

GROTA APPRAISALS, LLC
ASSESSOR SERVICES PROPOSAL
FOR THE
CITY OF MANITOWOC, WISCONSIN
NOVEMBER 2016 THROUGH DECEMBER 2018

Grota Appraisals, LLC
N88 W16573 Main St.
Menomonee Falls, WI 53051
Certified & Authorized Submittal by:
Michael L. Grota, Owner
262-253-1142
Mike@wi-assessor.com

August 25, 2016

City of Manitowoc
Nicolas Sparacio,
900 Quay Street
Manitowoc, WI 54220

Mr. Sparacio, and City Council,

We at **Grota Appraisals** appreciate your interest in our assessment services and look forward to a long and prosperous relationship.

We are certain that we can perform at a high level to meet or exceed your expectations for your proposed annual assessment maintenance work. Our quoted costs for performing these assessment services are more than competitive with others performing similar services.

Enclosed is a complete response to the City's Request for Proposal for Assessor Services as a firm and irrevocable offer for the services set to begin November 1, 2016. Alternative office staffing service options which you may be interested in adopting now or in the future are also included in the Service Options Addendum. Finally, we have included the proposed cost to perform a future revaluation project for the City.

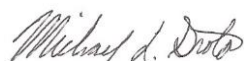
Grota Appraisals is technology savvy. With its sister company, Assessment Technologies, we have developed *Market Drive* assessment software, to develop uniform and equitable assessments for WI assessors. We also have experience in using other CAMA assessment software, as well as statistical, sketching software, and GIS.

Additionally, **Grota Appraisals** will make available as many Viewer Versions of the *Market Drive* assessment software as needed for use by City staff and will display the City's assessment information on our *AssessorData.Org* website, at no charge to the City. This website provides assessment information, such as, tax key #s, legal descriptions, basic property descriptions, last building permit date, last sale date, as well as the land, improvement and total assessed values; all at no charge to the user.

Grota Appraisals is fully staffed and equipped to start the City of Manitowoc assessment administration functions as noted in the RFP.

Should any questions arise regarding this proposal, please call 262-253-1142.

Sincerely,



Michael L. Grota, Grota Appraisal

Assessor Services Proposal for the City of Manitowoc November 2016 through December 2018

Legal Business Name

Grota Appraisals, LLC
N88 W16573 Main St.
Menomonee Falls, WI 53051

Lead Professionals

Michael L. Grota - Owner; Assessor II: Statutory Assessor with direct responsibility for the completion of all assessment duties and reports in a professional, timely manner.

Les Ahrens - Assessor I: Lead Property Appraiser in charge of residential inspections and valuation updates.

Pam Feavel - Personal Property Account Technician in charge of all aspects of business personal property account management and follow-up.

Appraiser Experience

Michael L. Grota - Owner, Manager of Grota Appraisals and Assessment Technologies - Major responsibilities include over 29 years of revaluation modeling & management, contract bidding & maintenance, exemption request reviews, new technologies development, training and education, problem solving and quality control.

Les Ahrens – Project Manager & Lead Assessor serving as a primary contact and residential inspection coordinator for several Cities, Towns and Villages. Les has over 15-years experience with Grota Appraisals, including property inspection, listing, statistical analysis, and residential modeling & valuation projects.

Pam Feavel - Personal Property Account Technician with responsibility for business personal property account correspondences, listing and roll preparation. Pam will soon be celebrating her 3rd anniversary with Grota Appraisals.

Contract Overview

Grota Appraisals is the best choice for the following reasons:

1. Grota Appraisals has extensive experience providing assessment services using Market Drive CAMA software for cities with similar parcel counts or complexity when compared to the City of Manitowoc, including the cities of Sheboygan, Fond du Lac, Mequon, Greenfield, Sun Prairie and West Allis.
2. Grota Appraisals is staffed with talented and driven professionals who are experienced and trained to perform the many necessary assessment tasks required for the City.
3. Grota Appraisals has a great reputation as evidenced by its list of 74 communities containing a total inventory of approximately 170,000 real estate parcels.
4. Grota Appraisals has the greatest knowledge of the use of technology in assessment practices in the State of Wisconsin. In 1996, Grota Appraisals with our sister company, Assessment Technologies of WI, created *Market Drive*, currently the most advanced and widely used Computer Assisted Mass Appraisal (CAMA) system in Wisconsin.
5. Grota Appraisals is a pioneer in CAMA development and its use for WI communities. We are the most knowledgeable user of *Market Drive*. We have experience working with other CAMA software systems used in WI as well.
6. Grota Appraisal's client list speaks for itself, with over 38-years of continued service, performing multiple revaluations throughout the State of Wisconsin.
7. Grota Appraisals recommends to its communities that they consider a Revaluation Options & Schedule to maintain compliance with Wisconsin's State Statute 70.05, which governs the required assessment levels for all communities. However, ultimately it is the community, not Grota Appraisals, which decides how and when to complete a revaluation.
8. Grota Appraisals is competitively priced, but our exemplary performance sets us apart. Some appraisal firms may charge less, but if the required results of fair and equitable assessments, delivered timely and presented to the taxpayers and municipal representatives professionally are not achieved; this could be a costly error. In a service profession, you do get what you pay for.
9. At Grota Appraisals,

“We know The Course Your Community Needs To Take”

Grota Appraisals Assessment Services Proposal

November 2016 through December 2018

A. Specific Services Provided:

1. Grota Appraisals will perform all the work required to properly and professionally assess the real and personal property of the City. All work shall be completed 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, including section 70.32 (1), Wis. Stats.

Our designated Project Manager for the City of Manitowoc will be Michael L. Grota working aside him will be Les Ahrens. Grota Appraisals shall report to and be accountable to the City's Community Development Director or his/her designee and will be available to meet and discuss project progress, reports, etc. with the City on an ongoing basis throughout the term of this contract.

2. Grota Appraisals will maintain regular office hours at the Sheboygan City Hall from 7:30 AM to 4:30 PM Monday through Friday, except on City-designated holidays. Additional hours for the Open Book session and scheduled Board of Review hearing proceedings will also be provided as necessary.
3. Grota Appraisals shall aide in and be responsible for assessment related clerical duties including: answering routine telephone calls and emails, fulfill walk-in requests for assessment data, address requests for assessment-related appointments, providing copies for assessment-related open records requests, preparing appointment mailers and assessment notices, filing property record cards/files and any other assessment-related records, and complete all assessment data entry during the term of the contract whether in office or remotely.
4. Grota Appraisals will provide a local phone number for City Officials, other professionals, and residents to contact us during regular business hours, Monday through Friday, and will return calls within 24 hours. Additionally, basic assessment data will be available for free review on the internet.
5. Grota Appraisals will field review and assess all properties that were under partial construction as of January 1 of the previous year.
6. Grota Appraisals will field review and assess all new construction as of January 1 of the current year.
7. Grota Appraisals will perform interior inspections on all newly constructed homes, partially constructed homes from the previous year, and any major interior remodeling projects including kitchen, bath, basement remodeling and additions.
8. Grota Appraisals will field review and measure all properties with building permits for exterior remodeling and for detached buildings and decks. Property records will be reviewed and updated for air conditioning and other miscellaneous permits as needed.
9. Grota Appraisals will field review as deemed necessary sale properties and other properties known to have major listing characteristic changes for which no building permit has been issued.

10. Grota Appraisals will be diligent in discovering and assessing all business personal property. Grota Appraisals will field visit all existing personal property accounts and known commercial use real property parcels annually to discover new accounts and account for businesses that may have closed prior to the assessment year. Grota Appraisals will cross-reference personal property accounts with the corresponding real property and parcel number.
11. Grota Appraisals will mail out State approved Personal Property forms to all holders of personal property in the City by January 15 of each year, audit the returned forms, and place new values in the assessment roll. Grota Appraisals will collect the names and address of each personal property contact person, separate from the business name. Grota Appraisals will provide a doornage listing to the Community Development Director prior to the Open Book session.
12. Grota Appraisals will account for all known buildings destroyed or demolished.
13. Grota Appraisals will implement use value assessments of agricultural lands per specifications set forth by the WIDOR.
14. Grota Appraisals will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
15. Grota Appraisals will process parcel subdivisions, lot-line adjustments, new subdivision plats, certified survey maps and any other land divisions.
16. Grota Appraisals will take digital photos of new construction on or about January 1 annually and also during all field review assignments.
17. Grota Appraisals will maintain and annually update property owner lists with current name and address changes.
18. Grota Appraisals will post assessments to electronic real estate transfer returns and record sale information to property records electronically.
19. Grota Appraisals will annually update all electronic property record cards with new legal descriptions.
20. Grota Appraisals will mail a Notice of Assessment to property owners and other as required by State Statutes.
21. As noted in #2 above, Grota Appraisals will conduct Open Book sessions in accordance with WI State Statutes. Grota Appraisals will prepare a written statement regarding the Open Book dates, times, and instructions on how to set up an appointment for an Open Book meeting, at least 15 days prior to the first day of the Open Book session. Grota Appraisals will notify the local press for publication prior to the Open Book.
22. Grota Appraisals will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statute, starting at any time during the 30-day period beginning on the 2nd Monday of May. Grota Appraisals will work with the City Clerk to arrange for the hearings. Grota Appraisals will attend the Board of Review hearings, assist City staff at the hearings and defend the assessor's valuations and work products. Grota Appraisals will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.

23. Grota Appraisals will update the City's assessment records within 14 days of the final adjournment of the Board of Review.
24. Grota Appraisals will be responsible for providing the WI DOR with final reports as required by law.
25. Grota Appraisals will value all mobile homes as required by law.
26. Grota Appraisals will coordinate with the Manitowoc County Real Property Listing office to facilitate the digital and manual transfer of data and values.
27. Grota Appraisals will provide a website that will be linked to the City's website to place the computer property assessment records data on the web for access to the public. It can also aid in the City in updating its existing online resources.
28. Grota Appraisals will update market values on existing City owned land and public building records via the cost approach annually as requested for internal City purposes. Grota Appraisals will not be required to create new records for buildings that do not have existing records except as agreed to between Grota Appraisals and the City.
29. Grota Appraisals will also perform all other duties incidental to the normal duties of the assessor.
30. All assessment files and records created and data collected by the assessor shall remain the property of the City. Except as needed for standard assessment duties and procedures, records shall not be removed from the City premises without the written permission of the City.
31. Grota Appraisals shall oversee the process of transforming all assessment records to a 'digital' format.
32. Grota Appraisals will be available to attend, upon the request of the Community Development Director, department head, City Council, Mayor or other prescribed meetings upon reasonable prior notice. Such meetings are expected to average 2 hours per month.
33. Grota Appraisals will communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. Grota Appraisals will 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. At the start of the project, Grota Appraisals agrees to meet with the City to develop a public relations plan to meet the objective above.
34. Grota Appraisals personnel will present a positive, professional image in both dress (business casual or as required for varying field assignments) and conduct while interfacing with City staff and the public.
35. Grota Appraisals' personnel will carry proper photo identification badges to assure the public of their identity and purpose for gaining access to private property. For additional public reassurance, Grota Appraisals will work with the City to acquire a "Letter of Engagement" on City Letterhead to take into the field indicating that Grota Appraisals LLC is working on behalf of the City as their statutory assessor.
36. Grota Appraisals will not assign subcontract or transfer the work without the written permission of the City.

37. Grota Appraisals personnel will have the proper WI DOR certification levels to perform their assigned duties in compliance with WI Statute 70 and Administrative Rules of the WI DOR.
38. Grota Appraisals will provide and update the City with a listing of all personnel assigned. The City shall approve all personnel assigned. Copies of each employee's certificate will be supplied to the City. Additionally, to ease the transition by the City from a full-time in-house assessment staff to a contracted assessment service, Grota Appraisals plans to seek out and hire/use existing City staff for the daily office staffing duties in order to maintain their invaluable knowledge about and experience with the City.
39. Grota Appraisals will review any complaint relative to the conduct of its employees. If the City deems the performance of any of the assessor's employees to be unsatisfactory, the assessor will remove such employee(s) from working for the City upon written request from the City.
40. Grota Appraisals has and will maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act of the Assessor, their agents and employees in the execution of work. Further, Grota Appraisals will be responsible for any and all of their agents and employees 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. Full insurance coverage details are listed below in Section "D."
41. Grota Appraisals agrees to carry proper and sufficient insurance to cover loss of the City's records withdrawn from the City by Grota Appraisals, as well as assessor's records in process under this agreement which is in possession of the assessor. Grota Appraisals will not be responsible for loss of records destroyed by fire, theft, or Act of God while kept in office space supplied by the City.
42. Grota Appraisals will be responsible for the proper completion of the assessment roll in accordance with State law. Final assessment figures for each property will be provided by the assessor to Sheboygan County in the county's approved format, and the roll will be totaled to exact balance between the County and the assessor. Grota Appraisals will prepare and submit the Municipal Assessment Report (MAR) and all required TID Assessment Reports to the DOR in a timely manner.
43. Grota Appraisals will insure that its employees maintain strict confidence regarding all privileged information received by reason of this contract per Chapter 70, Wis. Stats. Other than as required under the Wisconsin Open Records laws, 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.
44. Materials and supplies, other than standard office supplies and postage identified below as City Obligations necessary to perform the duties of the contract shall be the responsibility of Grota Appraisals.
45. The Consultant shall assist with the City Attorney and the City's outside legal counsel with any challenges to property values, including claims for excessive assessment.
46. If selected as the City's Assessor, Grota Appraisals will execute a contract with the City that incorporates the information in this RFP response, including any agreed-to options selected by the City from the Addendum.

B. Assessment Software:

The City of Manitowoc currently uses IAS World version 4.0.29.01 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 is seeking Consultant proposals that include an updated system of the Consultant's preferred/recommended choice. Assessment software proposed by Consultant must have the following attributes and abilities (see page #9 of RFP) Grota Appraisals proposes to using Market Drive, This CAMA software meets all requirements as set by the City. The City would be responsible for the purchase of the Market Drive CAMA software with the options of its choosing, as well the data conversion from Tyler CAMA software to Market Drive. (A firm estimate cannot be made at this time as Grota Appraisals does not yet have a copy of the data to be converted)

Grota Appraisals would contribute its time and resources to assure the conversion is timely and is successful in converting all available data to Market Drive, some data will need to be manually entered, Grota Appraisals will provide an listing of such data and in most instances handle the data entry itself. Helping the City to move its data to Market Drive CAMA and so the City sees the benefits it provides, Grota Appraisals would contribute the amount of \$10,000 more than half (1/2) the Market Drive annual maintenance cost for the first two (2) years. We firmly believe this is the best CAMA product available in Wisconsin, both Grota Appraisals and the City would benefit, hence our contribution.

Market Drive cost estimate:

- a. *Cost of software.* See CAMA pricing Addendum
- b. *Cost of Licensing or annual maintenance and who will be responsible for same.* See CAMA pricing Addendum
- c. *Software's ability to interface with the current software and records.* Market Drive will be able to accept and handle all critical elements and data from the City's current CAMA software to accurately value all property in the City.
- d. *Consultant's ability to convert the current data to the proposed software.* Our partner Assessment Technologies of WI, LLC has performed numerous conversions from multiple different CAMA software providers. With the help of the City we would expect the conversion to take no more than 5-months from the date the data is extracted from the City's current CAMA software.

In this response, the City would purchase the license for Market Drive and any third party software per the attached pricing proposal and have control of the CAMA software, Grota Appraisals would provide its expertise as part of its services covered in this RFP to help with the Assessors part in converting property data and its extensive knowledge of the Market Drive product.

C. Revaluation Estimate and Recommendation:

D. City Obligations:

1. The City shall furnish adequate office space at the Sheboygan City Hall at no cost to Grota Appraisals. Office space will include desks, tables, chairs, file cabinets, heating, lighting and janitorial services, including office machinery, equipment, copiers 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 codes, and property files at no cost. The City will notify the Assessor of any changes in zoning and permitted or conditional use and provide copies of related documents (electronic or paper) for the assessment records.
3. The City shall furnish the owner name(s), property address, legal description, size or area, and other identifying description of each parcel to be included in the assessment roll.
4. The City shall furnish the name and correct mailing address, if known, to the Assessor for notices to be sent for changes in assessed values.
5. The City shall aid the Assessor with a reasonable promotion of public information concerning the work under this agreement, including a “Letter of Engagement” indicating that Grota Appraisals, LLC has been retained by the City as their Statutory Assessor for the years of the contract.
6. The official Board of Review scheduling, correspondences and record keeping requirements are a statutory City Clerk’s Office function and responsibility. However, Grota Appraisals will work with the Clerk to schedule meeting dates, send correspondences and ensure proper closing of the annual assessment roll by the Board.

E. Insurance Coverage is as follows:

- \$1,000,000 Commercial General Liability, each occurrence
- \$100,000 Damage to Rented Premises, each occurrence
- \$5,000 Medical Expense, any one person
- \$1,000,000 Personal Injury
- \$2,000,000 General Aggregate
- \$2,000,000 Products – Comp
- \$250,000 Errors and Omissions
- \$100,000/100,000/500,000 Workers Compensation
- \$300,000/300,000/500,000 Automobile Coverage

As Owner and Manager of Grota Appraisals LLC since 1987, it is my objective to provide the highest quality services to clients (municipalities) and peers (assessment community).

Career History

Grota Appraisals, LLC: 1987 to Present

Position: Owner

Responsibilities:

- Continued stability in providing assessment services to existing clients;
 - Currently providing Statutory assessment services directly to 68 municipalities;
- Provide assessment services to communities through competitive bidding;
- Recruitment, development, and oversight of staff and associates;
- Oversight of office management and budgets;
- Oversight of reporting to State Agencies;
 - Property assessment information/reports;
 - Business information;
- Implement best practices for assessment administration.

Accomplishments:

- Instrumental in over 105 municipal revaluations;
- Encourage best practices for assessors state wide through involvement in assessment organizations and direct contact;
- Provide professional support to local Assessors with less experience;
- Provided resources to develop state of the art CAMA software (Computer Assisted Mass Appraisal);
 - Detailed a plan to market the finished CAMA product: **Market Drive PC**;
 - Currently providing the CAMA software and support to about 70% of Wisconsin municipalities.

Narrative synopsis:

Grota Appraisals has grown in employment from 2 to 15 quality long-term appraisers and from 11 to over 68 annual assessment contracts. This growth has resulted from providing a high level of professional service.

Assessment Technologies is the technology arm of Grota Appraisals with the sole purpose to create the best assessment software available to all Wisconsin Assessors at a fair price. Many proprietary trade secrets are part of **Market Drive PC**, which gives Assessors at all levels an advantage once enjoyed by only large municipalities.

Grota Appraisals 4/84 to 1/87

Position: Appraiser

Responsibilities:

- Responsible for the listing and valuation of agricultural, residential, commercial properties for assessment purposes; listing and valuation of new construction; reviewing annual building permits; updating of plats; discovery and valuation of personal property accounts; completion of assessment rolls and final reports.
- Dissemination of property record information to Realtors, appraisers etc.
- Office management duties i.e.: accounting, organization of materials and routing of properties
- In charge of all “Open Book” sessions answering taxpayer questions

Education

Property Assessment:..... Continuing Education
 Property Assessment Administration: Annual Assessor Schools since 1984

Waukesha County Technical College Course taken towards obtaining Assessor Certification 1984

Milwaukee Area Technical College Course taken towards obtaining Assessor Certification 1983

Germantown High School Graduated in 1978

Licensure

Assessor II certification WI63452CA (expires 2-28-2018)

Affiliations

- Wisconsin Association of Assessing Officers (WAAO)
 - Member WAAO Rural Concerns Committee
 - Member Ad Hoc Manufacturing Steering Committee
 - Member Ad Hoc Assessor Certification Committee

Personal

As a Father of three (3) children, Shayna, Michelle, & Nicholas, I coached and sponsored youth sports. Being an outdoor enthusiast, I enjoy all of Wisconsin’s activities including hunting, fishing, and boating. I am also active in the Wisconsin Racquetball Association as treasurer and participant.

Lester J. Ahrens IV
N88 W16573 Main St
Menomonee Falls, WI 53051
(262) 253-1142

Objective

To discover, list and value all agricultural, residential, commercial properties for assessment purposes also, to maintain accurate records and provide prompt service.

Employment History

Grota Appraisals, LLC

7/00 to Present

Project Manager/Division Assessor

- Responsible for the listing and valuation of agricultural, residential, commercial properties for assessment purposes; listing and valuation of new construction; reviewing annual building permits; discovery and listing of personal property accounts.
- Oversight of municipalities day-to-day operations of their assessment department.
- Maintain accurate records and provide prompt service for other assessors, appraisers, government officials and taxpayers.
- Mass Appraisal Statistical Analysis using NCSS
- Residential Mass Appraisal Modeling for Revaluation Assignments
- In charge of all "Open Book" sessions answering taxpayers questions.
- Preparation & presentation of "Board of Review" defenses

Education

Continuing Education	State certified property assessment classes annually since 2000
Waukesha County Technical College	2 year associates degree in property Appraisal/Assessment 1999-2001
University of Wisconsin-Milwaukee	1997-1999
Palmyra-Eagle High School	Graduated in 1997

Affiliations

- State of Wisconsin Assessor Certification
- W.A.A.O. Member

Personal

- Married – Corey
- Children – Colton & Brantley
- Member of a wetlands conservation organization
- Enjoy most outdoor activities

List of References for Grota Appraisals

Communities Currently Provided with Annual Assessment Services:

- Town of Brookfield** - Jane Carlson, Town Clerk; 262-796-3788
645 N. Janacek Rd. Brookfield, WI 53045
- City of Fond du Lac** - Hal Wortman, Dir. Of Administration 920-322-3450
160 S. Macy St. Fond du Lac, WI 54937
- City of Lake Mills** - Betsey Milbrath, City Clerk; 920-648-2344
200-D Water St. Lake Mills, WI 53551
- Village of Summit** - Debra Michael, Town Clerk; 262-567-2757
2911 N. Dousman Rd. Oconomowoc, WI 53066
- City of Mequon** - William Jones, City Manager; 262-236-2914
11333 N. Cedarburg Rd. Mequon, WI 53092
- Village of Slinger** - Tammy Tennes, Village Clerk; 262-644-5265
300 Slinger Rd. Slinger, WI 53086

Communities Recently Provided with Revaluation Services:

- City of Greenfield** - Eric Miller, City Assessor; 414-329-5343
7325 W. Forest Home Ave. Greenfield, WI 53220
- Town of West Bend** - Rebecca Schuster, Town Clerk; 262-338-3417
6355 Cty. Z West Bend, WI 53095
- Village of Jackson** - Deanna Boldrey, Village Clerk; 262-677-9001
PO Box 637 Jackson, WI 53037
- City of Oconomowoc** - Sarah Kitsembel, Finance Director; 262-569-2186
PO Box 27 Oconomowoc, WI 53066
- City of Lake Mills** - Betsy Milbrath, City Clerk; 920-648-2344
200-D Water St. Lake Mills, WI 53551

Grota Appraisals has long operated on the premise that revaluation work is necessary to maintain quality property attributes by which to base uniform, equitable assessments relative to the current market. We try to implement a plan that maximizes cost versus benefit performing revaluation work at the optimum time.

When such a plan is accomplished, the annual assessment process goes smoothly with little reaction and outcry from taxpayers. Public relations and knowledgeable staff are key components to completing successful revaluation projects.

Expertise, Experience Leading to Probable Success

Grota Appraisals is a full-service municipal valuation solution company with over 38 years of experience providing a wide variety of services to many nearby municipalities.

With a talented appraisal staff and meticulous support staff we are able to offer full-time service at a part-time price. We have sufficient staffing and the best available technology to help provide detailed and accurate estimates of value in a professional manner.

A partnership between Grota Appraisals and Assessment Technologies was formed to create assessment software designed to address the specific statutory requirements for Wisconsin and further, to provide a platform for using the “best practices” as outlined in the State’s Assessors Manual. While, *Market Drive* is far and away the most widely used Computer Assisted Mass Appraisal (CAMA) software in the State of Wisconsin, the staff at Grota Appraisals has the most extensive experience with and knowledge of the software’s full capabilities.

Grota Appraisals has a management team and staff that are very familiar with the assessment and public relations requirements for cities the size of the City of Sheboygan. Mr. Grota, Mr. Ahrens and our Office Manager, Ms. Rollinger, lead a team with experience in competently administering assessment services for cities, towns and villages ranging in size from a few hundred parcels to tens of thousands of parcels.

Meeting statutory dates is important in our business as our valuations affect other departments and other taxing jurisdictions. With Board of Review finalizing assessments on a yearly basis, it is important to conclude this meeting well in time for both the equalization and budget process to proceed in a timely fashion with firm or finalized valuations. The first meeting of the Board of Review will be held during the month of May every year of this contract. The only reason for an extension of these dates would be by the request of the City or in the year of a revaluation.

The **Open Book** phase of the assessment cycle will be held for a long enough period to offer property owners ample opportunity to review, compare and discuss the reported assessments for their properties.

Grota Appraisals is experienced working with TID districts. Many of our communities have one or more TID districts. We would work closely with City of Sheboygan staff to assure the Assessors TID Reports are filed on a timely basis and are to the benefit of the City.

Grota Appraisals has a great deal of experience working with exempt properties and those attempting to gain exemption. Our experience over the last 37 years has helped us develop the criteria upon which to base fair determinations of the exemption status. This experience varies from churches and cemeteries to large institutional facilities, including hospitals and clinics. Several properties are partially assessable and partially exempt, which requires careful review and an in-depth working knowledge of the State Statutes as they apply to that entity and its actual use. Should an exemption request arise, we have the knowledge and resources to properly investigate and render a decision based on the current State Statutes.

Town of Kewaskum

Grota Appraisals insured the Town of Kewaskum would meet statutory compliance under Wisconsin State Statutes 70.05(5)(d), (f) and (g).

After going more than 7 years without a full revaluation, the Town's assessment ratio declined to 75% in 2000, which is significantly below the states mandate of 10% +/- of full market value. To meet statutory compliance under Wisconsin State Statutes 70.05, the Town commissioned a full revaluation of all properties for 2001. Additionally, the Town scheduled the Board of Review be held in May, which is comparatively early in the assessment calendar year considering that the community was not in compliance and had not performed a revaluation in seven years. However, in spite of the challenges, Grota Appraisals successfully completed the revaluation in a timely manner and the assessment ratio was adjusted from its low of 75% in 2000 to 101% at the close of the Board of Review in May of 2001.

Unfortunately, in August of 2001, a full three months after the close of the Town's Board of Review, the State's Bureau of Property Tax reported their equalized values for the Town, which included a 45% increase in the commercial class. It should be noted that the Town of Kewaskum has only seven (7) properties classified as commercial.

Because of the State Bureau's reported assessment ratio for these 7 properties, the Town of Kewaskum would have been again listed as being out of compliance under s. 70.05(5)(d) and (f) for the commercial class for 2001. Given that as of 2000, the Town had been out of compliance since 1996, the Town would be candidate for a State supervised full revaluation. The State's decision to report the commercial class as non-compliant would result in the entire community being reported as non-compliant and therefore, subject to a supervised full revaluation the following year.

In spite of concerted efforts, the Town was unable to persuade the State to reconsider their position on the reported assessment ratios for the seven commercial properties. Since non-compliance in 2001 would require the Town to fall under order of the State for a supervised full revaluation, Grota Appraisals, at no additional charge to the Town, performed a market update revaluation for the Town to bring all properties back into an acceptable market value range for 2002.

Town of Saukville

In early July 2012 the Town Chairperson Barb Jobs called to ask if we were interested in working with the Town, before saying yes I needed to check background and 70.05 compliance. To my dismay I found they would not be in compliance for 2012, their 7th year of non-compliance.

Grota Appraisals did accept the challenge, we helped to re-open the 2012 assessment roll and fast tracked a market update revaluation to gain compliance.

With open book just completed and less than 30 property owners appearing the Town will have gained compliance in very short order with reasonable values for all properties while providing good public relations. The Chairperson and Treasurer both attended open book and were pleasantly surprised at the level of preparation and positive interaction their constituents received.

Waukesha County

Positive Client Interactions

From: Gormanson, Mary [<mailto:MGormanson@waukeshacounty.gov>]

Sent: Monday, November 22, 2010 9:40 AM

To: Patty Rollinger

Subject: RE: BIG NEWS!!!

Thanks for the good wishes and the compliments!

I have always been here to serve and hopefully I have done that faithfully throughout the years!

I too have found it an absolute pleasure to work with you personally and all the other folks at your office as well! I will miss all of you and the working relationships we have built over the years also!

But, as I said, it is TIME and (while I will miss the people and the work challenges) I will be happy to spend more time on myself (for a change) and with my husband and the kids, their spouses and our little grandson, Jude, too!

Thanks again!

P.S. They say there will be a cake/beverage reception for me sometime in January...your office will be invited, of course!

Mary L. Gormanson

Mary L. Gormanson

Real Property Tax Lister

Waukesha County

262-548-7577

From: Patty Rollinger [<mailto:Patty@wi-assessor.com>]

Sent: Monday, November 22, 2010 9:20 AM

To: Gormanson, Mary

Subject: RE: BIG NEWS!!!

Hi Mary, I am so happy for you. Wow I didn't know you had been so long! We will definitely miss you, it is always a pleasure to work with you. I appreciate your humor, thoroughness and work ethic. Good luck to you.

Patty Rollinger

Grota Appraisals, LLC

City of Delafield

From: Gina Gresch [ggresch@ci.delafield.wi.us]

Sent: Tuesday, August 02, 2011 4:21 PM

To: Jim Young

Subject: RE: Need a new tax key #

Thank you Jim! I haven't gotten around to asking them yet, so thank you for doing that and helping me out.

Gina C. Gresch, MMC/WCPC

City of Delafield Clerk-Treasurer

From: Jim Young [<mailto:JimY@wi-assessor.com>]

Sent: Tuesday, August 02, 2011 4:17 PM

To: taxlisting@waukeshacounty.gov

Cc: Gina Gresch
Subject: FW: Need a new tax key #

Hello Waukesha County Tax Listing Office,

I'm not sure if you have seen this tax key number question below yet, but could you review it and get back to the Delafield City Clerk at your earliest convenience? I've carbon copied her here so you have her direct email address for your follow-up.

Thank you,

Jim Young
Special Projects & Commercial Assessor
Grota Appraisals LLC

From: Gina Gresch [<mailto:ggresch@ci.delafield.wi.us>]
Sent: Thursday, July 28, 2011 10:16 AM
To: Jim Young; Kyle Waters; Mike Grota
Subject: Need a new tax key #

Last night's Plan Commission meeting had a preliminary Certified Survey Map.

- a. **DELC 0781.990, 1605 Hwy 83, Hartland.** Owner: John and Joe Geason. Applicant: Joseph Geason. Applicant seeks feedback for a preliminary CSM to create a three acre parcel in the A-1 zoning district.

Currently this land has a Conditional Use on it for the cell tower. The new 3 acre parcel will have the house, buildings, and cell tower on it. I need to know what the new tax key number will be so I can work on the new Conditional Use permit for it.

Do you know what it would be? 0781.990.001? is it that easy?

Gina C. Gresch, MMC/WCPC
City of Delafield Clerk-Treasurer

Village of Slinger

From: Margaret Wilber <mwilber@vi.slinger.wi.gov>
Date: Thu, 1 Dec 2011 08:58:50 -0600
To: 'Brian.Braithwaite@co.washington.wi.us' <Brian.Braithwaite@co.washington.wi.us>
Cc: Mike Grota <Mike@wi-assessor.com>; Maureen Murphy <MMurphy@vi.slinger.wi.gov>; Patty@wi-assessor.com <Patty@wi-assessor.com>
Subject: RE: FW: 2011 Final Equated Statement of Assessment

Thanks for confirming this, Brian; we had heard there were others as well. I knew that you and the assessor's office were on top of this; you always are. And we really appreciate all the hard work and support!

Margaret Wilber
Treasurer/Deputy Administrator/Deputy Clerk
Village of Slinger
300 Slinger Rd, Slinger WI 53086
262-644-5265, ext. 106

City of Manitowoc

Costs of Proposed Services

<u>Annual Assessment:</u>	<u>Per RFP:</u>	<u>Option 1:</u>	<u>Option 2:</u>
2016 Assessment Maintenance	\$16,000	\$13,000	\$12,000
2017 Assessment Maintenance	\$214,500	\$203,000	\$198,000
2018 Assessment Maintenance	\$217,000	\$205,500	\$200,500
 Total Assessment Maintenance Cost	 \$447,500	 \$421,500	 \$410,500
 Average per Year (2017-18)	 \$215,750	 \$204,250	 \$199,250

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

City-wide Revaluation:

Market Update to 100%	\$198,000
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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 Wis. Statutes. At the time of revaluation, Grota Appraisals will apply a discount to the revaluation services contract to allow for any and all duplication with the annual assessment services contract.

Costs are all inclusive, no additional charges for extra time, effort, additional parcels, annexation, office supplies, printing and mailing for the performance of the contract are included. Please see the following page for complete revaluation option details.

It would be a big step for the City to limit office hours; Grota Appraisals is open to the idea of altering the level of office staffing City Staff after consultation with the Project Manager.

Grota Appraisals would be open to extending the length of the contract beyond 2018, doing so might help to offset the extensive time needed to adequately learn the City, aid with the data conversion and help to train and take under our wing the City's in-house assessment technician.

City of Manitowoc

Service Options Addendum

Per RFP as Proposed:

- ❖ Grota Appraisals to complete all RFP requirements as proposed.
- ❖ Includes 1-day, 8-hours per week office coverage by a certified Assessor, full email and telephone support daily 7:30 AM to 4:30 PM, and all assessor field work as required.
- ❖ Adequate time to hear all who wish to appear at Open Book Sessions Annually.

Proposal Option 1:

- ❖ Grota Appraisals to complete all RFP requirements as proposed; except:
- ❖ Includes ½-day per week office coverage by a certified Assessor, full email and telephone support daily 7:30 AM to 4:30 PM, and all assessor field work as required.
- ❖ Includes up to 5 days of in office Open Book per year

Proposal Option 2:

- ❖ Grota Appraisals to complete all RFP requirements as proposed; except:
- ❖ Includes 2-days per month of office coverage by a certified Assessor, full email and telephone support daily 7:30 AM to 4:30 PM, and all assessor field work as required.
and telephone support daily 8:00 AM to 5:00 PM, and all assessor field work as required.
- ❖ Includes up to 3 days of in office Open Book per year

Included in all Proposal Options - is the availability and support from Grota Appraisals home office in Menomonee Falls. Telephone, e-mail, fax contacts are available to the City Hall; office hours to City Staff and Property Owners Monday through Friday 8:00 AM to 4:30 PM

Additional Time Requested by the City for Office Hours or special projects:

- Assessor/Project Manager: \$80/hr
- Appraiser/Technician: \$55/hr

Exhibit A
City of Manitowoc
Request for Proposal for Assessment Services
***List of Wisconsin Municipal Assessment Clients over 20,000 Population**

Name of Municipality	Population	Equalized Value	General Assessment Services	Revaluation Services	Market Drive Client
City of Mequon	23,334	\$4,361,728,700	Yes	Yes	Yes
City of Greenfield	37,159	\$2,753,243,300	No	Yes	Yes
Village of Germantown	19,749	\$2,405,913,400	Yes	Yes	Yes
City of West Allis	60,411	\$3,741,492,800	No	No	Yes
City of Fond du Lac	43,021	\$2,662,872,500	Yes	Yes	Yes
City of Wisconsin Rapids	18,039	\$1,011,657,700	Yes	No	Yes
City of Sheboygan	49,288	\$2,407,532,000	No	Yes	Yes
City of Oconomowoc	15,759	\$1,918,686,500	Yes	Yes	Yes

* Grota Appraisals currently provides general assessment services or revaluation services to Wisconsin municipalities with populations over 20,000. In addition we have recently completed both general assessment service contracts and/or revaluation contracts for communities that meet this criterion. Additionally, these communities are *Market Drive* CAMA assessment software clients, as is the City of West Allis who meet the over 20,000 population criterion. These client communities are listed in the table. Please see the further experience detail for these larger-sized municipalities below.

Major City Revaluation Experience Detail:

In the spring of 2011, Grota Appraisals completed a 4-year contract as the statutory assessor for the City of Mequon. In Mequon we successfully performed 3 years of annual maintenance assessment services and also performed a mixed walk-around/market update revaluation project for the 2009 assessment year. The City after pursuing contracts two (2) low-cost providers recently made the decision to contract with Grota Appraisals. Staff worked tirelessly and in a short timeframe to perform all required functions for 2015. We also did a residential class market update revaluation project for the City of Greenfield in 2009 and a model configuration and training City of Sheboygan 2014. The DOR Major Class Comparison Reports (Level of Assessment) in all cases ranged from 98% to 99% for the years of the revaluation and ranged from 98% to 102% in the next year following the revaluations.

Name of Firm: Grota Appraisals

Address of Firm: N88 W16573 Main St.

Menomonee Falls, WI 53051

Signature of Preparer: 