



# VILLAGE OF PLOVER

2400 POST ROAD - PO BOX 37 - PLOVER, WISCONSIN 54467  
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## Request for Proposals for Assessment Services

This is a request for proposals for Assessment services in the Village of Plover, located in Portage County, Wisconsin.

**SCOPE OF WORK:** The appraiser, having become familiar with the local conditions affecting the cost of the work, and the Standard Specifications for Revaluation of General Property in the State of Wisconsin pursuant to Chapter 70, Wisconsin Statutes, hereby agrees to perform everything required to be performed and to complete in a professional manner all the work required to revalue the real property of the Municipality as of January 1, 2022 in accordance with applicable Wisconsin Statutes and this contract, and other documents constituting a part hereof. The Village of Plover reserves the right to accept or deny all proposals, or part of the proposals. **Upon completion of the revaluation, the Village will consider a firm or independent to be our statutory assessor and to do our yearly maintenance work.**

**VALUATION:** For the valuation of residential and agricultural properties, the appraiser shall use Market Drive assessment software.

For the valuation of commercial properties, the appraiser shall use Market Drive assessment software.

The valuation of the personal property shall be completed by the Assessor in Market Drive.

**BACKGROUND INFORMATION:** The Village of Plover is located in Portage County in north central Wisconsin. The Village, encompassing approximately 11.5 square miles, is located along Interstate 39 just south of the City of Stevens Point. The Village population estimate is 13,298 based on the Wisconsin Department of Administration 2019 estimate.

The Village's 2020 Statement of Assessments indicates that there are 3,843 residential parcels (3,530 improved), 529 Commercial parcels (420 improved), 30 agricultural parcels, 5 undeveloped parcels, 1 forest parcel and 4 other parcels. There are 3 MFL

parcels. Totals 4,409 parcels, 3,953 improved. The Village currently has five (5) Tax Incremental Financing districts.

The 2020 Assessment value (excluding manufacturing is \$927,063,900 and the total equalized value is approximately \$1,236,085,200.

The Village 2020 assessment ratio is approximately 75%.

The last revaluation was completed in 2005

**DUE DATE OF PROPOSAL:** Proposals must be received by **12:00 pm, September 28, 2020**, The effective date for contract work to begin is June 1, 2021, or upon completion of the 2021 Board of Review for the Village.

Village of Plover  
Debra Edwards, Assessor  
PO Box 37  
Plover, WI 54467  
E-mail: [dedwards@ploverwi.gov](mailto:dedwards@ploverwi.gov)

**INFORMATION PREPARATON:** The cost of developing and submitting a proposal, discussions required to clarify items related to the proposal, and/or future interviews is entirely the responsibility of the applicant. All proposals and other information provided to the Village shall become the property of the Village. The Village reserves the right to use such proposals and other material or information and any of the ideas presented therein without cost to the Village.

**ACCEPTANCE/REJECTION PROCESS:** The Village may schedule discussions with applicants submitting proposals if it becomes necessary to clarify elements of the proposal. The Village will award the contract for assessment services based upon the proposal that the Village determines is in the best interests of the Village.

**The Village reserves the right to reject any and/or all proposals received. The Village will reject any proposal that does not meet all of the terms, services, and conditions requested in this RFP.**

**AMENDMENTS AND WITHDRAWAL:** The Village reserves the right to amend or withdraw this RFP at any time at its sole discretion prior to the due date of the RFP. If it becomes necessary to amend any part of the RFP, an addendum will be provided. **Responders must include acknowledgement of all addenda as part of the RFP.** Any withdrawal is effective upon issuance of such notice.

The Village reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the respondent of the conditions contained in this RFP, unless

clearly and specifically noted in a subsequent contract between the Village and the selected applicant.

**SURVEYING PREMISES:** Applicants are encouraged to carefully inspect the community and facilities of the Village, and judge for themselves the circumstances affecting the cost of the work and the time requirements for its completion. Failure to do so will not relieve the appraiser of the obligation to furnish and perform the work, to carry out the provisions of the contract or to complete the contemplated work for the consideration set forth in the proposal in a timely manner.

Questions regarding desired services and general operations are to be directed to:  
Debra Edwards, Assessor  
PO Box 37  
Plover, WI 54467  
Phone: 715-345-5250  
Email: [dedwards@ploverwi.gov](mailto:dedwards@ploverwi.gov)

**TERM OF ENGAGEMENT:** This proposal is for the term beginning June 2021 and shall be completed on or before June 30, 2022.

**TIME REQUIREMENTS:** The following is a list of key dates up to and including the date proposals are due to be submitted:

<b>Due date for proposals:</b>	<b>12:00pm September 28, 2020</b>
<b>Selected firm notified (anticipated):</b>	<b>October 8, 2020</b>
<b>Coverage beginning date:</b>	<b>June, 2021</b>
<b>Project completion date:</b>	<b>By June 30, 2022</b>

**TIMELINE AND REQUIREMENTS FOR PROCUREMENT PROCESS:** The Village has made every effort to include enough information in this RFP for an individual or firm (hereinafter “Contractor”) to develop a responsive proposal describing their qualifications, professional expectations, and service fees. The Village reserves the right to retain all proposals submitted and to use any ideas or information contained in a proposal, unless protected by copyright, regardless of whether that proposal is selected. Submissions of RFP indicates acceptance by the proposer of the conditions contained herein.

The Village reserves the right to reject any and all proposals, cancel all or part of the services proposed, waive any informality, and request additional information from proposers. The Village shall not reimburse proposers of the RFP for any expenses incurred in preparing proposals, or, if it desires, any interviews that it may choose to conduct. This RFP does not obligate the Village to accept or contract for any services.

The Village reserves the right to negotiate the final terms of any professional services agreement in the event modifications to the scope or proposed methodology is

determined to be advantageous to the Village after consultation with the selected or recommended respondent.

Response to this RFP shall be in a sealed envelope labeled “Village of Plover Revaluations RFP” and shall acknowledge and address all of the following:

1. Submit four (4) copies of proposal, with one being unbound and single-sided.
2. Individual or firm name, address, telephone number and e-mail addresses.
3. The Contractor shall provide basic information about their business, personnel and capabilities. Include the phone and fax number of the person to contact regarding the proposal as well as their e-mail address.
4. The Contractor shall provide a complete list of municipal clients for which assessment and revaluation services have been provided for during the previous five (5) years. Please provide reference information for each municipal client including name, telephone, and e-mail address.
5. Please provide an explanation of how the Contractor would deliver the services requested and inclusion of a timetable for deliver and completion.
6. The proposals shall also include the specific names, educational background and municipal assessment experience of the person or persons to be assigned as the Villages point of contact for the work to be performed. A detailed resume of the person or persons to be assigned as the Village’s primary contact(s) shall be submitted. Please include details regarding the Contractor’s current and projected work load and its ability to meet schedules.
7. 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 regulation promulgated by the Wisconsin Department of Revenue.
8. A cost proposal for assessment services shall be provided. A contract will be negotiated with the individual or firm determined to be most responsive to the RFP in the best interest of the Village. Please describe what expenses would be charged to the Village, including travel time, mileage, etc. if applicable.
9. The proposals shall also identify any and all contractual requirements that the bidder has.
10. 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 Plover.
11. Bidders are advised to carefully inspect the community, the entire records and facilities of the Village of Plover, 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 Contractor 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.
12. The Contractor is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the Village.
13. The Contractor will have five (5) 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.

14. Within fifteen (15) days following award, the selected contractor shall furnish the Village with a performance bond or other instrument of security acceptable to the Village, equal in value to the sum of the revaluation contract. Said security instrument shall remain in force through the duration of the contract period and will be retained by the village until completion of the contract.
15. The appraiser shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error, or omission of the appraiser, their agents and employees in the execution of work. Further, the appraiser 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 Village, listing the Village as an additional insured. Limits of Liability shall not be less than:
  - a. Workers compensation statutory limits
  - b. Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit.
  - c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit.
16. Proposals shall include any other information regarding other factors that may be helpful in evaluating the Contractor.

Questions or clarifications on the RFP Documents need to be submitted to the Village Assessor prior to **12:00 p.m. on Friday September 18, 2020.** The e-mail should have a subject line "Questions on RFP for Village Revaluation" and should be sent to [dedwards@ploverwi.gov](mailto:dedwards@ploverwi.gov). RFP Addendums or responses that are issued by the Village will be distributed to each respondent participating in the RFP process.

**FINAL SELECTION:** The Village Board will select an assessment firm based upon the recommendation of the Assessor and the Village Administrator. It is anticipated that a firm will be selected by approximately **October 8, 2020.** Following notification of the respondent selected, it is expected a contract will be executed between both parties prior to January 1, 2021. It is anticipated that the work under the contract will begin by June 1, 2021 and completed by June 30, 2022. This Request for Proposal will serve as the basis of the initial service contract with the firm that is selected.

**EVALUATION CRITERIA:** The following evaluation criteria will be used to review the Revaluation Proposals that are received and which meet the RFP specifications requirements:

1. Demonstration of successful experience in providing revaluation services and assessment software to Wisconsin municipalities of similar size as the Village of Plover.
2. Personnel management experience.
3. Past experience with providing revaluation services.
4. Demonstration of a high level of accuracy in assessment work for municipal clients.
5. Cost of Revaluation Services.
6. Evidence of positive customer interaction.

**RIGHT TO REJECT PROPOSALS:** By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the Village is binding and without appeal.

The Village reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the Village. In addition, the Village reserves the right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty.

The Village reserves the right to accept the proposal considered most advantageous to the Village, which in its opinion, meets the specifications of the RFP regardless of whether or not the terms are the lowest cost.

*All respondents accept the preceding terms and procedures in submitting a proposal.*

**DUTIES AND RESPONSIBILITIES:** The vendor shall be responsible for all of the work performed to properly and professionally assess and defend values for the real property of the Village 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 individual shall be certified Assessor Level II. The individual designated as such shall be available to the Village for the entire contract. Should the project supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the Village.

The vendor shall be accountable and report to the Village Assessor. The vendor shall meet with the Village Assessor on a regularly scheduled basis (not less than monthly) to discuss the progress of the work and to review the data and the reports completed. The Village reserves the right to inspect the data and the progress of the work performed at any time without limitation.

The vendor shall:

1. Complete a full revaluation of the Village's properties. The revaluation shall be considered complete only when informal reviews have been completed, figures have been accepted by the Board of Review, adjustments made as legally required, all required reports are filed with the Wisconsin Department of Revenue, and all final data/values have been provided to the Village Treasurer.
2. Perform all of the work required to properly and professionally assess the real property of the Village in accordance with applicable Wisconsin Statutes.
3. Schedule appointments. Village staff will also assist with setting appointments. If the resident makes no appointment, the Village will mail a letter requesting an appointment for inspection. Appointments/inspections will be conducted by days/hours agreeable to the Assessor and the vendor.
4. Exterior inspections are required of all commercial and residential properties. The vendor shall physically inspect the properties. Verify the accuracy and update all existing sketches, some measuring will be required. If the drawing is missing the appraiser shall create one. The Assessor will provide guidance in this matter.
5. The appraiser will perform all square footage calculations and verify accuracy. All incomplete, unverified and/or inaccurate measurements and/or calculations will be corrected at no additional expense to the Village.
6. Documentation will be noted on each property listing/record card including the date, and appraiser for each inspection or attempted inspection. The person authorizing internal inspection shall initial said document. In the event that no one is available upon the initial visit, a callback card will be left with clear instructions for making an appointment to complete the interior inspection.
7. The Assessor will assist in providing digital photographs for each parcel.
8. Completed listing sheets and sketches should be ready for data entry on a routine and timely manner. Any data deemed missing, illegible, or inaccurate will be corrected at no additional cost to the Village.
9. The assessor, with assistance from the vendor, will develop land values for all properties in the Village.

10. Review and assess all properties that were under partial construction as of January 1, 2022. Take digital photographs of new construction on or about January 1, 2022.
11. The appraiser shall consider the cost, market and income approaches in the valuation of all vacant and improved parcels of property by computer assisted means.
12. Additional information including market data, building cost, sales, rental rates, leasehold improvements, vacancy rates, and income and expense data will be collected. This information will be maintained in a separate file at the Village Assessors Office. It is confidential.
13. Store and maintain the municipality's assessment data electronically and electronically submit information to the Department of Revenue.
14. Communicate openly and in a timely fashion with Village personnel and the public, in the handling of all appeals, to ensure that the Board of Review has all available information to render its decisions.
15. The appraiser and the assessor will work with the Village Clerk who is statutorily responsible for scheduling and coordinating the annual Board of Review proceedings. Open book sessions will be conducted in accordance with Wisconsin State Statutes and with dates and times agreeable to the appraiser and the assessor. The appraiser and the assessor will also attend the open book and Board of Review meetings and testify under oath while defending the valuation and work products. The appraiser will promptly and adequately follow up and respond to any appeals made at the Board of Review assessment modifications as approved.
16. The appraiser and the assessor will be responsible for providing the Wisconsin Department of Revenue with all final reports including TIF reports as required by the DOR.
17. All assessment files and records created and data collected by the appraiser shall remain the property of the Village. Records removed for work in progress shall be returned to the Village offices.
18. The appraiser is expected to present a positive, professional image in both dress and conduct while interfacing with Village staff and the public
19. The appraiser is not permitted to assign, subcontract, or transfer the work without the written permission of the Village.
20. All personnel providing services requiring Wisconsin Department of Revenue Certifications shall be actively certified and in compliance with Wisconsin Statutes Chapter 73.09 as prescribed in the Wisconsin Property Assessment Manual.
21. The appraiser will provide and update the Village Assessor with a listing of all personnel assigned. All personnel shall be approved by the Village. Copies of each employee's certificate shall be supplied to the Village Assessor.
22. The appraiser and the Village Assessor shall review any complaint relative to the conduct of the employee(s). If the Village deems the performance of any of the appraiser's employees to be unsatisfactory, the appraiser shall remove such employee(s) from working for the Village upon written request from the Village.
23. The appraiser shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error, or omission of the appraiser, their agents and employees in the execution of work. Further, the appraiser 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 Village, listing the Village as an additional insured. Limits of Liability shall not be less than:

- Workers compensation statutory limits
  - Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit.
  - Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit.
24. The appraiser agrees to carry proper and sufficient insurance to cover loss of the Village's records, as well as appraiser's records in process under this agreement, which are in possession of the appraiser. The appraiser 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 Village.
  25. The appraiser 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 to the Register of Deeds/Land Description office of Portage County. All necessary measures and cooperation shall be exercised to balance said roll between the county and the appraiser.
  26. The appraiser 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.
  27. The appraiser shall be required to execute a contract with the Village that incorporates the information included in this RFP.
  28. All work of the Assessment Service 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.

**VILLAGE OBLIGATIONS:** The Village will perform services to assist the Appraiser, including:

1. Answering the telephone and greeting and assisting the public in researching property information and request for assessment data. Staff will also answer general correspondence concerning assessment related inquiries that Village staff is capable of answering. Field questions, take messages, set appointments for the Appraiser.
2. Provide copies of all building permits and commercial plans, previous assessment rolls and records as requested at no cost.
3. Publish public notices at appropriate times during the revaluation process.
4. The valuation of the personal property shall be completed by the Assessor.
5. The land valuation shall be completed by the Assessor with assistance from the vendor.
6. Time permitting Village staff will assist in data entry updates.

7. Provide adequate office space for assessment personnel.
8. Provide the name, address of the owner and the block and lot number, size or other identifying description of each parcel to be appraised.
9. Maintain current Village maps including lot sizes, parcel numbers and addresses.
10. The Village will have the office open during normal business hours: Monday through Friday, 7:30 am to 4:30 pm.
11. Storage for all property records will be at the Village Assessors office. Records are to remain at the Village Assessors office unless removed periodically as needed for inspections and updates.
12. All office supplies, postage and other supplies necessary to perform the duties of the contract shall be provided by the Village.
13. The Village will assist in the residential data entry.
14. Updated photos of most properties will be completed by the Village.