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CITY OF BERLIN

**REQUEST FOR PROPOSALS FOR 2020-2022 ASSESSMENT
SERVICES**

SUBMISSION DUE DATE: SEPTEMBER 24TH AT 4:30PM

SECTION I: BACKGROUND INFORMATION

The City of Berlin is soliciting proposals for auditing services for January 1, 2020-December 31, 2022. The following information should be used for developing proposals:

- The 2019 DOA preliminary population estimate is 5,604.
- The 2019 Equalized Value for the City is \$290,692,300.
- The City has six (6) active Tax Incremental Financing Districts (two are environmental) with a 2019 value of \$27,887,200.
- The last statistical revaluation was completed for assessment year 2010.
- The assessment ratio is estimated to be at .86.
- The State of Wisconsin handles the real estate for manufacturing properties.

Real Estate & Personal Property Information					
SOURCE: FINAL EQUATED 2018 STATEMENT OF ASSESMENT					
REAL ESTATE					
Classification	Parcel Count		Land Value	Improvement Value	Total Value
	Land	Improvements			
Residential	2,065	1,844	33,460,100	135,444,400	168,904,500
Commercial	268	225	9,275,700	49,229,900	58,505,600
Manufacturing*	26	25	1,122,500	15,414,800	16,537,300
Agricultural	2	-	80,900	-	80,900
Other	41	4	217,100	215,400	432,500
	2,444	2,098	44,156,300	200,304,500	244,460,800
PERSONAL PROPERTY			MOBILE HOMES		
Personal Property <u>Count</u>	Locally Assessed	Manufacturing*	Total	Mobile Homes	Count
282	\$ 4,501,500	\$ 4,082,000	\$ 8,583,500		2

*Assessed by WI DOR

City of Berlin Building Permit and Value Table		
	2019**	2018
New Dwelling Permits	1	2
Other Permits	122	225
Total Permits	123	227
Construction Value		
Commercial	\$333,346	\$736,819
Residential	\$972,190	\$1,884,401
Total Construction Value	\$1,305,536	\$2,621,220
<i>**2019 numbers are as of August 30, 2019</i>		

SECTION II: SCOPE OF SERVICES

A. Inspections. The following inspection cycle is to be completed by the Assessor annually, namely:

- 1) New construction, annexed properties, and exempt status changes shall be physically inspected and property record card created or updated as needed.
- 2) Properties affected by building removal, fire, significant remodeling (requiring a building permit), or other major condition changes shall be physically inspected.
- 3) Improved properties under construction over a period of years shall be re-inspected.
- 4) Sales properties shall be reviewed and inspected if deemed necessary to insure a fair assessment.
- 5) Requests to review by property owners made after the close of the previous Board of Review shall be inspected.
- 6) Footprint drawings and new exterior digital photos shall be updated or added for all new or altered major improvements as needed. DOR required footprint sketches should be stored as either Apex CAD drawings or scanned from existing drawings complying with Department of Revenue electronic data requirements.
- 7) The Assessor will review properties for changes in legal description which includes land splits, consolidations, rezoning and reclassification and update the appropriate assessment records.
- 8) Any other miscellaneous inspections or data analysis requests necessary to value and assess properties.

- B. Revaluation.** With the assessment ratio estimated at 86%, it is anticipated that a revaluation will be necessary during the contract time period.
- C. Approaches to Value.** The Assessor shall consider the cost, market and income approaches in the valuation of all vacant and improved parcels as appropriate. The Assessor will be educated and experienced in valuation of Section 42 housing projects.
- D. Software Valuation Tools.** The Market Drive PC software shall be used in the general valuation of all land and residential improvements and personal property. The Assessor will provide the City of Berlin with two Database Licenses (Viewer Only). Marshall Swift commercial valuation system shall be used to value commercial improvements. Other assessment software options will be considered and accepted if fully explained and demonstrated to meet the needs of the City of Berlin.
- E. Personal Property.** The Assessor shall distribute annual personal property statements to all businesses and by May 1 review statements and follow up with unfiled or incorrect statements. The Assessor shall determine the appropriate assessment. Any dooimages assigned will be reported to the City Clerk prior to Board of Review.
- F. Open Book Conference.** Upon completion of the Assessor's review of assessments and prior to the completion of the assessment roll, the Assessor shall hold open book conferences for one day of at least two hours to allow property owners or their agents to review and compare the assessed values. The Assessor shall be present to meet with property owners. The Assessor shall mail assessment notices not less than fifteen (15) days prior to the day of the conference for the convenience of property owners. Those property owners who refuse access for the Assessor to view changes to real property will receive registered letters from the Assessor warning them that a dooimage assessment may be required and that the Board of Review may deny them the right to appeal that assessment. Copies of the notices or a spreadsheet of the parcel numbers, value changes and date(s) sent will be provided to the City of Berlin Clerk. Appeal guides and instructional materials will be available at the conference. The Open Book conference shall be held no later than June 30.
- G. Completion of Assessment Rolls and Reports.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the Wisconsin Property Assessment manual. The Assessor will verify that all photos and sketches have been transferred to electronic filing after completing the annual assessments. The Assessor shall prepare and submit the Municipal Assessment Reports (MAR), the TID Assessment Reports (TAR), the Annual Assessment Reports and the Exempt Computer Value Reports as required by the Department of Revenue. The City of Berlin will also be provided this document in paper and electronic form. The

Assessor shall provide the City of Berlin with Property Records in electronic format on an annual basis and update them within 14 days of the adjournment of the Board of Review. If the assessor leaves office at any time during the contract term he/she will turn over all assessment data (paper and electronic).

- H. **Mobile Home Notices.** Assessor will prepare notices of Parking Fees and send to the individual mobile home owners and City of Berlin Clerk.
- I. **Omitted Property Tax.** The Assessor will be responsible for producing the Omitted Property Roll and providing the values to the City of Berlin Clerk necessary to generate Omitted Tax Bills. Likewise the assessor is responsible for providing values to the City of Berlin Clerk for Correction of Errors by Assessor.
- J. **Board of Review Attendance.** The Assessor shall be present at all Board of Review meetings to explain and defend the assessed value under oath. The Assessor will provide digital photographs and values with comparable properties in preparation for Board of Review hearings and determinations so that the Board and the petitioner have evidence of comparability. In the event of an appeal beyond the Board of Review, the Assessor shall furnish testimony in defense of the assessed values.
- K. **Office Hours and Availability to the Public.** The Assessor shall be available to meet with any and all municipal officials, property owners and their agents on an as needed basis throughout the contract period. The Assessor will maintain an answering service and will return all phone calls within twenty-four (24) hours.

SECTION III: GENERAL REQUIREMENTS

- A. **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 to the State of Wisconsin and to faithfully perform the duties of Assessor.
- B. **Conformance to Statutes.** All work of the Assessor shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and with all the rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue and the Municipality.
- C. **Qualifications and Conduct of Personnel.** All assessment personnel providing services shall be currently certified by the Department of Revenue (DOR) and in compliance with Wisconsin State Statutes and Administration rules of the DOR, and shall maintain certification throughout the duration of the contract. The Assessor and all assessment personnel shall conduct themselves in a safe, professional and courteous manner while performing services within the

Municipality. The Assessor shall work to establish good community relations throughout his tenure as Assessor.

C. Ownership of Records. All records prepared or maintained in connection with the assessments in the Municipality shall at all times be and remain the sole property of the Municipality. Each contract year, within 60 days of the final adjournment of the Board of Review, the Assessor shall turn over to the City of Berlin, all records prepared or maintained in connection with assessments in the City of Berlin including, but not limited to:

1. Viewer copy(s) of Market Drive database
2. All records and material obtained from the City of Berlin or for the City of Berlin to include maps, plans and Assessor's records.
3. Material specifically obtained and/or used for performance of assessment work for the City of Berlin, to include correspondence with property owners, sales data and operating statements of income property.

E. Public Records Compliance. The Assessor shall respond to all open records requests received in a timely manner. In so doing, the Assessor shall comply with the confidentiality provisions of the law regarding personal property returns, income and expense information, etc.

F. Insurance Liability, Worker's Compensation. The Assessor shall maintain insurance coverage to protect and hold harmless the Municipality against claims, demands, actions, and causes of action, arising from any act or omission of the Assessor, its 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 naming the City of Berlin as an additional insured. Limits of liability shall not be less than:

Worker's Compensation.....Statutory

Comprehensive General and Public Liability:

Bodily Injury

Per Person.....\$1,000,000

Per Occurrence.....\$1,000,000

Property Damage

Each Occurrence.....\$1,000,000

Comprehensive Auto Liability Including Non-Ownership Coverage:

Each Person.....\$1,000,000

Each Occurrence.....\$1,000,000

Property Damage

Each Occurrence.....\$2,000,000

Insurance-Valuable Papers. The Assessor agrees to carry proper and sufficient insurance to cover loss of Municipality's records withdrawn from Municipality for the Assessor use 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 destroyed by fire, theft or Act of God while kept in office space supplied by Municipality.

G. Status, Designated Assessor and Transfer of Obligations.

- 1) The Assessor is an independent contractor pursuant to Sec. 62.09(1)(c) Wis. Stats. The Assessor is an annual Mayoral appointment.
- 2) If firms are considering subcontracting portions of the contract to other firms, then the name of the proposed subcontracting firms must be clearly identified in the proposal. Following the award of the contract, the Assessor has no right to assign, transfer, convey or sub-contract all or any rights or obligations under this contract without the prior written consent of the Municipality, which consent shall be at the sole discretion of the Municipality.

SECTION IV: OTHER

COSTS ASSUMED BY ASSESSOR: This is an **ALL-INCLUSIVE** contract. The Assessor will carry out all duties and responsibilities described with no additional costs to the Municipality over and above the compensation agreed upon herein. The Assessor assumes responsibility for all postage, phone calls, photos, cost of all insurance, Open Book, Board of Review and Post-Board of Review appearances, etc.

OBLIGATIONS OF THE MUNICIPALITY:

- A. Office Space.** The Municipality shall furnish adequate office space at no cost to the Assessor in the municipal hall for conferences with property owners and the Open Book meeting.
- B. Access to Records.** The Municipality shall allow access to such municipal records such as, but not limited to previous assessment rolls, mapping, building permits, zoning data, etc.

TERM OF CONTRACT: The term of this contract shall be from January 1, 2020 through December 31, 2022.

SECTION V: PROPOSAL REQUIREMENTS

To be considered, three (3) copies of the proposal must be received at the address below by September 24th, 2019. Please include:

1. Brief overview of firm including summary of qualifications/experience
2. Copy of Proof of Insurance
3. References and Related Work
4. Detailed explanation of any current pending litigation involving the firm or any investigations by any regulatory agency.
5. Copies of State Certifications for all individuals that will be responsible for City assessment.
6. Detailed resume of the person(s) to be assigned to perform the work.
7. Rates of Personnel and hours for each
8. List of contractual requirements bidder currently has.
9. Copy of an Annual Assessment Report
10. Any reservations or exceptions from the specifications intended by the bidding contractor shall be specifically outlined and detailed in the proposal and bid as submitted, prominently entitled, "Reservations or Exceptions to Specifications"
11. Financial Cost Proposal should Include the following:
 - Option A: All-inclusive, not-to-exceed, annual maintenance cost for 2020-2022. Itemize where possible.
 - Option B: All-inclusive, not-to-exceed, annual maintenance cost for 2020-2022 and full revaluation with interior and exterior inspections. Itemize where possible.
 - Option C: All-inclusive, not-to-exceed, annual maintenance cost for 2020-2022 and full revaluation with exterior inspections. Itemize where possible.
 - Option D: All-inclusive, not-to-exceed, annual maintenance cost for 2020-2022 and market revaluation that revalues all parcels based on current market conditions. Itemize where possible.
 - Option E: Hybrid model of Option B & C where the cost for a full revaluation would be based on the actual number of interior inspections granted by property owners vs exterior only inspections completed.

Proposals will be evaluated and are subject to approval by the Mayor and City of Berlin Common Council. Award notification is anticipated to be on or around October 8th, 2019. During the evaluation process, the City reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. At the discretion of the City of Berlin, firms submitting proposals may be requested to make oral presentations as part of the evaluation process. The City of Berlin reserves the right to reject any and all proposals.

Please send or email your proposals to:

City of Berlin
Attention: Jodie Olson, City Administrator
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Berlin, WI 54923
jolson@cityofberlin.net
920-361-5400