
THE CITY of *Altoona*

REQUEST FOR PROPOSALS FOR INTERIM MARKET UPDATE REVALUATION AND ASSESSING SERVICES FOR THE CITY OF ALTOONA, WISCONSIN 2022 - 2024

PURPOSE

The City of Altoona is seeking proposals from qualified firms to provide professional interim market update revaluation and assessing services for a three-year contract. The contract includes one year of interim market update revaluation and two years of assessment maintenance. The City of Altoona reserves the right to extend the contract for an additional two years. The successful bidder will be a firm of sufficient resources to fulfill the requirements of this contract and Chapter 70, Wisconsin Statutes.

SCOPE OF SERVICES

The selected assessor will agree to perform the following interim market update revaluation and assessing maintenance services as required on an annual basis in conformance with the property assessment manual, as specified in §§ [70.32](#) and [70.34](#) Wis. Stats.:

1. Perform a complete interim market update revaluation of real property in the City of Altoona, including all necessary research, calculations, and property inspections necessary to make a professional, competent revaluation. The interim market update revaluation schedule will be at the discretion of the City, but must be completed by the end of the contract period;
2. Perform real property assessments for new construction and additions and alterations, including inspecting properties, making the necessary calculations and determining valuations, correcting legal descriptions, updating records for existing properties and creating records for new properties, and preparing the assessment rolls;
3. Mail out personal property statements in January and complete research for new accounts;
4. Prepare personal property assessments;
5. Prepare notice of mobile home valuations, process lottery credits, monthly parking fees, and distribute notices to property owners and provide City with summary reports;
6. Prepare and mail notices to affected property owners, including notices regarding personal and real property, as required by Wisconsin Statutes;
7. Deliver initial assessment rolls to Eau Claire County, and revised assessment rolls with noted corrections, following open book conferences and Board of Review

determinations. Final assessed values will be confirmed with reports from Eau Claire County and City Clerk;

8. Conduct open book conferences for at least two weekdays between the hours of 8:00 am to 8:00 pm and attend Board of Review meeting within the 45-day period beginning the fourth Monday in April, or as otherwise negotiated with the City of Altoona, but not later than July 1st;
9. Accurately maintain and update the existing filing system and all necessary records and documents;
10. Prepare and submit all required forms to the Department of Revenue, including final reports, personal property assessments, tax increment financing reports, and Real Estate Transfer Returns;
11. Testify in defense of valuations on appeals to the Department of Revenue and the courts;
12. Assist the public and City staff by providing revaluation and assessment information and answering questions regarding revaluation and assessing on an ongoing basis throughout the calendar year;
13. Fulfill all statutory requirements regarding revaluation and assessing;
14. Maintain a local telephone number and/or toll-free number, email account, and website with contact information during the contract period;
15. Respond within seven calendar days to any written inquiry, with a copy to the City Clerk;
16. Provide the City with quarterly progress reports and provide City staff with access to the firm's electronic data management software;
17. Provide direct notice of change of value of property owners whose valuation and/or assessment has changed per Wisconsin Statutes with a copy list to the City Clerk.
18. If the selected firm subcontracts with other individuals or firms to complete any items identified in the "Scope of Services," the qualifications of those individuals and firms must be included in the proposal.
19. If the selected firm does not include details about a subcontractor in the proposal, but determines a subcontractor is necessary to complete the necessary tasks pursuant to the contract during the revaluation and assessment process, the City shall have the right to review the qualifications and approve the use of the subcontractor before the subcontractor's services are utilized to complete the tasks of the contract.

TIMEFRAME

The assessment roll shall be completed in time for open book conferences in April and Board of Review shall meet annually at any time during the 45-day period beginning on the 4th Monday of April, but no sooner than 7 days after the last day on which the assessment roll is open for examination. Specifically, the City Clerk must receive a copy of the assessment roll at least five business days prior to Board of Review. Alternative dates may be allowed with City Council approval, but not later than July 1st.

The interim market update revaluation component of the contract will be conducted in year 2022, beginning no later than January 1.

RESPONSIBILITY OF ASSESSOR

The selected firm will serve as the City's professional and statutory assessor and shall provide advice and consultation to the City as a professional. Any opinions, calculations, and other decisions made by the assessor for the City will be rendered based on experience and qualifications and will represent the assessor's professional judgment. Access to computerized records will be provided to City staff and to appropriate parties as outlined under the requirements of Wisconsin open records law. The assessor shall also be familiar with the responsibilities of complying with Wisconsin's open records laws and proper administration of those applicable laws with respect to assessment records.

RESPONSIBILITY OF THE CITY

The City shall provide any information normally available, such as building permit records, during regular business hours, as detailed in the "Standard Specifications for Revaluation of General Property Pursuant to Chapter 70, Wisconsin Statutes," available through the Wisconsin Department of Revenue: <https://www.revenue.wi.gov/DORForms/pr-210.pdf>

FEES

A current fee schedule for all work required under "Scope of Service" shall be provided with each proposal.

QUALIFICATIONS

The selected firm shall be fully certified by the Wisconsin Department of Revenue to complete the revaluation and assessment service. Proposals must include the following qualification details:

1. The size of the firm;
2. The names and qualifications of the professional staff that will be managing the project, including, but not limited to, their certified assessor level, educational background, and detailed work experience;

3. Five references from municipalities of similar population;
4. Samples of reports completed for other municipalities;
5. Capabilities to convert property data to an electronic format;
6. Description of software to be utilized for property records, including accessibility for City staff;
7. As indicated in the scope of services, if the selected firm subcontracts with other individuals or firms to complete any items identified in the "Scope of Services," the qualifications of those individuals and/or firms must be included in the proposal.

SUBMITTAL DEADLINE

Four (4) hard copies of all proposals, the one (1) original copy and three (3) copies, must be submitted to the **CITY OF ALTOONA "ASSESSOR RFP,"** City of Altoona, WI, 1303 Lynn Ave., Altoona, WI 54720, by 4:00 pm October 29, 2021. The City will not accept proposals submitted electronically. Please submit hard-copy proposals to:

Office of the City Clerk
City of Altoona
1303 Lynn Ave.
Altoona, W 54720