



175 South Leonard Street, West Salem, Wisconsin 54669 (608) 786-1858 Fax (608) 786-1988

## VILLAGE OF WEST SALEM, WISCONSIN REQUEST FOR PROPOSALS FOR PROPERTY ASSESSMENT AND REVALUATION

The Village of West Salem (La Crosse County) is seeking proposals from individuals or businesses qualified and certified by the State of Wisconsin to act as an assessor in accordance with the requirements of the Wisconsin Department of Revenue per Chapter 70 of the Wisconsin Statutes for a three (3) year period starting January 1, 2026. The assessor may commence work on January 1, 2026.

The proposal should include alternate additional services to conduct a revaluation of all real property within the Village during the first year of the contract.

The successful individual or firm shall have sufficient resources to fulfill the requirements of a Contract and Chapter 70, Wisconsin Statutes. The Village of West Salem reserves the right to extend the Contract for an additional two (2) years. Bidders are advised to carefully inspect the community, the entire records and facilities of the Village of West Salem and examine the 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 Request for Proposal.

For your information, Exhibit "A" attached to this Request for Proposals is the 2024 Statement of Assessment which was completed after the 2024 Board of Review.

## I. Background Information

The Village of West Salem's population is 5,400 and is located centrally in the County of La Crosse, Wisconsin. The 2024 assessed value was \$612,156.300, and the assessment ratio for 2024 was .876698285. The Village's last full revaluation was in 2017, and a market update revaluation was conducted in 2023.

## II. Assessment Software

The current Village of West Salem Assessor utilizes the "Market Drive" assessment software marketed by Catalis Tax/CAMA (formerly Assessment Technologies, LLC, Menomonee Falls, Wisconsin). All of the initial setup work has been completed (names, addresses, current and prior assessment values and class, and sales data). The choice of assessment software is at the option of the assessor, subject to

acceptance by the Village. If assessor chooses not to use and maintain assessment data in the current software system, any software selected shall have the following attributes/abilities:

- 1. Have statistical package that includes descriptive statistics and regression analysis.
- 2. Comparative sales report that can be used to support individual assessments with adjustments shown.
- 3. Flexible cost and depreciation tables that can be adjusted to capture specific markets.
- 4. The ability to electronically export the completed assessment roll to the County of La Crosse Tax Lister's Office in the format required. This shall eliminate any manual data entry of the completed roll.
- 5. The capability to import "start-up data" from the La Crosse County Tax Lister's Office. This shall also be used to set up the Village's computerized system, to avoid time/cost consuming initial data entry. Typical imported data must include owners name(s), mailing address, parcel address, legal description, parcel number, and all other relevant data provided by the County of La Crosse.
- 6. Building Permit record keeping.
- 7. Sales data shall be kept, stored, and accessed.
- 8. Have the ability to create a wide range of reports, including assessment roll, Assessor's final report, individual parcel data, and similar information.
- 9. Have the ability to run queries to locate specific data.
- 10. Must use standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages.
- 11. Assessor shall annually provide the Village with a copy of the database used, together with file maps and descriptions, and all associated digital photos. This database shall at all times be the property of the Village. Proprietary database formats exclusive to a particular software package are unacceptable.
- 12. Electronic files for all parcels shall be provided and organized in a systematic fashion which may be easily retrieved by Village staff. The format and data provided shall be approved by the Department of Revenue and should contain the same data fields as shown on the PA-500 property record card as a minimum. All printouts containing major improvements shall have digital photos attached.
- 13. Digital photos shall be provided for all residential and non-residential improvements.

## III. Proposal Requirements

1. All proposals must identify the firm name, address and specific assessment services experience in Wisconsin. The proposals must include the names, educational background and municipal assessment experience of the person or persons to be assigned as the Village's point of contact and who will actually perform the work and be present at the Board of Review sessions. A photocopy of the licenses and certifications held by those performing any work under the RFP shall be provided.

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- 2. The proposal shall include a price for assessment services for 2026 through 2028, and revaluation services for 2026 in conformity with Section V.
- 3. Proposers shall express a fee for each year of this proposed engagement (2026, 2027, and 2028) in a not-to-exceed sum to include all of the Assessor's costs, including but not limited to: labor, materials, transportation costs, meals, lodging, and Board of Review expenses. A desired payment schedule should be detailed in the proposal. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm. The Village will retain ten (10%) percent of the total fee subject to timely delivery of the certified tax roll.
- 4. Proposer shall provide a list of municipal references for which the Assessor has provided assessment services and revaluation services within the past four (4) years. An explanation of how the Assessor would deliver the services requested and inclusion of a timetable for delivery and completion of the revaluation shall also be submitted.
- 5. A detailed resume of the person(s) to be assigned as the Village's primary contact and performer of work under this RFP shall be submitted.
- 6. All work shall be accomplished in accordance with the provisions of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
- 7. The proposals shall explicitly state all contractual requirements that the proposer seeks.
- 8. All personnel providing assessment 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 the Village of West Salem.
- 9. Proposer is advised to carefully research the Village and its records and facilities to determine the circumstances affecting the cost of the work or the time requirement for the completion. Failure to do so will not relieve the successful proposer of the obligation to furnish and perform the work, to carry out the provisions of this RFP to complete the contemplated work for consideration set forth in this RFP.
- 10. The successful proposer shall not assign, subcontract, or transfer the work of providing assessment services, without the prior written approval of the Village and subject to the terms of VIII below.
- 11. Proposer shall maintain insurance coverage as indicated on Exhibit "B", which is part of this RFP, 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 the work. Insurance endorsements by a company authorized to transact business in the State of Wisconsin with an AM Best rating in the range of a+/a- shall be supplied. The Village of West Salem shall be named primary and non-contributory additional insured.
- 12. The proposals will be reviewed and may be awarded to the proposer deemed most qualified in the sole discretion of the Village of West Salem, 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

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agreement which the Village will enter into. The final agreement will be modified upon selection and will be subject to review and approval by the Village Board.

13. Submit any additional information that is pertinent to the RFP.

## IV. Scope of Work - Assessment Services

The selected assessor will agree to perform the following revaluation services, and the following maintenance services as required on an annual basis, in conformance with the property assessment manual, as specified in applicable Wisconsin State Statutes. Scope of work includes, but is not limited to:

- Computer software to be used shall be the latest version of "Market Drive", if possible, or software agreed to by the Village as long as it conforms to Section II, above. Village staff must be provided with access to the firm's electronic data management software.
- Assessor will review and assess all properties with construction that was not completed as of January 1<sup>st</sup> of the previous year. Assessor will review and assess all properties with finished or in partial construction as of January 1<sup>st</sup> of the current year.
- 3. Assessor will inspect the interior and exterior of all remodeled, altered, or newly-improved residential and commercial parcels. The Assessor shall physically inspect the properties to be reassessed and will carefully measure and list all improvements to be assessed; verify accuracy and update existing sketches; and if the drawing is missing, the Assessor shall create one. The contract goal shall be that one hundred (100%) percent of remodeled, altered, or newly-improved properties shall be inspected, and Assessor will provide a digital photograph of each parcel reviewed. Any large, unique, or unusual properties may require more than one photo.
- 4. Assessor will account for all buildings moved, destroyed, or demolished.
- 5. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
- 6. Assessor will create new property records for all parcels created from parcel splits and with new plats. All property record cards shall be updated as needed.
- 7. Assessor shall inspect all classes of property, except manufacturing, according to State Statutes.
- 8. Assessor will correct legal descriptions as needed.
- 9. Assessor will record assessment data, prepare appointment mailers, stuff envelopes and mail notices, and schedule and reschedule appointments as necessary.
- 10. Assessor will mail the notices of changed/increased assessments.
- 11. Assessor will be responsible for completing the real estate property assessment rolls.
- 12. Assessor will become and remain informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Assessor will become and remain informed about court decisions, Department of Revenue advisories, and other governmental decisions that impact value.

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- 13. All office supplies, postage, and other supplies necessary to perform the duties of the contract shall be provided by the Assessor.
- 14. Assessor will conduct Open Book sessions in accordance with all applicable Wisconsin State Statutes. Assessor 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 one (1) month prior to the first Open Book session. The intent is to publish this statement on the Village website and publish prior to Open Book at Village expense.
- 15. The Board of Review will be conducted prior to June 30<sup>th</sup> except for the year of the Revaluation, or as approved by the Village Board of Review.
- 16. Assessor will attend the Board of Review meetings and testify under oath while defending the Assessor's valuation and work products. In the event of an appeal to or initiation of an action in courts, it is agreed that the Assessor will be available as a witness to furnish expert testimony in defense of any of the assessed values.
- 17. The Village currently has two TIF Districts. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports and TIF report per DOR regulations. <u>The Assessor shall provide the Village a draft copy of TIF reports for its review and comments prior to their submittal to the DOR.</u>
- 18. Assessor will provide a local or toll-free phone number and e-mail for Village officials and residents to contact Assessor during Village regular business hours, Monday through Friday, and shall return calls and e-mails within twenty-four (24) hours.
- 19. Assessor will be available by phone to provide information to Village staff as needed, and return phone calls within twenty-four (24) hours during the business week or the next business day after a legal holiday or weekend.
- 20. Assessor will maintain and update monthly at the Village Hall a complete set of computer property assessment records that are compatible with the Village's computer equipment and software. (Village computer records shall be updated within thirty (30) days or less of the final adjournment of the Board of Review.)
- 21. Any person who will perform any duties incidental to the normal duties of Assessor shall maintain appropriate licensures and certifications needed to perform all assessment services under this RFP. Proof of such licensures and certifications shall be provided with the submission of the proposal in response to this RFP.

## V. Scope of Work – Revaluation Services

The Revaluation, if determined necessary by the Village Board, is to be completed at a mutually agreed upon time with the Village. The Assessor, having familiarized himself/herself with the local conditions affecting the cost of the work to be done, and the Standard Specifications for the Revaluation of all real property in the State of Wisconsin pursuant to Chapter 70, Wisconsin State Statutes, will perform everything required to be performed, and to complete in a professional manner, all the work REQUEST FOR PROPOSAL TO PROVIDE ASSESSMENT SERVICES

required to be completed, to revalue all real property within the Village in accordance with all the applicable Wisconsin State Statutes.

- 1. For the valuation of residential properties, the Assessor shall use a Computer Assisted Appraisal System.
- 2. For the valuation of commercial properties, the Assessor shall use a Computer Assisted Appraisal System which conforms with Section II, above.
- 3. Provide the Village with quarterly progress reports and provide Village staff with access to the firm's electronic Market Drive or agreed upon data management software.
- 4. The Assessor shall complete all revaluation work in a timely and professional manner in compliance with Wisconsin State Statutes and with Volume 1 of the Wisconsin Property Assessment Manual. The Assessor shall complete a Market Update updated to reflect all current sales for all properties in the Village.
- 5. The Assessor shall reconcile and update as needed existing property record card data with data maintained in the Assessor's mass appraisal software program.
- 6. The Assessor shall review all recent property sales, perform an outside inspection to verify property attributes, and take digital color photographs of all properties involved in sales since January 1 or the prior year.
- 7. The Assessor shall perform sales analysis to determine value trends and help to build a valuation model specifically for the Village and shall deliver all documents/evidence needed to understand same to the Village.
- 8. The Assessor shall apply the new valuation model to existing property record information to arrive at a new assessed value for all property in the Village.
- 9. The Assessor shall individually review each property's data to insure a fair and equitable assessment.
- 10. The Assessor shall mail new notices of assessment along with a letter explanation to all affected property owners.
- 11. Prior to the Open Book hearing period, a time for public inspection of the proposed roll shall be scheduled. The Open Book period shall be scheduled to comply with appropriate Statutes and ensure timely notice to affected properties.
- 12. The Assessor shall hold a sufficient number of "Open Book" meetings with taxpayers allowing enough time for taxpayers wishing to ask questions or provide evidence supporting a different value.
- 13. The Board of Review for the revaluation period shall be scheduled at the mutual convenience of the Assessor, Board of Review, and the Village Clerk.
- 14. The Assessor shall attend all sessions of the Board of Review to provide testimony supporting the assessment.
- 15. The Assessor shall defend assessed values should a property owner challenge the determined assessment following board of review proceedings at no additional cost to the Village.

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## VI. Obligations of the Village

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

- 1. Answering the telephone and greet and assist the public in researching property information and requests for assessment data. Also answer general correspondence concerning assessment related inquiries that Village staff is capable of answering. Field questions, take messages, and provide information as to how to contact the assessor by mail, fax, email, or telephone in order to schedule appointments.
- 2. Provide copies of all building permits, previous assessment rolls, and records as requested at no cost.
- 3. Publish public notices at appropriate times during the assessment and revaluation process.
- 4. Provide adequate office space for assessment personnel.
- 5. Provide the name, address of the owner, and the block and lot number, size, or other identifying description of each parcel to be assessed.
- 6. The Village will have the office open during normal Village Administration hours, Monday through Friday, 8:00 a.m. to 4:45 p.m.

## VII. Timeframe

The assessment roll shall be completed in time for open book conferences in April and Board of Review on the second Monday of May. Specifically, the Village Administrator must receive a copy of the assessment roll at least five (5) business days prior to Board of Review. Alternate dates may be allowed with Village approval, but not later than July 1.

#### VIII. Subcontract

If the selected individual or 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. 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 Village 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.

#### IX. Evaluation Criteria

The following criteria will be used to review the assessment services proposals that are received and which meet the request for proposal specification requirements:

- 1. Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the Village of West Salem;
- 2. Past experience with providing assessment and revaluation services;

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- 3. Ability to provide and maintain a computerized database of property assessment records;
- 4. Demonstration of high level of accuracy in assessment work for municipal clients;
- 5. Cost of assessment services; and
- 6. Evidence of positive customer interaction.

#### X. Submittal Deadline

An original and four (4) copies of the Property Assessment and Revaluation Proposal must be received at the address listed below by **no later than 3:00 p.m. on Thursday, June 12, 2025:** 

Teresa DeLong, Village Administrator Village of West Salem 175 South Leonard Street West Salem, WI 54669

Feel free to email a .pdf proposal as well to <u>tdelong@westsalemwi.gov</u> Inquiries regarding this Request for Proposal should be directed to Teresa DeLong, Village Administrator at the address listed above, or phone at (608) 786-1858 or email at <u>tdelong@westsalemwi.gov</u>

The Village of West Salem reserves the right to reject any or all proposals, or to accept the proposal that the Village deems to be in the best interest of the Village, regardless of the lowest proposed amount. The Village also reserves the right to accept all or part of the selected proposal. The Village reserves the right to request additional data or information regarding written proposals.

	REQUEST FOR PROPOSAL TO PROVIDE ASSESSMENT SERVICES
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Exhibit "A"

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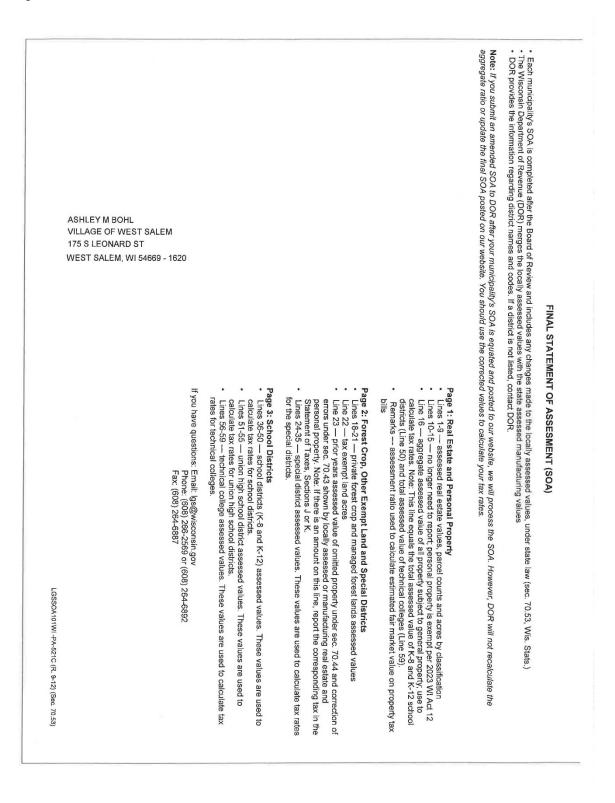
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		328030	Enter 6-digit Special District Code (Col. A)	SPECIAL DISTRICTS	Manufacturing Equated Value of Omitted Property From Prior Years (Sec. 70.395) (d) REAL ESTATE (d) PERSONAL	Assesse (a) REA		(a) County Forest Cropland Acres	(a) PARCELS	Entered After 2004 Managed Forest - OPEN @ \$1.9 per acre	(a) PARCELS (b) ACRES (c) ASSESSED VALUE	(a) PARCELS	(a) PARCELS	FOREST CROP AND OTHER EXEMPT LAND FOREST LANDS (Line 7) and FOREST CROPS (in this section) - are NOT the same
		0197 L	Account Number (Col. B)	TS	(d) REAL ESTATE	Assessed Value of Omitted Property From Prior Years (Sec. 70.44) (a) REAL ESTATE		Cropland Aci		After 2004 M	d Before 2005	Private For	Private Fo	and FORES
		LAKE NESHONOC PROT & REHAB DISTRICT			e of Omitted	nitted Prope		res	0) ACRES	lanaged Fore	) ACRES	Private Forest Crop - Special Class @ 20¢ per acre (b) ACRES	Private Forest Crop - Reg Class @ 10¢ per acre (b) ACRES (c) ASSESSED VALUE	R EXEMI
		ONOC PRO	Spec		Property Fr	ty From Pri		(b) Federal Acres		st - OPEN (	orest - OPE	oecial Class	eg Class @	<b>PT LAN</b>
		<b>DT &amp; REHA</b>	Special District Name (Col. C)		om Prior Years (e) PERSONAL	or Years (Sec. 7 (b) PERSONAL		I Acres	(c) ASSE	0 \$1.9 per	V @ 72¢ per (c) ASSE	@ 20¢ per a (c) ASSE	10¢ per acri (c) ASSE	on) - are NC
		B DISTRIC	Name		ars (Sec. 70.	96. 70.44) NAL		-	SSED VALUE	acre	SSED VALUE	ICTE SSED VALUE	e SSED VALUE	)T the same
		T			995)		89.83	(c) State Acres		_				
		60	Locally A of Real E		Mfg	As		lores	(d) PARCELS 8	m	En (d) PARCELS	Entered (d) PARCELS	(d) PARCELS	
		601,015,600	Locally Assessed Value of Real Estate (Col. D)		Mfg. Equated Value of Sec.70.43 Corrections of Errors (1) REAL ESTATE (12)	Assessed Value of Sec. 70.43 Corrections of Errors by Assessors (c1) REAL ESTATE (c2) PERSONAL -60,600		(d) Count		Entered After 2004 Managed Forest - CLOSED @ \$9.49 per acre	Entered Before 2005 Managed Forest - CLOSED @ \$1.68 per acre ELS (e) ACRES (f) ASSESSED VALUE	Entered Before 2005 Managed Forest - Ferrous Mining CLOSED @ \$7.37 per acre (d) PARCELS (e) ACRES (f) ASSESSED VALUE		1
-	_				lue of Sec ATE	e of Sec. 7 ATE	40	y (NOT FC	(e) ACRES 96.29	2004 Man	(e) ACRI	(e) ACRE	e) ACR	2024 YEAR
		11,140,700	y Value of Re (Col. E)		.70.43 Corre	10.43 Correc	408.83	(d) County (NOT FOREST CROP) Acres	G III	aged Forest	laged Fores ≣S	Es ≣S	Private Forest Crop - Reg Class @ (e) ACRES	32
		,700	Mfg Value of Real Estate (Col. E)		ections of Er	tions of Erro		P) Acres		- CLOSED (	t - CLOSED	rous Mining		191 MUN
					(f2) PERSONAL	(c2) PERSONAL		(e)	(f) ASSESSED VAI 1,216,900	@ \$ 9.49	(f) ASSESSE	(f) ASSESSI	\$3.6 per acre (f) ASSESSED VALUE	
		612,156,300	Merged Value of Real Estate (Col. F)		) PERSONAL	ONAL	283.18	(e) Other Acres	5,900	per acre	D VALUE	D VALUE	ED VALUE	0860 ACCT NO
			r F)									acre		Page 2

## VILLAGE OF WEST SALEM REQUEST FOR PROPOSAL TO PROVIDE ASSESSMENT SERVICES

LGSSOA101WI-PA - 521C (R. 9-12) (Sec. 70.53)

Phone (608	PAMEL	Name	I hereby	59	58	57	56	5	7 C 4	5	52	51	Ē	50	49	48	47	46	h 44	43	42	41	40	39	38	37	36	A.	Line Sc No. C	
) 785 - 5510	PAMELA HOLLNAGEL		certify, to the	TOTAL ASSES			000200	TECHNICAL COLLEGE DISTRICTS	TOTAL ASSES				UNION HIGH SCHOOL DISTRICTS	TOTAL ASSES													326370	SCHOOL DISTRICTS (K-8 and K-12)	Enter 6-digit School District Code (Col. A)	
0	1		e best of	SED VALU			0002		SED VALL				SCHOOL [	SSED VALU													0196	TRICTS (K	Account Number (Col. B)	
Email address HOLLNAGEL.PAM@CO.LA-CROSSE.WI.US			hereby certify, to the best of my knowledge and belief, this form is complete and correct	TOTAL ASSESSED VALUE OF TECHNICAL COLLEGES			WESTERN TECHNICAL COLLEGE LACR	DISTRICTS	TOTAL ASSESSED VALUE OF LINION HIGH SCHOOLS				DISTRICTS	TOTAL ASSESSED VALUE OF SCHOOL DISTRICTS (K-8 and K-12)													SCH D OF WEST SALEM	(-8 and K-12)	School District Name (Col. C)	
A-CROSSE.WI.US	i	Title	complete and correct.	601,015,600			601,015,600							601,015,600													601,015,600		Locally Assessed Value of Real Estate (Col. D)	YEAR
				11,140,700			11.140.700							11,140,700													11,140,700		Mfg Value of Real Estate (Col. E)	CO MUN
	06 / 18 / 2024	Submission date		612,156,300			612.156.300					and the second second	たいとうないで、おいろう」は	612,156,300													612.156.300		Merged Value of Real Estate (Col. F)	ACCT NO

#### VILLAGE OF WEST SALEM REQUEST FOR PROPOSAL TO PROVIDE ASSESSMENT SERVICES



# Exhibit "B"

Insurance Requirements for individuals or corporations providing assessment services

#### Minimum Scope and Limits

- 1. Errors & Omissions Liability coverage, with a minimum limit of \$500,000 per claim, \$1,000,000 annual aggregate. This insurance shall be maintained for at least two years after completion of the contract.
- 2. Commercial General Liability coverage together with excess or umbrella liability with limits of no less than the following:
  - a. Each Occurrence Limit \$1,000,000
  - b. General aggregate limit (other than Products-Completed Operations) \$1,000,000
  - c. Products-Completed Operations \$1,000,000
  - d. Personal and Advertising Injury limit aggregate \$1,000,000
- 3. Automobile Liability together with excess or umbrella coverage with minimum limits of \$1,000,000 combined single limit per accident for bodily injury and property damage, provided on a Symbol 1 Any Auto basis.
- 4. Workers' Compensation as required by the State of Wisconsin and Employers Liability Insurance with sufficient limits to meet underlying Umbrella Liability insurance requirements.
- 5. Name the Village of West Salem as an additional insured on the Commercial General Liability Policy.
- 6. Provide a certificate of insurance prior to the commencement of work for each year of the contract.