

VILLAGE of CAMBRIDGE

REQUEST FOR PROPOSALS TO PROVIDE ASSESSMENT SERVICES

The Village of Cambridge (hereinafter referred to as "the Municipality") is requesting proposals from qualified Assessors to provide annual assessment services for the period of January 1, 2012 to December 31, 2018.

Parcel Count and Other Information:

The 2010 assessment roll parcel count was as follows (excluding manufacturing):

	Dane County	Jefferson County	Total
Total Real Estate Parcels	794	45	839
Total Improved	591	33	624
Residential	552	35	587
Commercial	113	1	114
Agricultural	9	0	9
Other	87	5	92
Manufacturing * not included in contract	6	0	6
Personal Property	143	1	144
2010 Assessment Ratio	.96743	.96223	
Total Assessed Value (excl. Manuf)	138,836,200	5,535,700	144,371,900

The Village of Cambridge currently has one (1) active TIF districts.

The Village of Cambridge is currently undergoing a revaluation in 2011.

Obligations of the Municipality:

The Municipality will perform limited clerical services to assist the assessor including:

- Answer general correspondence concerning assessment related inquiries that Municipal staff is capable of answering. Provide information as to how to contact the assessor by mail, fax, email or telephone.
- Provide copies of all building permits and commercial plans, previous assessment rolls and records as requested at no cost.
- Publish public notices at appropriate times during the assessment process.
- Provide the name, address of the owner and the block and lot number, size or other identifying description of each parcel to be appraised when possible.
- Provide adequate office space for assessment personnel for office hours.
- Provide access to the office during normal Village Hall hours.

Scope of Work – Assessment Services

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the Municipalities in accordance with all applicable Wisconsin State Statutes.
2. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
3. Assessor will review and assess new construction, partial construction and remodeling as of January 1st of the current year.
4. Assessor will mail out state approved forms to all holders of personal property in the Municipalities, audit the returned forms and place the new values in the assessment roll. Doomage assessments will be added to any personal property account whereon a return has not been filed. Due diligence will be done to determine new businesses not previously assessed, and businesses that have terminated and should be removed from the roll.
5. Assessor will account for all buildings moved, destroyed or demolished.
6. Assessor will create new property record cards for all parcels including those created from parcel splits and new plats and take digital pictures of all parcels. All property record cards shall be updated as needed.
7. Assessor will correct legal descriptions as needed.
8. Assessor will record assessment data, prepare appointment mailers, stuff envelopes and mail notices and schedule and reschedule appointments as necessary.
9. Assessor will notify the Village Administrator/Clerk/Treasurer of missing building permits or apparent errors in property record files.
10. Assessor will update and maintain 100% real property assessment records for the Municipality. Assessor will physically inspect the exterior and the interior of a minimum of 25% of the properties annually from 2012-2015, with a full market revaluation conducted in 2016.
11. Assessor will post assessments to real estate transfer returns and record sale information on property record card.
12. Assessor will mail the notices of changed / increased assessments.
13. The Assessor will be responsible for completing and signing the real estate and personal property assessment rolls.

14. The Assessor shall submit all applicable reports to the Department of Revenue.
15. Assessor will stay informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Assessor will also stay informed about court decisions, Department of Revenue advisories and other governmental decisions that impact value.
16. All data and programs gathered will become the property of the municipalities.
17. All office supplies, postage and other supplies necessary to perform the duties of the contract shall be borne by the Assessor.
18. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. Property owners will be given sufficient notice of changes in assessment and will be provided the opportunity to meet with the Assessor to discuss changes. The assessment roll will be available for public inspection prior to the Open Book session.
19. Assessor will be responsible for insuring that all procedures are properly completed for Open Book and Board of Review proceedings to be held according to statutes. Assessor will also attend the Open Book and Board of Review meetings testify under oath while defending the Assessor's valuation and work products. In the event of an appeal to the courts, it is agreed that the Assessor will be available to furnish expert testimony in defense of any of the assessed values.
20. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports and TIF report per DOR requirements, and providing all records and reports required by either Dane or Jefferson Counties.
21. Assessor will provide a local or toll-free phone number and email for municipal officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours, 90% of the time.
22. Assessor will maintain a complete set of computer property assessment records (including digital photographs of each property), and provide copies to the Municipalities upon request and to the Dane and Jefferson County Treasurers as required. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. In addition the Assessor shall provide computer data of the property assessments in its original format so as to allow the municipality to respond to open records requests.
23. Assessor will also perform all other duties incidental to the normal duties of Assessor.

General Quotation Requirements

1. Proposals must include no more than twenty (20) pages, 8 ½ inches by 11 inches.
2. All quotations must identify the firm name, address and specific assessment services experience in Wisconsin. The proposals shall also include the names, educational background and municipal assessment experience of the person or persons to be assigned as the Municipality's point of contact for the work to be performed. The Assessor shall provide basic information about their business, location, personnel and capabilities. Include the phone and fax number of the person to contact regarding the proposal as well as their email address.
3. The Assessor shall provide a list of municipal references for which the Assessor has provided assessment services along with dates of service. An explanation of how the Assessor would deliver the services requested.
4. A detailed resume of the person or persons to be assigned as the Municipality's primary contact for work to be performed shall be submitted.
5. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
6. A cost proposal for assessing services shall identify an amount for Statutory Assessor services from January 1, 2012 to December 31, 2018. A contract will be negotiated with the firm determined to be most responsive to the RFP in the best interest of the Municipality.
7. The proposals shall also identify any and all contractual requirements that the bidder has.
8. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administrative rules of the Department of Revenue for the type of properties in Cambridge.
9. Bidders are advised to carefully inspect the community, the entire records and facilities of the Municipality and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for consideration set forth in this RFP.
10. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the Municipality.

11. The successful Assessor will have three or more years of experience in municipal government assessing, including conducting a revaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
12. The Assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action, arising from any act or omission of the Assessor, his/her 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. Limits of liability shall not be less than:

Workers Compensation	Statutory
General Liability i Each Occurrence	\$2,000,000
Aggregate	\$4,000,000
Bodily Injury - Each Occurrence	\$1,000,000
Medical Expenses i Per Person	\$5,000
Damage to Property	\$500,000
Comprehensive Auto Liability Including Non-ownership Coverage	
Each Accident	\$1,000,000
Errors & Omissions	\$1,000,000

13. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the solicitation and is the most advantageous to the Municipality, considering experience, knowledge, demonstration of a high level of accuracy in assessment work for municipal clients, high level of customer service to property owners as well as municipal clients and other factors. The conditions enumerated in this request for proposal will form the basis for the agreement which the Municipality will enter into. The final agreement may be modified upon selection and will be subject to review and approval by the Village Board. The Municipality reserves the right to accept or reject any and all proposals received.
14. Submit any additional information that is pertinent to the RFP.

Inquiries

Inquiries about this RFP should be directed to:

Norma DeHaven
Administrator/Clerk/Treasurer

PO Box 99
Cambridge, WI 53523

Phone: 608-423-3712 fax: 608-423-3916
Email: normad@ci.cambridge.wi.us

Submission Instructions

The Municipality reserves the right to request additional written or oral information to supplement all written statements of qualifications or proposals. Interviews and presentations to a review committee are anticipated and will be on an invitation basis.

Submit the original and ten (10) copies to:

Village of Cambridge
Response with Proposal for Assessment Services
PO Box 99
Cambridge, WI 53523

No later than 4:00 p.m. August 1, 2011.

Right to Reject

The Municipality reserves the right to reject any and all submittals, waive any irregularities, reissue all or part of this Request for Proposal, and not award any contract, all at their discretion and without penalty and accept no responsibility for the cost of proposal preparation.