



**REQUEST FOR PROPOSALS:
Assessment Services
for the City of De Pere**

City of De Pere, Wisconsin

Clerk's Office

**Issued: April 15, 2025
Proposal Questions: May 2, 2025 by 5:00 p.m.
Proposals Due: May 30, 2025 by 5:00 p.m.**

A. INTRODUCTION AND SUMMARY

The City of De Pere, Wisconsin (hereafter referred to as “City”) invites proposals from qualified assessment firms (“Consultant”) to provide annual assessment services.

The City is investigating three options for the provision of services in a competent, timely, efficient, cost effective, and customer service-oriented manner. For Option 1, the City is seeking a firm to serve as its statutory assessor and to provide annual interim market updates over a three-year term. For Option 2, the City is seeking a firm to provide a blend of interim market updates and maintenance in alternating years over a four-year term. Option 3 invites proposers to recommend alternatives not encompassed by the first two. This Request for Proposal seeks professional services, and statutory bidding laws do not apply.

Submissions must be received by the Clerk’s Office no later than 5:00 p.m. on May 30, 2025.

B. COMMUNITY OVERVIEW

The approximately 25,500 people who call the City of De Pere, Wisconsin home know that the community provides a high quality of life in the Greater Green Bay metropolitan area. The excellent schools, a dynamic downtown, successful business parks, and safe neighborhoods served by ample parks and natural areas have resulted in considerable loyalty and community pride among

residents. The residences, businesses, and commercial areas are connected with a transportation and green space network that accommodates cars, bikes, and pedestrians. The beautiful Fox River is the focal point of the City Center, and the Claude Allouez Bridge unites the two sides of our dynamic Downtown. Whether on the east or west side, historic buildings thoughtfully blend with new redevelopment to provide a mix of housing, employment, shopping, dining, and entertainment.

A city-wide reassessment was last completed in 2016. Since 2018, the City has conducted annual full-value maintenance services. The City’s assessment ratio for 2024 was 98.35% for residential and 101.15% for commercial.

The City’s Equalized Value (including manufacturing and TIDs) was \$3,584,193,000. The City has 11 active Tax Incremental Financing Districts accounting for \$344,990,500 in increment or 9.63% of the equalized value. The 2024 Statement of Assessment indicates that the City has 95 tax-exempt properties and has the following parcel counts from the 2024 Final Statement of Assessment (next page):



Property Class	Total Parcels	Improved Parcels
Residential	7,790	7,382
Commercial	545	434
Manufacturing	60	60
Agricultural	47	0
Undeveloped	13	0
Agricultural Forest	14	0
Forest Lands	4	0
Other	4	4
Total	8,477	7,880

C. OBJECTIVES

The following statement of goals outlines the City's overall desires 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, market adjustment, 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 City services. Consultants will endeavor to work seamlessly with City staff to achieve this.

D. SCOPE OF WORK

The City desires to form a strategic partnership with the selected Consultant in a way that best utilizes City resources and creates a seamless delivery of service from the customer perspective. The Consultant shall be the statutory assessor for the City and complete in a professional manner all the work required under this proposal in accordance with Wisconsin State Statutes. The Consultant shall complete revaluation, statutory assessor, and full-value maintenance services for all taxable real property within the City for the term of the agreement. It is anticipated that the selected Consultant will begin work under contract in the fall of 2025.

1. **Option 1 – Annual Interim Market Updates:**

Consultant will conduct a full value maintenance program annually, to maintain 100% market

value on all taxable property for the assessment years of 2026, 2027, and 2028.

2. Option 2 – Interim Market Update/Maintenance Blend:

Consultant will conduct an interim market update followed by a maintenance program in alternating years, to maintain all taxable property within 10% of full value for the assessment years of 2026, 2027, 2028, and 2029.

3. Option 3 – Other Alternatives:

Proposals may also include other alternatives as recommended by the Consultant, as long as each alternative also includes a cost estimate. Consultants may consider various methods and timing for accomplishing equitable valuations throughout the City, from city-wide revaluation as a single project, to aggressive yearly maintenance, to neighborhood-level market updates, and everything in between. At this time, the preference is for more aggressive yearly maintenance.

4. Required Services for any options:

- a) Consultant shall perform all the work required to properly and professionally assess the real property of the City 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.
- b) Consultant shall designate a qualified and responsible employee to supervise the operation of the Consultant's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. The individual designated as such shall be available to the City for the entire contract. Should the supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval by the City.
- c) Consultant shall report to and be accountable to the City Clerk or his/her designee. Consultant shall meet with the Clerk on a regular basis to discuss the progress of the work and to review the data and the completed reports. The City reserves the right to inspect the data, and the progress of the work performed at any time without limitation.
- d) Consultant shall be available to attend, upon the request of the City Clerk, other department head, or Mayor, City Council and committee meetings upon reasonable prior notice on an as-needed basis.
- e) Consultant shall provide an e-mail address and a local (or toll free) phone number for City officials and customers to contact the Consultant during regular business hours, Monday through Friday, and shall return e-mails and calls within two business days/48 hours.
- f) Consultant shall provide an educational outreach program for the City related to the activity and responsibility of Consultant's assessment services.

- g) Consultant shall field review and assess all properties that were under partial construction as of January 1st of the previous year.
- h) Consultant shall field review and assess new construction as of January 1st of the current year.
- i) Consultant shall perform interior inspections on all newly constructed homes, partially constructed homes from the previous year, and any interior remodeling including kitchen, bath, basement remodeling, and additions if allowable.
- j) Consultant shall field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, and other miscellaneous permits.
- k) Consultant shall field review as deemed necessary sale properties and properties for which no building permit has been issued.
- l) Consultant shall account for all buildings destroyed or demolished.
- m) Consultant shall provide projected assessed values for potential development projects upon the request of the Development Services Director.
- n) Consultant shall coordinate with City staff for an annual meeting to discuss the previous year's development projects and building permit data.
- o) Consultant shall determine the fair market value of mobile home units in the municipality subject to the monthly municipal permit fee, in accordance with State Statute 66.0435.
- p) Consultant shall implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
- q) Consultant shall create, print, and mail State-approved Notices of Changed Assessment to property owners and others as required by State Statutes.
- r) Consultant shall conduct Open Book sessions in accordance with Wisconsin State Statutes. Consultant shall prepare a written statement regarding Open Book dates, times, and instructions on how to set up an appointment for an Open Book session, at least thirty (30) days prior to the first Open Book session.
- s) Consultant shall be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to the deadline each year. Consultant shall work with the City Clerk to arrange for the hearings. Consultant will provide digital photographs and data for comparable properties in advance of the Board of Review meeting so that the Board and the petitioner have evidence of comparability.

- t) Consultant will attend the Board of Review hearing(s), serve as City staff at the hearing(s) and defend the valuations and work products. Consultant will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved. The consultant will be available for any Circuit Court proceedings that may result from appeals or other assessment-related matters.
- u) Consultant shall be responsible for providing all assessment data to Brown County's Real Property Listing office to facilitate the digital and manual transfer of data and values and for ensuring that the County's assessment roll is balanced to the records submitted by the Consultant. Consultant will provide printed copy of assessment roll to the City.
- v) Consultant shall be responsible for providing the Wisconsin Department of Revenue (WI DOR) with both preliminary and final reports of assessed valuations after the Board of Review meeting. Consultant will also be responsible for providing WI DOR with assessments for all TIF districts by the prescribed deadlines.
- w) Consultant shall place detailed property assessment records with images and full parcel information on the internet with free access to the public and the City. This may be accomplished through the City's existing online resources or through the Consultant's software package. Property record cards will be updated on at least an annual or bi-annual basis. Consultant shall provide the City with unlocked, freely accessible databases upon request. Consultant will provide an annual export of one PDF property card per parcel ID, or a suitable alternative.
- x) Consultant is not permitted to assign, subcontract, or transfer the work of providing assessment services without the prior written approval of the City Council.
- y) Assessment Software:
The City currently consults with an outside contractor for Assessor Services, and as such the City requires the Consultant software platform be able to complete the following items:
 - i. Comparative sales reports that can be used to support individual assessments with adjustments shown to be derived from the regression analysis.
 - ii. Flexible cost and depreciation tables that can be adjusted to capture specific markets. For commercial properties, a system-generated income approach to value.
 - iii. The ability to electronically export the completed assessment roll to the Brown County Real Property Listing office in the format required, eliminating any manual data entry of the completed roll.

- iv. The ability to import "start-up data" from any existing databases to avoid time/cost-consuming initial data entry.
- v. The ability to accept and import the City's existing building permit records utilizing either a CSV or MS Excel file.
- vi. Maintains a separate sales listing file to record and store data on sale properties as of the date of sale.
- vii. Maintains an ownership history.
- viii. The ability to create a wide range of reports, including Assessment Roll, Assessor's Final Report; and neighborhood attributes and values.
- ix. The ability to run queries to locate specific data.
- x. Has an electronic sketch for each property.
- xi. Uses standard database format that can be read or easily converted to be read by other software packages and managed by Microsoft Sequel (SQL) Server.
- xii. The data should be capable of being uploaded to the City's GIS system.

5. City Obligations:

- a) With guidance and support from the Consultant, the City shall publish required notices with the local media. This applies to Open Book and any other required notices.
- b) The City shall furnish adequate space at De Pere City Hall at no cost to the selected Consultant.
- c) The City shall allow access by the Consultant to City records including, but not limited to, prior assessment rolls, sewer and water layouts, building permits, tax records, building plans, records of special assessments, plats or any other maps and property files at no cost.
- d) The City shall aid the Consultant with a reasonable promotion of public information concerning the work under this agreement.

E. SUBMITTAL QUESTIONS

All questions shall be submitted in written form to the portal link provided below by 5:00 p.m. on Friday, May 2, 2025. Answers will be provided via the City website as an addendum to the RFP as they become available. The City anticipates releasing responses by 5:00 p.m., Friday, May 9, 2025. Multiple addenda may be released.

Question Portal: <https://deperewi.seamlessdocs.com/f/RFPQuestions>

F. SUBMISSION REQUIREMENTS

The City wishes to evaluate each proposal under the same uniform review standards. Proposals for this project should be organized in the following order and contain all the following information: Respondent shall submit one (1) electronic copy in PDF format through the City's online portal. To be considered, proposals must be received no later than 5:00 p.m., May 30, 2025, at the portal link below:

RFP Site: [Assessor RFP](#)

Submission Portal: <https://deperewi.seamlessdocs.com/f/RFPSubmittal>

The following format and sequence should be followed to provide consistency in the firm's responses and ensure that each proposal receives full consideration. Use 8 ½ x 11 sheet pages with a minimum font size of 10 points and separate sections as defined below. Do not place more than one section on one page so that those evaluating your submittal can easily compare each section with others submitted. Undesignated information shall be inserted at the rear of each package. Proposal documents containing links to other web pages shall be clearly marked. If any of the information provided by the Proposer is found to be substantially unreliable, their proposal may be rejected in the sole opinion of the Evaluation Committee.

Proposals should include all the following categories. The categories below coincide with the evaluation criteria listed in Section G:

1. Cover Letter (2 pages):

Include a cover letter outlining why the City should select your firm/team. The letter shall identify the firm name and address. Provide the name(s) of the person(s) authorized to make representation for your firm, their title, address, email address, and telephone number(s). If different, also provide the name, title, address, email address, and telephone number of the qualified and responsible individual that will be designated as the key contact person and that will supervise the operation of the Consultant's staff for the entire contract period.

2. Qualifications and Capabilities (up to 10 pages):

- a. Demonstration of successful experience in providing general assessment services and software to Wisconsin municipalities of similar size. Include a summary of the firm's experience providing assessment services for Wisconsin municipalities with a population greater than 20,000. Include name of municipality, population, equalized value, total parcel count, and type of assessment services provided. The summary should also include evidence of the accuracy of the firm's work.
- b. The qualifications of key personnel and past experience with providing assessment and revaluation services for both residential and commercial properties. Include the names, educational background, Wisconsin Department of Revenue certification level, and municipal assessment experience of the person or persons to be assigned to perform the scope of work. Include the key contact person's experience with conducting a revaluation process and experience with assessment evaluation of potential tax-exempt properties.

- c. Provide a staff organization chart. Identify key individuals involved in this project, their affiliation, and office location. For each staff member identified in the organization chart, provide DOR certification level.
 - d. Please indicate which individuals will attend the proposed interview if an interview is requested.
3. **Understanding and Approach (up to 10 pages):**
- a. Demonstrate understanding of the project opportunities and challenges facing the City of De Pere assessment process.
 - b. Provide your firm/team's approach to achieving the project's scope of work, as presented in Section D above.
 - c. Provide any value-added services your firm/team can provide above that are not identified within the request.
4. **Project Timeline (up to 3 pages):**
- a. Overview of the professional team's resources available to complete the services requested in the scope of services.
 - b. Recommended annual schedules for all the elements listed in Section D of this RFP.
5. **Budget (up to 2 pages):**
- State the total annual compensation rate to provide the services described in the above Specific Services Required section and in accordance with the laws of the State of Wisconsin for assessment years 2026-2028 (and 2029 if applicable) beginning not later than October 1, 2025. Clearly list the fee for each year of the proposed contract with a not-to-exceed sum including all the Consultant's costs, but not necessarily limited to: labor, materials, supplies, equipment, transportation, meals, lodging, computer software, and Board of Review expenses. All expense reimbursements will be the responsibility of the firm. The City will pay Quarterly as invoiced on the basis of the percentage of work completed; however, the City is open to other payment structures suggested by the Consultant.
6. **References (up to three pages):**
- Identify and provide contact information for three references from Wisconsin municipal clients for which the Consultant has provided assessment and/or revaluation services within the past two (2) years; at least one reference shall be from a client listed in the Firm Qualification section listed above. References should be of a size similar to the City of De Pere. References must include the name, title, email address, and business phone number of the contact person.
7. **Insurance and Legal Responsibilities (up to three pages):**
- List the names and addresses of the insurance companies that have written commercial liability insurance policies for your organization and the projects listed in the experience section of this RFP during the past three (3) years. Joint ventures should list the insurers for the company or

person expected to be the major owner of the joint venture. Has any insurance company paid on behalf of the persons or organizations covered? If so, indicate names and addresses of insurance companies, particulars of payment, and date(s). Is your firm now, or has it been, within the past five (5) years, involved in any legal action related to any projects? If yes, please explain in detail and identify any judgments entered in such action. Also, provide all details of any declaration of default, non-conformance notices, or termination for cause against your firm with respect to such services. In addition, state whether during the past five (5) years your firm or sub-consulting firms have been suspended from either bidding or entering into any government contract.

8. Conflict of Interest:

Disclose any potential conflict of interest including, but not limited to, familial relationships between members of the consulting team and elected officials and/or employees of the City of De Pere.

G. SELECTION PROCESS, SCHEDULE, AND CRITERIA

All proposals will be evaluated based on the technical and professional expertise and experience of the submitting firm(s), the proposed method and the procedures for completion of the work, and the proposal's cost. The firm's apparent ability to be independent and objective in performing the requested work will also be considered.

1. Solicitation Schedule:

This solicitation's critical dates and times are listed below. The City may need to change any of these dates or times. All dates are subject to change.

<u>Action</u>	<u>Estimated Completion Date</u>
RFP Release	April 14, 2025
RFP Questions Due	May 2, 2025
RFP Question Response	May 9, 2025
RFP Response Due Date	May 30, 2025
Evaluation Committee Meeting	week of June 9, 2025
Interview/Presentation (if needed)	week of June 24, 2025
Finance and Personnel Committee	July 8, 2025
Council Approval	August 5 or 19, 2025
Service Start Date	October 1, 2025 (no later than)

2. Proposal Opening:

The RFP opening is public on the date and at the time specified on the proposal form. The proposer is responsible for ensuring the proposal is delivered at the proper time and place.

3. Evaluation Committee:

The City Manager may appoint an internal evaluation committee to review and evaluate the proposals using the following criteria. At its sole discretion, the City may contact the references and/or visit one or more of the projects listed in response to this solicitation as part of the

evaluation process. A shortlist of proposers may be interviewed for final ranking.

4. Selection Criteria:

Any proposal not meeting the minimum qualifications stated above will be rejected. The criteria below are not necessarily listed in order of importance. Proposals will be evaluated on the following criteria:

Cover Letter:	0 PTs
Qualifications and Capabilities:	20
Project Understanding and Approach:	40
Project Timeline:	10
Budget:	15
References:	15
Total	100

Based on the evaluation process and selection criteria results, the Evaluation Committee will prepare a prioritized ranking of the firm/team. City staff will present an agreement to the top-ranked firm/team. The final contract will then be forwarded to the Finance and Personnel Committee for recommendation to the Common Council for final approval.

H. GENERAL TERMS AND STATEMENT OF RIGHTS AND UNDERSTANDING

The City reserves and may, in its sole discretion, exercise any and all of the following rights and options with respect to this RFP:

1. Each Proposer should carefully read and review all such items and address them in its proposal. However, the final description of the services and/or specifications to be provided to the City under this RFP is subject to negotiations with the successful Proposer and the City's final approval.
2. The City reserves the right to reject any or all proposals, to divide responsibilities among one or more applicants or the project team, to waive formalities, and to select the individual or firm/team which, in the City's sole judgment, can best perform the scope of services required.
3. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP. The City has prepared this RFP and does not purport to be all-inclusive or to contain all of the information a prospective applicant may desire. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP.
4. Ownership of all data, material, and documentation originated and prepared for the City pursuant to the RFP shall belong to the City and be subject to public inspection in accordance with the Freedom of Information Act (FOIA) and Wisconsin Public Records law. Trade secrets or proprietary information submitted by the Proposer shall not be subject to public disclosure unless otherwise required by law or a court.

5. The City is not liable for any costs incurred by any Proposer in connection with this RFP or any response by any Proposer to this RFP. The expenses incurred by a Proposer in the preparation, submission, and presentation of the proposal are the sole responsibility of the Proposer and may not be charged to the City, regardless of whether or not the City ultimately selects a Proposer's Proposal for completion of the work detailed in this RFP.
6. The City of De Pere does not discriminate on the basis of race, color, religion, age, marital or veterans' status, sex, national origin, disability, or any other legally protected status in the admission or access to, or treatment or employment in, its services, programs or activities.
7. Submission:
 - a. Submission of a proposal does not bind the City to any action or any applicant.
 - b. Proposals received after the deadline will not be accepted. Proposals will not be opened publicly. It is neither the City's responsibility nor practice to acknowledge receipt of any proposal. It is the responder's responsibility to ensure that a proposal is received in a timely manner.
 - c. No official or employee on the evaluation committee shall have any financial interest, either direct or indirect, in the contract. No official or employee of the evaluation committee shall exercise any undue influence in the awarding of the contract.
 - d. Amendment/Clarification of proposals may be done as follows:
 - i. By City: The RFP may be amended by the City in response to need for further clarification, specifications and/or requirement changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors and must be signed and returned by the vendor as specified in the amendment.
 - ii. By Consultant: Proposals may only be amended after receipt by the City by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the City.
 - e. Proposals may be withdrawn only in total, and only by a written request to the City prior to the time and date scheduled for opening of proposals.
8. To negotiate with one or more applicants.
9. To select any submission as the basis for negotiations and to negotiate with applicants for amendments or modifications to their submission.
10. To conduct investigations with respect to the qualifications of each applicant.
11. The City is not responsible for costs associated with preparing proposals or for costs incurred before a formal notice to proceed is issued if a contract is awarded.
12. The Proposer shall maintain, during the life of the Agreement, public liability and property damage insurance to cover claims for injuries, including accidental death, as well as claims for property damages

that may arise from the performance of work under the Agreement.

13. Insurance:

The Consultant shall maintain during the life of the Agreement, the following minimum public liability and property damage insurance to cover claims for injuries, including accidental death, as well as from claims for property damages which may arise from the performance of work under the Agreement as stated below:

- a) Comprehensive general liability insurance, including personal injury liability, blanket contractual liability and broad form property damage liability. The combined single limit for bodily injury and property damage shall not be less than \$1,000,000; with additional umbrella liability insurance coverage for a total of not less than \$5,000,000.
- b) Automobile bodily injury and property damage liability insurance covering owned, non-owned, rented and hired cars. The combined single limit for bodily injury and property damage shall be not less than \$1,000,000.
- c) Statutory workers compensation and employers' liability insurance as required by the state having jurisdiction.
- d) Consultant shall also maintain professional liability insurance covering damages to City resulting from errors and omissions of the Consultant. The limit of liability under said policy shall be \$1,000,000 or the total consultant's fee on the project, whichever is greater.
- e) Proof of Insurance. The Consultant shall furnish the City with a Certificate of Insurance and additional insured endorsement countersigned by a Wisconsin Resident Agent or Authorized Representative of the insurer indicating that the Consultant meets the insurance requirements identified above. The Certificate of Insurance shall include a provision prohibiting cancellation of said policies except upon 30 days' prior written notice to the City and shall name the City as an additional insured under Consultant's general and professional liability policies for the specific contract or project covered. A copy of the Certificate of Insurance and endorsement shall be delivered to the City prior to execution of the agreement for final approval.