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## Request for Proposals: Assessment Services for the City of Manitowoc

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To Provide Statutory Assessor,  
Annual Maintenance, and  
Software Services

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**Community Development  
Department of the City of  
Manitowoc**

Released **August 19, 2016**

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## I. Introduction

The City of Manitowoc is requesting proposals from qualified assessment firms (“Consultant”) to provide annual assessment services for the City of Manitowoc, Wisconsin (hereafter, referred to as “City”) for the years 2016-2018. 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. The City is also seeking a firm to provide and use appropriate CAMA software and to facilitate any needed data conversion from the City’s existing system to any proposed new system. In addition to these core services, the City is also requesting informal recommendations and preliminary cost estimates on City-wide revaluation.

### A. Program Goals

The following statement of goals outlines the City’s overall desires for the results of its tax assessment program.

1. Provide tax assessment services that are **technically sound** – free from errors and defensible from an equity standpoint.
2. Utilize consultant services in a way that meets the needs for both ongoing maintenance and revaluation in a **cost-effective** manner. This may mean that large revaluation projects are avoided completely by more aggressively maintaining equity on an ongoing basis.
3. Provide a level of **customer service that is consistent** with the expectations for other City services. Consultants will endeavor to work seamlessly with City staff to achieve this.

### B. Addenda, Rejection, Cancellation, Preparation Cost

The City reserves the right to revise any part of this RFP by issuing an addendum at any time prior to the submittal deadline. The City reserves the right to accept or reject, in whole or part, all proposals submitted and/or to cancel this announcement if any such action is determined to be in the City’s best interest. All materials submitted in response to this RFP become the property of the City. The City will not be responsible for costs associated with preparing proposals. By submitting a proposal, each Consultant agrees to be bound in this respect and waives all claims regarding such costs and fees.

## II. Background

The City of Manitowoc, with an (American Community Survey 5-year) estimated 2014 population of 33,443, is located in Manitowoc County. The 2015 Equalized Value (including manufacturing and TID) for the City is \$1,911,750,600. The City has ten active Tax Incremental Financing Districts. The assessment ratio for 2015 was 1.0482 in total for all property classes. The estimated 2016 ratio is 1.200.

The City has the following parcel counts (from 2015 Statement of Assessment):

	<b>Total Parcels</b>	<b>Improved</b>
Residential	11,859	11,233
Commercial	1,113	971
Manufacturing	103	102
Agricultural	74	
Undeveloped	43	
All Others	2	
<b>Total</b>	<b>13,194</b>	<b>12,306</b>

The 2016 Municipal Assessment Report indicates that the City has 1,848 Personal Property accounts with a preliminary value of \$48,373,000.

The last full City-wide revaluation was completed in 2007. No exterior or interim market updates have been conducted since then.

### **III. Anticipated Scope of Work**

An important goal of the City of Manitowoc in selecting a Consultant is to form a strategic partnership that best utilizes City resources and creates a seamless delivery of service from the perspective of our customers. The City will employ an Assessment and Property Listing Technician at the certification level of at least Assessor Technician (but preferred at Property Appraiser). As such, the City is seeking integrated proposals for assessor services and supporting software, as well as a recommendation and preliminary cost estimate on a potential city-wide revaluation. Details on each scope area follow.

#### **A. Specific Services Required**

1. Consultant 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 Consultant shall designate a qualified and responsible employee to supervise the operation of the Consultant'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 supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

The Consultant shall report to and be accountable to the Community Development Director or his/her designee. The Consultant shall meet with the Community Development Director on a regular 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. Consultant or his/her City-approved designee will maintain regular office hours at Manitowoc City Hall from 7:30 AM to 4:30 PM at least one day per week. (Additional time will be spent in the City to perform other responsibilities, but this is the minimum

commitment for on-site office hours.) Additional office hours should also be planned after assessment notices are sent out, during the Open Book review, and prior to the Board of Review.

3. The Consultant shall be available, either on-site during regular office hours or remotely via telephone and email, to assist City staff when needed with assessment related clerical duties including:
  - a. Answering routine telephone calls
  - b. Walk-in requests for assessment data
  - c. Assist in 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. All assessment data entry
4. Consultant will provide a local (or toll free) phone number for City officials and residents to contact the Consultant during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
5. Consultant will collaborate with City assessment staff to field review and assess all properties that were under partial construction as of January 1st of the previous year.
6. Consultant will collaborate with City assessment staff to field review and assess new construction as of January 1st of the current year.
7. Consultant will collaborate with City assessment staff to 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. Consultant will collaborate with City assessment staff to 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. Consultant will collaborate with City assessment staff to field review as deemed necessary sale properties and properties for which no building permit has been issued.
10. The Consultant will be diligent in discovering and assessing all personal property. Consultant will collaborate with City assessment staff to field visit all personal property accounts annually to discover new accounts and account for business that may have closed prior to the assessment year. Consultant will cross reference personal property account with the corresponding real property and parcel number.
11. The Consultant will collaborate with City assessment staff to 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. Consultant will collect the name and address of each personal property contact person,

- separate from the business name. The Consultant shall provide a dooimage listing to the Community Development Director or his/her designee prior to the Open Book review.
12. Consultant will collaborate with City assessment staff to account for all buildings destroyed or demolished.
  13. Consultant will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
  14. The Consultant will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
  15. Consultant will assist City assessment staff to process parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps and any other land divisions.
  16. Consultant will collaborate with City assessment staff to take digital photographs of new construction on or about January 1st annually, and also during the review process if needed.
  17. Consultant will collaborate with City assessment staff to maintain and annually update property owner lists, with current name and address changes.
  18. Consultant will collaborate with City assessment staff to post assessments to real estate transfer returns and record sale information to property record cards electronically.
  19. Consultant will collaborate with City assessment staff to annually update all property owner record cards with new legal descriptions electronically.
  20. Consultant will collaborate with City assessment staff to mail Notice of Assessment to property owners and others as required by State Statutes.
  21. Consultant will conduct Open Book sessions in accordance with Wisconsin State Statutes. Consultant 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 Consultant shall notify the local press for publication prior to Open Book.
  22. The Consultant 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 Consultant shall work with the City Clerk to arrange for the hearings. The Consultant will attend the Board of Review hearings, serve as City staff at the hearings and defend the valuations and work products. The Consultant will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.
  23. The Consultant shall update the assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.

24. The Consultant will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
25. The Consultant will collaborate with City assessment staff to value all mobile homes as required by law.
26. Consultant will assist City assessment staff to coordinate with the Manitowoc County Real Property Listing office to facilitate the digital and manual transfer of data and values.
27. Consultant will collaborate with City staff to place property assessment records on the web for access to the public. This may be accomplished through the City's existing online resources or through the Consultant's software package.
28. The Consultant shall update market values on City owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation and/or establishing lease values.
29. The Consultant shall also collaborate with City staff to perform all other duties incidental to the normal duties of the assessor.
30. All assessment files and records created and data collected by the Consultant shall remain the property of the City. Records shall not be removed from City premises without the written permission of the City.
31. All records shall be converted to and stored in a digital format.
32. The Consultant shall be available to attend, upon the request of the Community Development Director, other department head, or Mayor, other prescribed meetings upon reasonable prior notice. Such meetings are expected to average two (2) hours per month.
33. The Consultant shall communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. The Consultant 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.
34. The Consultant is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
35. All Consultant personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.
36. The Consultant is not permitted to assign, subcontract, or transfer the work without the written permission of the City.
37. All Consultant 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.

38. The Consultant will provide an 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 Consultant shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the Consultant's employees to be unsatisfactory, the Consultant shall remove such employee(s) from working for the City upon written request from the City.
40. The Consultant shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of the Consultant, their agents and employees in the execution of work. Further, the Consultant 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. Said certificates shall be in a form and amount acceptable to the City Attorney.
41. The Consultant agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as Consultant's records in process under this agreement which is in the possession of the Consultant. The Consultant 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.
42. The Consultant 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 Consultant to Manitowoc County in the appropriate electronic format, and the roll shall be totaled to exact balance between the county and the Consultant. The Consultant 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 Consultant 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.
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 the Consultant.
45. The successful Consultant shall be required to execute a contract with the City that incorporates the information included in this RFP.

#### **B. Assessment Software**

The City of Manitowoc currently utilizes CLT by Tyler Technologies (IAS World version 4.0.29.01) assessment software. 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:



1. A statistical package that includes descriptive statistics and regression analysis. The Consultant 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 Manitowoc County Real Property Listing office in the format required, eliminating any manual data entry of the completed roll.
5. The ability to import "start-up data" from the City's existing databases to avoid time/cost consuming initial data entry.
6. Ability to communicate with City's existing building permit record keeping which is maintained in Springbrook/Accela software package.
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 or Sequel Server, that can be read or easily converted to be read by other software packages.
14. Consultant will collaborate with the City to maintain the database used, together with file maps and descriptions, and all associated digital photos. This database will remain 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.
17. Within the proposal, the Consultant should clearly identify what software platform it intends to use during the engagement. In addition, the proposer shall clearly state the following:
  - a. Cost of Software
  - b. Cost of licensing or annual maintenance and who will be responsible for same
  - c. Software's ability to interface with the current software and records

### **C. Revaluation Estimate and Recommendation**

With the last full, City-wide revaluation completed in 2007, the City is beginning to plan for this future need. Proposals shall include a statement with a recommendation and preliminary cost estimate for revaluation services. Such recommendations may include multiple alternatives, as long as each alternative also includes a cost estimate. Consultants may consider various methods and timing for accomplishing equitable valuations throughout the City, from city-wide revaluation as a single project, to aggressive yearly maintenance, to neighborhood-level market updates, and everything in between. This will be considered an informational and informal part of Consultant's proposal, but it may also be considered in evaluating and ranking proposals if all other criteria between Consultants have been found to be roughly equal.

### **D. City Obligations**

1. The City Assessor's Office currently operates with a total of one (1) trained Staff. With the retirement of the previous City Assessor, this position is currently vacant as is being redefined based in part on the responses to this RFP. The City will employ an Assessment and Property Listing Technician at the certification level of at least Assessor Technician (but preferred at Property Appraiser). This individual will be responsible for property listing functions and will assist in many assessment duties as their level of experience and certification allow. This individual will provide clerical support and help facilitate service between Consultant and customers.
2. City assessment staff will be responsible for maintaining plat and section/cadastral maps on file and update yearly.
3. City will be responsible for all office supplies, postage, cards, and other materials needed to perform mailings and other clerical functions.
4. The City shall furnish adequate space at the Manitowoc City Hall at no cost to the selected Consultant. Office space will include desks, tables, chairs, file cabinets, heating, lighting, telephone and janitorial services, along with other office machinery, equipment and computers that are utilized in City Hall.
5. The City shall allow access by the Consultant 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.

6. 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.
7. The City shall furnish the name and correct address, if known, to the Consultant for notices to be sent for changes, in assessed values.
8. The City shall aid the Consultant with a reasonable promotion of public information concerning the work under this agreement.

## IV. Proposal Requirements

### A. Proposal Content and Organization

To achieve a uniform review process and a degree of comparability, the proposals should be organized in the following order and contain all of the following information:

1. **Firm and Contact Information:** Identify the firm name and address. Provide the name(s) of the person(s) authorized to make representations for your firm, their title, address, email address, and telephone number(s). If different, also provide the name, title, address, email address, and telephone number of the qualified and responsible individual that will be designated to supervise the operation of the Consultant's staff for the entire contract period.
2. **Individual Qualifications:** Include the names and resumes, including educational background, municipal assessment experience, and current Wisconsin Department of Revenue certification level, of the person or persons to be assigned as the City's points of contact for the work to be performed. Include the key contact person's experience with conducting a revaluation process and experience with assessment evaluation of potential tax-exempt properties.
3. **Firm Qualifications:** Include with your proposal a summary of firm experience that identifies the following for Wisconsin municipalities with a population greater than 20,000 for which your firm currently provides assessment services:
  - a. Name of municipality
  - b. Population
  - c. Equalized value
  - d. Total parcel count
  - e. Whether Statutory Assessor services are provided
  - f. Whether Maintenance services are provided
  - g. Whether Revaluation services are provided
  - h. Evidence of the accuracy of the firm's assessment work for that municipality
4. **Work Proposal:** In order to be considered as complete, proposals shall acknowledge and respond to each point in the above Scope of Work.

5. **Cost:** State the total annual compensation rate to provide the services described in the above Scope of Work and in accordance with the laws of the State of Wisconsin for assessment years 2017 and 2018 beginning not later than November 1, 2016. The City will pay the annual compensation pro-rata on a monthly basis. Clearly list the fee for each year of the proposed contract in a not-to-exceed sum including all of the Consultant's costs, but not necessarily limited to: labor, materials, supplies, equipment, transportation, meals, lodging, computer software, and Board of Review expenses. All expense reimbursements will be the responsibility of the firm.
6. **Office Hours:** Consultants 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. **Informal Revaluation Proposal and Qualifications:** Consultants shall provide an informal recommendation and preliminary cost estimate for a future revaluation of City property. The selected Consultant shall have successfully completed a revaluation in a municipality of similar size and stature. The Consultant shall have Assessor Level II or higher staff competent to perform such a revaluation of commercial and residential property.
8. **References:** Identify a reference and provide contact information for at least five references from Wisconsin municipal clients, including at a minimum all those municipalities listed in Exhibit A. References should be of a size similar to the City of Manitowoc for which the firm 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, email address, and business phone number of the contact person.

## **B. Submittal Requirements**

Proposals must be received by the City of Manitowoc by 4:30 PM on **Monday, September 12, 2016**. It is recommended that all proposals be submitted via certified mail or other commercial courier services in order that the Consultant will have a written record of the delivery. The following requirements must be completed in full:

1. Five (5) original hard copies of the completed proposal
2. At least one (1) electronic copy via one of the following devices: CD, DVD, or USB
3. Please send the identified information to the City of Manitowoc at the address listed below:  
City of Manitowoc  
Attn: Nicolas Sparacio  
900 Quay Street  
Manitowoc, WI 54220

## V. Selection Criteria and Process

### A. Selection 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 Manitowoc.
2. The qualifications of key personnel and past experience with providing assessment and revaluation services for both Residential and Commercial properties.
3. Ability to provide and maintain a computerized database of property assessment records meeting the requirements of the RFP.
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.

The proposals will be reviewed and awarded to the Consultant whose quote is the most responsive to the RFP and is the most advantageous to the City of Manitowoc considering experience, price, and other factors. The City reserves the right to accept or reject any and all proposals received.

### B. Selection Process

The Consultant selection process will involve the following primary steps.

1. **Proposal Review:** Proposal review will be based on a comparative assessment and scoring of each document in accordance with the identified Selection Criteria. The City will then select one or more finalist firms to advance in the selection process.
2. **Interviews:** The City will determine whether interviews are needed, or it may make a selection based on the proposals alone. If determined necessary by the City, the finalist firms will be requested to present their experience, qualifications, software package, and personnel in an interview to members of the City's selection team. (Further interview instructions will be provided to the selected finalist firm(s).) The City will then review the presentation(s) and select a Consultant to advance in the process.
3. **City Approvals:** Based on the results of the selection process, the City's selection team will recommend to the Manitowoc Finance Committee and the Manitowoc Common Council a Consultant for approval. It is anticipated that such approvals would occur in the month of October so that a Consultant could begin work in November.
4. **Contract Negotiation:** The selected Consultant will submit a proposed scope of services, then work cooperatively with the City to develop the final scope and project cost. Proof of

the required insurance coverage will also be required at that time. Refer to Sections C and D below for further details related to insurance, contract award, and notification.

### C. Selection Timeline

The following is the anticipated schedule for Consultant selection but is subject to change.

Submittal Deadline	September 12
Interview Scheduling	September 19-21
Consultant Interviews	September 27-29
Consultant Selection	September 30
Finance and Council Confirmation	October 4 and 17
Contract Negotiation	October 18-21
Contract Award by Council	October 25

### D. Rules Governing Competitive Evaluation

1. **Examination of Request for Proposals:** Consultants are advised to carefully inspect the community, the assessment records and facilities of the City of Manitowoc, 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 Consultant 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 RFP on a timely basis.
2. **Proposal Acceptance Period:** The selection of a Consultant with which to begin contract negotiation is expected to occur within four weeks of the submittal deadline. Short-listing of Consultants for interview and Consultant interviews will take place within this time period.
3. **Contract Negotiations:** The highest-ranked Consultant will enter into negotiations with the City. If an agreement cannot be met, the City will notify the Consultant and stop negotiations. Then the second highest-ranked Consultant will enter into negotiations. This process may continue until a successful negotiation occurs. The City reserves the right to cease any negotiations with any Consultant should it be in the City's best interest.
4. **Personnel Changes:** Prior to the execution of any contract for the requested services, the Consultant shall notify the City, in writing, of changes in key staff. The City shall have the right to terminate or renegotiate the contract if these changes will affect any work product or agreed upon timetables.
5. **Compensation:** Compensation will be based upon a negotiated fee between the Consultant and the City determined by the actual unit cost for items of work required to perform a specific task. The Consultant will not be permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
6. **Contract Time:** The Consultant shall proceed with the services specified after the execution of the contract and upon written notice from the City. The estimated contract duration for

the requested services is two years. The actual duration will be specified in the contract along with options for renewal and extension.

7. **Insurance Requirements:** The successful Consultant will be required to provide proof of required insurance coverage, naming the City as an additional insured, to the City Attorney prior to the start of work. The minimum requirements include at least \$2,000,000 general liability on an occurrence basis, evidence of automobile liability, and statutory workers compensation.

#### **E. Questions and Comments**

All questions shall be submitted in written form to the contact information provided below. Answers will then be provided, via the City website, in written form as a part of an addendum to this RFP.

City of Manitowoc  
Attn: Nicolas Sparacio  
900 Quay Street  
Manitowoc, WI 54220  
Email: [nsparacio@manitowoc.org](mailto:nsparacio@manitowoc.org)  
Phone number: (920)686-6930

For additional context on the City of Manitowoc, its tax assessment program, and the digital version of this RFP, please visit our website at [www.manitowoc.org](http://www.manitowoc.org).