS	BRADLEY THEIEN	A	-	27,200	2	\$ 1,630,578,600	\$ 959,234,400	\$ 479,833,300	\$ 71,579,600	11,235	9,475	1,643	95	911	\$ 119,902,200	?	?	\$ 339,868	0	0	0	0	1/0	N	\$ -	0	AS NEEDED	??/NA
16	WAUKESHA	C	WAUKESHA	PAUL KLAUCK ASSESSOR	A	-	72,000	2	\$ 5,877,157,700	\$ 3,867,581,500	\$ 1,585,035,500	\$ 238,470,200	21,434	19,640	1,623	139	2,323	\$ 184,958,400	20	100	\$ 491,021	5	0	3	1	1/0	N	\$ -	0	2	N/NA
17	WAUSAU	C	MARATHON	NAN GIESE	A	-	39,106	2	\$ 2,620,513,720	\$ 1,444,130,930	\$ 952,568,610	\$ 103,426,800	15,362	13,285	1,296	81	1,601	\$ 118,579,390	100	100	\$ 432,000	5	0	3	1	1/0	N	\$ -	0	AS NEEDED	N/NA
18	WAUWATOSA	C	MILWAUKEE	SHANNON KRAUSE	A	-	50,000	2	\$ 5,530,000,000	\$ 3,240,000,000	\$ 1,780,000,000	\$ 130,200,000	16,307	14,811	929	29	1,763	\$ 202,200,000	100	100	\$ 658,000	6	0	3	1	1/1	N	\$ -	0	3±	N/NA
19	WEST ALLIS	C	MILWAUKEE	CHARLES RUUD ASSESSOR	A	-	60,164	2	\$ 3,735,583,600	\$ 2,386,494,500	\$ 1,175,468,100	\$ 54,495,600	19,794	17,596	1,688	64	1,825	\$ 131,660,800	100	100	\$ 530,220	5	1	2	2	1/1	N	\$ -	0	3-5	N/NA
20	WEST BEND	C	WASHINGTON	JEFF YODER	A	-	32,000	3	\$ 2,421,482,320	\$ 1,611,711,420	\$ 690,631,300	\$ 63,484,000	11,476	10,433	935	53	847	\$ 50,905,300	100	100	\$ 232,693	3	0	0	1	1/1	N	\$ -	0	AS NEEDED	Y/\$40,000
21	WISCONSIN RAPIDS	C	WOOD	STEVE SHEPRO	H	2012	18,300	3	\$ 1,011,657,700	\$ 526,964,300	\$ 335,675,900	\$ 89,739,200	8,048	7,136	837	57	943	\$ 32,931,900	?	?	\$ 129,272	0	.8	0	1	0/0	Y	\$ 48,000	1	AS NEEDED	Y/\$45,000

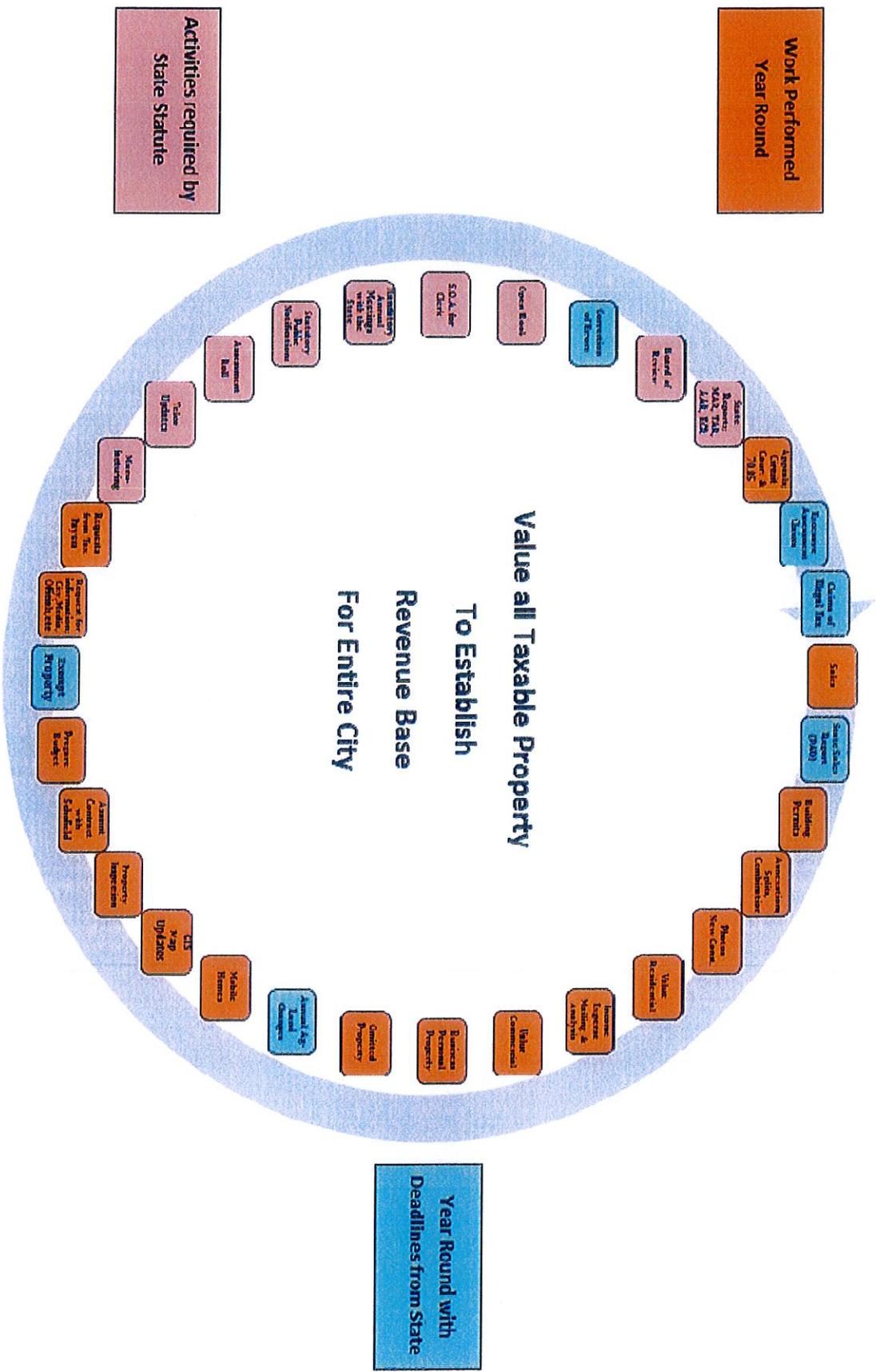
■ = ?'s about staffing / contract info

■ = RESPONDED TO SURVEY (if not shaded information obtained from municipality budgets, DoR, etc.)

SURVEY CALCULATIONS

Municipality	County	C/A	POP	CLASS	EQV	BUDGET \$ PER	COST	COST	PARCELS	PARCELS	TIME	TIME	EQV PER FTE	EQV PER	TOTAL RE	RES EQV	COMM EQV	MANUF EQV	PP EQV	AGG RATIO	MEAN	MEDIAN	COD	COD	PRICE	COD		
						FTE	PER	PER	PER FTE	PER FTE	ALLOWED PER PARCEL*	ALLOWED PER PARCEL*		CAPITA	EQV / TOTAL PARCELS	/ RES PARCELS	/ COMM PARCELS	/ MANUF PARCELS	/ # PP		RATIO	RATIO		RATING		COC	DIFFL	RATING
1	APPLETON	OUTAGAMIE, CALUMET, WINNEBAGO	A	72,623	2	\$ 4,938,725,300	\$ 105,816	\$ 20.91	\$ 19.45	5,060	5,441	21.8	20.3	\$ 987,745,060	\$ 68,005	\$ 190,340	\$ 144,145	\$ 728,542	\$ 1,101,936.80	\$ 52,145.93	97.88	100.13	98.42	8.68	E	86.70	1.02	3
2	BELOIT	ROCK	H	36,966	3	\$ 1,593,559,300	\$ 66,751	\$ 15.71	\$ 14.68	4,249	4,548	26.0	24.3	\$ 531,186,433	\$ 43,109	\$ 117,903	\$ 73,564	\$ 641,189	\$ 2,532,084.62	\$ 92,588.94	102.94	105.97	100.67	13.95	G	68.40	1.03	2
3	BROOKFIELD	WAUKESHA	A	38,000	2	\$ 6,712,615,100	\$ 82,738	\$ 44.50	\$ 38.32	1,859	2,159	59.4	51.1	\$ 839,076,888	\$ 176,648	\$ 438,308	\$ 326,737	\$ 2,760,926	\$ 1,371,621.62	\$ 73,750.00	102.14	100.92	99.63	9.65	G	79.30	0.99	2
4	EAU CLAIRE	EAU CLAIRE, CHIPPEWA	A	66,000	2	\$ 4,872,721,700	\$ 105,440	\$ 23.66	\$ 21.54	4,456	4,895	24.8	22.6	\$ 974,544,340	\$ 73,829	\$ 209,866	\$ 140,029	\$ 777,160	\$ 1,775,247.25	\$ 81,099.18	93.67	98.73	93.83	12.14	G	86.90	1.05	2
5	FOND DU LAC	FOND DU LAC	C	43,021	2	\$ 2,662,872,500	\$ 20.42	\$ 18.37	?	?	0.0	0.0	?	\$ 61,897	\$ 168,696	\$ 119,842	\$ 630,319	\$ 1,349,972.04	\$ 76,947.21	98.29	100.63	98.47	8.84	E	82.60	1.02	3	
6	GREEN BAY	BROWN	A	105,000	2	\$ 6,500,000,000	\$ 112,937	\$ 14.94	\$ 13.98	7,560	8,080	14.6	13.7	\$ 1,300,000,000	\$ 61,905	\$ 162,632	\$ 136,364	\$ 500,000	\$ 2,000,000.00	\$ 123,076.92	101.95	105.18	101.72	12.23	G	75.20	1.03	2
7	JANESVILLE	ROCK	A	65,000	2	\$ 4,165,074,300	\$ 83,333	\$ 20.92	\$ 18.14	3,983	4,593	27.7	24.0	\$ 694,179,050	\$ 64,078	\$ 167,860	\$ 116,369	\$ 687,390	\$ 1,574,108.82	\$ 37,265.65	92.94	95.13	93.78	10.00	G	79.70	1.02	2
8	KENOSHA	KENOSHA	A	100,000	2	\$ 5,754,024,000	\$ 108,333	\$ 20.17	\$ 18.82	5,372	5,755	20.6	19.2	\$ 959,004,000	\$ 57,540	\$ 170,240	\$ 124,105	\$ 742,386	\$ 1,415,841.58	\$ 108,695.65	93.23	95.79	94.07	11.73	G	72.50	1.03	2
9	LA CROSSE	LA CROSSE	A	53,000	2	\$ 3,329,000,000	\$ 87,875	\$ 44.33	\$ 37.61	1,982	2,336	55.7	47.3	\$ 416,125,000	\$ 62,811	\$ 195,289	\$ 117,762	\$ 536,909	\$ 1,026,400.00	\$ 73,295.66	88.66	92.78	90.52	14.09	G	67.30	1.05	2
10	MARSHFIELD	MARATHON, WOOD	A*	19,186	3	\$ 1,461,314,300	\$ 89,217	\$ 36.23	\$ 32.10	2,463	2,779	44.8	39.7	\$ 487,104,767	\$ 76,166	\$ 184,258	\$ 123,766	\$ 680,578	\$ 768,454.17	\$ 91,414.65	98.09	99.07	98.27	8.77	E	82.40	1.01	1
11	OSHKOSH	WINNEBAGO	H	66,555	2	\$ 3,781,663,205	\$ 91,333	\$ 25.30	\$ 23.44	3,610	3,896	30.6	28.3	\$ 630,277,201	\$ 56,820	\$ 169,428	\$ 117,436	\$ 604,189	\$ 1,613,215.22	\$ 51,098.77	100.05	103.56	100.00	11.45	G	79.70	1.04	2
12	RACINE	RACINE	A	78,100	2	\$ 3,112,849,700	\$ 111,680	\$ 20.94	\$ 19.71	5,334	5,666	20.7	19.5	\$ 622,569,940	\$ 39,857	\$ 112,404	\$ 90,769	\$ 417,663	\$ 916,541.01	\$ 59,837.82	94.97	100.96	98.73	12.74	G	74.60	1.06	2
13	SHEBOYGAN	SHEBOYGAN	H	49,288	2	\$ 2,500,000,000	\$ 92,000	\$ 27.28	\$ 24.82	3,372	3,707	32.7	29.8	\$ 500,000,000	\$ 50,722	\$ 141,578	\$ 100,775	\$ 489,408	\$ 1,339,285.71	\$ 57,979.68	98.25	102.35	99.81	14.76	F	61.20	1.04	1
14	STEVENS POINT	PORTAGE	H	27,037	3	\$ 1,643,950,000	\$ 76,361	\$ 25.35	\$ 22.56	3,012	3,385	36.7	32.6	\$ 547,983,333	\$ 60,804	\$ 173,871	\$ 104,878	\$ 721,957	\$ 1,365,529.41	\$ 59,874.51	79.35	82.96	82.31	10.52	G	79.40	1.05	2
15	SUPERIOR	DOUGLAS	A	27,200	2	\$ 1,630,578,600	?	\$ 30.51	\$ 28.20	?	?	0.0	0.0	?	\$ 59,948	\$ 134,462	\$ 101,238	\$ 292,047	\$ 753,469.47	\$ 131,616.03	99.44	100.32	98.27	9.36	E	78.60	1.01	3
16	WAUKESHA	WAUKESHA	A	72,000	2	\$ 5,877,157,700	\$ 98,204	\$ 23.06	\$ 20.79	4,259	4,724	25.9	23.4	\$ 1,175,431,540	\$ 81,627	\$ 265,569	\$ 196,924	\$ 976,608	\$ 1,715,612.95	\$ 79,620.49	92.52	97.36	95.81	7.77	E	88.90	1.05	3
17	WAUSAU	MARATHON	A	39,106	2	\$ 2,620,513,720	\$ 86,400	\$ 28.27	\$ 25.59	3,056	3,376	36.1	32.7	\$ 524,102,744	\$67,011	\$ 162,865	\$108,704	\$ 735,007	\$ 1,276,874.07	\$ 74,065.83	99.65	100.24	100.06	5.81	E	92.30	1.01	3
18	WAUWATOSA	MILWAUKEE	A	50,000	2	\$ 5,530,000,000	\$ 109,667	\$ 40.42	\$ 36.47	2,713	3,007	40.7	36.7	\$ 921,666,667	\$ 110,600	\$ 326,719	\$ 218,756	\$ 1,916,039	\$ 4,489,655.17	\$ 114,690.87	94.39	97.90	97.22	8.08	E	87.00	1.04	3
19	WEST ALLIS	MILWAUKEE	A	60,411	2	\$ 3,735,583,600	\$ 106,044	\$ 26.87	\$ 24.60	3,946	4,311	28.0	25.6	\$ 747,116,720	\$ 61,836	\$ 182,071	\$ 135,627	\$ 696,367	\$ 851,493.75	\$ 72,142.90	100.71	103.08	100.68	11.23	G	77.70	1.02	2
20	WEST BEND	WASHINGTON	A	31,700	3	\$ 2,421,482,320	\$ 77,564	\$ 20.37	\$ 18.96	3,808	4,090	29.0	27.0	\$ 807,160,773	\$ 76,387	\$ 206,568	\$ 154,482	\$ 738,643	\$ 1,197,811.32	\$ 60,100.71	96.72	99.10	98.14	9.01	E	86.20	1.02	3
21	WISCONSIN RAPIDS	WOOD	C	18,300	3	\$ 1,011,657,700	\$ 129,272	\$ 16.18	\$ 14.47	7,991	8,934	13.8	12.4	\$ 1,011,657,700	\$ 55,282	\$ 121,611	\$ 73,846	\$ 401,046	\$ 1,574,371.93	\$ 34,922.48	102.57	103.16	100.00	11.60	G	75.80	1.01	2

The Wausau Assessment Department Annual Assessment Cycle And Work Required by Wisconsin State Statute



Work Performed Year Round

Year Round with Deadlines from State

WISCONSIN DOR RATINGS OF CLASS 2 & SELECT CLASS 3 MUNICIPALITIES

MUNICIPALITY	COUNTY	ACH	EST POP	CLASS	TOTAL EKV	AGG RATIO	MEAN RATIO	MEDIAN RATIO	COC	PRICE DIFF	COD	COD RATING
1 GREEN BAY	BROWN	A	105,000	2	\$ 6,500,000,000	101.95	105.18	101.72	75.20	1.03	12.23	G
2 KENOSHA	KENOSHA	A	100,000	2	\$ 5,754,024,000	93.23	95.79	94.07	72.50	1.03	11.73	G
3 RACINE	RACINE	A	78,100	2	\$ 3,112,848,700	94.97	100.96	98.73	74.60	1.06	12.74	G
4 APPLETON	OUTAGAMIE, CALUMET, WINNEBAGO	A	72,823	2	\$ 4,398,325,300	97.88	100.13	98.42	86.70	1.02	8.88	E
5 WAUKESHA	WAUKESHA	A	72,000	2	\$ 5,877,157,700	92.52	97.36	95.81	88.90	1.05	7.77	E
6 EAU CLAIRE	EAU CLAIRE, CHIPPewa	A	66,000	2	\$ 4,872,721,700	93.67	98.73	93.83	86.90	1.05	12.14	G
7 JANESVILLE	ROCK	A	65,000	2	\$ 4,165,074,300	92.94	95.13	93.78	79.70	1.02	10.00	G
8 WEST ALLIS	MILWAUKEE	A	60,411	2	\$ 3,795,589,600	100.71	103.08	100.68	77.70	1.02	11.23	G
9 LA CROSSE	LA CROSSE	A	53,000	2	\$ 3,329,000,000	88.66	92.78	90.52	67.30	1.05	14.09	G
10 WAUWATOSA	MILWAUKEE	A	50,000	2	\$ 5,590,000,000	94.39	97.90	97.22	87.00	1.04	8.08	E
11 WAUSAU	MARATHON	A	39,106	2	\$ 2,647,764,700	99.55	100.24	100.06	92.30	1.01	5.81	E
12 BROOKFIELD	WAUKESHA	A	38,000	2	\$ 6,712,615,100	102.14	100.92	99.63	79.30	0.99	9.65	G
13 SUPERIOR	DOUGLAS	A	27,200	2	\$ 1,630,576,600	99.44	100.32	98.27	79.60	1.01	9.36	E
14 FOND DU LAC	FOND DU LAC	C	43,021	2	\$ 2,662,872,500	98.29	100.63	98.47	82.60	1.02	8.84	E
15 OSHKOSH	WINNEBAGO	H	66,555	2	\$ 3,781,663,205	100.05	103.56	100.00	79.70	1.04	11.45	G
16 SHEBOYGAN	SHEBOYGAN	H	49,288	2	\$ 2,500,000,000	98.25	102.35	99.81	61.20	1.04	14.76	F
17 WEST BEND	WASHINGTON	A	31,700	3	\$ 2,421,482,320	96.72	99.10	96.14	86.20	1.02	9.01	E
18 MARSHFIELD	MARATHON, WOOD	A	19,186	3	\$ 1,461,314,300	98.09	99.07	96.27	82.40	1.01	8.77	E
19 WISCONSIN RAPIDS	WOOD	H	18,300	3	\$ 1,071,657,700	102.57	103.16	100.00	75.80	1.01	11.80	G
20 BELLOT	ROCK	H	36,986	3	\$ 1,593,559,300	102.94	105.97	100.67	89.40	1.03	13.95	G
21 STEVENS POINT	FORTAGE	H	27,037	3	\$ 1,943,950,000	79.35	82.96	82.31	79.40	1.05	10.52	G

A = ASSESSOR MUNICIPALITY
 C = CONTRACTOR MUNICIPALITY
 H = HYBRID MUNICIPALITY

COC = COEFFICIENT OF CONCENTRATION
 PRICE DIFF = PRICE DIFFERENTIAL
 COD = COEFFICIENT OF DISPERSION

DESCRIPTION	AGG RATIO	MEAN RATIO	MEDIAN RATIO	COC	PRICE DIFFL	COD	COD RATING	AVERAGE
ALL CLASS 2 & CLASS 3	96.59	99.30	97.16	79.16	1.029	10.59	G	ALL
	96.46	99.11	97.28	81.02	1.027	10.09	G	IN-HOUSE
	96.91	99.77	96.88	74.52	1.032	11.85	G	CONTRACT/HYBRID

CLASS 2	96.80	99.69	97.56	79.39	1.030	10.54	G	ALL
	96.32	99.12	97.13	80.52	1.029	10.27	G	IN-HOUSE
	98.86	102.18	99.43	74.50	1.033	11.68	G	CONTRACT/HYBRID

CLASS 3	95.93	98.05	95.88	78.44	1.024	10.77	G	ALL
	97.41	99.09	98.21	84.30	1.015	8.89	E	IN-HOUSE
	94.95	97.36	94.33	74.53	1.030	12.02	G	CONTRACT/HYBRID



****All present are expected to conduct themselves in accordance with our City's Core Values****

OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

Meeting of the: **Human Resources Committee**
Date/Time: **Monday, December 14, 2015 at 4:30 p.m.**
Location: **City Hall (407 Grant Street) - Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Bill Nagle, David Oberbeck, Lisa Rasmussen**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 11/09/15 Minutes
- 2) Input from DPWU regarding Competitive Wage -- Street Maintainer (Lindman)
- 3) Discussion and Possible Action of Employee Handbook - New Revisions to Chapter 5 and Section 8.07 Family Medical Leave (Hite)
- 4) Discussion and Possible Action of Organizational Efficiency Proposal (Hite)
- 5) HR Director's Report: (Hite)
 - A. Employee Open Enrollment After Action Review
 - B. ATU Contract negotiations Process Update
 - C. Anonymous Letter of Complaint
- 6) Future Agenda Items for Consideration
- 7) Adjourn

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 12/09/2015 at 4:00 p.m.
Questions regarding this agenda may be directed to the Human Resources Office (715) 261-6630.

It is possible and likely that members of, and possibly a quorum of the Council and/or members of other committees of the Common Council of the City of Wausau may be in attendance at the above-mentioned meeting to gather information. **No action will be taken by any such groups.**

It is anticipated that each item listed on the agenda may be discussed, referred, or acted upon unless it is noted in the specific agenda item that no action is contemplated. It is possible that members of, and possibly a quorum of members of other committees of the Common Council of the City of Wausau may be in attendance at the above mentioned meeting to gather information. **No action will be taken by any such group at the above mentioned meeting other than the committee specifically referred to in this notice.**

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For information or to request this service, contact the City Clerk at 407 Grant Street, Wausau WI 54403 or by phone (715) 261-6620.

Other Distribution: Media, Alderpersons, Mayor, Department Heads, City Departments, Union Presidents.

FINAL (excerpt)

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: December 14, 2015, 2015 at 4:30 p.m.
LOCATION: City Hall (407 Grant Street) – Board Room
MEMBERS PRESENT: R. Wagner (C), G. Gisselman, W. Nagle, D. Oberbeck, L. Rasmussen
MEMBERS ABSENT:
Also Present: Mayor Tipple, T. Alfonso, P. Czarapata, K. Dubore, M. Hite, E. Krohn, T. Kujawa, E. Lindman, R. Mohelnitzky, J. Schara, B. Schmidt

Discussion and Possible Action of Organizational Efficiency Proposal (Hite).

Hite reviewed the chart of the proposed organizational efficiency analysis and improvement process included in the packet with the Committee. Hite said the first step of the process is to understand what hopes to be accomplished, followed by a performance audit. After a performance audit, processes would be evaluated, and this is where the Lean would come into play, evaluating if processes are being done as efficiently as possible, and identifying barrier and gaps. Once the performance audit and process evaluations are complete, job descriptions would be reviewed to clarify performance standards, expectations, and organizational goals. Hite said that job descriptions will be updated in 2016 regardless. The position descriptions will then better determine levels of compensation within the organization. Once the positions descriptions are updated, development of employees would follow, ensuring that they are able to do the job. The last step would be to evaluate the process to determine if desired change is occurring and if outcomes are being met. Hite said that Lindman expressed interest in having Public Works as a pilot department, and expects the process to take approximately 3-4 months for each evaluation. Hite included a proposal for the requested Lean Black Belt assistance from NTC; the proposal is \$5100.00 for 6 months of assistance (10 hours per month). Hite explained that priorities will have to set for what is to be evaluated, and that the Committee cannot expect a full evaluation of all Public Works to be completed within 3-4 months. Hite explained that the evaluations would be conducted by body of work, not by department. Wagner said that the first thing the Committee needs to do is decide what to evaluate. Hite listed examples of bodies of work to evaluate and said that she can continue to determine bodies of work to be evaluated or the Committee can determine them. The Committee agreed that the items listed are important to look at. Oberbeck would like to have a session to determine priorities, core services, add-on services, and more expensive services. Wagner asked if the money for the NTC assistance needs to go to Finance Committee. Hite said she talked with Groat and the money will come from the Council budget. Motion by Rasmussen to direct Myla to move forward with the process as outlined for the test pilot for six months. Second by Oberbeck. Oberbeck asked if they could get a proposal from NTC that includes additional services to bring back to the Committee, and would prefer that the proposal be brought back when clarification is made to the Lean Black Belt of what the Committee would like to accomplish. Hite will talk with the Lean Black Belt and the proposal will come back to the Committee next month for a vote.

Romey Wagner
Human Resources Committee, Chair



Memorandum

From: Myla D. Hite, Human Resources Director
To: Human Resources Committee
Date: December 14, 2015
Subject: Organizational Efficiency and Development

Purpose: To comply with the Committee's assignment to present a proposal to conduct internal organizational efficiency analysis and LEAN process improvement work within the City in 2016. The goal is to better develop the organization towards accomplishing the strategic goals of the City of Wausau in the most cost effective manner possible in service of the citizenry.

Proposal for an Internal Organization Efficiency Analysis and Organization Development Effort: That you review the process outlined in the attached for the proposed process to accomplish the Committee tasking (encl), to decide whether to conduct an internal analysis or to pursue another avenue. The outcomes using the proposed process would include the following:

1. An organization strategy for the body of work in question that is aligned with the priorities of the citizens, policymakers and the mission of the affected department. A performance audit along with a process improvement initiative to assess barriers, remove gaps, eliminate waste and to develop realistic measures for efficiently performing the work. Job descriptions, work processed, performance standards would be aligned and staff developed to support the efficiencies implemented. Measures would be in place to determine overall effectiveness of the process.
2. For each body of work being analyzed for potential improvement, the anticipated time frame would be 3-4 months. It would involve personnel in key roles (see Enclosure 2)

Background

1. In September 8, 2014 the Human Resources Committee approved soliciting Requests for Proposal to conduct an Organization Efficiency study within General City Government.
2. On February 9, 2015 the Human Resources Committee voted to table the idea of hiring an external consultant to conduct a City-wide organizational efficiency study due, in part, to the proposed costs, which ranged from \$57,500.00 to \$112,000.00.
3. During 2015, the Committee has reviewed efforts to strengthen the tie between performance and pay, enhance the performance appraisal process (goal setting as well as feedback) and discussed the importance of continuing to develop and improve the organizational efficiency.
4. At the November 9, 2015 meeting, the Committee again discussed the need to look for ways to more efficiently conduct business given that a 4.7% budget increase is predicted for 2016, emphasizing that an effort to review matters organizationally (as opposed to individual position) needs to occur. During the discussion, the Committee tasked Human

Resources Director Myla Hite to prepare a proposal for committee consideration in December.

Recommendation(s): If the Committee elects to perform this work internally, I recommend that you approve the following:

1. A six month pilot from January to June of 2016, re-evaluating for continuation at that time.
2. Anticipated time frame of 3-4 months for each analysis.
3. Designate HR Director to perform the overall work and to make assignments consistent with the designated roles and responsibilities.
4. Approve implementing skeletal staffing, for 3-5 days during the conduct of the actual LEAN event, within the area of work being analyzed for process improvement. This would facilitate staff performing the work to be involved in task analysis, elimination of waste and outlining streamlined processes as opposed to performing normal business operations.
5. Approve designating up to \$5,100 from the City Council's Professional Services budget to obtain the oversight of LEAN Blackbelt Craig Dreikson for the period January 1, 2016 through June 30, 2016. (See enclosure 3)
6. That the Human Resources Committee brainstorm, identify and prioritize the body(ies) of work to be analyzed for improvement, with the initial focus being on work that impacts external customers. Ideas for consideration, although not all inclusive, are as follows:

Priority Number	Body of Work	Primary Dept. Secondary Dept.
	Establishing Property Valuations within the City	Assessments Finance
	Maintaining and Constructing Streets within the City	Public Works
	Providing Potable Drinking Water within the City	Public Works
	Ensure construction complies with codes and ordinances	Public Works
	Other:	

Resource Impact: \$5,100.00 along with staff time which can be absorbed within existing resources.



**Enclosure 2:
December 14, 2015**

Organizational Efficiency and Development

Roles and Responsibilities.

During the LEAN portion of the event, the following roles will be designated:

Executive Sponsor. One elected official (Mayor and/or HR Committee member) designated to serve as the executive sponsor to support the initiative at a high level. The Executive Sponsor communicates with the leadership team and addresses barriers, works with the facilitator and process owners to set vision, ensure events are conducted, an action plan is implemented and improvements are sustained.

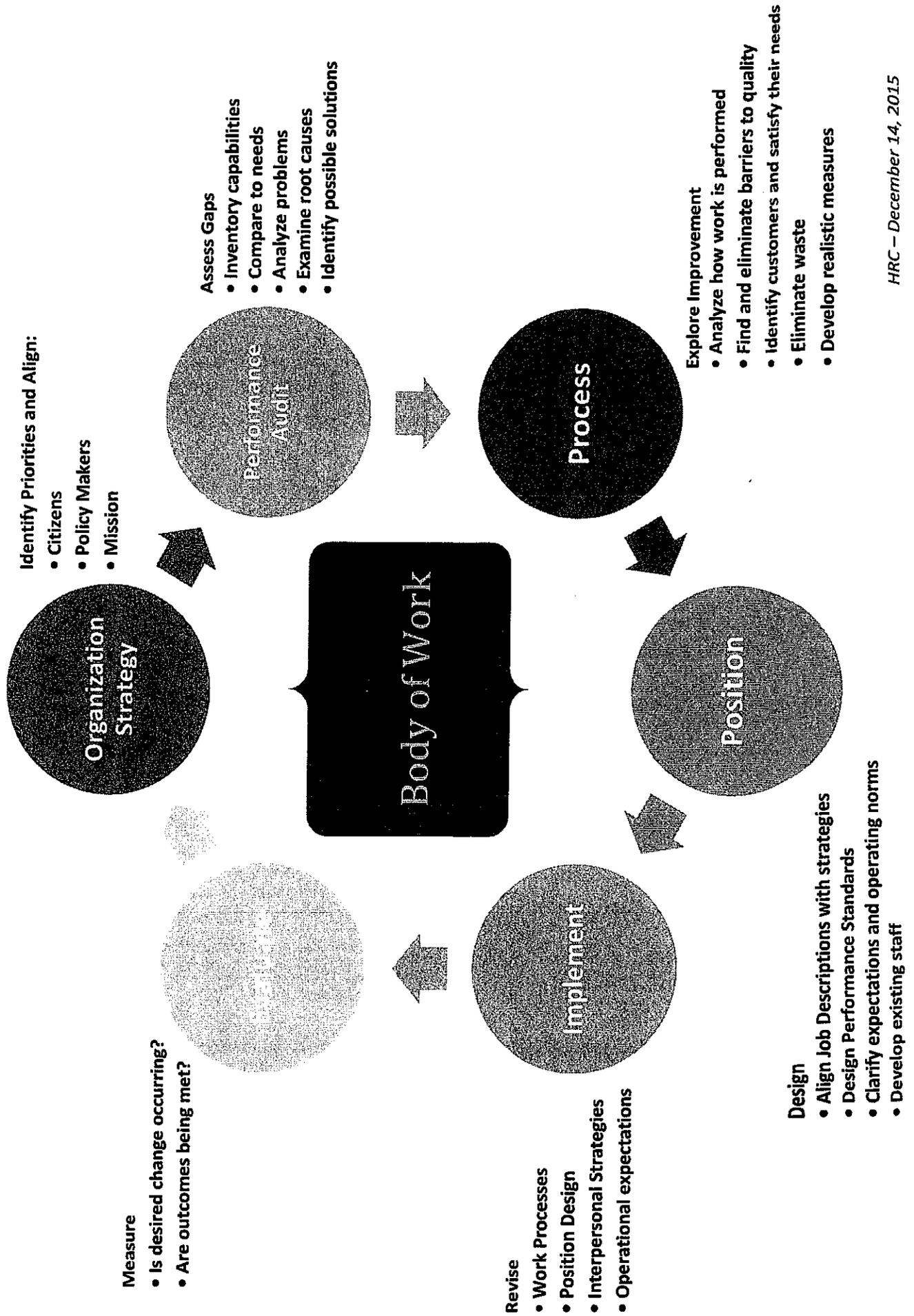
Process Owner. By position, the Department Director for the involved body of work being analyzed assumes this role. The person has broad view and authority over the process to be improved, "owns" the overall process from preparation through effective follow-up and tracking. This person is necessary for coordinating all details within the department. He/she champions the team and lean process as necessary. Assists the team by communicating vision, eliminating barriers to change, providing support and promoting the team objectives. In follow up is responsible for all data collection.

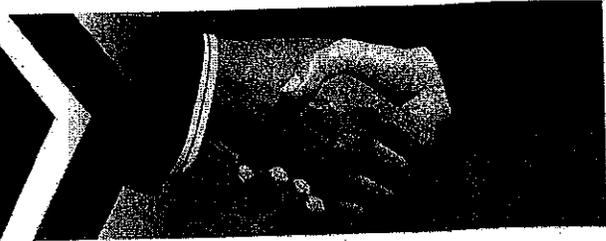
Team Lead. Ordinarily the team lead would be the first level manager with responsibility for the work (ex: City Inspections – William Hebert, Street Maintenance – Ric Mohelnitzky, etc.). Team leads will work closely with the Facilitator to keep the team focused on daily requirements. During the actual LEAN event, the team lead will be responsible for delivering real results, guiding the team toward aggressive changes and focusing on content during the meeting.

Team Member(s). Consist of staff currently involved in performing the body of work who are expected to participate and contribute to the team by assisting in achieving the team goals and objectives. Team members may consist of people involved in the daily workload of the targeted area, or be interfacing or support personnel (example: Assessment LEAN event would include Finance Department staff who are involved in performing aspects of the work. The potential exists to include other personnel such as customers, etc.

Facilitator. LEAN greenbelt (HR Director) who owns the Lean process, provides structure and direction to help facilitate a successful learning experience for all team members while achieving the team's goals and objectives.

Proposed Organizational Efficiency Analysis and Improvement Process





I am pleased to present the following training package for the advancement and growth of your team. If the scope or duration does not meet your goals and expectations, please don't hesitate to contact me. Thank you for considering Northcentral Technical College for your training and professional development needs.

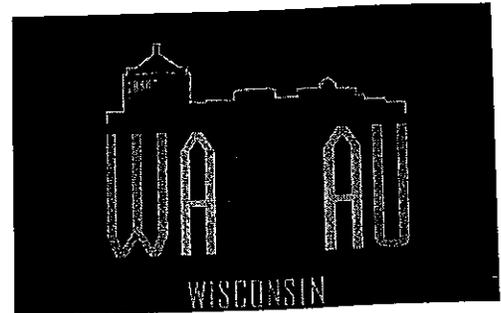
Date: 12.2.15 **Attn:** Myla Hite

Course name: Professional Development – Lean Coaching

Number of Training Hours per employee: 10 hours per month or 60 hours

Training Site: City Hall

Date & Time of Training(s): January – June 30th, 2016



<u>Lean Coaching</u>	10 hours per month
<ul style="list-style-type: none"> - Support planning initiatives - Bouncy approaches and ideas past one another - Co-Facilitative session as needed - Review documents - Align program with sustainable practices for longevity 	
TOTAL INVESTMENT – (Firm dates, times & locations still need to be determined for these sessions)	\$5,100.00

Business representative

Company

Date

By signing this document, we accept this proposal and wish to move forward with the generation of a formal contract for the training outlined above. **Please scan and email: wolfa@ntc.edu or fax to 715.301.2471.**

Best regards,

Ali Wolf

*Business Development Manager; Northcentral Technical College - Business and Industry Solutions (BIS)
1000 W. Campus Drive Wausau, WI 54401 Office: 715.803.1471 Cell: 715.581.0345 www.ntc.edu/business-industry*





Northcentral
TECHNICAL COLLEGE
Business and Industry Solutions



Instructor Bio – Craig Dreikosen



Craig Dreikosen is an experienced Business Improvement and Project Management professional. Craig brings to the table a wealth of knowledge in Lean, Six Sigma, Problem Solving, Project Management, Strategic Planning, Performance Measurement and Organizational Change. With a professional career including aerospace, manufacturing, healthcare and additional experience through consulting from High Mix/Low Volume Manufacturing, government and healthcare, Craig is ready to serve your organizational performance improvement needs.

Craig's credentials include:

- Bachelors of Science in Industrial Engineering – UW-Platteville
- Masters of Science in Project Management – UW-Platteville
- Lean/Six Sigma Black Belt
- Graduate of several internal Leadership Programs

Craig strives to strengthen and improve local businesses with the objective of seeing the area continue to thrive economically. To this end Craig volunteers with several local professional organizations including United Way, Emerging Leaders, Society of Manufacturing Engineers, American Society for Quality and currently serves on the Marathon Venture Academy Governance Board as President. Craig and his wife Sonya call Marathon City home with their young children and want to ensure the area continues to support good paying jobs.

For more information about Craig's specialty topics and delivered topic areas, please contact:

Ali Wolf
Business Development Manager
NTC Business and Industry Solutions (BIS)
1000 W. Campus Drive
Wausau, WI 54401
Office: 715.803.1471



****All present are expected to conduct themselves in accordance with our City's Core Values****

OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

Meeting of the: **Human Resources Committee**
Date/Time: **Monday, January 11, 2016 at 4:30 p.m.**
Location: **City Hall (407 Grant Street) - Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Bill Nagle, David Oberbeck, Lisa Rasmussen**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 12/14/15 Minutes
- 2) Discussion and Possible Action of Process for Employee Handbook Review
- 3) Discussion and Possible Action of Revised Organizational Efficiency Proposal (Hite)
- 4) Discussion and Possible Action Regarding Update and Salary Range Resignment of Senior Human Resource Generalist Position (Hite)
- 5) HR Director's Report:
 - A. ATU Contract Bargaining Update
- 6) Future Agenda Items for Consideration
- 7) Adjourn

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 01/08/2015 at 3:00 p.m.

Questions regarding this agenda may be directed to the Human Resources Office (715) 261-6630.

It is possible and likely that members of, and possibly a quorum of the Council and/or members of other committees of the Common Council of the City of Wausau may be in attendance at the above-mentioned meeting to gather information. **No action will be taken by any such groups.**

It is anticipated that each item listed on the agenda may be discussed, referred, or acted upon unless it is noted in the specific agenda item that no action is contemplated. It is possible that members of, and possibly a quorum of members of other committees of the Common Council of the City of Wausau may be in attendance at the above mentioned meeting to gather information. No action will be taken by any such group at the above mentioned meeting other than the committee specifically referred to in this notice.

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For information or to request this service, contact the City Clerk at 407 Grant Street, Wausau WI 54403 or by phone (715) 261-6620.

Other Distribution: Media, Alderpersons, Mayor, Department Heads, City Departments, Union Presidents.

FINAL (excerpt)

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: January 11, 2016 at 4:30 p.m.
LOCATION: City Hall (407 Grant Street) – Board Room
MEMBERS PRESENT: R. Wagner (C), G. Gisselman, W. Nagle, D. Oberbeck, L. Rasmussen
MEMBERS ABSENT:
Also Present: Mayor Tipple, C. Barr, M. Hite, E. Krohn, T. Kujawa, T. Larsen, E. Lindman, J. Schara, R. Neupert (WSAU)

Discussion and Possible Action of Revised Organizational Efficiency Proposal (Hite).

Hite said, working from the direction given by the Committee at the last meeting, she has provided an expanded proposal that includes more involvement from the LEAN BlackBelt. Hite provided a supplement to the proposal she presented to the Committee in December. Hite explained that she met with the BlackBelt and focused on the four items that were listed in the original proposal. The previous quote was \$5,100 and the revised quote is \$13,150. Hite provided an outline of the activities that would take place and the amount of time the activities would take, indicating that the BlackBelt would be more heavily involved at the beginning of the process and less involved as the process move forward. At the end of the contracted 180 hours, it would be up to the Committee if they wish to have the BlackBelt continue in the process. Rasmussen pointed out that on the memo for this item that in the initiatives listed, it said “City-County IT Commission” instead of “City”. Hite said that this was an electronic error and “City-County IT Commission” should be replaced with “City”. Motion by Rasmussen to approve the revised Organizational Efficiency Proposal and direct Hite to move forward. Second by Oberbeck. Wagner asked when the Committee can expect the study to be done. Hite said the request for the funds needs to go to the Finance Committee, and then it will be a 6 month pilot. Wagner asked for clarification if that meant 6 months after it starts; Hite responded that he was correct. Gisselman asked if this was included in the budget. Hite said the \$13,150 is not in the budget, and that the Finance Director has some ideas on where to get the money, and that is why this needs to go to the Finance Committee. All ayes. Motion passes 5-0.

Romey Wagner
Human Resources Committee, Chair



Memorandum

From: Myla D. Hite, Human Resources Director
To: Human Resources Committee
Date: January 11, 2016
Subject: Organizational Efficiency and Development

Purpose: On December 14, 2015 consistent with the Committee assignment, I submitted a proposal to conduct an internal organizational efficiency analysis within the City of Wausau. At the December 14 meeting, the Committee directed that I submit an expanded proposal (Attachment A).

Excerpt from Draft December 14, 2015 HR Committee Minutes:

Oberbeck would like to have a session to determine priorities, core services, add-on services, and more expensive services. Wagner asked if the money for the NTC assistance needs to go to Finance Committee. Hite said she talked with Groat and the money will come from the Council budget. Motion by Rasmussen to direct Myla to move forward with the process as outlined for the test pilot for six months. Second by Oberbeck. Oberbeck asked if they could get a proposal from NTC that includes additional services to bring back to the Committee, and would prefer that the proposal be brought back when clarification is made to the Lean Black Belt of what the Committee would like to accomplish. Hite will talk with the Lean Black Belt and the proposal will come back to the Committee next month for a vote.

The supplemental proposal is more detailed and is tailored to the following initiatives:

- Establishing Property Valuations within the City-County IT Commission
- Maintaining and Constructing Streets within the City
- Ensure construction complies with codes and ordinances in the City
- Providing Potable Drinking Water within the City-County IT Commission

The concept for the pilot is for the LEAN Blackbelt to be heavily involved initially to oversee establishing the overall framework for the process, as well as development of initial tools. HR will be an integrally involved as part of GreenBelt development. The NTC BlackBelt will also be personally involved in initial Kaizen Events, assisting with the work and supervising me as GreenBelt. The scope of work has tripled from the initial 10 hours per month (Approximately 60) to a total of 180 hours of contracted time. Cost increased from \$5,100 to \$13,150.00.

Resource Impact: \$13,150 along with staff time. The staff time can be absorbed within existing resources.

The Committee's consideration is appreciated.



Northcentral
TECHNICAL COLLEGE
 Business and Industry Solutions



I am pleased to present the following training proposal for the advancement and growth of your team. If the scope or duration does not meet your goals and expectations, please don't hesitate to contact me. Thank you for considering Northcentral Technical College for your training and professional development needs.

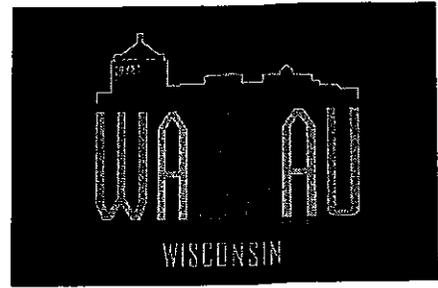
Date: 1.6.16 **Attn:** Myla Hite

Course name: Professional Development – Lean Coaching REV 1

Number of Training Hours per employee: 30 hours per month or 180 hours

Training Site: City Hall

Date & Time of Training(s): January – June 30th, 2016



<p align="center"><u>Lean Coaching – see attached plan breakdown</u></p> <ul style="list-style-type: none"> - Support planning initiatives - Bouncy approaches and ideas past one another - Build program and model for future application - Co-Facilitative session as needed - Review documents and collaborate on dashboard inputs etc. - Scope of work, deliverables and durations may shift from one phase to another once project is underway 	<p>180 hours</p> <p>(not to exceed budget)</p>
<p>TOTAL INVESTMENT – (Firm dates, times & locations still need to be determined for these activities)</p>	<p>\$13,150.00</p>

Business representative

Company

Date

By signing this document, we accept this proposal and wish to move forward with the generation of a formal contract for the training outlined above. **Please scan and email: wolfa@ntc.edu or fax to 715.301.2471.**

Best regards,

Ali Wolf

*Business Development Manager; Northcentral Technical College - Business and Industry Solutions (BIS)
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City of Wausau Lean Development for January through June (Tentative Project Scope and Flow)

Element	Hours	Attendees	Date
Planning and Master Scheduling	2 Hours	Myla & Craig	
Kickoff (Mindset) Training Development	3 Hours	Craig	
Kickoff (Mindset) Training Delivery	3 Hours	Myla, Craig, Property Valuation Team	
Lean Process and Definition Creation/Development	12 Hours	Craig	
Lean Process and Definition Review/Edit/Planning	3 Hours	Myla, Craig	
Lean Process and Definition Leadership Review and Rollout	4 Hours	Myla, Craig	
Just In Time Training – Property Valuation Development	4 Hours	Craig	
Just In Time Training – Property Valuation	4 Hours	Myla, Craig, Property Valuation Team	
Kaizen Event – Property Valuation Process	20 Hours	Myla, Craig, Property Valuation Team	
Kaizen Event Follow Up/Feedback/Planning	3 Hour	Myla, Craig	
Post Kaizen Event Coaching (As Needed)	4 Hours	Myla, Craig	
Kaizen Event #2 – Property Valuation Process	16 Hours	Myla, Craig, Property Valuation Team	
Kaizen Event #2 – Report Out/Closure	2 Hours	Myla, Craig, Leadership	
Definition and Selection of “Greenbelt” Potential(s)	2 Hours	Myla, Craig	
Potential Greenbelt Mindset/Skillset/Toolset Training Development	30 Hours	Craig	
Greenbelt Mindset/Skillset/Toolset Training Delivery	30 Hours	Myla with Craig as a 50% resource (15 Hours)	
Just In Time Training – Maintaining and Constructing Streets Development	4 Hours	Craig	
Just In Time Training – Maintaining and Constructing Streets	4 Hours	Myla, Craig (50%), Maintaining and Constructing Streets Team	
Kaizen Event – Maintaining and Constructing Streets Process	20 Hours	Myla, Craig (50%), Maintaining and Constructing Streets Team	
Kaizen Event Follow Up/Feedback/Planning	3 Hour	Myla, Craig	
Post Kaizen Event Coaching (As Needed)	4 Hours	Myla, Craig	
Kaizen Event #2 – Maintaining and Constructing Streets Process	16 Hours	Myla, Craig (50%), Maintaining and Constructing Streets Team	
Kaizen Event #2 – Report Out/Closure	2 Hours	Myla, Craig (50%), Leadership	
Just In Time Training – Providing Potable Drinking Water	4 Hours	Craig	
Just In Time Training – Providing Potable Drinking Water	4 Hours	Myla, Craig (25%), Providing Potable Drinking Water Team	
Kaizen Event – Providing Potable Drinking Water Process	20 Hours	Myla, Craig (25%), Property Valuation Team	
Kaizen Event Follow Up/Feedback/Planning	3 Hour	Myla, Craig	
Post Kaizen Event Coaching (As Needed)	4 Hours	Myla, Craig	
Kaizen Event #2 – Providing Potable Drinking Water Process	16 Hours	Myla, Craig (25%), Providing Potable Drinking Water Team	
Kaizen Event #2 – Report Out/Closure	2 Hours	Myla, Leadership	
Total Contracted Time	180 Hours		



****All present are expected to conduct themselves in accordance with our City's Core Values****

OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

Meeting of the: **Human Resources Committee**
Date/Time: **Monday, February 8, 2016 at 4:30 p.m.**
Location: **City Hall (407 Grant Street) - Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Bill Nagle, David Oberbeck, Lisa Rasmussen**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 01/11/16 Minutes
- 2) Discussion and Possible Action of Compensation Plan Adjustments - Internal Alignment for:
 - A. Fire Department Battalion Chiefs
 - B. Police Department Lieutenants
 - C. Police Department Captains
- 3) CLOSED SESSION pursuant to Section 19.85(1)(e) of the Wisconsin State statutes for bargaining reasons requiring a closed session for the purpose of considering the following:
Amalgamated Transit Union (ATU) Local 1168 Bargaining
- 4) Reconvene into Open Session, and Possible Action on Closed Session Item of Amalgamated Transit Union (ATU) Local 1168 Bargaining
- 5) Discussion and Possible Action of New Elected Official Orientation
- 6) HR Director's Report:
 - A. Employee Handbook Feedback Sessions:
 - 2/17/16 at 1:00 p.m. - Board Room, City Hall
 - 2/17/16 at 2:15 p.m. - Water Distribution Shop, 1701 N. River Drive
 - 2/24/16 at 7:15 a.m. - Public Works Garage, 400 Myron Street
 - 2/24/16 at 8:30 a.m. - Board Room, City Hall
 - B. Organization Efficiency Study Update
- 7) Future Agenda Items for Consideration
- 8) Adjourn

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 02/03/2016 at 5:00 p.m.

Questions regarding this agenda may be directed to the Human Resources Office (715) 261-6630.

It is possible and likely that members of, and possibly a quorum of the Council and/or members of other committees of the Common Council of the City of Wausau may be in attendance at the above-mentioned meeting to gather information. No action will be taken by any such groups.

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Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For information or to request this service, contact the City Clerk at 407 Grant Street, Wausau WI 54403 or by phone (715) 261-6620.

Other Distribution: Media, Alderpersons, Mayor, Department Heads, City Departments, Union Presidents.

FINAL (excerpt)

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: February 8, 2016 at 4:30 p.m.
LOCATION: City Hall (407 Grant Street) – Board Room
MEMBERS PRESENT: R. Wagner (C), G. Gisselman, D. Oberbeck, L. Rasmussen
MEMBERS ABSENT: W. Nagle
Also Present: Mayor Tipple, A. Antolik, P. Czarapata, D. DeSantis, M. Hite, E. Krohn, T. Kujawa, E. Lindman, J. Schara, G. Seubert

6B. Organization Efficiency Study Update.

Hite reported that the Mayor made a decision not to fill the City Assessor's position permanently until the organizational efficiency study of the Assessment Department is completed. Hite said that she met with Nan Giese and explained the process that will be used to solicit interim City Assessor candidates. Hite will then work with the Interim City Assessor to start the process to review the work of the department for the study.

Romey Wagner
Human Resources Committee, Chair



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OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

Meeting of the: **Human Resources Committee**
Date/Time: **Monday, April 11, 2016 at 4:30 p.m.**
Location: **City Hall (407 Grant Street) - Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Bill Nagle, David Oberbeck, Lisa Rasmussen**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 3/14/16 Minutes
- 2) Discussion and Possible Action of Non-represented Employee Compensation
 - A. Compensation Plan Adjustment - Street Maintainers
 - B. Merit Pay - Introductory Period Completion
 - C. Merit Pay - Satisfactory Performers
- 3) HR Director Report
 - A. ATU Grievance Advancement - Employee Insurance Grievance (Flegner)
 - B. Organizational Efficiency and Effectiveness Update
 - C. Employee Handbook Update
- 4) Future Meeting Agenda Items (Administrative Items for New Council)
- 5) Adjourn

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 04/07/2016

Questions regarding this agenda may be directed to the Human Resources Office (715) 261-6630.

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Other Distribution: Media, Alderpersons, Mayor, Department Heads, City Departments, Union Presidents.

FINAL (excerpt)

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: April 11, 2016 at 4:30 p.m.

LOCATION: City Hall (407 Grant Street) – Board Room

MEMBERS PRESENT: R. Wagner (C), G. Gisselman, W. Nagle, D. Oberbeck, L. Rasmussen

MEMBERS ABSENT: W. Nagle

Also Present: Mayor Tipple, C. Barr, S. Boers, P. Czarapata, M. Goede, G. Hagenbucher, T. Hanson, M. Hite, E. Krohn, T. Kujawa, E. Lindman, R. Mohelnitzky, J. Ray, J. Schara, Pat Peckham (reporter).

B. Organizational Efficiency and Effectiveness Update. Hite met with the LEAN Blackbelt to start the organizational efficiency and effectiveness. Hite and the Blackbelt will be meeting with the Assessment Department on April 26th. Hite said that she did ask the Blackbelt to come and talk to the committee at the May meeting to provide an overview of the vision and talk about the work he and Hite will be doing with the pilot.

Romey Wagner
Human Resources Committee, Chair

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OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal, Corporation, or Sub-unit thereof.

Meeting of the: **Human Resources Committee**
Date/Time: **Monday, June 13, 2016 at 4:30 PM**
Location: **City Hall (407 Grant Street) – Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Becky McElhane, Tom Neal, Dennis Smith**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 04/11/16 Minutes
- 2) Administrative Items:
 - A. Select a Chairperson and Vice Chairperson for the 2016-2018 Term
 - B. Establish Regular Meeting Dates and Time for 2016-2018 Term
- 3) Discussion and Possible Action of 2017 Employee Compensation Plan – Proposed Timeline
- 4) Discussion and Possible Action of Executive Recruitment Strategy for Various Departments to Include: Assessment, Community Development, and Public Safety
- 5) HR Director's Report:
 - A. LEAN Organizational Efficiency and Effectiveness Update
- 6) Future Agenda Items for Consideration
- 7) Adjourn

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 06/08/2016 at 2:00 PM

Questions regarding this agenda may be directed to the Human Resources Office at (715) 261-6630.

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Other Distribution: Media, Alderperson, Mayor, Department Heads, City Departments, Union Presidents.

FINAL (excerpt)

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: June 13, 2016 at 4:30 p.m.
LOCATION: City Hall (407 Grant Street) – Board Room
MEMBERS PRESENT: R. Wagner (C), G. Gisselman, R. McElhaney, T. Neal, D. Smith
MEMBERS ABSENT:
Also Present: Mayor Mielke, M. Hite, E. Krohn, T. Kujawa, E. Lindman, R. Mohelnitzky, J. Ray, R. Rubow, J. Schara

HR Director Report: LEAN Organizational Efficiency and Effectiveness Update.

Hite provided an update on the LEAN study that was beginning with the Assessment Department. At this time, the staff that was involved in the effort at NTC has left. NTC has hired someone else, however, the six month period that the City was looking at to complete the study will not be able to start until July at the earliest. Wagner asked about the contract with NTC and the status. Hite said that she has a meeting set up with NTC regarding the contract and LEAN study and will bring an update to the July meeting.

Romey Wagner
Human Resources Committee, Chair

****All present are expected to conduct themselves in accordance with our City's Core Values****



OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal, Corporation, or Sub-unit thereof.

Meeting of the **Human Resources Committee**
Date/Time **Monday, October 10, 2016 at 4:30 PM**
Location: **City Hall (407 Grant Street) – Board Room 2nd Floor**
Members: **Romey Wagner (C), Gary Gisselman, Becky McElhane, Tom Neal, Dennis Smith**

AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)

- 1) Approval of 09/12/16 Minutes.
- 2) Discussion and Possible Action on Recommendation of Vendor for Wage Compensation Study.
- 3) Discussion and Possible Action Approving Creation of Lab Technician Position in Wausau Water Works (1 FTE).
- 4) Discussion and Possible Action Approving Creation of Administrative Assistant II Position in Wausau Water Works (1 FTE).
- 5) Discussion and Possible Action Approving Elimination of the Senior Sewer Maintainer Position and Approving Creation of the Sewer Maintenance Supervisor Position in Wausau Water Works (1 FTE).
- 6) Discussion and Possible Action Approving Elimination of the Senior Plant Maintenance Mechanic Position and Approving Creation of the Wastewater Plant Operations Supervisor Position.
- 7) Discussion and Possible Action Approving the Creation of a Deputy Chief Position and the Elimination of a Patrol Captain Position in the Police Department.
- 8) Discussion and Possible Action Approving Creation of two (2) Administrative Positions Within the Police Department (each .5 FTE).
- 9) Discussion and Possible Action Approving Creation of a Youth Safety Coordinator Position (Civilian) in the Police Department (.25 FTE).
- 10) Discussion and Possible Action on Authorizing Research and Analysis of Options for the Provision of Assessment Services.
- 11) Future Agenda Items.
- 12) Adjournment.

Romey Wagner, HR Chair

This Notice was posted at City Hall and faxed to the Daily Herald newsroom on 10/06/2016 at 3:00 PM

Questions regarding this agenda may be directed to the Human Resources Office at (715) 261-6630.

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Other Distribution: Media, Alderperson, Mayor, Department Heads, City Departments, Union Presidents.

DRAFT

**CITY OF WAUSAU HUMAN RESOURCES COMMITTEE
MINUTES OF OPEN SESSION**

DATE/TIME: October 10, 2016 at 4:30 p.m.
LOCATION: City Hall (407 Grant Street) – Board Room
MEMBERS PRESENT: R. Wagner (C), G. Gisselman, R. McElhaney, T. Neal, D. Smith
MEMBERS ABSENT:
Also Present: Mayor Mielke, M. Barnes, N. Giese, M. Groat, D. Hampson, J. Hardel, A. Jacobson, E. Krohn, S. Lang, E. Lindman, J. Schara

Approval of 09/12/16 Minutes.

Motion by Neal to approve the Human Resources Committee minutes from September 12, 2016. Second by Gisselman. Gisselman questioned why some items listed as future agenda items on last month's minutes are not on this month's agenda. Wagner responded that items dealing with wage increases will be on the November agenda after discussion of the wage compensation study item on this agenda. Jacobson said that she and Human Resources are working with outside legal counsel and it was advised that any issues with wages be looked at after a wage study is complete. All ayes. Motion passes 5-0.

Discussion and Possible Action on Recommendation of Vendor for Wage Compensation Study.

Wagner opened the discussion by saying that everyone received a brief breakdown of information from the vendors who submitted proposals, and that a comparison cannot be made by the information provided. Wagner said that price cannot be the determining factor, and that the committee members and select staff need to take the time to look at all the proposals thoroughly to make an informed recommendation. Neal recommended using public information to perform a market study to determine if the City's employees are receiving comparable pay. Neal said that the committee shouldn't just be looking at "who" but also "why". Wagner asked if staff was able to gather the needed information to perform a market study or if a professional service is needed. Groat said at the present time, she feels that the City has a compensation plan that no one understands and it is a major problem. Wagner asked if the City needs to start over and put a different compensation plan in place. Jacobson agreed with Groat and said that vendors will have access to information that will not be available to the City. Discussion took place as to what the City needs to look at – wage compensation, compensation plan, or both. Mielke said he doesn't feel that pay for performance works well in the public sector setting and it isn't good for morale since no one understands the compensation plan. Discussion took place regarding how the pay for performance system was implemented and other options for the City. Wagner said he believes an expert needs to come up with a system that will work for the City. Gisselman said that since this agenda item was to recommend a vendor for a wage compensation study and the discussion has deviated, he is not ready to vote on this item. Neal believes that plans used by other cities should be available for the City to review and consider, and questioned if anyone has contacted other cities for information on their compensation plans. Smith agreed with Neal. Krohn said that she is aware of other municipalities that are going through the same process that Wausau is, and municipalities are choosing a variety of compensation plans to fit their needs. Wagner asked if that information would be available to the City; Krohn said that she can gather data on what other comparable municipalities are doing, along with any information they are willing to share, to make a better determination of how to proceed. Discussion took place regarding the RFP, process and proposals.

The committee decided to review the submitted proposals and discuss at the next meeting. No motion was made on this item.

Discussion and Possible Action Approving Creation of Lab Technician Position in Wausau Water Works (1 FTE).

Lindman explained that this would be a new position within the department. Wagner quickly explained to the committee that they are to determine if a new position is needed, not determine if the City can afford it, as that is

the responsibility of the Finance Committee. Lindman explained that the Lab is currently run by interns who are in school and are not always available when needed. Lindman expects more regulations to affect the department in the near future, and having a full-time Lab Technician would allow the department to complete all the work required for testing, samples, reporting, etc., effectively. The Lab Technician position would eliminate the need for lab interns.

Motion by Neal to approving creation of Lab Technician position in Wausau Water Works (1 FTE). Second by McElhaney. Lindman said that the position is funded through the utility, not through the levy. It was determined that this item does not need to be approved by the Finance Committee. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving Creation of Administrative Assistant II Position in Wausau Water Works (1 FTE).

Lindman explained that this added position would be with the Water Department. This position would help with reporting, logging, day-to-day operations, as well programs that are currently contracted out. This position would be responsible for monitoring and tracking various programs. Wagner asked if this position is funded the same as the Lab Technician position; Lindman said yes.

Motion by Gisselman approving creation of Administrative Assistant II position in the Wausau Water Works (1 FTE). Second by Smith. No further discussion. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving Elimination of the Senior Sewer Maintainer Position and Approving Creation of the Sewer Maintenance Supervisor Position in Wausau Water Works (1 FTE).

Wagner asked if this item was to change the title of the position. Lindman explained that he began looking at the organization of the department in 2015 and that the superintendent was the supervisor for everyone at the Wastewater Plant. Lindman said that having the superintendent supervise all the employees is not efficient; he would like to take the Senior Sewer Maintainer and the Senior Plant Mechanic positions and change them into supervisory positions. Lindman said that when the positions are rewritten they will be advertised. Neal asked how the position would change; Lindman said that the position would be gaining responsibilities and allowing the superintendent to manage the plant as a whole rather than trying to supervise maintainers.

Motion by Gisselman approving elimination of the Senior Sewer Maintainer position and approving creation of the Sewer Maintenance Supervisor position in Wausau Water Works (1 FTE). Second by Smith. No further discussion. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving Elimination of the Senior Plant Maintenance Mechanic Position and Approving Creation of the Wastewater Plant Operations Supervisor Position.

Lindman said that this is the same situation as the request for the creation of the Sewer Maintenance Supervisor position, only on the Wastewater Plant side.

Motion by Neal approving elimination of the Senior Plan Maintenance Mechanic position and approving creation of the Wastewater Plant Operations Supervisor position. Second by McElhaney. No further discussion. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving the Creation of a Deputy Chief Position and the Elimination of a Patrol Captain Position in the Police Department.

Hardel explained that the department used to have a Deputy Chief position and it was eliminated about three years ago to flatten the department's organization. Hardel said that the current organization of the department is not working; when he is not there, a Captain who specializes in either patrol or detective is often left to make decisions for another bureau. Hardel said that he needs someone who is able to oversee all department operations. Smith said that he agrees with the request to eliminate any interruptions in the command structure. A question was posed by Neal as to the duties that would fall on the Deputy Chief. Hardel said that the Deputy Chief would continue to have some of the patrol duties, as well as the other bureaus. Wagner said that the change sounds like

a great opportunity for staff to develop and have the opportunity to learn, and be viable candidates for when positions become open.

Motion by Neal to approve the creation of a Deputy Chief position and eliminate a Patrol Captain position in the Police Department. Second by Smith. Gisselman asked if there will be a national search to fill the position. Hardel responded that it will be an internal search. Gisselman asked if there is a reason why a national search will not be done. Hardel said that he has been developing staff internally ever since he became Chief, and there are two Captains that will be available for the promotion. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving Creation of two (2) Administrative Positions Within the Police Department (each .5 FTE).

Barnes said that the department has been overwhelmed with clerical work. The department has hired summer help from college students to try to ease the load, but it has not been the answer. Barnes explained that the Wausau Police Department has 3 clerical staff; in 2012 they did a survey of comparable agencies and found that they had the lowest number of clerical staff per officer. In 2015, Krohn did a survey with comparable agencies within the state and Wausau is still the lowest in clerical support staff. Barnes explained how the workload has increased over the years due to an increase in call volume, requests, and also the new technology that the department is utilizing. Barnes said they are requesting 2 part-time positions for cost savings; 1 full-time position would cost the department and City more for benefits. Barnes shared that the department paid \$17,000 in 2013 for overtime, in 2014 the cost for overtime was \$34,000, and \$23,000 in overtime in 2015. Barnes believes that if the positions are approved for the department that overtime will be eliminated.

Motion by Smith to approve the creation of two (2) Administrative positions within the Police Department (each .5FTE). Second by Neal. No further discussion. All ayes. Motion passes 5-0.

Discussion and Possible Action Approving Creation of a Youth Safety Coordinator Position (Civilian) in the Police Department (.25 FTE).

Barnes said that Officer Pilsner recently retired; she spent most of career working on youth safety initiatives. After Pilsner's retirement, the department was left to figure out who would have time to fill the gap left. Pilsner is currently back at the department on a temporary/seasonal basis to take care of the youth safety initiatives; she runs Safety City, a 2-week program that educates young kids on bike safety, stranger safety, how to cross the street, and other things. She also works with schools and the Safety Patrol program; this requires working with each school, training the kids, events and educational programs. Lastly, Pilsner is a master trainer for car seat installation and safety, and also helps run the computer systems for the distracted driver simulators.

Motion by Neal to approve the creation of a Youth Safety Coordinator position (civilian) in the Police Department. Second by Smith. No further discussion. All ayes. Motion passes 5-0.

Discussion and Possible Action on Authorizing Research and Analysis of Options for the Provision of Assessment Services.

Wagner explained that the City Assessor position has not been filled since the retirement of Giese, and now two other positions are vacant. Wagner said this provides an opportunity to discuss how to put the department back together or look at other options, including privatization or a hybrid model of City staff and contracting services. Giese introduced Hampson to provide the committee with information on in-house assessment versus contracting services. Hampson began speaking to the committee regarding the Assessment Department during the last 6 months. Wagner asked Hampson to stop when it became evident that the information being provided was off topic. Jacobson explained that recruitment was done for the City Assessor position this summer; an offer was made that had to been withdrawn. The position was advertised again and 2 applications were received. Jacobson said that now is a good time to decide how the committee wants to proceed. She went on to say that she has contacted Stevens Point to find out how they provide services with a staff/contract system in place. Neal said that he would be interested in finding out more about what other municipalities are doing and how it's working for them; saying that the information should be available to the City without having to hire a consultant. Gisselman

questioned why the committee should look at other options when the current structure seemed to be working fine. Wagner said that because of the 3 vacancies, it is an opportune time to re-evaluate the needs of the City and look at options available. The committee could choose to keep the structure the same or take a different direction. Jacobson in response to Gisselman's question, explained that Giese submitted her notice of retirement in December of 2015; the former mayor decided to study the topic of departmental organization in January and not replace the City Assessor position at that time; Council authorized a study by NTC to conduct an efficiency and organizational study, beginning with the Assessment Department. The study never took place due to staff leaving NTC. Therefore, the topic of options for the Assessment Department was first brought up in January of 2016. Wagner suggested a committee of City staff research what other municipalities are doing. Wagner also suggested that a temporary contractor may need to be hired to fill in what's not getting done with 3 vacancies in the department.

Future Agenda Items.

Items from Lindman regarding wage increases for consideration.
Employee handbook.
FLSA laws and compliance.

Adjournment. Motion by Smith to adjourn. Second by Neal. All ayes. Motion passes 5-0. Meeting adjourned.

Romey Wagner
Human Resources Committee, Chair

BELOIT

*Included in packet

RFP released 9/30/16; Due 10/28/16

Term of Contract with Tyler Technologies from 1/1/17 – 12/31/19 (3 years) (second term following 1/1/14 – 12/31/16)

Exhibit A* – Options and Costs

- Assessor II on site 2 days per month - \$39,500 – 2017; \$37,000 – 2018; \$37,000 – 2019
- Assessor II on site 2 days per month January – June and 1 day per month July – December – \$33,500 – 2017; \$32,000 – 2018; \$32,000 – 2019
- Maintain two in house staff – 1 appraiser and 1 technician, supervised by Director of Finance and Administrative Services

Exhibit C* – Scope of Work

FOND DU LAC

RFP* released 11/9/11; Due 12/2/11

Term of Contract* with Grota Appraisals, LLC, 2/1/12 – 12/31/16 (almost 5 years)

- Grota employees (at least one, and sometimes two) maintain regular office hours on site from 7:45 a.m. -4:30 p.m., Monday through Friday; additional hours for Open Book and Board of Review (the entire function is contracted out)
- Grota designates a Project Manager to supervise Grota's staff and report directly to the City's Director of Administration

Compensation: \$230,000 – 2012; \$248,000 – 2013; \$250,000 – 2014; \$252,000 – 2015; \$254,000 – 2016;
City Wide Revaluation \$237,600

OSHKOSH

Term of Contract with Tyler Technologies from 11/1/14 – 10/31/15 (1 year), with options to extend for two additional one-year periods, through 10/31/17 (Tyler hired for Commercial Appraisal Services 4 years ago; following retirement of Assessor, promoted staff Appraiser to Deputy Assessor, contracted with Tyler to provide statutory Assessor duties)

Schedule A* – Annual Assessment and Commercial Services to be provided

- Assessor II on site 8 hours per week to provide guidance to staff and perform other duties of Statutory Assessor
- Measure, list, conduct interior inspections on up to 350 commercial class properties that have applied for a building permit during the previous year, were valued as a partial assessment or were sold during the previous year

- City staff: 1 FTE Deputy Assessor, 3 FTE residential appraisers, .8FTE Assessment Tech, 1 Office Asst., supervised by Deputy Assessor
- Contracted: City Assessor (\$40,000 annually), Commercial Appraiser (\$45,000 annually)

Schedule B* – Additional Services at Time and Materials rate of \$560.00 per person per day

Compensation: \$79,900 first year; \$81,400 second year; \$82,900 third year; Revaluation \$130,000 spread over 2016 and 2017

SHEBOYGAN

RFP released 9/25/15; Due 10/22/15

Term of Contract with Grota Appraisals, LLC, 1/1/16-12/31/18 (3 years); options to extend for 1 year intervals (staff assessor stayed until 4/1/16; had 6 staff employees, including an assessor; contractor hired assessor and 4 of 5 remaining employees; two former staff employees on site 8-5, M-F, one of which is office support/technician)

- Grota employees maintain regular office hours on site from 8:00 to 5:00, Monday through Friday; additional hours for Open Book and Board of Review
- Grota designates a Project Manager to supervise Grota's staff and report directly to the City's Chief Administrative Officer

Compensation: \$270,000 – 2016, 2017, 2018 (the same for each year); City-Wide Revaluation \$280,000

STEVENS POINT

RFP released ____; Due 9/27/13

Term of Contract* with Forward Appraisal, LLC, 1/1/13 – 6/30/15 (2.5 years)

- Statutory Assessor on site 8 hours per week from 7:30 – 4:00 p.m.

Compensation: \$50,000 – 2014; \$50,000 – 2015; total contract price - \$100,000

Accurate Appraisal LLC, Menasha: (Jim Danielson)

Examples of Current Contracts:

City of DePere – Market revaluation in 2016 – 7,500 improved properties = \$60,000

Town of Menasha – full 100% physical inspection revaluation in 2017 – 6,000 improved properties = \$234,000

City of Cudahy – four year contract with an annual revaluation to maintain 100% market value on all properties while physically inspecting 25% of the properties each year – 5,900 improved properties = \$70,000 annually

City of Beaver Dam – same contract as Cudahy – 5,500 improved properties = \$60,000

*The tradeoff in cost savings is having less staff available less of the time and communicating with the vendor by phone or e-mail.

Grota Appraisals, LLC: (Michael Grota)

*opined that it would be a mistake to contract out the entire assessment office function to a contractor. Too many moving parts exist with making that move, installing a new Assessor, new assessment staff, new CAMA software. Any one of these changes takes time and effort to achieve a desirable outcome. Keeping the current assessment staff would be critical to running a successful assessment office if the City decided to pursue a contract City Assessor.

City of Madison staff (former Grota employee): (Jim Young)

Both the municipal budget and the assessment administration contract set the framework for the scope of work that can be completed by assessment staff each year and/or over a planned set of years. By their nature, assessment contracts with outside firms typically have a more limited expectation regarding the scope of annual work/tasks to be performed than the typical expectations for an in-house assessor. The WI DOR has provided a guide for municipal officials to consider when determining how they will facilitate and fund proper assessment administration in their jurisdiction.

See: 2016 Property Assessment Process Guide for Municipal officials

<https://www.revenue.wi.gov/DOR%20Publications/pb062.pdf> (first 12 pages printed)



2016
Property Assessment Process
Guide for Municipal Officials

Prop 062 (R. 1-16)

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I. Introduction

The Wisconsin Department of Revenue (DOR) is responsible for tax law administration while the local taxation jurisdiction is responsible for valuation and tax collection. This document provides information on how to contract for assessors' services.

This publication provides general information, not legal advice. Municipal officials should consult with the municipal attorney when contracting for services.

II. Property Taxes and Property Assessments

A. Property taxes fund functions of government and education:

- Municipalities
- Counties
- Public Schools
- Technical Colleges
- State Reforestation
- Special Districts (sewer and lake rehabilitation)

Property assessments are the values placed upon taxable real and personal property by the assessor. An assessment determines the portion of property tax that will be due from the property.

Property assessments are based upon the amount that a typical purchaser would pay for the property under ordinary circumstances. An exception is agricultural property that is assessed based upon its value in an agricultural use. Assessments should be uniform "at the full value which could ordinarily be obtained therefore at private sale" (sec. 70.32, Wis. Stats.). This is considered full value.

B. Classes of property are assessed

At 100 percent of full value, 50 percent of full value or use-value:

1. 100 percent of full value:

- Residential
- Commercial
- Manufacturing (state-assessed)
- Productive forest land
- Other (farm buildings and farm sites)
- Personal property

2. 50 percent of full value:

- Undeveloped land
- Agricultural forest land

3. Use-value:

- Agricultural land

III. Assessment Standards

Assessors are required to follow state law, case law and the Wisconsin Property Assessment Manual (WPAM). Other information is available for assessors to consider, including the Uniform Standards of Professional Appraisal Practice (USPAP) and standards from the International Association of Assessing Officers (IAAO).

The WPAM specifies technical, procedural, and administrative practices. It also defines procedures, policies, legal decisions, and assessor performance expectations.

Sec. 73.03, Wis. Stats., provides the authority for preparing the WPAM. The law requires the Wisconsin Department of Revenue (DOR) to prepare a manual that "shall discuss and illustrate accepted assessment methods, techniques and practices with a view to more nearly uniform and more consistent assessments of property at the local level." It goes on to say "The manual shall be amended by the department from time to time to reflect advances in the science of assessment, court decisions concerning assessment practices, costs, and statistical and other information deemed valuable to local assessors by the department."

Annual Assessment Report (AAR)

The AAR explains how the assessor completed the assessment work in the municipality. Assessors are required to complete an AAR for each municipality. Ample modifiable notes sections are throughout the report for assessors to explain their unique situations. The report must be completed within 30 days of the final adjournment of the Board of Review.

AAR Addenda has specific information, unique to each municipality. Unlimited attachments can be added to the report and easily transferred to DOR. Attachments can include:

1. Sales used in the analysis (and sales not used)
2. Neighborhood and market area maps and spreadsheets
3. Improved valuation and land models
4. Names and qualifications of those providing significant assistance
5. Copy of contract or work agreement
6. Copy of Notice of Changed Assessment
7. Copy of Assessor's Affidavit

IV. Assessment Process

A. Municipal assessor is responsible for the assessment process

1. Discover – all real and personal property is subject to tax unless exempted by law
2. List – property characteristics determine value
3. Value – determine the value subject to property tax

B. Assessor certification

State law requires assessors to be certified by DOR. Certification involves an exam that tests the individuals' knowledge of appraisal and assessment law and administration. While there is no formal training required, assessors must show that they have acquired the knowledge essential to do a satisfactory job through successful completion of the certification exam.



In addition, many full time assessors in Wisconsin are active in professional organizations with established professional standards for assessors and appraisers.

The municipally employed assessor and the independently contracted assessor and their staffs (except clerical help) must possess current assessor certification at the appropriate level.

Five levels of assessor certification:

- Assessment Technician
- Property Appraiser
- Assessor 1
- Assessor 2
- Assessor 3

Before beginning work, assessors must take an oath of office with the municipal clerk, as provided by state law ([sec. 19.01, Wis. Stats.](#))

C. Assessment of property

Wisconsin has an annual assessment. This means that each year's assessment is a new assessment. The assessor is not obligated to keep the same assessment each year. The assessor may change an assessment because of building permits or sales activity even if he or she did not inspect your property.

The law requires that property be valued from actual view or from the best information that can be practicably obtained. An interior inspection results in a better quality assessment. It is not always possible to conduct interior inspections.

If a property owner denies entry to view the property, the assessor sends a certified letter requesting entrance to the property to view it. If the property owner still refuses admittance, the assessor values the property using the best evidence available. This is commonly referred to as a doornage assessment. After this type of assessment, the property owner cedes their right to appeal before the BOR.

1. Sale of the property

- When a property sells, the assessor must review the sale
- Assessor verifies the facts surrounding the sale to determine if it is an arm's-length sale and usable for assessment purposes, this may include an interior inspection of the property
- Assessor uses sales to update assessments in a municipality when conducting a revaluation ([see page 14](#))

2. New construction and improvement maintenance

- Under state law, the assessment must be based on the market value of the improvement. The assessor looks at how much the total value of the building and land changed due to the improvement. The cost may not be the true measure of any change in market value. However, under many circumstances, a prudent property owner will calculate the change in value due to remodeling approximates the cost of such work. If there is an increase in market value, it should be reflected in an increase in assessed value.
- If a building is under construction as of January 1, the best way for the assessor to get this information is with an on-site inspection and recording the data on the appropriate property record card
- On-site inspection reveals new or remodeled improvements not previously recorded
- If the property owner started new or remodeled improvements before January 1 (the assessment day) and finished after January 1, the assessor must find out how much was completed as of January 1 and value the uncompleted improvements along with the existing improvements as of that date
- Normal home repairs and maintenance generally prevent property values from falling and usually do not warrant a change in the assessment

Example:

A property is worth \$90,000. As of January 1, the property owner started an addition, but only has a foundation. The property should be appraised at the \$90,000 plus the value of the foundation as of January 1. In such a case, the value of the foundation should be determined by the construction cost and could possibly be verified with construction receipts or the building permit.

D. Equitable assessment

If your property's assessment ratio is similar to the assessment level of the taxation district (see [Definition of Terms](#) section of this guide), then your assessment is equitable. To determine your property's assessment ratio, divide your property's assessed value by your property's current market value.

$$\frac{\text{Your Property's Assessed Value}}{\text{Current Market Value of Your Property}} = X\%$$

To make a sound decision, you must know your property's assessed value, current market value and the assessment level of the taxation district.

1. Sources of information are listed below:

- Property's assessed value is recorded in the assessment roll and is shown on your tax bill
- Purchase price is usually the best evidence of market value if you have recently purchased the property
- Sale price of other property comparable to yours is the next best evidence of market value
- Professionally prepared appraisal is a reliable estimate of market value
- Assessment level of the taxation district – to view, contact the assessor
- Estimated fair market value of your property (determined by dividing your assessment by the assessment level) is shown on your tax bill

2. Assessment compliance

- State law recognizes the difficulties in maintaining annual full value assessments and requires each municipality to assess property within ten percent of full value at least once every five years
- State law requires uniform assessments of and between each property class. Each major class must be within ten percent of the other major classes at least once every five years. A major class is defined as having more than 5 percent of the full value of the taxation district. For purposes of this law, the only classes considered are residential, commercial, personal, and the sum of undeveloped, agricultural forest, productive forest and other.
- DOR orders a state-supervised assessment after seven consecutive years of non-compliance

E. Assessment classification

State law requires the assessor to classify land on the basis of use. Classification is important since it affects the assessed value.

Eight statutory classifications for real property are:

1. Residential (Class 1) – [sec. 70.32\(2\)\(c\)3., Wis. Stats.](#)

- Any parcel or part of a parcel of untilled land that is not suitable for the production of row crops, on which a dwelling or other form of human abode is located
- Vacant land where the most likely use would be for residential development
- Mobile homes assessed as real property are classified as residential
- Apartment buildings of up to three units are also classified as residential

2. Commercial (Class 2)

- Land and improvements primarily devoted to buying and reselling goods
- Includes the providing of services in support of residential, agricultural, manufacturing, and forest uses

3. Manufacturing (Class 3)

- State law ([sec. 70.995, Wis. Stats.](#)), provides for the state assessment of manufacturing property
- Contact the manufacturing district office (revenue.wi.gov/contact/sfdoc.pdf) for information on qualifying uses

4. Agricultural (Class 4)

- [Sec. 70.32\(2\)\(c\)1g, Wis. Stats.](#), as "land, exclusive of buildings and improvements, which is devoted primarily to agricultural use.
- Land devoted primarily to the production of crops (excluding forestry operations) or the keeping, grazing, or feeding of livestock for the sale of livestock or livestock products
- Buildings and dwellings associated with growing, production, and associated services enumerated above are classified as "Other" (Class 7)
- [Agricultural Assessment Guide for Wisconsin Property Owners](#) provides classification examples

5. Undeveloped (Class 5) – [sec. 70.32\(2\)\(c\)4, Wis. Stats.](#)

- Areas commonly called marshes, swamps, thickets, bogs, or wet meadows
- Fallow tillable land (assuming agricultural use is the land's highest and best use),
- Road right of way, ponds, depleted gravel pits
- Land because of soil or site conditions is not producing or capable of producing commercial forest products

6. Agricultural forest (Class 5m)

- [Sec. 70.32\(2\)\(c\)1d, Wis. Stats.](#), defines agricultural forest as land that is producing or is capable of producing commercial forest products, if the land satisfies any of the following:
 - » The forest land is contiguous to a parcel that has been classified in whole as agricultural land. The forest land and the contiguous agricultural parcel must have the same owner. Contiguous includes separated only by a road.
 - » The forest land is located on a parcel that contains agricultural land for the January 1, 2004 assessment, and on January 1 of the current assessment year.
 - » The forest land is located on a parcel where at least 50 percent of the acreage was converted to agricultural land for the January 1, 2005, assessment year or thereafter
- The [Agricultural Assessment Guide for Wisconsin Property Owners](#) provides classification examples

7. Productive forest land (Class 6) – [sec. 70.32\(2\)\(c\)2, Wis. Stats.](#)

- Land, which is producing, or capable of producing commercial forest products. Forest land cannot include buildings and improvements.
- Forested areas which are being managed or set aside to grow tree crops for "industrial wood" or to obtain tree products such as sap, bark, or seeds
- Forested areas with no commercial use made of the trees, including cutover
- Cherry orchards, apple orchards, and Christmas tree plantations are classified as agricultural property
- Lands designated Forest Crop Land and Managed Forest Land by the Department of Natural Resources are entered separately in the assessment roll
- Improvements on Forest Crop Lands and Managed Forest Land are to be listed as personal property (secs. [77.04\(1\)](#), and [77.84](#), Wis. Stats.)
- Forested areas primarily held for hunting, trapping, or in the operation of game preserves, should be classified as forest unless clearly operated as a commercial enterprise or exempt

8. Other (Class 7) – [sec. 70.32\(2\)\(c\)1m, Wis. Stats.](#)

Buildings and improvements on a farm (such as houses, barns, and silos, along with the land necessary for their location and convenience)

F. Notice of changed assessment

According to state law ([sec. 70.365 Wis. Stats.](#)), whenever an assessor changes the total assessment of any real property (or any improvements on Managed Forest Land that are taxed as personal property under [sec. 77.84\(1\), Wis. Stats.](#) by any amount, the owner must be notified. However, failure to receive a notice does not affect the validity of the changed assessment.

The notice must be in writing and mailed at least 15 days (30 days in revaluation years) prior to the Board of Review (BOR) meeting (or meeting of the Board of Assessors (BOA) if one exists). The notice contains the amount of the changed assessment and the time, date, and place of the local BOR (or BOA) meeting. The notice must include information notifying the owner of the procedures to be used to object to the assessment. The notice requirement does not apply to personal property assessed under [Chapter 70](#).

G. Assessing at fair market value every year

State law recognizes the difficulty in maintaining full value assessments under state law ([sec. 70.32, Wis. Stats.](#)), for non-agricultural property classes. The compliance requirements under [sec. 70.05\(5\), Wis. Stats.](#), mentioned earlier in this guide, require monitoring by DOR and that your municipality meet specific assessment levels for major property classes at least once every five years.

The state Constitution requires that assessments of real property (non-agricultural and non-undeveloped) as a class and personal property as a class must be uniform. Therefore, if your assessment contract does not require subsequent annual assessments at the full value standards set by [sec. 70.32, Wis. Stats.](#), new assessments based on recent sales or new construction costs, for example, may need to be equated to the municipal level of assessment.

It is worth noting, therefore, that assessment level and assessment quality can be related directly to the contractual agreements made between the municipality and the assessor.

Full Value Law (Section 70.05(5), Wis. Stats.)

An example of how DOR monitors compliance under the seven-year cycle.

- **2009 2010 2011 2012 – Monitor Level**
If one or more of the major classes, except agricultural, are not within 10 percent of Equalized Value once in those years, DOR sends notice in October, 2011 that the municipality must achieve compliance the following year (2012) or the assessor must receive training in 2013
- **2013 – Monitor Level**
DOR orders assessor training, in October, 2012, to be taken the following year (Summer of 2013), if one or more of the major classes, except agricultural, did not come into compliance
- **2014 – Assessor Receives Training**
If compliance is met in year of training, new cycle begins, but training must still be taken
- **2015 – Monitor Level**
DOR orders revaluation for following year (2015), if one or more of the major classes, except agricultural, is not in compliance in either this or the previous year
- **2016 – State Supervised Revaluation Completed**

H. Assessment work

Professional assessment practice includes a variety of duties and resources. Under Wisconsin law, many duties are required annually. Law will impose some duties, professionalism will demand others. The thoroughness with which some tasks are approached can vary, depending on the available resources. Therefore, you must decide what is desired for your municipality and spell it out in the contract. You must understand what is needed, and what level of service is acceptable. Each duty and a definition of each associated task should be detailed in the contract with the assessor/assessment firm.

Following are some examples of tasks that will require clear identification in the contract, and the resources required to complete:

- | | |
|--|--|
| 1. Office space, furniture, phone lines, copies and supplies | 14. Other manuals to be used |
| 2. Insurance and bonding | 15. Safes analyses |
| 3. Forms and photographs | 16. Assessment Notices |
| 4. Travel reimbursement | 17. Personal property and mobile homes |
| 5. Training of assessment staff | 18. Agricultural use-value |
| 6. Public relations | 19. Use-value conversion fee administration |
| 7. Clerical, mail and reception duties | 20. Appeals involvement |
| 8. Improvement sketching and parcel identification | 21. Final assessment data and format |
| 9. Mapping (new legal descriptions and parcel combinations) | 22. Storage |
| 10. Building permit listing and other discovery | 23. Computers |
| 11. Data collection and format | 24. Data conversion and transfer (ex: to and from county) |
| 12. Inspection cycle and project timeline | 25. Reports to DOR (ex: TIF/TID reporting, Municipal Assessment Report, Exempt Computer) |
| 13. Wisconsin Property Assessment Manual, Vol. 1 | |

In each instance, the contract should spell out what is expected. A good contract will also leave no question as to who furnishes it, who pays for it, who performs it, and when the task will be done. Examples of contracts are included near the end of this booklet.

I. Assessment data ownership

Municipal assessment data is the property of the municipality. When the municipality changes assessors, the assessment data remains with the municipality.

One question that arises frequently pertains to the ownership of computerized or electronic data, particularly when the departing assessor holds the software license. If your assessment record system is computerized, the contract should, at a minimum, provide that the software be able to create an exportable text file of the data. This text file could then be left with the municipality, along with a field definition file to describe the various data fields in the text file. Proprietary information, such as the program, would not be required to be left with the municipality under this scenario, merely the data collected on each real estate parcel and personal property account, in a format that the municipality will be able to utilize for subsequent assessment years.

Information for real property parcels must include, but is not limited to, parcel number, owner's last name, owner's first name, owner's address, city, state, and zip code, property address, legal description, total acres, assessment data by property class to include class, acres in that class, land assessment, improvement assessment. Similar information will be required for Managed Forest, Private Forest Crop and exempt parcels (excluding value information on exempt parcels). Fields containing descriptive data for improvements would also be required. The intent is that the data provided will be sufficient for the municipality to create a complete property record card for each parcel. Personal property data would include owner's last name, first name, mailing address, property location, class of personal property, and value.

Professional practice further implies the inclusion of all neighborhood descriptions, as well as mathematical models, table look-ups, algorithms and transformations developed for the municipality by the assessor, which were used to convert the data into the assessed values.

J. Assessment cycle timetable

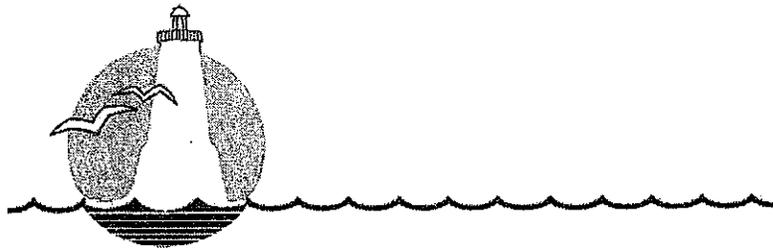
Period or Date	Activities or Comment
January 1 *	Statutory assessment date
.	• Statement of personal property forms sent
December/January	<ul style="list-style-type: none"> • Statement of personal property forms sent • Occupational tax forms sent • Prior year's sales reviewed
January 1 – March 1	As returned forms are received, date, and office audit all forms. Note any address and/or owner changes.
February 1	Non-filer notice sent to occupational tax accounts
February – end of	Assessments for sales to be included on preliminary Ratio Report entered. All assessments are submitted on-line through the Provide Assessment Data (PAD) system at Wisconsin Web Access Management System.
February 15	Locally assessed parcels that are going to be assessed by DOR, Manufacturing, should be transferred before this date.
March 1	<ul style="list-style-type: none"> • Due date of Statement of Personal Property and Exemption forms • Non-filer notice should be mailed to Personal Property non-filers • Filers of unacceptable reports will be contacted for additional information
March – middle of	DOR releases Ratio Report. Assessor reviews for unusable sales, incorrectly posted assessments and typos.
March – end of	Last date to submit assessment information for prior year sales in PAD to be included in final Ratio Report. Assessor should contact Equalization District Office with changes to previously submitted PAD assessment information.
April 1	Electronic Municipal and Tax Incremental District (TID) computer exemption forms which are available this date.
March – April	<p>Agricultural classifications are reviewed for any changes. Finalize value and enter into the roll. Send notice of changed assessment to the following:</p> <ul style="list-style-type: none"> • Doomages • New accounts • All Accounts with changed assessments
May – on or before 1st Monday	Assessment roll are completed and submitted to the Municipal Clerk. Assessment roll open for public inspection.
May 2	Stratified assessment data is due to Equalization District Offices (feedback on economic changes in district). Form is available on the DOR website.
May – 2nd Monday**	Assessor signs affidavit in assessment roll and attends BOR. **BOR shall meet during the 30-day period beginning the second Monday of May. If the initial Municipal Assessment Report (MAR) was estimated, a final version must be filed within 10 days of the completion of the BOR.

Period or Date	Activities or Comment
June – 2nd Monday	<ul style="list-style-type: none"> • Due date for Municipal Assessment Report (MAR) • Information is used for the August 1st preliminary Equalized Values, the August 15th Equalized Values and current year's net new construction for levy limits • Due date for TID Assessment Report. If no report is filed, there will be no change to increment (non-manufacturing).
June – 2nd Monday*	Municipal and TID exempt computer reports must be filed on or before this date. Failure to file the electronic form by the second Monday in June results in taxation districts forfeiting the opportunity to receive a municipal or TID exempt computer reimbursement.
August 1	Due date for any amended electronic Exempt Computer Report, provided the original report was timely filed by May 1. The final information determines the current year's computer aid payment.
August 1	Equalized Values released.
September – October	For next year's assessment cycle, obtain <u>personal property forms</u> from County Clerk. Or refer property owners to the online form available on DOR's website.
September – December	<ul style="list-style-type: none"> • For next year's roll, check occupancy, prepare names and addresses of personal property accounts. Add new accounts, do address changes, and remove accounts that moved out of district or went out of business. Make note of vacant business locations. • For next year's assessment cycle, compile building permits, maps, real estate transfer returns, analyze sales data, obtain market, cost and income data, formulate a plan for viewing properties
November 1*	Non-compliance notices sent to municipalities after DOR checks Major Class Comparison status.
December 1	<ul style="list-style-type: none"> • Letter sent to municipal clerk if final version of MAR has not been filed • Final MAR must be submitted
* Statutory Requirement	

REQUEST FOR PROPOSAL
FOR
ASSESSMENT SERVICES
FOR THE
CITY OF FOND DU LAC, WISCONSIN

ISSUED NOVEMBER 9, 2011

DUE DATE: DECEMBER 2, 2011, AT 11:00 AM



**CITY OF FOND DU LAC
REQUEST FOR PROPOSAL FOR
ASSESSMENT SERVICES**
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I. INTRODUCTION

Purpose of Document

The City of Fond du lac is requesting proposals (RFP's) from qualified assessment firms to provide annual assessment services for the City of Fond du Lac, Wisconsin (hereafter, referred to as "City") for the years 2012 (final eleven months) through 2016. The City is seeking a firm to serve as its statutory assessor and to provide annual maintenance work in a competent, timely, efficient, cost effective and customer service-oriented manner.

Background Information

The City, with a 2011 population of 43,075, is located in Fond du Lac County. The 2011 Equalized Value (including manufacturing and TID) for the City is \$2,696,595,500. The City has eight active Tax Incremental Financing Districts. The assessment ratio for 2010 was 0.966035006.

The City has the following parcel counts (from 2010 Statement of Assessment):

	<u>Total Land</u>	<u>Improvements</u>
Residential	13,382	12,708
Commercial	1,264	1,094
Manufacturing	104	102
Agricultural	159	0
Undeveloped	58	0
Agricultural Forest	6	0
Forest Lands	6	0
Other	<u>2</u>	<u>2</u>
Total	14,981	13,906

Personal Property Accounts: 2,085. Personal Property includes buildings on leased land, double-wide mobile homes and boathouses.

A City-wide market revaluation was completed in 2010.

Due Date of Proposal

Proposals are due in City Administrative offices to the attention of Eileen Baus, Purchasing Agent, by 11:00 AM on December 2, 2011. The effective date when the contract work is to begin is February 1, 2012.

Cost of Information Preparation

The costs of developing and submitting a proposal, discussions required to clarify items related to the proposal, and/or future interviews is entirely the responsibility of the applicant. All proposals and other information provided to the City become the property of the City. The City reserves the right to use such proposals and other material or information and any of the ideas presented therein without cost to the City.

Acceptance/Rejection Process

The City may schedule discussions with firms submitting proposals if it becomes necessary to clarify elements of the proposal. The City will award the contract for

assessment services based upon the proposal that the City determines is in the best interests of the City.

The City reserves the right to reject any and/or all proposals received. The City will reject any proposal that does not meet all of the terms, services and conditions requested in this RFP.

Amendments and Withdrawal

The City reserves the right to amend or withdraw this RFP at any time at its sole discretion prior to the due date of the RFP. If it becomes necessary to amend any part of the RFP, an addendum will be provided. **Responders must include acknowledgment of all addenda as part of the RFP.** Any withdrawal is effective upon issuance of such notice.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the respondent of the conditions contained in this RFP, unless clearly and specifically noted in a subsequent contract between the City and the firm selected.

Questions/Surveying Premises

No pre-proposal meetings shall be scheduled. Questions regarding desired services or general operations are to be directed to Eileen Baus, Purchasing Agent, at (920) 322-3454. All site visits must be scheduled in advance and confirmed by contacting the Purchasing Agent by phone or e-mail (ebauss@fdl.wi.gov).

Applicants are encouraged to carefully inspect the community and facilities of the City, and judge for themselves, the circumstances affecting the cost of the work and the time requirements for its completion. Failure to do so will not relieve the assessor of the obligation to furnish and perform the work, to carry out the provisions of the contract or to complete the contemplated work for the consideration set forth in the proposal in a timely manner.

Term of Engagement

This proposal is for the term beginning February 1, 2012 and expiring December 31, 2016.

II. TIME REQUIREMENTS

The following is a list of key dates up to and including the date proposals are due to be submitted:

Request for proposal issued:	November 9, 2011
Due date for proposals:	December 2, 2011 (11:00 a.m.)
Selected firm notified (anticipated):	December 16, 2011
Coverage beginning date (no later than):	February 1, 2012

III. 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 and in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue. The assessor shall designate a qualified and responsible employee to supervise the operation of the assessor'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 project supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

The assessor shall report to and be accountable to the City's Director of Administration or his/her designee. The assessor shall meet with the Director of Administration on a regular (weekly) 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. Assessor and his/her City-approved designee will maintain regular office hours at the Fond du Lac City-County Government Center, 160 South Macy Street from 7:45 AM to 4:30 PM Monday through Friday (as further explained in paragraph 22). Additional hours should be planned after assessment notices are sent out, during the open book review, and prior to the Board of Review.
3. The assessor shall be responsible all assessment related clerical duties including:
 - Answering routine telephone calls
 - Walk-in requests for assessment data
 - Assist in scheduling assessment-related appointments
 - Providing copies of all assessment-related open records requests
 - Preparing appointment mailers, stuffing envelopes and mailing all notices
 - Filing of all assessment property records cards and any other assessment-related records
 - All assessment data entry
4. Assessor will provide a local phone number for City officials and residents to contact the assessor during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
5. Assessor will field review and assess all properties that were under partial construction as of January 1st of the previous year.
6. Assessor will field review and assess new construction as of January 1st of the current year.
7. Assessor 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. Assessor 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. The assessor will field review as deemed necessary sale properties and properties for which no building permit has been issued.
10. The assessor will be diligent in discovering and assessing all personal property. Assessor will field visit all personal property accounts annually to discover new accounts and account for business that may have closed prior to the assessment year. Assessor will cross reference personal property account with the corresponding real property and parcel number.
11. The assessor 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. Assessor will collect the name and address of each personal property contact person, separate from the business name. The assessor shall provide a dooamage listing to the Director of Administration prior to open book review.
12. Assessor will account for all buildings destroyed or demolished.
13. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
14. The assessor will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
15. Assessor will process parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps and any other land divisions.
16. Assessor will take digital photographs of new construction on or about January 1st annually, and also during the review process if needed.
17. Assessor will maintain and annually update property owner lists, with current name and address changes.
18. Assessor will post assessments to real estate transfer returns and record sale information to property record cards electronically.
19. Assessor will annually update all property owner record cards with new legal descriptions electronically.
20. Assessor will be responsible for maintaining plat and section/cadastral maps on file and update yearly.
21. Assessor will mail Notice of Assessment to property owners and others as required by State Statutes.

22. Assessor will conduct open book sessions in accordance with Wisconsin State Statutes. Assessor 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. The assessor shall notify the local press for publication prior to open book.
23. The assessor 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 assessor shall work with the City Clerk to arrange for the hearings. The assessor will attend the Board of Review hearings, serve as City staff at the hearings and defend the assessor's valuations and work products. The assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.
24. The assessor shall update the City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
25. The assessor will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
26. The assessor will value all mobile homes as required by law.

27. The assessor will value all boathouses as required by law.
28. Assessor will coordinate with the Fond du Lac County Real Property Listing office to facilitate the digital and manual transfer of data and values.
29. Assessor will provide a website that will be linked to the City's website to place the computer property assessment records on the web for access to the public.
30. The assessor shall update market values on City owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
31. The assessor shall also perform all other duties incidental to the normal duties of the assessor.
32. The assessor will be required to provide 100% performance bond or stand-by letter of credit to the City prior to the start of the contract in the amount of the full contract price.
33. All assessment files and records created and data collected by the assessor shall remain the property of the City. Records shall not be removed from City premises without the written permission of the City.
34. The assessor shall be available to attend, upon the request of the Director of Administration, department head, City Council or other prescribed meetings upon reasonable prior notice. Such meetings are expected to average two (2) hours per month.

35. The assessor shall communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. The assessor 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.
36. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
37. All assessment personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.
38. The assessor is not permitted to assign, subcontract or transfer the work without the written permission of the City.
39. All 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.
40. The assessor will provide and update 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.

41. The assessor shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the assessor's employees to be unsatisfactory, the assessor shall remove such employee(s) from working for the City upon written request from the City.
42. 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 City, listing the City 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
43. The assessor agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as assessor's records in process under this agreement which are in possession of the assessor. The assessor shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the City.

44. The assessor 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 assessor to Fond du Lac County on the County's forms, and the roll shall be totaled to exact balance between the county and the assessor. The assessor shall prepare and submit the Municipal Assessment Report (MAR) and the TID Assessment Reports to the Department of Revenue in a timely manner.
45. The assessor shall insure that employees maintain strict confidence 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.
46. The assessor shall supply all necessary office machines and equipment such as, but not limited to, computers, calculators, typewriters, adding machines, and copy machines.
47. All office supplies, postage, cards and other materials and supplies necessary to perform the duties of the contract shall be the responsibility of the assessor.
48. The successful assessor shall be required to execute a contract with the City that incorporates the information included in this RFP.

IV. ASSESSMENT SOFTWARE

The City of Fond du lac owns and uses MAS assessment software marketed by Tyler Technologies. All of the initial setup work has been completed (names, addresses, current and prior assessment values and class, and sales data). The City would prefer the assessor use and maintain assessment data in the current software system. The current assessment software has the following attributes/abilities:

1. Have statistical package that includes descriptive statistics and regression analysis. The firm 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. Has the ability to electronically export the completed assessment role to the Fond du Lac County Real Property Listing office in the format required. This eliminates any manual data entry of the completed roll.
5. The ability to import "start-up data" from the Fond du Lac County Real Property Listing office. This would also be used to set up the City's computerized system, to avoid time/cost consuming initial data entry. Typical imported data would include owners name(s), mailing address, parcel address, legal description, parcel number, etc.
6. Building permit record keeping.

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.
14. Assessor will annually provide the City with a copy of the database used, together with file maps and descriptions, and all associated digital photos. This database will become 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.

V. CITY OBLIGATIONS

1. The City shall furnish adequate space at the Fond du Lac City-County Government Center at no cost to the assessor. Office space may include desks, tables, chairs, file cabinets, heating, lighting, telephone and janitorial services, but shall not include other office machinery, equipment and computers.
2. The City shall allow access by the assessor 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.
3. The City shall furnish the name and address of the owner and the block and lot number size or other identifying description of each parcel to be appraised.
4. 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.
5. The City shall furnish the name and correct address, if know, to the assessor for notices to be sent for changes in assessed values.

6. The City shall aid the assessor with a reasonable promotion of public information concerning the work under this agreement.

VI. GENERAL PROPOSAL REQUIREMENTS

1. Five (5) copies of proposal shall include no more than twenty-five (25) pages, 8 ½ inches by 11 inches. At least one proposal shall be unbound and single sided.
2. All proposals must identify the firm name, address and specific assessment service 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 revaluation process; identify experience with assessment evaluation of potential tax-exempt properties, demonstrate accuracy of assessment work.
3. Complete and submit a copy of Exhibit A with your proposal. Please, list only Wisconsin municipalities with a population greater than 20,000 for which your firm currently provides assessment services. Please indicate whether your firm provides the municipality with general annual assessment services, revaluation services, or both.
4. 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 for assessment years 2011, 2012, 2013, 2014 and 2015, beginning not later than February 1, 2012. The City will pay the annual compensation pro-rata on a monthly basis.
5. Proposals shall clearly list the fee for each year of the proposed contract (2012, 2013, 2014, 2015 and 2016) in a not-to-exceed sum to include all of the assessor's costs including but not limited to: labor, materials, supplies, equipment, transportation costs, meals, lodging, computer software and Board of Review expenses. All expense reimbursements will be the responsibility of the firm.
6. The assessor will be allowed to propose alternate office hours to those specified in the RFP if significant savings and/or benefits may result for the City as part of an alternate quote. However, the basic proposal must include all stated requirements in this RFP including staffing for the regular office hours listed in the RFP.
7. The assessors shall provide a cost for a future revaluation of City property. The assessor shall have successfully completed a revaluation in a municipality of similar size and stature. The assessor shall have Assessor Level II or higher staff competent to perform such a revaluation of commercial and residential property.
8. 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.
9. The proposal shall identify five references from Wisconsin municipal clients of a size similar to the City of Fond du Lac for which the assessor 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, address and business phone number of the contact person.

10. Assessors shall provide a detailed resume of the person or persons assigned as the City's statutory assessor/point of contact for the work to be performed.
11. 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 the assignment.
12. Assessors are advised to carefully inspect the community, the assessment records and facilities of the City of Fond du Lac 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 the consideration set forth in this bid on a timely basis.
13. The assessor is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
14. The successful assessor will have five years' experience in Wisconsin municipal government assessing, including re-evaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
15. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the RFP and is the most advantageous to the City of Fond du Lac considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received.
16. If a proposal is accepted, the assessor shall provide a certificate of insurance naming the City as additionally insured for the purposes of general and professional liability protection. Said certificate shall be in a form and amount acceptable to the City Attorney.

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 and employees while performing acts ostensibly 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.

Limits of Liability shall not be less than:

- a) Worker's 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.

17. This proposal may not be withdrawn for a period of sixty (60) days after the date and time set for the opening of bids. Any company may withdraw its proposal at any time prior to the submittal deadline.

VII. OTHER INFORMATION

The "sealed" original and five (5) copies of the Assessment Services Proposal must be received at the address listed below by no later than 11:00 AM on December 2, 2011. Sealed envelopes shall be marked: Assessor Services Proposal

Proposals shall be submitted to:

Eileen Baus
Purchasing Coordinator
City of Fond du Lac
160 South Macy Street
PO Box 150
Fond du Lac WI 54936-0150

VIII. EVALUATION CRITERIA

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

1. Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the City of Fond du Lac.
2. Past experience with providing assessment and revaluation services.
3. Ability to provide and maintain a computerized database of property assessment records.
4. Demonstration of a high level of accuracy in assessment work for municipal clients.
5. Cost of Assessment Services.
6. Evidence of positive customer interaction.

IX. FINAL SELECTION

The City Manager of the City of Fond du Lac will select an assessment firm based upon the recommendation of the Director of Administration. It is anticipated that a firm will be selected on approximately December 5, 2011. Following notification of the respondent selected, it is expected a contract will be executed between both parties prior to December 31, 2011. It is anticipated that the work under the contract will begin on February 1, 2012. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected.

X. RIGHT TO REJECT PROPOSALS

By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the City of Fond du Lac is binding and without appeal.

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

Exhibit A
City of Fond du Lac
Request for Proposal for Assessment Services
List of Current Wisconsin Municipal Assessment Clients over 20,000 Population

Name of Municipality	Population	Equalized Value	General Assessment Services	Revaluation Services
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Name of Firm: _____

Address of Firm: _____

Signature of Preparer: _____

**CLIENT SERVICE AGREEMENT
("AGREEMENT")**

THIS CLIENT SERVICE AGREEMENT made and entered into this 26th
day of June, 2012, by and between:

CITY OF FOND DU LAC, a Wisconsin Municipal corporation in the State of Wisconsin, with its principle office located at 160 S. Macy Street, Fond du Lac, WI 54935 and referred to in the Agreement as "City",

-and-

GROTA APPRAISALS, LLC, hereinafter called "GROTA", a limited liability corporation formed under the laws of the State of Wisconsin located at N88 W16573 Main Street, Menomonee Falls, WI 53051 and qualified to do business in the State of Wisconsin, herein after referred to as "GROTA,"

W I T N E S S E T H

WHEREAS, the City wishes to Agreement for Assessment services from GROTA; and

WHEREAS, GROTA wishes to provide Assessment services to the City.

NOW, THEREFORE, in consideration of the promises, covenants, terms and conditions hereinafter contained and other good and valuable consideration the receipt and sufficiency thereof the parties hereby acknowledge, the parties agree as follows:

1.0 TERM AND TERMINATION

- 1.1 The term of this Agreement shall be from February 1, 2012 to December 31, 2016, which may be extended for one year intervals with the agreement of both parties. The assessor shall have completed all work under this agreement, except for appearing at Board of Review and any subsequent appearances as per this agreement, on or before the completion date referred to in the Agreement. The date of completion may be extended, if necessary, under the terms of this Agreement and by mutual consent .
- 1.2 Either party may terminate this Agreement only with cause, cause being defined as default of the other party of terms of this Agreement upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to Fond du Lac all records and materials in Assessor's possession used or created during this Agreement. During the

60-day wind down period, both Assessor and Fond du Lac shall act in good faith with each other and cooperate in the orderly transfer of records.

- 1.3 Either party may request of the other party a renewal or extension of this Agreement anytime after the first term by giving written notice on or before July 1 beginning in 2016, which decision shall be accomplished by September 1 beginning in 2016. If neither party provides written notice, the Agreement will automatically renew.
- 2.0 **INCORPORATED BY REFERENCE.** GROTA replied to a REQUEST FOR PROPOSAL for Assessment Services for the City of Fond du Lac, Wisconsin dated November 4, 2011, hereinafter known as "RFP". The RFP dated November 4, 2011 and GROTA's Proposal dated November 28, 2011 are by this reference incorporated herein as if set out in full. If there is a conflict between the RFP, GROTA's proposal and this Agreement, this Agreement is controlling. If this Agreement is silent on an issue that is covered by the RFP and GROTA's Proposal, the RFP is controlling. Where an issue or matter is covered only by GROTA's Proposal and does not conflict in any way with this Agreement or the RFP, then GROTA's proposal is controlling.
- 3.0 **SERVICES TO BE PROVIDED** The prescribed duties of GROTA shall include, but not necessarily be limited to the following:
 - 3.1 **Conformance to statutes.** All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with all the rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue (DOR).
 - 3.2 **Oath of Office.** GROTA shall be required to take and subscribe to an oath or affirmation supporting the Constitution of the United States and of the State of Wisconsin and to faithfully perform the duties of assessor. If GROTA is a corporation or partnership, the person(s) designated as responsible for the assessment shall comply with the above. The oath shall conform to sec. 19.01, Wis. Stats. and be filed with the municipal clerk prior to undertaking any of said duties.
 - 3.3 **Assessment manual.** GROTA shall make all assessments in accordance with the property assessment manual as specified in secs. 70.32 and 70.34, Wis. Stats.
 - 3.4 **Accurate parcel identification.** GROTA shall review all legal descriptions as listed in the assessment roll for imperfections to include, but not

restricted to errors, incorrect acreages, omissions, overlap, or failure to close. In the event that such discrepancies exist, GROTA shall correct or cause the same to be corrected in conjunction with Fond du Lac County-

- 3.5 Preparation of record cards.** GROTA shall prepare individual record cards or computer-generated data sheets for each parcel to be valued on forms currently approved by the DOR. If GROTA and/or municipality shall have reason to use forms not currently approved, such use shall be contingent upon DOR approval. Record cards shall be completed for each parcel, labels with the property owners name and address as provided in sec. 70.17, Wis. Stats., and the following information as listed in the assessment roll: legal description of the property, parcel number and size of land parcel when available.
- 3.6 Hours.** GROTA employees shall maintain regular office hours at the Fond du Lac City-County Government Center, 160 South Macy Street from 7:45 AM to 4:30 PM Monday through Friday, except on City-designated holidays. There will be additional hours for Open Book and prior to the Board of Review, as necessary.
- 3.7 Clerical Duties.** GROTA shall be responsible all assessment related clerical duties including:
- Answering routine telephone calls and e-mails
 - Fulfill walk-in requests for assessment data
 - Assist in scheduling assessment-related appointments
 - Providing copies of all assessment-related open records requests
 - Preparing appointment mailers, stuffing envelopes and mailing all notices
 - Filing of all assessment property records cards and any other assessment-related records
 - All assessment data entry
- 3.8 Office Space.** The City shall furnish adequate space at the Fond du Lac City-County Government Center at no cost to GROTA. Office space may include desks, tables, chairs, file cabinets, heating, lighting, telephone and janitorial services, but shall not include other office machinery, equipment

and computers.

- (1) GROTA will provide a local phone number for City officials and residents to contact GROTA during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
- (2) GROTA shall supply all necessary office machines and equipment such as, but not limited to, computers, calculators, typewriters, adding machines, and copy machines. All office supplies, postage, cards and other materials and supplies necessary to perform the duties of the Agreement shall be the responsibility of GROTA.
- (3) GROTA shall pay to the City the sum of \$1,225 per quarter for the rental of existing computers (4), the use of existing copier and the use of existing printers (2) and the support thereof from the city's IT staff

3.9 Specific Services.

- (1) Field review and assess all properties that were under partial construction as of January 1st of the previous year.
- (2) Field review and assess new construction as of January 1st of the current year.
- (3) 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.
- (4) Field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning and other miscellaneous permits as needed.
- (5) Field review as deemed necessary sale properties and properties for which no building permit has been issued.
- (6) GROTA will collect the name and address of each personal property contact person, separate from the business name. GROTA shall provide a doornage listing to the Director of

Administration prior to open book review.

- (7) Account for all buildings destroyed or demolished.
- (8) Implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
- (9) GROTA will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
- (10) Process parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps and any other land divisions.
- (11) Take digital photographs of new construction on or about January 1st annually.
- (12) Maintain and annually update property owner lists, with current name and address changes.
- (13) Post assessments to real estate transfer returns and record sale information to property record cards electronically.
- (14) Annually update all property owner record cards with new legal descriptions electronically.

4.0 NOTICE OF ASSESSMENT. Mail Notice of Assessment to property owners and others as required by State Statutes.

5.0 BOARD OF REVIEW

- 5.1 GROTA will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to May of each year. GROTA shall work with the City Clerk to arrange for the hearings. GROTA will attend the Board of Review hearings, serve as City staff at the hearings and defend GROTA's valuations and work products. GROTA will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.

- 5.2 GROTA shall update the City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
- 5.3 GROTA will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
- 5.4 Value all mobile homes and all boathouses as required by law.
- 5.5 Coordinate with the Fond du Lac County Real Property Listing office to facilitate the digital and manual transfer of data and values.
- 5.6 Provide a website that will be linked to the City's website to place the computer property assessment records on the web for access to the public.
- 5.7 Update market values on City owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values. Values will be provided to the City by no later than October 1 of each year.
 - 5.7.1 City to pay GROTA (pass through to Assessment Technologies) for enhanced property data display (full public property record card) the sum \$625.77 per quarter.
- 5.8 Perform all other duties incidental to the normal duties of the assessor.

6.0 MEETING REQUIREMENTS

- 6.1 Upon reasonable prior notice, the Project Manager shall upon the request of the Director of Administration, City Manager, Department Head, or City Council attend City Council meetings that average two (2) hours per month or other prescribed meetings upon reasonable notice.
- 6.2 GROTA agrees to meet monthly or upon request, with the Director of Administration and/or the City Council to discuss areas of work such as, but not limited to progress, procedures, valuations, and problems.
- 6.3 If a DOR-ordered assessment or reassessment occurs, GROTA agrees to meet with the DOR upon request.

- 7.0 **APPROACHES TO VALUE.** GROTA shall consider the cost, market, and income approaches in the valuation of all vacant and improved parcels of property by computer assisted means.
- 7.1 GROTA shall collect and analyze all available sales data for the City of Fond du Lac 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. Data gathered shall either be noted on the property record cards, or contained within supplements to the records (e.g. copies of real estate transfer returns, leases, computer-generated data sheets, etc.). All data so gathered shall become and remain the property of the City.
- 7.2 Sales analysis shall include sales identified on an appropriate map (section, subdivision, etc.), analysis and verification for time adjustments, neighborhood boundaries and descriptions and other (agricultural) improvements. It may be necessary, as part of the analysis, to field visit a sale and measure and list the improvements of the properties that have sold using computer-assisted means.
- 7.3 In valuing income producing properties, where appropriate, GROTA 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.
- 8.0 **IMPROVEMENTS - DATA COLLECTION.** GROTA shall accurately measure to the nearest foot all improvements and prepare a complete outline sketch to scale (top view) of the major buildings showing all additions, porches, and appendages with dimensions and necessary identifications on the property record cards.
- 8.1 GROTA shall photograph all residences, and all major commercial improvements and all major buildings on agricultural land classified as other while performing onsite inspections.
- 8.2 GROTA shall inspect the interior of a *minimum* of 90% of the major buildings of each class of improvements, noting both the interior and exterior features on the proper record card to provide an accurate and complete listing for each improvement. The actual number of

improvements to be inspected for each class shall be determined by applying the above percentage to the final improvement count for each respective class. This applies to a revaluation where interior inspections are required.

- 8.3 In those instances where a minimum inspection of 90% is unattainable due to the nature of the properties to be valued and the time of the year, an alternate minimum shall be so specified in the addenda of the standard Agreement, such minimum to be established by the City. This applies to a revaluation where interior inspections are required.
 - 8.4 In those instances where a minimum inspection of 90% of the major buildings of each class of improvements is not considered adequate, an alternate minimum shall be specified in the addenda of the standard Agreement. This applies to a revaluation where interior inspections are required.
 - 8.5 The date of inspection or listing of all major buildings shall be indicated on the record cards.
 - 8.6 Upon failure to gain entrance to a major building after reasonable attempt, GROTA shall attempt to contact the property owner or occupant by ordinary mail to arrange an appointment for the purpose of viewing and listing the interior.
 - 8.7 If GROTA's request to list a major building is refused by the owner or occupant, GROTA shall make a request by registered mail to inspect the building; such written request shall state the purpose of the inspection, the desired time of inspection and shall advise the owner or occupant that their refusal shall constitute a loss of appeal of the assessment to the local board of review and further appeal avenues; should the requests to inspect major buildings be denied, GROTA shall list and value the improvements according to the best information practicably obtainable.
- 9.0 **IMPROVEMENT VALUATION - COST APPROACH.** GROTA shall value improvements in accordance with *Wisconsin Property Assessment Manual*, using generally acceptable appraisal practices and cost manuals and computer-generated costs.
- 9.1 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 or other cost manual, with proper base costs selected as appropriate for each improvement and adjusted base building costs.

- 9.2 In using the cost approach for other (agricultural) outbuildings, the current replacement costs should be determined for all buildings. Buildings in poor condition having little or no value shall be physically described and listed as having "no value" or given an appropriate sound physical value.
- 9.3 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.
- 9.4 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.
- 9.5 All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence, must be accurately documented by the market and deducted from current replacement costs.
- 9.6 All improvements shall be valued at market value as of January 1.
- 9.7 **Data collection – land.** GROTA shall gather and note on the property record card or computer-generated data sheet for each parcel information including, but not limited to size, area, frontage, width, depth, shape, topography, productivity, site improvements, utilities, access, zoning and location. This information shall include a land sketch.
 - (1) GROTA shall collect data concerning sales of land and sales of improved parcels which may indicate the residual value of land. From these and other sources the appraiser shall become familiar with land values throughout the City.

- 10.0 **VALUATION - LAND.** Unit value ranges per acre for each grade of fallow agricultural land, agricultural forest land, 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% 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 City.

- 10.1 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 (usevalue 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 City thru our GIS system, and shall be left with the City, along with classification and unit values documentation.
 - 10.2 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.
 - 10.3 Having determined basic unit values GROTA 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.
 - 10.4 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.
 - 10.5 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.
- 11.0 **VALUATION, ASSESSMENT OF TAXABLE PERSONAL PROPERTY.**
Taxable personal property shall be valued and assessed by the statutory assessor in compliance with Chapter 70, Wisconsin Statutes and with recommended procedures in Volume 1 of the *Wisconsin Property Assessment Manual*.
- 11.1 The assessor shall compile an updated list of all personal property accounts in Fond du Lac.

- 11.2 To aid in determining the amount and value of personal property used in the production of income, the assessor shall require such property owners to furnish information on personal property forms as to the value of personal property owned by them or in their possession as provided in sec. 70.35, Wis. Stats. Such forms shall be mailed or delivered to property owners by the assessor. Completed forms received by the assessor shall be verified for accuracy in content and checked for arithmetic and procedural errors. In the absence of a completed form, the assessor shall field check the account, along with any other questionable accounts.
- 11.3 The 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, including the value of exempt computers and completing all necessary forms in relation thereto. GROTA will be diligent in discovering and assessing all personal property. GROTA will field visit all personal property accounts annually to discover new accounts and account for business that may have closed prior to the assessment year. GROTA will cross reference personal property account with the corresponding real property and parcel number.
- 11.4 All forms used in the valuation of personal property shall be approved by DOR and shall be left with the City.
- 12.0 **FINAL FIELD REVIEW.** Prior to Open Book, GROTA shall make a final field review. Each parcel shall be reviewed at the property location. In the final review process, the indicated value of the structure 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. This applies to when a revaluation is performed.
- 13.0 **OPEN BOOK.** Upon completion of the assessment process outlined above, but prior to the completion of the assessment rolls, GROTA shall hold Open Book appointments for the purpose of enabling property owners or their agents

to review and compare the assessed values.

- 13.1 The City of Fond du Lac shall designate the place for Open Book with both the Director of Administration and appraiser mutually agreeing upon the date(s) and hours. Open Book shall include evening hours in the year a revaluation is performed.
 - 13.2 GROTA shall conduct Open Book in accordance with Wisconsin State Statutes. GROTA shall prepare a written statement regarding Open Book dates, times, and instructions on how to set up an appointment for an Open Book, at least fifteen (15) days prior to the first Open Book. GROTA shall notify the local press for publication prior to the Open Book.
 - 13.3 GROTA shall 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 form prescribed by the Department of Revenue for notice required under sec. 70.365, Wis. Stats. GROTA shall also indicate on the notice, or attach to the notice, the time, date, and place the Open Book will be held. Expenses related to the notices, excluding form supply, but including preparation of the forms and postage, shall be paid by GROTA.
 - 13.4 Open Book shall be held within the completion date specified in the Agreement. In the event the City requests that Open Book be held at a date beyond the Agreement completion date, and provided GROTA agrees to such, the Agreement shall be extended commensurate with the lapse of days between the originally Agreement completion date, and the revised date for Open Book. Such extension shall be in writing and signed by both the City and GROTA.
- 14.0 **COMPLETION OF ASSESSMENT ROLL.** GROTA shall be responsible for the proper completion of assessment rolls according to current statutes. GROTA shall where necessary enter into said rolls all newly established assessments, both real and personal, and the names of those to whom personal property is assessable; each roll shall also be totaled to exact balance by GROTA. For computer prepared assessment rolls, it shall be sufficient for GROTA to provide a list of all assessments at market value in the format required for data entry.
- 14.1 Final assessment figures for each property shall be provided by GROTA to Fond du Lac County on the County's forms, and the roll shall be totaled to exact balance between the County and GROTA. GROTA shall prepare and submit the Municipal Assessment Report (MAR) and the TID

Assessment Reports to the Department of Revenue in a timely manner.

15.0 **BOARD OF REVIEW: SUBSEQUENT APPEARANCES.** GROTA and/or responsible member(s) of GROTA'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.

15.1 In the event of appeal to the DOR or to the courts, it is agreed that the appraiser and/or qualified representative(s) 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.

GENERAL AGREEMENTS

16.0 **PERSONNEL/EMPLOYMENT.** All personnel providing services shall be currently certified in compliance with secs. 70.055 and 73.09, Wis. Stats. and the administrative rules prescribed by the DOR.

16.1 GROTA shall review any complaint relative to the conduct of his employee(s). If Fond du Lac deems the performance of any of GROTA's employees to be unsatisfactory, GROTA shall, for good cause, remove such employee(s) from work upon written request from the Director of Administration, such request stating reasons for removal.

16.2 GROTA shall designate a Project Manager qualified and responsible employee to supervise the operation of GROTA's staff for the entire Agreement period. The individual shall be certified at a minimum as an Assessor II. The individual designated as such shall be available to the City for the entire Agreement. Should the Project Manager be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

16.3 The designated **Project Manager** for the City of Fond du Lac will be James Young. The Project Manager shall report to and be accountable to the City's Director of Administration or his/her designee. The Project Manager shall meet with the Director of Administration on a regular (weekly) basis to discuss the progress of the work and to review the data and the reports completed.

16.4 **Confidential.** GROTA shall ensure that employees maintain strict confidence regarding all privileged information received by reason of this

Agreement.

- 16.5 GROTA shall comply with all the applicable provision of Federal and Wisconsin laws, rules and regulations regarding employment and shall further specifically comply with those sections related to Equal Employment Opportunity.
 - 16.6 GROTA is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
 - 16.7 All assessment personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.
 - 16.8 GROTA will provide and update the City with a listing of all personnel assigned. All personnel shall be approved and copies of each employee's certificate shall be supplied to the Director of Administration within 30 days of assignment to the City.
- 17.0 **INSURANCE.** GROTA shall maintain insurance coverage to protect against claims, demands, actions and causes of action, arising from any act or omission of GROTA, 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 Fond du Lac. Limits of liability shall not be less than:

Worker's Compensation - Statutory

Bodily Injury:

Per Person \$ 100,000
Per Occurrence \$ 300,000

Comprehensive Auto Liability Including: Non-Ownership Coverage:

Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit.

Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence,

combined single limit.

- 18.0 **INSURANCE - VALUABLE PAPER.** GROTA agrees to carry proper and sufficient insurance to cover loss of municipality's records withdrawn from municipality for appraiser's use as well as appraiser's records in process under this agreement which are in possession of GROTA.
- 19.0 **PUBLIC RELATIONS.** During the course of the revaluation GROTA shall carry on a suitable program of public information in a manner dictated by experience to be the most effective and productive and of such a nature in which to allow Fond du Lac to actively participate. The City shall aid GROTA with a reasonable promotion of public information concerning the work under this agreement.
- 20.0 **DIRECTOR OF ADMINISTRATION TO BE INFORMED.** Appraiser shall make a reasonable explanation to the director of administration or his designee throughout the revaluation in the use of procedures, standards, and records used for making property appraisals.
- 21.0 **INFORMATION TO THE DEPARTMENT OF REVENUE.** GROTA shall complete and submit to the Supervisor of Equalization:
- 21.1 The Municipal Assessment Report when the revaluation is completed or upon completion of the assessment roll(s). If work is in progress on the second Monday in May, a tentative report shall be submitted on the status of the real estate and personal property existing as of January 1. The tentative report shall be submitted by June 1. The report shall provide the following information relating to real estate: increases in valuation due to annexations, new construction, property formerly exempt and now assessed, losses in value due to annexation, demolitions, and property becoming exempt and shifts in class. For personal property the report shall provide information on estimated values of all personal property by class. A completed final Municipal Assessment Report shall be filed at the end of the revaluation in addition to this tentative report. If reports were estimated, the final reports must be submitted to both the City and DOR within seven (7) days after completion of the board of review.
- 21.2 A list showing the value of any buildings on leased land and whether they are assessed as real estate or personal property, as well as the use and occupancy of each. Such list shall be submitted to the City upon completion of the assessment roll(s).

- 22.0 INDEMNITY.** GROTA shall indemnify, save, and hold harmless the City and all of its officers, agents, and employees, from any and all claims for losses, injuries, damages and liability to persons or property occasioned wholly or in part by the acts or omissions of GROTA, his agents, officers, employees, guests, patrons, or any person or persons admitted to said premises while said premises are used by or under the control of GROTA. Indemnity shall apply to situations or circumstances where current Wisconsin State Statutes may not fully make correction.
- 23.1** GROTA has already started work under this Agreement, GROTA has, or will have obtained all insurance required under this Agreement within 15 days after acceptance of this contract by both parties. A certificate of insurance shall accompany the signed Agreement and shall be filed with the City Clerk as proof of such insurance, which shall not be cancelled without thirty (30) days written notice to the insured and the City. All insurance premiums shall be the obligation of and shall be paid by GROTA.
- 23.2** GROTA shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of GROTA, their agents and employees in the execution of work. Further, GROTA shall be responsible for any and all of their agents while performing acts under the terms of this Agreement. 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.
- 23.0 OWNERSHIP OF DATA.** All assessment files and records created and data collected by GROTA shall remain the property of the City. Records shall not be removed from City premises without the written permission of the City.
- 24.0 LOSS OF RECORDS.** GROTA agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as GROTA's records in process under this Agreement which are in possession of GROTA. GROTA shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the City.
- 25.0 ASSESSMENT RECORDS.**
- 25.1** The City shall allow access by GROTA 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.

25.2 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.

25.3 The City shall furnish the name and correct address, if know, to GROTA for notices to be sent for changes in assessed values.

26.0 **COMPENSATION.** Payments will be made based on work performed. GROTA will invoice the City as work is performed. Payments will be based on work performed and the annual payment schedule shown below:

\$230,000 - 2012.

\$248,000 - 2013.

\$250,000 - 2014.

\$252,000 - 2015.

\$254,000 - 2016.

26.1 **Compensation upon effort.** The compensation is based upon effort required to complete the work under this agreement in an acceptable manner, and not upon the whole value or any part of the value of Fond du Lac.

26.2 **Method and terms of payment for this Agreement.** Payment for services rendered under the Agreement shall be on a monthly basis. The monthly statements shall reflect the percentage of work completed less ten percent (15%) retainage by the City. The prior year's retainage shall be paid on or before January 31 of the following year. (ie. 2012 retainage of \$34,500 would be paid by January 31, 2013)

26.3 All statements shall be submitted to the Director of Administration on the first day of each month for services performed the preceding month. After review and procuring any needed corrections therein, the Director of Administration shall endorse his/her approval and promptly pay such statements.

26.4 All compensation paid to GROTA shall be by check mailed to the address indicated in the Agreement.

27.0 CITY-WIDE REVALUATION:

Market Update to 100%	\$237,600
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27.1 In the near future the City may be required to/or choose to perform a City-wide revaluation to achieve uniform and equitable assessments and compliance with 70.05 of the Wisconsin Statutes. At the time of revaluation, GROTA Appraisals will apply a discount to the revaluation services Agreement to allow for any and all duplication with the annual assessment services Agreement.

27.2 Costs are all inclusive, no additional charges for extra time, effort, additional parcels, annexation, office supplies, printing and mailing for the performance of the Agreement are included.

27.3 That in the event the revaluation cannot for any reason be completed within the time originally specified, GROTA shall provide written notification to the municipality, stating the reasons for not completing the revaluation by the Agreement completion date, so that the situation may be timely remedied and the revaluation completed in substantial compliance with law.

28.0 TURN OVER OF RECORDS. Within 14 days of the final adjournment of the board of review, GROTA shall turn over to Fond du Lac:

- (a) all records prepared for the revaluation including, but not limited to property record cards, personal property forms, maps and any other schedules or forms; and
- (b) all records and materials obtained from the municipality 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 Fond du Lac under Agreement to include aerial photos, maps, depth factor tables, copies of leases and copies of real estate transfer returns; and
- (d) if your assessment system is computerized, at a minimum, provide that the software be able to create an exportable text file of the

data. This text file shall then be left with Fond du Lac, along with a field definition file to describe the various data fields in the text file.

- 29.0 INDEPENDENT CONTRACTOR.** GROTA is not permitted to assign, subcontract or transfer the work without the written permission of the City.
- 30.0 CONFLICT OF INTEREST.** GROTA covenants that it has not public or private interest, and will not acquire directly or indirectly any interest that would conflict in any manner with the performance of its services. GROTA warrants that no part of the total Agreement amount proceed herein shall be paid directly or indirectly to any officer or employee of the City as wages, compensation, or gifts in exchange for acting as office, agent, employee, subcontractor, or consultant to GROTA in connection with any work contemplated or performed relative to this Agreement.
- 31.0 GOVERNING LAWS.** This Agreement shall be interpreted under the laws of the State of Wisconsin, as it existed and was interpreted on the date of this Agreement.
- 32.0 ENTIRE AGREEMENT.** This Agreement contains the complete and entire Agreement between the parties and may not be altered or amended except in writing, executed, making specific references to this Agreement, by a duly authorized officer of GROTA and by a duly authorized office of the City.
- 33.0 SEVERABILITY.** If any provision of this Agreement shall be declared invalid or unenforceable, such invalidity or unenforceability shall not affect the whole Agreement, but the whole Agreement shall be construed as if not contained in the provision, and the rights and obligation of the parties shall be construed and enforce accordingly, provided same is not of a material nature and does not substantially affect the work performed or the cost.
- 34.0 SOVEREIGN IMMUNITY.** The City of Fond du Lac is a governmental entity entitled to governmental immunity under law, including Section 893.80, Wis. Stats. Nothing contained herein shall waive the rights and immunities to which each party may be entitled under law, including all of the immunities, limitations and defenses under Section 893.80, Wis. Stats., or any subsequent amendments thereof, any federal law, common law or other applicable laws.
- 35.0 NOTICES.** Whenever in the Agreement it shall be required or permitted that notice shall be given, such notices shall be forwarded by certified mail, return receipt requested, and addressed as follows:

To City:

City Clerk
City of Fond du Lac
160 South Macy Street
Fond du Lac WI 54935

To GROTA APPRAISALS, LLC:

GROTA Appraisals, LLC
N88 W16573 Main Street
Menomonee Falls, WI 53051

or to such other place as the parties may designate in writing. Notice given in accordance with these provisions shall be deemed given one day after deposited by the sender, postage prepaid, certified mail, return receipt requested.

IN WITNESS WHEREOF, the said parties have hereunto set their hands and seals this 26th day of JUNE, 2012.

GROTA APPRAISALS, LLC

BY: _____

Michael L. Doto, Member
Michael L. GROTA, Member GROTA Appraisals, LLC

BY: _____

CITY OF FOND DU LAC, WISCONSIN

BY: _____

Wayne Rollin
Wayne Rollin,
Acting City Manager

ATTEST: _____

Sue L. Strands
Sue L. Strands,
City Clerk

Drafted by:
Deborah S.R. Hoffmann
City Attorney
City of Fond du Lac

OSHKOSH

**Schedule A - Annual Assessment and Commercial Services
City of Oshkosh, Wisconsin**

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SCHEDULE A - ANNUAL MAINTENANCE SERVICES

1.0 WORK TO BE PERFORMED BY THE COMPANY

SECTION I. Assessment Duties

The prescribed duties of the Company shall include, but not necessarily be limited to, the following:

- A. Provide on-site hours eight (8) hours per week by an individual or individuals certified with an Assessor II level certification in order to provide guidance to City Assessment Staff and perform other duties of the Statutory Assessor.
- B. Measure, list, conduct interior inspections on up to THREE HUNDRED FIFTY (350) commercial class properties that have applied for a building permit during the previous calendar year; were valued as a partial assessment in the previous assessment year; properties that sold during the previous year.
- C. Maintain data changes, including specific notes relating to each commercial parcel that was visited for an inspection in the City's IAS CAMA software.
- D. Review each parcel visited to determine if a valuation change and notice of assessment is warranted for each assessment year.
- E. The Company's Appraiser shall use valuation models, including land valuation models, cost models, income models and base cap rates as they exist for the January 1, 2015 assessment year or the next revaluation. Specific adjustments to individual cap rates and income stream shall be made by the Appraiser when appropriate to arrive at a uniform market value estimate. The Appraiser shall work to maintain uniformity amongst commercial structure types.
- F. The Company's Appraiser shall be available to meet with property owners during the Open Book period. The Appraiser shall also prepare for cases and defend values at

Board of Review. The City and the Company agree that the Appraiser may use time during the regularly scheduled office hours for Open Book meetings, Board of Review preparation and appearance at the Board of Review. The Appraiser shall also be available during non-regularly scheduled office hours to assist with Open Book and to prepare and defend values at Board of Review.

G. The Company shall work with the City's Information Technology Department to ensure that values balance between CAMA and Tax prior to, and again at the conclusion of, Board of Review. The final balance shall be within FOURTEEN (14) days of the conclusion of the Board of Review.

H. The Company shall work with the Director of Community Development to schedule and conduct all work under this agreement for a timely completion of the assessment roll. The Company shall complete all commercial permit work and sales verification work annually by the by the FIRST MONDAY IN APRIL in order for the Board of Review to begin the SECOND WEDNESDAY IN MAY. Commercial data collection not relating to permits or may me be completed after the conclusion of the Board of Review until the total parcels visited in the field totals THREE HUNDRED FIFTY (350) total parcels as outlined in Section 1, item B.

The Director of Community Development may extend these dates by THIRTY (30) days with written notice from the Company showing cause for the request for extension. The Common Council may extend these dates an additional THIRTY (30) days with written notice and/or a presentation from the Company showing good cause for the request for extension.

- I. Appear at subsequent appeals of Board of Review determinations for up to Two (2) years of the conclusion of the Board of Review.
- J. The Company shall complete all required assessor reports to be filed with the Department of Revenue including the Assessor's Annual Report (AAR), the Municipal Assessor's Report (MAR), the TID Annual Report (TAR) and the Exempt Computer Report (ECR).
- K. The Company shall perform a sales verification on each sale of a commercial class property and record the proper sales verification code in the City's IAS CAMA system as well as key all required information into the Department of Revenue's PAD system on commercial class sales. City staff shall be responsible for sales verifications and PAD reporting on residential class sales. The Company shall provide proper supervision and guidance to City staff on the verification and PAD reporting of residential class properties.
- L. The Company shall maintain regularly scheduled status update meetings with the Director of Community Development at the direction of the Director of Community Development or his/her designee.
- M. Provide a telephone number and email address for the Assessor, City officials and property owners to contact the Appraiser during normal business hours Monday through Friday of each week. Responses shall be made within forty-eight (48) hours.
- N. Any additional services not described in Schedule A will be provided to the City upon written request by the City specifying that additional services are requested at the Time & Materials Rates. Article 1.0 of Schedule B provides a schedule of Time and Materials rates.

2.0 SUPPORT OF ASSESSMENT SERVICE BY THE CITY

A. Office Assistance

The City shall be responsible for printing property record cards to be taken to the field for inspection and scheduling call-back appointments at no cost to the Company.

B. Computer Services

The City shall make available to the Company access to its IAS CAMA software.

C. Office Space

The City shall provide, at no cost to the Company, suitable office space and all necessary accoutrements to allow the Company to perform the functions related to commercial valuation.

D. Mailing and Postage

The City shall be responsible for the cost of all mailings and postage relating to the commercial assessments.

SCHEDULE B - ADDITIONAL SERVICES

1.0 ADDITIONAL SERVICES

Except as may otherwise be mutually agreed to, any additional services not described in Schedule A will be provided to the City upon written request by the City.

2.0 TIME AND MATERIALS RATES

FIVE HUNDRED SIXTY DOLLARS (\$560.00) PER PERSON DAY

Should the City desire a long-term assignment, the Company shall work with the City to determine whether an hourly rate or an amendment to the existing agreement with a revised scope of services is in the best interest of the City.

AGREEMENT FOR ASSESSMENT MAINTENANCE SERVICES

This Agreement is by and between the City of Stevens Point, Portage County, State of Wisconsin, a municipal corporation (hereafter "City") and Steven J. Shepro (hereafter "Assessor"), d/b/a Forward Appraisal, LLC, with his principal address of 2775 Gemini Ct., Green Bay, WI 54311.

I. PURPOSE

The purpose of this Assessment Services Agreement ("Agreement") is for Steven J. Shepro, d/b/a Forward Appraisal, LLC, to provide annual assessment services for the City of Stevens Point, Wisconsin for the years 2014 and 2015. Pursuant to the Agreement, Mr. Shepro shall serve as the City's statutory assessor and provide annual maintenance work in a competent, timely, efficient, and cost effective and customer service-oriented manner.

II. ASSESSOR'S UNDERTAKINGS

- 1) All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the Wisconsin Property Assessment Manual and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this Agreement.
- 2) The Assessor shall generally be responsible for the oversight, review and validation of assessment functions performed by the City. The Assessor shall be the statutory contracted Assessor pursuant to Wis. Stats. § 62.09(1)(a) for the 2014 and 2015 assessment years and shall ultimately be responsible for the completion and defense of all necessary documents pursuant to and in accordance with Chapter 70 of Wisconsin Statutes, as amended from time to time.
- 3) The Assessor shall be accountable to the City Council, with frequent reporting to the City's Director of Community Development or his/her designee. The Assessor shall meet with the Director of Community Development on a regular (weekly) 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 by the Assessor at any time without limitation.
- 4) The Assessor and his/her City-approved designee shall maintain regular office hours at the Stevens Point City-County Building, 1515 Strongs Avenue, Stevens Point, WI 54481, of at least eight (8) hours per week. Office hours shall be during 7:30 AM to 4:00 PM Monday through Friday. Additional hours should be planned after assessment notices are sent out, during the open book review, and prior to the Board of Review. In addition, the Assessor may be required to attend city meetings as requested.
- 5) The Assessor shall provide a phone number for City officials to contact the Assessor during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.

- 6) The Assessor shall be responsible for all listing, valuation and processing of appeals for all property classified as commercial under Wisconsin Statutes 70.32(2).
- 7) The Assessor shall oversee and assist in all assessment related clerical duties including:
 - a. Answering routine telephone calls.
 - b. Walk-in requests for assessment data.
 - c. 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. Assessment data entry.
- 8) In cooperation with the City, the Assessor shall prepare and implement standard procedures for the City staff's annual field and/or office review of real estate assessment practices to determine the validity of said practices for the functions including, but not limited to, the following:
 - a. Property Sales.
 - b. Annexations.
 - c. New construction or remodeling (as provided by permits)
 - d. New recorded plats and certified survey maps.
 - e. Property formerly exempt, now assessed.
 - f. Buildings destroyed, significantly damaged or removed (as provided by permits)
 - g. Change to higher land use
 - h. Change in classification of property
- 9) The Assessor shall review real estate valuation proposals prepared by the City utilizing the software system of the City's choice and standard cost approach techniques. The Assessor shall make recommendations as necessary for modification of property valuations.
- 10) The Assessor shall assist in the field review and assessment of all properties that were under partial construction as of January 1st of the previous year.
- 11) The Assessor shall assist in the field review and assessment of new construction as of January 1st of the current year.
- 12) The Assessor shall assist in the field visit and measurement of all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning and other miscellaneous permits.
- 13) The Assessor shall prepare for the City approval, practices, procedures and an implementation strategy to utilize an income approach for the valuation of commercial class property.

14) The Assessor shall be diligent in discovering and assessing all personal property. Assessor shall assist in the field visit of all personal property accounts annually to discover new accounts and account for businesses that may have closed prior to the assessment year. Assessor shall cross reference personal property account with the corresponding real property and parcel number. The Assessor shall review and as necessary modify personal property value recommendations prepared by the City.

15) The Assessor shall oversee the mailing out of 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. Assessor shall assist in the collection of the name and address of each personal property contact person, separate from the business name. The Assessor shall keep on file in the City Assessor's Office a doorage listing prior to open book review.

16) The Assessor shall conduct and process all Commercial Open Book reviews and any other reviews as assigned in cooperation with City staff, for all property classified as commercial under Wisconsin Statutes 70.32(2) and all waterfront property classified as residential.

17) The Assessor shall defend and/or assist on all assessment roll valuation hearings before the Board of Review. In the event of a subsequent appeal of: a Board of Review decision to the Wisconsin Department of Revenue or the Courts, the Assessor shall appear as necessary to continue their defense of any appealed value.

18) The Assessor shall be responsible for the completing and filing of all required reports to the Wisconsin Department of Revenue by the required deadline.

19) The Assessor shall assist in the accounting of all buildings destroyed or demolished.

20) The Assessor shall assist in the implementing of use value assessments of agricultural lands per the specifications set forth by the Wisconsin Department of Revenue.

21) The Assessor shall be responsible for determining whether an organization or individual meets the requirements for exemption in determining the tax exempt status of a property.

22) The Assessor shall assist in the processing of parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps, and any other land divisions.

23) The Assessor shall assist in taking digital photographs of new construction on or about January 1st annually, and also during the review process if needed.

24) The Assessor shall assist in maintaining and annually updating property owner lists, with current name and address changes.

- 25) The Assessor shall assist in providing assessment data through the Department of Revenue PAD System, and recording of sales information to property record cards electronically.
- 26) The Assessor shall annually update all property owner information with new legal descriptions electronically.
- 27) The Assessor shall assist in maintaining plat and section/cadastral maps on file and updating yearly, as provided by the Portage County Register of Deeds / Land Description Office.
- 28) The Assessor shall assist in the mailing of Notices of Assessment to property owners and others as required by State Statutes.
- 29) The Assessor shall conduct open book sessions in accordance with Wisconsin State Statutes. The Assessor 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. The Assessor shall notify the City Clerk for publication prior to open book.
- 30) The Assessor shall be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to May of each year. The Assessor shall work with the City Clerk to arrange for the hearings and defend the Assessor's valuations and work products. The Assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing while incorporating assessment modifications as approved.
- 31) The Assessor shall assist in the updating of City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
- 32) The Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
- 33) The Assessor will assist in valuing all mobile homes as required by law.
- 34) The Assessor will assist in valuing all airport hangers and buildings on leased land as required by law.
- 35) The Assessor will assist in the coordination with the Portage County Register of Deeds / Real Property Listing Office to facilitate the digital and manual transfer of data and values.
- 36) The Assessor shall also perform all other duties incidental to the normal duties of the Assessor.

37) The Assessor shall ensure that all personnel providing services requiring Wisconsin Department of Revenue Certificates shall be currently certified in compliance with Wisconsin Statutes Ch. 70 and Administrative Rules of the Wisconsin Department of Revenue.

38) The Assessor shall provide and update 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.

39) The Assessor shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the Assessor's employees to be unsatisfactory, the Assessor shall remove such employee(s) from working for the City upon written request or notification from the City.

40) The Assessor shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act of the Assessor and his agents and employees in the execution of work. Further, the Assessor shall be responsible for any and all of his agents while performing acts under the terms of this contract. Certificates of insurances by a company authorized to transact business in the State of Wisconsin shall be supplied to the City and shall list the City 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 \$1,000,000.00 per occurrence, combined single limit.
- c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000.00 per occurrence, combined single limit.

See attached Certificate of General Liability Insurance.

41) The Assessor agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as Assessor's records in process under this Agreement, which are in possession of the Assessor. The Assessor shall not be responsible for loss of records accidentally destroyed by fire theft or Act of God while kept in office space supplied by City.

42) The Assessor shall be responsible for the proper completion of the assessment roll in accordance with Wisconsin state law. Final assessment figures for each property shall be provided by the Assessor to the Portage County Register of Deeds/Land Description Office and all necessary measures and cooperation shall be exercised to balance said roll between the County and Assessor. The Assessor shall prepare and submit the Municipal Assessment Report (MAR) and the TID assessment Reports to the Department of Revenue in a timely manner.

43) The Assessor shall produce and present the Annual Assessment Report (AAR) as required by the Wisconsin Department of Revenue.

44) The Assessor shall ensure that employees maintain strict confidence regarding all privileged information received by reason of this contract. Disclosure of any appraisal information to any individual, firm, or corporation other than appropriate public officials or their authorized agents is expressly prohibited.

45) The Assessor shall present a positive, professional image in both conduct and dress while working with City staff and the public.

III. CITY'S UNDERTAKINGS

- 1) The City generally remains responsible for the administration of the assessment process and the assessment roll.
- 2) The City shall assist the Assessor as needed with the preparation of materials associated with mandatory reporting requirements.
- 3) The City shall respond to normal and customary internal and external requests for assessment information and correspondence.
- 4) The City shall provide adequate personnel to assist the Assessor in accomplishing assessment related activities. Currently, the City employs one full-time assistant assessor and one full-time assessment technician. The assistant assessor is certified as an Assessor 1 and the assessment technician is certified as such. For purposes of this Agreement, City and Assessor agree that this level of staffing is adequate.
- 5) The City shall maintain the database of photographs of real property.
- 6) The City shall conduct residential Open Book sessions in cooperation with the Assessor.
- 7) The City shall assist the Assessor with preparing necessary documentation needed to defend assessment roll valuations before the Board of Review.
- 8) City shall complete property discovery activities for both real estate and personal property.
- 9) The City, with assistance from Portage County, shall complete property listing activities for real property.
- 10) The City shall conduct preliminary valuation activities (i.e. sales, building permits, new construction) and report to the Assessor for review, validation and recommendation.
- 11) The City shall, in cooperation with the Assessor, prepare an annual assessment roll and associated notices of assessment change in accordance with Chapter 70 Wisconsin Statutes.
- 12) The City shall facilitate the automation of property records utilizing a computerized system of valuation. (GVS for 2014 roll, TBD for 2014).

13) The City shall provide the Assessor with suitable office space and all necessary accessories to perform the functions related to property assessment.

14) The City shall provide the Assessor with a cell phone and City email account to facilitate any and all calls and emails related to performance of his obligations under this Agreement.

15) The City shall provide the Assessor with a vehicle for his transportation to and from any appointments necessary

IV. GENERAL PROVISIONS

1) **INDEPENDENT CONTRACTOR.** The relationship of the Assessor to the City shall be that of an independent contractor and no principle-agent or employer-employee relationship is created by this Agreement.

2) **OWNERSHIP OF DATA.** Data collected pursuant to this Agreement is the property of the City. Data used by the Assessor in the services contemplated herein shall remain the property of the City and no use or copying shall be made thereof beyond that listed in this Agreement without the written permission of the City. The Assessor shall cooperate with the City in replying to any open records requests made pursuant to Wis. Stat. Ch. 19, Subchapter II relating to this Agreement or for services provided hereunder.

3) **INDEMNIFICATION.**

A. Except as provided below, the Assessor agrees to defend, indemnify, and hold harmless the City, its officers, agents and employees against any and all claims, demands, payments, suits, actions, recovery, and judgments of every kind and description arising out of the performance of this Agreement, for personal injury or property damage brought or recovered against it by reason of any negligent action or omission of the Assessor, its agents, or employees and with respect to the degree to which the City is free from negligence on the part of itself, its employees and agents.

B. The City agrees to defend, indemnify, and hold harmless the Assessor, its officers, agents and employees against any and all claims, demands, payments, suits, actions, recovery and judgments of every kind and description arising out of any valuation disputes, or challenges to the methodology employed under this Agreement brought or recovered against it, whether based in contract, negligence or otherwise. Neither party shall be liable to the other for consequential, indirect or incidental damages, including, but not limited to, loss of tax revenue or claims related to valuation of property, whether based in contract, negligence, strict liability, or otherwise.

4) **FORCE MAJEURE.** Neither party shall be liable to the other for any loss, damage, failure, delay or breach in rendering any services or performing any obligations hereunder to the extent that such failure, delay or breach results from any cause or event beyond the control of the party being released hereby ("Force Majeure"), including, but not limited to, acts of God, acts or omissions of civil or military authorities. If either party is prevented or delayed in the

performance of its obligations hereunder by Force Majeure, that party shall immediately notify the other party in writing of the reason for the delay or failure to perform, describing in as much detail as possible the event of Force Majeure causing the delay or failure and discussing the likely duration of the Force Majeure and any known prospects for overcoming or ameliorating it. Both parties agree to take any commercially reasonable measures to overcome or ameliorate the Force Majeure and its adverse effects on this Agreement, and to resume performance as completely as is reasonably possible once the Force Majeure is overcome or ameliorated.

5) CONFLICT OF INTEREST. Mr. Shepro covenants that he has no public or private interest, and shall not acquire directly or indirectly any interest that would conflict in any manner with the performance of his services. Mr. Shepro warrants that no part of the total contract amount provided herein shall be paid directly or indirectly to any officer or employee of the City as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor, or consultant to Mr. Shepro in connection with any work contemplated or performed relative to this Agreement.

6) PROJECT PERSONNEL. All work shall be performed by personnel certified by the State of Wisconsin, Department of Revenue. The Assessor shall provide and update the City with a listing from time to time of personnel assigned to the Project. All project personnel assigned shall be approved by the City.

7) SUBCONTRACTS. The Assessor agrees not to subcontract any of the work required by this Agreement without the written permission of the City. The Assessor agrees to be responsible for the accuracy and timeliness of the work submitted in the fulfillment of its responsibilities under this Agreement.

8) ASSIGNMENT OF AGREEMENT. The Assessor agrees not to assign, transfer, convey, sublet, or otherwise dispose of the Agreement or its rights, titles, or interest in this Agreement without the previous consent and written approval of the City.

9) GOVERNING LAW. This Agreement shall be interpreted under the substantive law of Wisconsin, as it existed and was interpreted on the date of this Agreement. In the event that the laws of the State of Wisconsin change, so as to create additional work for the Assessor not provided for in this Agreement, the City shall allow the Assessor a reasonable extension of the completion date and additional compensation to be negotiated. The methods and procedures used in performance of this Agreement shall comply with Chapter 70 of the Wisconsin State Statutes.

10) ENTIRE AGREEMENT. This Agreement contains the complete and entire Agreement between the parties and may not be altered or amended except in writing, executed, making specific references to this Agreement by the Assessor and by a duly authorized official of the City.

11) SEVERABILITY. If any provision of this Agreement shall be declared invalid or unenforceable, such invalidity or unenforceability shall not affect the whole Agreement, but the whole Agreement shall be construed and enforced accordingly.

12) NOTICES.

All notices required to be sent to Mr. Shepro shall be sent to the following address:

**Steven J. Shepro
Forward Appraisal, LLC
2775 Gemini Court
Green Bay, WI 54311**

All notices required to be sent to the City shall be sent to the following address:

**City Clerk
1515 Strongs Avenue
Stevens Point, WI 54481**

V. TERM & TERMINATION

1) **TERM.** The term of this Contract is from November 1, 2013 through June 30, 2015. The Assessor shall have completed all work under this Agreement on or before the second Monday of May or 30 days thereafter, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this contract and by mutual consent.

2) **TERMINATION.** Either party may terminate this Contract only with cause, cause being defined as default of the other party of terms of this Contract upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to the Municipality all records and materials in Assessor's possession used or created during this Contract. During the 60-day period, both Assessor and the Municipality shall act in good faith with each other and cooperate in the orderly transfer of records.

VI. COMPENSATION

For the duties and scope of services performed under paragraphs 1 – 11 of this Agreement, the City shall pay equal monthly installments to Mr. Shepro in the total amount of:

Assessment year 2014 (November 1, 2013 – June 30, 2014):	\$50,000.00
<u>Assessment year 2015 (July 1, 2014 – June 30, 2015):</u>	<u>\$50,000.00</u>

Total contract price: **\$100,000.00**

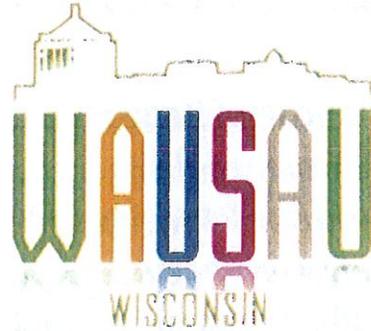
Signatures:

Steven J. Shepro
Forward Appraisal, LLC

Date

Andrew J. Halverson, Mayor
City of Stevens Point, Wisconsin

Date



City-County IT Commission

City of Wausau Assessment Department

RESPONSE DUE:

September 19, 2016

Request for Proposal

of Computer Assisted Mass Appraisal (CAMA) Software

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Exhibit A – Software Vendor Executive Summary Response Chart

Exhibit B – Vendor Exceptions to the RFP

Exhibit C – Functional Requirements Response

Exhibit D – Vendor References

Exhibit E – Implementation Staff Summary

PROJECT COORDINATOR:

Julie Henrichs

City County IT

407 Grant Street

Wausau, WI 54403

Office: 715-261-6704

E-mail: Julie.Henrichs@co.marathon.wi.us

A. Purpose of Request

The City of Wausau (City), who receives IT services from the City-County Information Technology Commission (CCITC) is requesting proposals for the purpose of obtaining a Computer Assisted Mass Appraisal (CAMA) software system and related implementation services to replace the City of Wausau's current CAMA software system. All aspects of this Request for Proposal will be in accordance with the City of Wausau Procurement Policy. A copy of the procurement policy is available on the city's website at: www.ci.wausau.wi.us or at the City Clerk's Office, 407 Grant Street, Wausau, Wisconsin 54403. The procurement policy includes prohibitions against gratuities and kickbacks.

City reserves the right to reject, in whole or in part, any and all proposals; to waive any technical deficiencies in the proposals; to accept the proposal and award final contract to the responsible Firm determined to be the most advantageous to the City. The contract shall be awarded in accordance with the terms and conditions of the Procurement Policy and the contract shall comply with Sections G and J of this Request for Proposal. This solicitation may be canceled if doing so is determined to be in the best interests of the City. Upon award of the contract, all submitted documents become subject to the Open Records Law of the State of Wisconsin.

B. Time Schedule

The City intends to procure the CAMA software in accordance with the following schedule. The City reserves the right to modify or change any part of this schedule, as necessary. The City will also entertain any recommendations regarding its planned schedule for implementing the new system.

Release RFP to vendors on State of Wi Vendornet http://vendornet.state.wi.us/vendornet/default.asp	Friday, August 26th, 2016
Vendor questions (if any) due to the City	Thursday, Sept 8th, 2016
Proposal responses due	Monday, September 19, 2016 @ 4 PM
Proposals opened at the following Board of Public Works meeting	
Reference checks, vendor visits and product presentations	September-mid November, 2016
Finalist(s) selected	Late November 2016
Negotiate contract for software and services	Early December 2016
Finance Committee & Common Council Approval	Mid December, 2016
Contract awarded	Mid December, 2016
Project commencement	January 2017
System go-live	June/July 2017

C. Proposal Provisions / Instructions to Firms

1. All responses must be addressed to, and mailed or delivered to:

City of Wausau
Attn: Julie Henrichs
407 Grant Street
Wausau, Wisconsin 54403-4783
2. Clarifications - If additional information is needed to interpret the specifications/ requirements, written questions should be directed to the project coordinator: Julie Henrichs at the above address or via e-mail Julie.Henrichs@co.marathon.wi.us. All questions must be in writing and received by the close of business (4:30 P.M. CDT) on **Thursday, September 8th, 2016.**
3. Responsibility – It is the responsibility of all Firms to carefully read the entire Request for Proposal (RFP) which contains provisions applicable to successful submission and completion of a proposal. All questions, prior to contract award, must be in writing and directed as detailed above. From the issue date of this request for proposal until contract award is made, respondents are not permitted to communicate with any employee about the subject or contents of this request for proposal except as outlined above. Violation of this provision may result in rejection of the respondent’s submission. No information provided verbally or by any other personnel will be considered binding. All respondents shall use this written document and its attachments as the sole basis for proposal at this time.
4. All proposals must be typewritten and shall be delivered in a sealed envelope or other USPS approved container and clearly marked in the lower left corner: “CAMA Software and Services”. All proposals must be received by 4:00 P.M. (CDT) on **Monday, Sept. 19, 2016.** Proposals received after that date and time will be rejected. Actual receipt is required by that time. Deposit in the mail is not sufficient. Submittals by FAX or E-mail are not acceptable and will be rejected. Proposals will not be opened publicly.
5. Submit one (1) original proposal, three (3) hard copies, and one (1) electronic copy (CD, DVD or USB) in MS Word (PDF format may be used for your proposal, brochures, and other collateral material, but not for the City’s required Word forms for response to requirements and pricing). The proposal shall be typewritten and submitted on 8 ½” x 11” papers and assembled in a 3-ring binder. It may be typed on one or both sides of the paper. If oversized sheets must be used, they shall be folded to conform to the 8 ½” x 11” size requirements. Proposals shall be signed and dated by an official authorized to bind the Firm in legal matters.
6. This request for proposal does not commit the City to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or software. The City reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this request for proposal, if it is in the

best interests of the City to do so. The City may require respondents to participate in negotiations or to submit such price, technical or other revisions in their proposals as may result from negotiations.

7. The City further reserves the right for itself and any of its agents or contractors, to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal. Such clarification can be in any form including but not limited to conference calls, email communications, Web demos, additional onsite demos or vendor headquarters visits. Finally the City reserves the right to share the RFP, proposals and any subsequent vendor provided information with any consultant of City's choosing in order to secure an expert opinion; and to make copies of proposals for evaluation purposes or as required for legal or regulatory compliance.
8. Amendments:
 - a) **By City:** This request for proposals may be amended by the City in response to the need for further clarification, specifications and/or requirements, changes, new due date, etc. Amendments will be posted on the State of Wisconsin Vendornet website, <http://vendornet.state.wi.us/vendornet/default.asp>.
 - b) **By Firm:** After receipt by the City, proposals may only be amended by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the proposal response due date unless requested by the City.
9. **Withdrawal of Proposal** - Any proposal may be withdrawn up until the date and time set above for the response due date of the proposals. Proposals shall remain firm once submitted and may not be withdrawn for a period of ninety (90) days.
10. **Public Information** – All submitted proposals become the property of the City and information included therein or attached thereto shall become public record after recommendation for endorsement of contract is made. In order to protect the integrity of the contracting process, proposals will not be disclosed until after award and signing of any and all contracts that may result from this Request for Proposal. All materials provided to the City by the respective Firm are subject to State of Wisconsin public disclosure laws. Any information contained in the proposal that a Firm desires to claim as proprietary and exempt from disclosure must be clearly designated, including identifying the page and particular exception(s) from disclosure. The City will try to respect all material identified by Firms as being confidential, but requests that Firms be highly selective of what they mark as Confidential. The City will make a disclosure decision predicated upon applicable laws and can choose to disclose information despite its being marked as confidential or proprietary. Marking the entire proposal as proprietary or confidential, and, therefore, exempt from disclosure will NOT be accepted or honored, and may result in disclosure of the entire proposal or disqualification of the proposal solely at the discretion of the City. Documents identified as Confidential will not be treated as such if public disclosure laws take precedence, if the information is publicly available, is already in the City's possession, is

obtained from third parties without restrictions on disclosure, is independently developed by the City without reference to Confidential Information, or is required to be disclosed by order of a court or other governmental entity.

11. **Contents of Proposal** - All attachments, additional pages, addenda or explanations supplied by the respondent with this proposal shall be considered as part of the proposal response.
12. **Use of Brand Names** - The use of brand names is for the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.

D. Entity Overview

The City of Wausau is located in Marathon County. Incorporated in 1872, the City of Wausau covers over 18 square miles and has a population of 39,106 (per 2010 US Census). The City operates under the Mayor-Council form of government. The 11 alderpersons represent 11 districts, serving 2-year terms, with all alderpersons elected every two years. The Mayor is elected to serve a four-year term and serves as the City's chief executive and administrative officer.

Wausau provides a full range of services typical of municipal governments, including police, fire and emergency medical protection; public works activities such as highway and street maintenance, refuse and recycling collection, water utility and wastewater treatment services; parks and recreation activities; community development activities including planning and zoning enforcement, economic development, and construction inspection; and general and financial administration (finance, legal, property assessment, information technology, and human resources).

As of the most recent debt issue in 2016, the City continues to maintain an Aa2 rating from Moody's Investor's Service, Inc. The City government includes 15 departments, and employs 330 full time equivalent (excluding temporary) employees. The City's fiscal year ends on December 31.

Assessment Department

The City of Wausau – When at full staff, the Assessment Department consists of a City Assessor, two Senior Appraisers, three Property Appraisers, and one Office Technician.

For the 2015 Assessment Year, in the City of Wausau there were 17,175 total parcels: 13,291 Residential Properties (12,498 Improved), 1,290 Commercial Properties (1,133 Improved), 74 Agricultural Properties, 6 Agricultural Forest Properties, 9 Productive Forest, 4 Other Properties (2 Improved), 3 Managed Forest Property, 8 Undeveloped Properties, 577 Exempt Properties, 80 Manufacturing Properties, 57 Manufacturing Personal Property Accounts, 1,594 Commercial Personal Property Accounts and 182 mobile home lots.

The City of Wausau also provides contract assessment services for the City of Schofield as of 2013. For the 2015 Assessment Year the City of Schofield has 1,436 total parcels: 792 Residential Properties (726 Improved), 212 Commercial Properties (186 Improved), 62 Exempt Properties, 26 Manufacturing Properties, 2 Utility Properties, 15 Manufacturing Personal Property Accounts, 258 Commercial Personal Property Accounts and 69 mobile home lots.

E. Budgetary and Technology Information

The City's 2016 adopted budget of approximately \$96.3 million includes approximately \$8.8 million for capital improvements. The remaining \$87.5 million funds the municipal services listed in the preceding paragraph. The City prepares a comprehensive budget document, including both operating and capital budgets, which is adopted by the Common Council in November for the subsequent fiscal year. The budget document is available for review on the City's website (www.ci.wausau.wi.us). The City's accounting structure uses funds and departments typical of other Wisconsin governments.

The City utilizes the following technology resources provided by the City-County Information Technology Commission (CCITC):

Overview of Current CCITC Network - For reference purposes only.

- 1) Network Environment - The CCITCC currently supports the following:
 - a) Switched 10/100/1000 Mb Ethernet to the desktop.
 - b) Power Over Ethernet
 - c) A (3) node 10 Gigabit Ethernet backbone over fiber optic cable
 - d) High traffic hosts are Gigabit attached
 - e) TCP/IP protocol is currently supported
 - f) WAN services to several NCHC sites; DSL, private and leased point-to-point wireless, and leased fiber service
 - g) LAN to LAN VPN
- 2) Desktops Standard - CCITCC currently purchases HP desktops and Laptops with Windows 7.
- 3) Mobile Devices – CCITCC supports iPads, iPhones and Android Smartphones. (We are currently evaluating Surface devices.)
- 4) Servers Standards - If we need to install a local application, then our preferred new installation is Windows 2008 R2 on VM Ware and Cisco B-Series. We also are interested in looking at Hosted solutions.
- 5) Directory Services - CCITCC uses Active Directory and prefers that all new applications authenticate to the Active Directory.
- 6) Application Software
 - a) The CCITCC currently supports the following major third-party application software products:
 - i) SunGard Public Sector Appraisal Plus running on the iSeries.
 - ii) Cayenta Financials
 - iii) ESRI ArcGIS
 - iv) Deketo Tract Index and Posse running on the iSeries and network servers.
 - v) Laserfiche Document Management Software (Includes pictures of all Wausau properties)
 - vi) Affinity Integration Tools for Laserfiche
 - vii) ApexSoftware Apex Sketch – Assessor
 - viii) Marshall & Swift Commercial Estimator
 - ix) InfoVision Evolve software for permitting and licensing
 - b) The CCITCC currently supports the following major internally developed software products running on the iSeries:
 - i) Land Records which includes the following integrated applications:
 - (1) Taxes and Assessments,
 - (2) Inspections permitting and violation reporting,
 - (3) Zoning,
 - (4) Land Conservation.

F. Scope of Project

The purpose of this software selection project is for the procurement of a Computer Assisted Mass Appraisal (CAMA) solution containing the following (REQUIRED) functionality:

- 1) Property Management Functions
 - a) Name and Address Information
 - b) Billing Data
 - c) Legal Descriptions
 - d) General Data
 - e) Assessed Value Data
 - f) Building Sketch capabilities
 - g) Shared Data (for use by other departments)
 - h) User Defined Data
 - i) Change History
- 2) Sales Analysis
 - a) Sales "Snapshot" data (data at the time of the sale)
 - b) Sales Ratio Studies
 - c) Various Sale Reports
- 3) Valuation System
 - a) Land
 - i) Property Site Data
 - ii) Inspection History
 - iii) General Data
 - iv) Acreage & Square Footage
 - v) Front Foot
 - vi) Dimensions (more than 4 sides)
 - vii) Gross or Site
 - viii) Unit
 - ix) Land Use Value
 - x) Multi Zoning types per parcel
 - xi) Multiple Land Types per parcel
 - xii) Adjustments (Influence Factors)
 - xiii) Land Valuation Summary
 - b) Residential
 - i) Permits and Percent Complete
 - ii) Inspection History
 - iii) General Data
 - iv) Cost Approach
 - (1) Dwelling Information
 - (2) Living Area
 - (3) Quality and Condition
 - (4) Attachments
 - (5) Detached Improvements
 - (6) Features
 - (7) Land values
 - v) Market Approach (Comparable Sales)
 - vi) Adjustments (Influence Factors)
 - c) Commercial
 - i) Permits and Percent Complete
 - ii) Inspection History
 - iii) General Data
 - (1) Structure Information
 - (2) Building / Section Area Square Footage
 - (3) Quality and Condition
 - (4) Attachments
 - (5) Detached Improvements
 - (6) Features
 - (7) Yard Improvements
 - (8) Land Values
 - iv) Cost Approach
 - v) Market Approach (Comparable Sales)
 - vi) Income Approach
 - (1) Direct Capitalization
 - vii) Adjustments (Influence Factors)
 - d) Exempt
 - i) Permits and Percent Complete
 - ii) Inspection History
 - iii) General Data
 - iv) Exemption Classification
 - v) Cost Approach
 - (1) Structure Information
 - (2) Building / Section Area SF
 - (3) Quality and Condition
 - (4) Attachments
 - (5) Detached Improvements
 - (6) Features
 - (7) Yard Improvements
 - (8) Land Values
 - e) Manufacturing / Industrial
 - i) Permits and Percent Complete
 - ii) Inspection History
 - iii) General Data
 - iv) Cost Approach
 - (1) Structure Information
 - (2) Building / Section Area SF
 - (3) Quality and Condition
 - (4) Attachments
 - (5) Detached Improvements
 - (6) Features
 - (7) Yard Improvements
 - (8) Land Values
 - f) Personal Property
 - i) Permits and Percent Complete
 - ii) Tenant Improvements
 - iii) Inspection History
 - iv) Schedules A, B, C, D, D1, D2, E, F, G, H
 - v) Doomages & Overrides

- vi) Adjustments
- vii) Lease Provisions
- viii) Rent Info supplied on PP Form
- ix) View All Accounts on a Specific Tax Key Number
- x) Form follows state form
- xi) Print forms with mailing information and account number
- xii) Real Estate PIN numbers of Site
- g) Mobile Home
 - i) PIN for each mobile home
 - ii) Real Estate PIN number of Site
 - iii) Permits and % complete
 - iv) Last inspection date
 - v) General Data
 - vi) Ability to store Value Data
 - vii) Sale Date information
- h) Recalculation of Values
 - i) Land
 - ii) Residential
 - iii) Commercial
 - iv) Agriculture
 - v) Productive Forest
 - vi) Agriculture Forest
 - vii) Undeveloped
 - viii) Other
 - ix) Department of Natural Resources Programs
 - x) Exempt
 - xi) Manufacturing
 - xii) Personal Property
 - xiii) Mobile Homes
 - xiv) Frozen values
 - xv) Override Values
- 4) Integration
 - a) Laserfiche for all photos and documents
 - b) GIS Interface (ESRI)
 - c) Marathon County Land Records
 - d) Marathon County Register of Deeds tract Index
 - e) InfoVision (Evolve) for permit information
 - f) Apex for Sketch Software
 - g) Marshall & Swift (Core Logic)
- 5) Inquiry Functions
- 6) System Defined Reports
 - a) Acreage Reports
 - b) Assessment Change Notices
 - c) Assessment Roll
 - d) Change Report
 - e) Critical Change Report
 - f) Database Audit Report
 - g) Final Personal Property Report
 - h) Final Real Estate Report
 - i) Nightly - User Changes Report
 - j) Property Record Card
 - i) Residential
 - ii) Commercial
 - iii) Exempt
 - iv) Manufacturing
 - v) Personal Property
 - k) Mobile home reports
 - l) State Reports
 - m) TID Final Report
 - n) Up/Down Report
- 7) User Defined Reports and Queries
- 8) System Setup and Administration

The City desires an integrated CAMA system. It is important to have a system that is easy to use, maintain, and integrate with other disparate applications.

G. Contract Terms and Conditions

The following contractual conditions shall be included in the contract entered into by the City and the successful Firm:

Insurance Requirements

The successful Firm shall not commence work under this contract until all insurance required under this section is obtained, and such insurance has been approved by the City Attorney, nor shall Firm allow any subcontractor to commence work on their subcontract until all insurance requirements have been obtained and approved.

Workers Compensation Insurance - Firm shall obtain and maintain throughout the duration of this contract statutory Worker's Compensation Insurance for all of its employees employed at the site or while working on this project. In case any work is sublet Firm shall require the subcontractor similarly to provide statutory Worker's Compensation Insurance for all of the latter's employees, unless such employees are covered by protection afforded by Firm.

General Liability, Professional Liability and Property Damage Insurance - Firm shall secure and maintain in force throughout the duration of this contract such General Liability, Professional Liability and Property Damage Insurance as shall protect him/her and any subcontractor performing work covered by this contract from claims for damages for personal injuries including accidental death, as well as from claims for property damage, which may arise from operations under this contract, whether such operations be by Firm, or by any subcontractor or by anyone directly or indirectly employed by either of them; and the amount of such insurance shall be as follows:

- Comprehensive General Liability, \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
- Professional Liability Coverage, \$ 1,000,000 per occurrence and in aggregate.
- Automobile Liability, \$1,000,000 per occurrence and in aggregate for bodily injury and property damage.
- Excess Liability Coverage, \$1,000,000 over the General Liability and Automobile Liability Coverages.
- If aircraft are used in conjunction with this project, \$ 2,000,000 per occurrence and in aggregate for bodily injury and property damage.

Proof of Insurance

1. The Firm shall furnish the City Attorney with a Certificate of Insurance, naming the City as an additional insured, countersigned by a Wisconsin Resident Agent or Authorized Representative of the insurer indicating that the Firm meets the insurance requirements identified above.
2. The Certificates of Insurance shall include a provision prohibiting cancellation of said policies except upon (30) days prior written notice to the City Attorney and specify the name of the contract or project covered.
3. The Certificate of Insurance shall be delivered to the owner, with a copy of the Certificate of Insurance to be delivered to the City Attorney for approval prior to the execution of this contract.
4. The Certificates shall describe the contract by name and or identification number in the "Description of Operations" section of the form.

Applicable Law

Except as otherwise specifically provided herein, this contract shall be governed by and construed according to the laws of the State of Wisconsin. The Firm shall comply with all local, state and federal laws and regulations applicable to this Contract and applicable to the goods and services provided under this Contract.

Termination of Contract

The City may, for its convenience, terminate this contract at any time by a notice in writing from the City to the Firm by certified mail. If the contract is terminated by the City as provided herein, the Firm shall be paid an amount which bears the same ratio to the total compensation as the services actually performed bear to the total services of the Firm covered by this contract, unless payments of compensation have previously been made.

Change Orders

The scope of the services to be performed under this contract may be amended or supplemented by mutual written agreement between the parties to the contract. This amendatory provision shall not operate to prevent the City from exercising its reserved right to establish reasonable time schedules of and for any of the work or services to be performed by the Firm hereunder, nor to cancel any of the services not performed at the time notice is given to the Firm of the cancellation of such services or portion of the work to be performed hereunder.

Gratuities and Kickbacks

It shall be unethical for any person to offer, give, or agree to give any elected official, employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer for employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the contents of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceedings or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or contract, subcontract, or any solicitation or proposal therefore.

It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or a higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract, or order.

Non-appropriation of Funds

Notwithstanding anything contained in this contract to the contrary, no Event of Default shall be deemed to have occurred under this contract if adequate funds are not appropriated during a subsequent fiscal period during the term of this contract so as to enable the City to meet its obligations hereunder, and at least thirty (30) days written notice of the non-appropriation is given to Firm.

MUTUAL INDEMNIFICATION/HOLD HARMLESS.

The Firm, _____, hereby agrees to release, indemnify, defend, and hold harmless the CITY, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and reasonable attorney's fees, which may be sustained or to which

they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of _____'s officers, officials, employees, agents or assigns.

The CITY hereby agrees to release, indemnify, defend, and hold harmless the Firm, _____, its officials, officers, employees and agents from and against all judgments, damages, penalties, losses, costs, claims, expenses, suits, demands, debts, actions and/or causes of action of any type or nature whatsoever, including actual and reasonable attorney's fees, which may be sustained or to which they may be exposed, directly or indirectly, by reason of personal injury, death, property damage, or other liability, alleged or proven, which is determined to be caused by the negligent or intentional acts or omissions of CITY's officers, officials, employees, agents or assigns. CITY does not waive, and specifically reserves, its rights to assert any and all affirmative defenses and limitations of liability as specifically set forth in Wisconsin Statutes, Chapter 893 and related statutes.

Americans with Disabilities Act Compliance

In connection with performance of work under this contract, Firm agrees that no qualified individual with a disability, as defined by the Americans with Disabilities Act, shall, by reason of such disability, be excluded from participation and the benefits of services, programs, or activities, including employment, or be subjected to discrimination. The Firm is specifically notified that it is subject to all employment requirements listed under Title I of the Americans with Disabilities Act by virtue of its contract with the City, a public entity. The Firm is specifically notified that it is subject to federal requirements to assure participation and access to public facilities, programs, and activities under Title II of the Americans with Disabilities Act by virtue of its contract with the City, a public entity. These requirements mandate separate or special programs or reasonable modification of existing programs, services, and activities without surcharge to disabled individuals as long as safety is not compromised. The Firm shall provide a similar notice to its subcontractors.

Dispute Resolution

If a dispute related to this agreement arises, all parties shall attempt to resolve the dispute through direct discussions and negotiations. If the parties cannot resolve the dispute and if all parties agree, it may be submitted to either mediation or arbitration. If the matter is arbitrated, the procedures of Chapter 788 of the Wisconsin Statutes or any successor statute shall be followed. If the parties cannot agree to either mediation or arbitration, any party may commence an action in the Circuit Court of Marathon County. If a lawsuit is commenced, the parties agree that the dispute shall be submitted to alternate dispute resolution pursuant to §802.12, Wis. Stats., or any successor statute. Unless otherwise provided in this contract, the parties shall continue to perform according to the terms and conditions of the contract during the pendency of any litigation or other dispute resolution proceeding.

The parties further agree that all parties necessary to the resolution of a dispute (as the concept of necessary parties is contained in Chapter 803, Wisconsin Statutes, or its successor chapter) shall be joined in the same litigation or other dispute resolution proceeding. This language relating to dispute resolution shall be included in all contracts pertaining to this project so as to provide for expedient dispute resolution.

Non-Debarment Clause

Firm hereby certifies that neither it nor any of its principal officers or officials has ever been suspended or debarred, for any reason whatsoever, from doing business or entering into contractual relationships with any governmental entity. Firm further agrees and certifies that this clause shall be included in any subcontract of this contract.

Statement of Compliance

Vendor has carefully reviewed the City's required contract language, as set forth in the Request for Proposal/Bid pertaining to termination of contract, change orders, gratuities and kickbacks, non-appropriation of funds, hold harmless/indemnification, ADA compliance, insurance requirements/proof of insurance, dispute resolutions, non-debarment, and is in full compliance with all statements and requirements. This contract language is incorporated herein by specific reference as if set forth in full. Any statements set forth in this contract document that conflict with the City's contract language are superseded by the City's required contract language.

Assignment or Subcontract

This contract may not be assigned or subcontracted by the Firm without the written consent of the City.

Independent Contractor Status

The Firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same of any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Force Majeure

The term "Force Majeure" shall include, with limitation by the following enumeration: acts of God or Nature; acts of civil or military authority; terrorism; fire; accidents; pandemic outbreaks; power shortage; telecommunication or data communications; shutdowns for purpose of emergency repairs; strikes and any other industrial, civil or public disturbances that are not reasonably within the control of a party, causing the inability to perform the requirements of this Contract. If any Party is rendered unable, wholly or in part, by a Force Majeure, to perform or comply with any obligation or condition of this Contract then, upon giving notice and reasonably full particulars to the other Party, such obligation or condition shall be suspended only for the time and to the extent reasonably necessary to allow for performance, compliance and restoration of normal operations. If only the Firm is impacted by Force Majeure and more than 60 days has elapsed then the City shall be entitled to exercise any remedies otherwise provided for in this Contract, including termination for default.

Warranty

A warranty is sought for both the software and implementation services.

Software

1. The selected Firm will warrant that the proposed software will conform in all respects to the requirements and specifications as stated in the RFP, except for minor or inconsequential errors. Specifically, the detailed requirements as stated in this RFP will become part of the selected Firm's contract and will be warranted as such. Any repairs or "bug fixes" required during this period will be made at no expense to the City.
2. The selected Firm must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional requirements as included in this RFP.
3. State that the warranty, at a minimum, should be valid for the duration of the implementation and for a minimum of one year after final acceptance of all modules/suites/applications included in the implementation. The City will look more favorably at Firms with warranty periods longer than the minimum specified herein.
4. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), describe the software warranty for the software quoted. Identify all coverage points. Please specify when the warranty period begins and ends.

Implementation and Professional Services

1. The City expects a warranty for implementation and professional services (e.g. work products, developed modifications, and system configuration) for a minimum of 12 months after the final acceptance (configuration phase) date of the respective modules, except for minor or inconsequential items. It is assumed that Firms have priced their services to include these warranty provisions. The extent of the warranty coverage will be evaluated as part of the overall procurement process.
2. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), state the implementation services warranty for the software quoted. Identify all coverage points. Please specify when the warranty period begins and ends.
3. In Section 4 of the required proposal format outlined below (Contract Terms and Conditions), specify what costs for repairs the City may be responsible for while the system is under warranty, e.g., labor, travel expenses, parts, etc.

Payment and Performance Guarantee

The City has a requirement to have some retainage and means for software and vendor performance assurance, and as such, proposes the following payment schedule:

- 15% upon signing of contract
- 10% upon successful installation and acceptance of initial software functionality
- 05% upon accepted first conversion of Sungard data accepted by the City
- 10% upon modeling of prior year's data that is within 5% of that years value
- 05% All interfaces working properly
- 20% upon customization completed, tested and successful, Training completed successfully. System ready for Go-Live with current data conversion
- 35% upon final acceptance (City will create a "punch list" 60 days after "go-live" of non-conformance issues to be corrected. Final acceptance takes place upon City acceptance that the "punch list" items have been corrected. The City agrees to be reasonable in its list.
- The city expects this project to be completed within 7 months of contract signing. As we finalize the contract language we will have penalties defined for delays caused by the vendor that extend the Go-Live past 7 months.

Renewal Costs

Regardless of whether or not we purchase a product that is installed on our network or purchase a hosted solution that runs at a vendor's website, we expect to control annual renewal increases. Our contract with the successful bidder will include a stipulation that the annual support or lease costs cannot increase at all in the first 3 years and thereafter, cannot increase more than the previous year's consumer price index + 1%. If you cannot accept this stipulation, please clearly state what your proposed cap would be for the automatic renewal process when you respond to the RFP.

Acceptance of Terms and Conditions

Submission of a proposal shall constitute acknowledgment and acceptance of all the terms and conditions contained in this Request for Proposal. The selected Firm(s) will be required to enter into a formal contract with the City (see Section J – Contract below).

H. Technical Proposal Requirements and Format

In order for the City to adequately compare proposals and evaluate them uniformly and objectively, all proposals **must** be submitted according to the following format. Each proposal should be bound, include a table of contents and be separated by section and tabbed with the proposal heading.

Your proposal should provide a straightforward, concise description of the proposed software and services and your ability to deliver the same. Emphasis should be on completeness and clarity. Unnecessarily elaborate brochures, artwork or other presentations beyond that sufficient to present a complete and effective proposal is **not desired**.

SECTION	TITLE	CONTENTS
Section 1	Cover Letter	<p>The transmittal letter should be:</p> <ul style="list-style-type: none"> ▪ On your letterhead ▪ Signed by an official in your organization authorized to bind his or her firm to all statements, including services and prices, contained in the proposal. ▪ State the length of time the proposal terms remain firm, which must be for a minimum of 120 days from the proposal due date. <p><i>Please note that an unsigned cover letter will cause rejection of the proposal.</i></p>
Section 2	Table of Contents	<p>The table of contents of the proposal should include a clear and complete identification of the material submitted by section and page number.</p>
Section 2	Executive Summary	<ul style="list-style-type: none"> ▪ Complete the Software Vendor Executive Summary Response Chart from Exhibit A - Required Vendor Information of this RFP. <p><i>Please note that in the space provided in the Executive Summary Response Chart, Firms must identify the primary engagement contact for the software vendor—including a valid e-mail address. We have the option to require a Firm to provide additional information and/or clarify requested information.</i></p>
Section 3	Audited Financial Statements & Annual Reports	<ul style="list-style-type: none"> ▪ Copy of the Firm's most recent audited financial statements (electronic format acceptable) ▪ Copy of the Firm's most recent annual report (if public company).
Section 4	Contract Terms and Conditions	<ul style="list-style-type: none"> ▪ Description of your method for supporting the City's required contract terms and conditions. ▪ Describe the software warranty for your software. ▪ State the implementation services warranty for the quoted software. Identify all coverage points. Please specify when the warranty period begins and ends. ▪ Specify all costs that we may be responsible for while the system is under warranty, e.g., labor, travel expenses, parts, etc. <p><i>Please limit this section to no more than four (4) pages.</i></p>

Section 5	RFP Exceptions	<p>Complete the Exceptions Form (see Exhibit B) and include it in this section. Identify ALL Exceptions to this RFP, including contract terms and conditions, and proposed payment schedule. If you provide a sample of your contract you are still required to identify in this section all exceptions you have to the City's contract terms and conditions.</p> <p><i>We will not recognize any exceptions to this RFP unless they are clearly identified IN THIS SECTION of the RFP Response.</i></p>
Section 6	Scope of Services	<p>Include a general discussion of the Firm's understanding of:</p> <ul style="list-style-type: none"> ▪ "Overall" project ▪ Scope of work proposed ▪ Proposed version of your product, when it was released for general availability and how many customers (not users or locations) are installed on the proposed product and version proposed. ▪ Summary of the features of your proposed software product ▪ Summary of any other modules or services that you offer that you feel that we should be aware of <p><i>Please limit this section to no more than two (2) pages.</i></p>
Section 7	Functional Requirements	<p>Please include the following in this section of your proposal:</p> <ol style="list-style-type: none"> 1. A brief summary of the functionality that your software has for the following: <ul style="list-style-type: none"> • Property Management Functions • Sales Analysis • Valuation System <ul style="list-style-type: none"> ○ Land ○ Residential ○ Commercial ○ Exempt ○ Manufacturing / Industrial ○ Personal Property • Images & Sketching Capabilities • Inquiry Functions • System Defined Reports 2. Completed Requirements Document from Exhibit C – Functional Requirements Response. <p><i>Provide a response for each requirement. Leaving a requirement blank may deem a Firm unresponsive.</i></p>
Section 8	Architecture	<p>Describe the system architecture, what software development tools are you using? List version numbers. What reporting tools are supported – SQL SRSS and or Crystal? Are there standard published APIs for interfaces? If we wish to enhance the product, what knowledge and software development tools will we need in house?</p>

Section 9.A	Technical Requirements (Locally Installed Software)	<p>NOTE: We wish to evaluate both locally installed and hosted solutions (that run on the vendor's network). If you support both options, please present separate pricing on both options. Fill out the applicable sections 9.A and 9.B or just the section applicable to the solution that you propose.</p> <p>Include technical information regarding your proposed software:</p> <ul style="list-style-type: none"> ▪ Desktop requirements ▪ Mobile options that you support: Apple iPad app, Android App, Surface, other tablets that have been tested. ▪ Thin client solutions that are confirmed as supported: Citrix, VMWare View, etc. ▪ Server side environment (database, hardware, server operating system, network requirements, etc., Virtual technology supported?) ▪ Interfaces already built to other software. Included or not? ▪ Data conversion capabilities and requirements ▪ Recurring Service (recommended backups, routine database administration, performance tuning, other system maintenance, etc. ▪ Number of versions that we can install with the proposal – in other words – can we have a Disaster Recovery instance? How about a Test instance? Identify any extra costs in terms of setup, installation, configuration, testing, training and licenses related to having extra instances installed locally. ▪ Proposed methodology for integration of the CAMA system with Microsoft Outlook. ▪ Proposed methodology for integration of the CAMA system with the ESRI GIS application. The City is currently running version 10.0 and is planning on upgrading to version 10.1 in 2013.
Section 9.B	Technical Requirements (Hosted Solution)	<p>Include technical information regarding your proposed software:</p> <ul style="list-style-type: none"> ▪ Desktop requirements ▪ Mobile options that you support: Apple iPad app, Android App, Surface, other tablets that have been tested. ▪ Thin client solutions that are confirmed as supported: Citrix, VMWare View, etc. ▪ Interfaces already built to other software. Included or not? ▪ Data conversion capabilities and requirements ▪ Recurring Service that we would be expected to perform if applicable ▪ Can we access a Test instance? Identify any extra costs in terms of setup, installation, configuration, testing, training and licenses related to having access to a test instance ▪ What is your disaster recovery plan and methodology for maintaining high availability? ▪ How would we get our data back if we switched vendors a few years into the contract? Costs involved in getting the data?

		<p>Format that it would be provided?</p> <ul style="list-style-type: none"> ▪ Proposed methodology for integration of the CAMA system with Microsoft Outlook. ▪ Proposed methodology for integration of the CAMA system with the ESRI GIS application. The City is currently running version 10.0 and is planning on upgrading to version 10.1 in 2013.
Section 10	References	<p>Please list at least five (5) references of other customers with installed systems of the software that you are proposing who are similar to our requirements, using the format included in Exhibit D. Specify the exact version of the software and all modules that the customer is using.</p> <p><i>References will be contacted (this may be an on-site visit) as part of the proposal evaluation process. (We are particularly interested in Wisconsin cities with similar requirements, number of employees, and population.)</i></p>
Section 11	Implementation Staff	Provide information as to staff expected to be assigned for software implementation by filling out Exhibit E.
Section 12	Implementation Methodology	<p>Provide a brief overview of your implementation methodology and expected timeframe for this project including resources that we are required to provide in terms of time and tasks that will be assigned to us.</p> <p><i>Please limit this section to no more than two (2) pages.</i></p>
Section 13	Pricing	<ol style="list-style-type: none"> 1. Provide a summary overview of the pricing model used to estimate costs including module pricing and implementation services. Information regarding users and other data that may be used in developing pricing is included in Exhibit A. 2. Include a separate spreadsheet with pricing.
Section 14	Other Information and Attachments	Include in this section a copy of your proposed license, maintenance and implementation services agreements (sample contracts), along with any agreements relative to 3 rd party providers. NOTE: Any exceptions to our contract terms and conditions, payment schedule, etc. must be noted on the Exception Form in Section 5 of your proposal. Also include a copy of a certificate demonstrating the required insurance coverage's outlined above under Terms and Conditions.
Section 15	Other Vendor Information	Use this section if you have any other material that you feel is important for our evaluation. Please limit the pages in this section. We are not interested in unnecessary sales literature.

I. Evaluation of Proposals

The City and/or its representatives will be the sole judge of the appropriateness and completeness of any and all proposals and reserves the right to reject any and all proposals that do not provide the information requested. Neither the City nor any agent thereof on behalf of the City of Wausau shall be obligated in any fashion by any response(s) to this RFP. The City reserves the right to negotiate those issues not included in the proposal document. The City will not reimburse Firms for costs incurred in preparing proposals or traveling to any City of Wausau location to demonstrate products.

Proposals will be objectively evaluated by a qualified team of CCITC staff, City of Wausau staff and/or stakeholder representatives. The most responsible proposal will be determined by criteria determined essential to the City as outlined below. The evaluation criteria are not limited to the lowest price.

The City may choose to conduct site visit(s) to the software vendor's headquarters and/or Firm's clients as part of the evaluation process. The site visits will be considered as part of the determination of the successful Firm. Evaluation of the client sites will be based on but not limited to the following:

- Assessment of the Firm's performance during system implementation.
- Assessment of the quality of Firm's ongoing support.
- Overall user satisfaction with the system and its reporting functionality

Each proposal will be examined to ensure that it follows the proposal format and instructions in this RFP.

The City is seeking a Firm with the following qualifications:

- Is a viable vendor in terms of financial position, customer base, and technology
- The ability to provide and implement an integrated CAMA Software system that meets the City's requirements as described in this RFP.
- The ability and flexibility to meet the City's regulatory and contractual requirements, and vendor expectations as summarized in this section and as detailed in the RFP.
- Has experience in Wisconsin
- Has experience with municipalities the size of Wausau and the surrounding area
- Has ability to support more than one municipality at a time
- Is willing to enter into a contract which supports performance milestones, and penalties when not met
- Proven history of successful on-time, on-budget and in-scope implementations of the proposed software with the functionality required by the City for public sector entities similar to Wausau.
- Provide a modern software application that will be easy to support for the foreseeable future with the flexibility to accommodate new technologies and future workflow changes within the department.

- Provide a way for the City to protect its software investment and responsibly manage its ongoing support costs for at least eight years.
- Provide technical expertise and guidance in the implementation and configuration of the system (software, database, hardware, network and integration with 3rd party applications), and ongoing customer support following system implementation.

Proposals will be evaluated on some or all of the following criteria:

- Ability to deliver an integrated solution that meets functional requirements with minimal customizations
- Firm's experience with similar customers and similar projects
- Firm's qualifications (financial strength, company size, stability, product vision and direction, and ability to work with the City and CCITC)
- Firm's development and project management capacity, available support staff and response time expectations,
- Firm's recommended project plan, including installation, configuration, testing, and conversion timeframe
- Whether the vendor agrees to a data conversion, then (assuming there are errors) repetitive data conversion runs until we have a clean conversion, clean testing of the software with the clean converted data, then a final data conversion just before Go-Live.
- Technology that meets the CCITC's technology and IT strategic plan requirements
- Training plan
- Feedback from customer references on vendor performance, reliability, service level and customer service and responsiveness
- Demonstration of software and tools
- Firm warranties for the software and implementation services
- Adherence to requirements for RFP response including specified format
- Conformance to required contract provisions
- Total cost of ownership over 5 years (Software, annual maintenance and support, implementation services, training, hardware, database, resources required, etc.)
- Quality and completeness of the proposal

All proposers will be notified in writing when a final selection of a Firm has been made and the contract has been executed. Contract negotiations may be conducted simultaneously with two or more Firms.

J. Contract

If your proposal is accepted and a contract is issued, the contract between the City and the selected vendor to provide the required software and related services will consist of:

- This request for proposal
- The selected Firm's proposal
- The Firm's product demonstration and related handouts and electronic presentations
- Related commentary – any communications from the Firm clarifying the proposal, technology, project planning, implementation services, training, 3rd party applications, software functionality, support services and professional services
- Documents containing any additional items stipulated during contract negotiations
- A mutually agreed upon Statement of Work that outlines the project scope, project timeline, assigned responsibilities (Firm and City) and estimated hours by role for the major work components, deliverables, milestones, and costs by major work component.
- A signature page.

Said contract between the City and the Firm shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto. Any agreement or contract resulting from the acceptance of a proposal shall be on forms either supplied or approved by the City. The City reserves the right to reject or modify any agreement which does not conform to the request for proposal and any City requirements for agreements and contracts.

The submission of a proposal shall be considered as a representation that the Firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon execution of the contract by the proper City officials, and delivery of the fully-executed contract to the Firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful firm. The contract may be amended only by written agreement between the Firm and the City.

The documents constituting the contract between the City and the Firm are intended to be complementary so that what is required by any one of them shall be as binding as if called for by all of them. In the event of any conflicting provisions or requirements within the several parts of the Contract Documents, they shall take precedence in the following order: Change Orders (with the most recent taking precedence); Statement of Work, Contract Document Amendments; the Contract Document as described in the signed Agreement; Request for Proposal Addenda; Request for Proposal; and Firm's Proposal.

Other Contract requirements:

1. Provide copies of all proposed contracts and agreements. The following contractual

- conditions shall be included in the contract entered into by the City and the successful offer or:
2. Include a specific and clear section titled RFP Exceptions in the response identify each and every item in the RFP to which you are not able to meet all or part of the requirement
 3. The contract will state clearly that the RFP and the vendor's RFP response are all included as part of the agreement.
 4. There shall be one contract between the City and offeror(s).
 5. The contract shall be governed by the laws of the State of Wisconsin.
 6. The contract shall be effective on the date it is approved and signed by the City.
 7. All products generated as a result of this Request for Proposal shall become the sole property of the City
 8. The successful offeror shall not assign any part of its interest in this agreement without the prior written consent of the City.
 9. The successful offeror shall be responsible for any and all permits required.
 10. The Software maintenance agreement must cap future annual software maintenance increases as specified earlier in the RFP
 11. There will be performance penalties agreed to during contract negotiations which will penalize the vendor if milestones are not met on time or scope. If you cannot agree in principle now to these penalties this must be clearly identified in the RFP Exceptions section of your response.
 12. The License must allow and include for the license to use and the costs to setup a test and disaster recovery instance of the software (for software purchases).
 13. The indemnification language must be completely reciprocal. Use this.
 14. We will agree on language that defines Final Acceptance that is the date after GoLive in which all critical and significant issues are resolved.
 15. The software maintenance is expected to have the first year included
 16. Software maintenance starts at Final Acceptance – not installation or the Go-Live dates.
 17. There will be a warranty for at least 12 months.
 18. For software – all data and information will be owned by City.
 19. For cloud solutions – Move to more appropriate place
 - i. the contract will specify that we will be provided all of our data in a csv format at no cost within 5 business days of us requesting it when the contract is terminated plus at least once annual (so that the export is tested annually). If applicable, photos will be in jpg format, videos in mp4 format. Audio in an industry standard format (not AAC).
 - ii. The contract will specify that we will be notified of any information breach in the vendor's cloud within 48 hours, regardless if it is on our servers or on other customers
 - iii. The contract will specify that the cloud solution will have a security audit annually and that the report will be provided to CCITC within 1 month of receipt at no charge. The report will also include the vendor's plans and schedule to mitigate any issues identified. The vendor will keep us informed of the resolution of the identified risks at least every month until resolved.
 - iv. Provide in your response the following:
 - (a) Your method of performing background checks on staff at hire and routinely and your policy on what to do if any candidate or current employee has a

felony or has a misdemeanor related to criminal theft or money, products or information.

- (b) If any information of the City or its partners will be stored outside the US borders
- (c) Explain what methods of remote access you use and how they are secured
- (d) Explain how IDs and passwords for access to our servers and content are protected at rest AND while in motion.

Assessment Software Selection Current Status 1/9/2017

We released a new RFP and had two respondents
Both respondents are viable.

Vendor A

Higher up-front costs lower annual recurring cost
Large Wisconsin presence – 2/3 of all municipalities (but many are smaller than Wausau)

Vendor B

Lower up-front costs, higher annual recurring cost
Only in three municipalities in Wisconsin

We've seen demos of both products and have made calls to existing customers for reference checks. We are going to do site visits over the next two weeks. We (assessment and IT staff) are developing a Pros/Cons list based on the RFP, the demos, the due diligence calls and the upcoming site visits

With the RFP open at this time, we can't go into any more details than this in open session.

Both vendors can do the project in about 5-6 months. Both would require time from our assessment staff to test and evaluate the data conversion quality and that would need to start about 6-8 weeks after the project kickoff.

Our assessment staff have a preference, based on anticipated workloads, that that type of work wouldn't start until late June/ Early July. Based on that information, we should decide and sign a contract by approximately late March 2017 – Mid April.

If the city wants to contract out the assessment activity or contract it with a hybrid model, it makes sense to hold off on making the software purchase selection until the decision is made and executed. That way, either the contract assessor can weigh in on which product that want to work with or provide themselves. If a new Assessment Department Head is hired, that person should be involved in the final selection.

Gerry Klein
Director - CCITC