

Village of Rochester

**REQUEST FOR PROPOSALS**

Assessment Services for Assessment Years 2025-2027

January 31, 2024

The Village of Rochester, Wisconsin will be receiving proposals for the above noted service until 4:00PM, Thursday, April 4, 2024. Proposals must be in sealed envelopes clearly identifying the request for proposal title. **No faxed or electronic proposals will be accepted.**

Mail or Deliver Proposal to:

Village of Rochester  
Attention: Village Administrator  
300 W. Spring Street  
P.O. Box 65  
Rochester, WI 53167

The Village of Rochester reserves the right to reject any and all proposals not judged to be in the best interest of the Village.

Questions for further information on this RFP may be directed to:

Village of Rochester  
Village Administrator  
300 W. Spring Street  
P.O. Box 65  
Rochester, WI 53167  
262-534-1185  
[bnovy@rochesterwi.gov](mailto:bnovy@rochesterwi.gov)

**REQUEST FOR PROPOSALS  
Assessment Services for the  
Village of Rochester 2025-2027**

Date of Request: January 31, 2024

Project Title: Assessment Services for the Village of Rochester 2025-2027

Submittal Deadline: 2:00 PM Local Time, Thursday, April 4, 2024. There will not be a public opening for these proposals.

Late Proposals: Any proposal received by the Village after the exact time and date specified will not be considered.

Withdrawal of Proposals: Proposals may be withdrawn by written notice received at any time prior to the proposal closing date and time. Proposals may also be withdrawn in person by a representative of the firm, provided that the representative signs a receipt for return of the proposal.

Submit To: Village of Rochester  
Attn: Village Administrator  
300 W. Spring Street  
P.O. Box 65  
Rochester, WI 53167

Label the sealed envelope of the submittal: "Assessment Services RFP #2025-2027"

The following requirements must be completed in full:

1. One (1) original copy of the completed proposal.
2. One (1) electronic copy via USB drive.

## **I. Introduction**

The Village of Rochester is requesting proposals from qualified assessment firms (“Consultant”) to provide annual assessment services for the Village of Rochester, Wisconsin (hereafter referred to as “Village”) for the years 2025-2027 with 2025 being a Village-wide full revaluation year; and with 2026 and 2027 being Annual Review/ Maintenance years. The Village is seeking a firm to serve as its statutory assessor, to provide annual maintenance work, and perform a Village-wide revaluation in a competent, timely, efficient, cost effective, and customer service-oriented manner. The Village is also seeking a firm to provide and use appropriate CAMA software and to facilitate any needed data conversion from the Village’s current spreadsheet software to any proposed new system.

### **A. Program Goals**

The following statement of goals outlines the Village’s overall desire 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 Village services. Consultants will endeavor to work seamlessly with Village staff to achieve this.

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

1. The Village reserves the right to revise any part of this RFP by issuing an addendum at any time prior to the submittal deadline.
2. The Village reserves the right to accept or reject, in whole or in part, any or all proposals submitted and/or to cancel this announcement if any such action is determined to be in the Village’s best interest.
3. All materials submitted in response to this RFP become the property of the Village.
4. The Village 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**

1. The Village of Rochester, estimated 2023 population 3,799, is located in Racine County, Wisconsin.

2. The 2023 Equalized Value (including manufacturing) for the Village was \$553,446,700
3. The Village has no Tax Incremental Financing Districts (TIDs).
4. The assessment ratio for 2023 was 77.73%, as detailed below:

Year	Property Class	Municipal Assessed Value	DOR Base Value	% of DOR Base Value	Ratio (%)	Major Class Municipal Compliance Status
2023	Residential	393,440,100	510,062,600	92.69	77.14	NO
	Commercial	23,808,000	25,775,700	4.68	92.37	
	Agricultural	1,135,700	1,301,200	0.24	87.28	
	Sum Of 5, 5M, 6, 7	8,538,500	12,274,500	2.23	69.56	
	Personal	820,600	863,800	0.16	95.00	
	<b>Total</b>	<b>427,742,900</b>	<b>550,277,800</b>	<b>100.00</b>	<b>77.73</b>	<b>NO</b>

5. The last full, Village-wide revaluation was completed in 2007.
6. More details are provided in **Attachment 1: 2023 Statement of Assessment (SOA) Data**.

### III. Scope of Work

#### Section 1

##### Annual Maintenance Services 2025-2027

1. The Consultant will act as the Assessor for the Village for tax assessment years 2025, 2026, and 2027, with the contract to begin June 1, 2024, and to terminate upon completion of the 2027 Assessment Roll and the filing of the 2027 Municipal Assessment Report prior to May 31, 2027.
2. The Consultant will perform all work to completion and complete it in a professional manner.
3. All work will be performed in accordance with Chapter 70 of the Wisconsin State Statutes and the Wisconsin Property Assessment Manual.
4. The following lettered paragraphs describe the work to be completed:
  - a. Assess all new construction improvements, all properties which the buildings have been destroyed or moved, and all properties which the original parcel has been split into two or more parcels.
  - b. Create new property record cards for all properties in which ownership splits have occurred for that year and new annexations.
  - c. Complete all assessor/assessment related Department of Revenue forms for the Village.

- d. Send change of value notices to real estate property owners when a change in their assessed value occurs. These property owners will be given the opportunity to come into the Village Hall to discuss their assessed values with the Consultant at Open Book prior to the Board of Review.
- e. Hold an Open Book session at the Village Hall, located at 300 W. Spring Street, Rochester, WI at least one day during each year.
- f. Field check properties in which there appears to be a question concerning the assessed value of the property.
- g. Responsible for the completion of the Real Estate Assessment Roll.
- h. Attend all meetings of the Board of Review to explain and defend under oath established assessment values. In the event of appeal to the courts, the Consultant will be available to furnish testimony in defense of the assessed values.
- i. All office supplies, stamps and telephone calls made by the Consultant will be paid by the Consultant.
- j. Maintain the following minimum insurance coverages (paid by the Consultant):

Limits	
Commercial General Liability	<ul style="list-style-type: none"> <li>Coverage Limits of: <ul style="list-style-type: none"> <li>\$ 1,000,000 Per Occurrence</li> <li>\$ 2,000,000 Annual or General Aggregate</li> <li>\$ 1,000,000 Products/Completed Operations Aggregate</li> </ul> </li> </ul>
Business Auto	<ul style="list-style-type: none"> <li>Liability Coverage Limits: <ul style="list-style-type: none"> <li>\$1,000,000 Combined Single Limit</li> </ul> </li> </ul>
Workers Compensation & Employers Liability	<ul style="list-style-type: none"> <li>Employer Liability Limits: <ul style="list-style-type: none"> <li>\$ 100,000 Bodily Injury by Accident/Each Accident</li> <li>\$ 500,000 Bodily Injury by Disease/Policy Limit</li> <li>\$ 100,000 Bodily Injury by Disease/Each Employee</li> </ul> </li> </ul>
Umbrella	<ul style="list-style-type: none"> <li>Coverage Limits of \$ 2,000,000</li> </ul>

- k. Utilize market approved CAMA software for assessment purposes.
- l. Use the Cost, Market, and Income Approaches to value all properties where applicable following guidelines set forth by the State of Wisconsin in the Wisconsin Property Assessment Manual.
- m. Maintain phone numbers and email addresses for the community to contact the Consultant Monday through Friday throughout the year. All phone calls, emails, or faxes will be answered in a timely manner.

## Section 2

### Full Inspection Revaluation Work- 2025

1. 2025 will be a Full Revaluation year, including the revaluation work as defined in the Wisconsin Property Assessment Manual.
2. The following lettered paragraphs describe the work to be completed:
  - a. Complete a revaluation of all taxable real estate in the Village of Rochester for the 2025 Assessment Roll.
  - b. Perform everything to completion in a professional manner in accordance with Wisconsin State Statutes and the Wisconsin Property Assessment Manual.
  - c. Schedule visits to all taxable properties in the Village and perform both interior and exterior inspections of every property.
  - d. Measure all buildings, take digital photos of all primary buildings, sketch all primary buildings and create new property cards for all taxable properties.
  - e. Appropriate CAMA software will be identified and utilized in the valuation of all properties.
3. The Consultant will perform the following for the Village:
  - a. CONFORMANCE TO THE STATUTES. All work will be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with all the rules and regulations officially adopted by the Wisconsin Department of Revenue.
  - b. PERSONNEL. (a) All personnel of the Consultant providing services will be currently certified in compliance with Section 70.055. (b) The Consultant will review any complaint relative to the conduct of their employee(s). If the Village deems the performance of any of the Consultant's employees to be unsatisfactory, the Consultant will, for good cause, remove such employee(s) from work upon written request from the Village, such request stating the reason for removal.
  - c. ASSESSMENT MANUAL. All assessments will be made in accordance with the Wisconsin Property Assessment Manual as specified in the Wisconsin Statutes Sections 70.32 (1) and 70.34.
  - d. PREPARATION OF RECORD CARDS. The Consultant will use existing record cards for each parcel to be revalued and update all property information digitally.
  - e. DATA FOR EVALUATION. The Consultant will gather and analyze construction and market data necessary to appraise the revalued properties. This data will be

noted on the individual property record cards. All data gathered will become the property of the Village.

- f. DATA COLLECTION. The Consultant will utilize a combination of existing data and new data gained from interior and exterior inspections to create new property record cards or computer-generated data sheets for each parcel including, but not limited to size, area, frontage, width, depth, shape, topography, productivity, site improvements, utilities, access, zoning and location. This information shall include a land sketch. The Consultant will accurately measure all improvements where previous records are inaccurate and prepare a complete outline sketch to scale of the major buildings showing all additions, porches and appendages with dimensions and necessary identifications on the property record cards. All pertinent construction data of improvements will be entered/updated on the appropriately.
- g. IMPROVEMENT-VALUATION. (a) The Consultant will consider the Cost Approach; replacement costs will be derived from costs within Volume II of the Wisconsin Property Assessment Manual. (b) In using the cost approach for agricultural outbuildings, the current replacement cost will be determined for all sound buildings. Buildings in poor condition having little or no value will be physically described and listed as having "No Value" or given an appropriate sound physical value. (c) In using the cost approach for mercantile improvements; area and perimeters will be determined as recommended for use with Marwill & Swifts Pricing Manual. Proper base cost will be selected as appropriated and adjusted to adequately reflect variations from base building cost. (d) Local modifiers will be used in determining all current replacement costs. Local modifiers and cost appearing in the Assessor's Manual will be adjusted when documented by an analysis of current construction costs and market sales data. Records will be prepared and left with the Village to account for any adjustment made. (e) All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence, must be accurately documented by the market and deducted from current replacement costs. (f) In the evaluation of improvements by the Income Approach, adequate records will be prepared for each improvement so values showing the determination of value, a reconstruction of income and expenses, estimate of remaining economic life, and capitalization rate. Capitalization rates used will be accurately documented by the market.
- h. DETERMINE LAND VALUES. (a) Basic unit values will be determined for residential and mercantile lands from an analysis of sales, rent leases and other available market data. In the analysis of market data, adequate records will be prepared showing data collected and unit value determinations. Such records will be left with the Village. Basic unit values for Agricultural lands will be determined by the Department of Revenue. (b) Having determined basic value, the Consultant will determine the land value of each parcel to be appraised. Land value computations will be properly shown for each parcel on the property cards. (c) For residential and mercantile lands maps and schedules will be prepared indicating unit values used and locations thereof to be left with Village. (d) A copy of all charts schedules and tables, not previously referred to, including depth factor tables used in the valuation of lands will be left with the Village.



- i. **FINAL REVIEW.** After tentative appraisals have been made for each parcel, the Consultant will make a final review of all property appraised. This review is to ensure uniformity in the assessments of various properties and to eliminate any errors that may have been made.
- j. **CHANGE OF VALUE NOTICES.** Upon completion of the revaluation, all property owners will be sent a notice of change in their assessed values. This notice will indicate their new assessments.
- k. **INFORMAL HEARINGS.** After sending out the Change of Value Notices, the Consultant will hold informal hearings at Village Hall with interested property owners or their agents concerning their assessed value.
- l. **ASSESSMENT ROLL.** The Consultant will be responsible for the proper completion of the assessment rolls.
- m. **BOARD OF REVIEW; SUBSEQUENT APPEARANCE.** The Consultant will attend all meetings of the Board of Review to explain and defend the assessed values and prepared to testify under oath regarding such values. In the event of an appeal to the Department of Revenue or the courts, it is agreed the Consultant will be available to furnish expert testimony in defense of any of the assessed values.
- n. **INSURANCE.** The Consultant will maintain full insurance coverage to protect and save harmless the Village from claims, demands, action and causes of action, arising from any act or omission of the Consultant in execution of work. Consultant will maintain Workmen's Compensation and Public Liability Insurance on all employees. The Consultant will carry valuable paper insurance on any records withdrawn from the Village as well as the Consultant records.
- o. **MISCELLANEOUS GENERAL AGREEMENTS.** (a) To ensure that employees maintain strict confidence regarding all privileged information received by reason of this agreement. (b) To supply all necessary office machines such as, but not limited to typewriters, calculators and computers.

#### **IV. Compensation**

- 1. Indicate compensation for Village-wide revaluation and maintenance work in 2025.
- 2. Indicate compensation for maintenance year 2026.
- 3. Indicate compensation for maintenance year 2027.
- 4. Indicate total compensation for 2025-2027.
- 5. Indicate daily compensation for the Consultant for any days that require the Consultant to defend the assessed values before the Department of Revenue or the courts, whether it be pretrial or trial, or for Board of Review lasting more than two (2) days.



6. The Village will allow access and make available to the Consultant municipal records such as previous assessment rolls and records, building permits, assessor's workbook, and municipal plats and maps at no cost to the Consultant.

# ATTACHMENT 1

Form  
PA - 521C

## 2023 Statement of Assessment

WI Dept  
of Revenue

Co-muni Code 51176		County RACINE Municipality VILLAGE OF ROCHESTER			Account No. 1366	Report Type AMENDED	
Line No.	Real Estate (See Lines 18 - 22 for other Real Estate)	Parcel Count		No. of Acres (Whole Numbers Only) (Col. C)	Land Value (Col. D)	Value of Improvements (Col. E)	Total Value of Land and Improvements (Col. F)
		Total Land (Col. A)	Improvements (Col. B)				
1	Residential - Class 1	1,604	1,410	2,481	121,204,900	272,235,200	393,440,100
2	Commercial - Class 2	55	37	190	7,718,100	16,089,900	23,808,000
3	Manufacturing - Class 3	- For Department Use Only -					
4	Agricultural - Class 4	171	N/A	3,776	1,135,700	N/A	1,135,700
5	Undeveloped - Class 5	103	N/A	1,109	1,317,200	N/A	1,317,200
6	Agricultural Forest - Class 5m	15	N/A	185	535,500	N/A	535,500
7	Forest Lands - Class 6	27	N/A	280	1,681,700	N/A	1,681,700
8	Other - Class 7	28	28	49	767,300	4,236,800	5,004,100
9	Total - All Columns	2,003	1,475	8,070	134,360,400	292,561,900	426,922,300
10	Number of personal property accounts in roll			40	Locally Assessed	Manufacturing	Merged
11	Boats and other watercraft not exempt - Code 1				0		
12	Machinery, tools and patterns - Code 2						
13	Furniture, fixtures and equipment - Code 3				816,500	- For Department Use Only -	
14	All other personal property not exempt - Codes 4A, 4B, 4C				4,100		
15	Personal Property not exempt (sum of Lines 11-14)				820,600		
16	Aggregate assessed value of all property subject to general property tax (sum of Lines 9F and 15D) must equal total value of the school districts (K-8 and K-12) - Line 50, Col. D						427,742,900