

Proposal for Assessing Services

Presented to the City
of Spring Lake Park



Spring Lake Park

APRIL 15, 2024

Erik Skogquist &
Mary Wells

April 15, 2024

City of Spring Lake Park
1301 81st Ave NE
Spring Lake Park, MN 55092

Honorable Mayor and City Council,

As experienced assessors that have lived and worked in the area for decades, we are excited to have the opportunity to respond to your Request for Proposals for City Assessor Services. Our group has not only the knowledge and experience to provide a high quality product, but we pride ourselves on building relationships in the community and being professional and approachable representatives of the city.

Here are just a few of the benefits of contracting with us as your City Assessors:

1. Professional, accurate and timely processing of all physical inspections, data updates and reporting required by the county and the state.
2. Full representation at all levels of Board of Appeal and Equalization meetings.
3. Caring and responsive communications with property owners – we answer all calls, emails and letters promptly and respectfully.
4. Our focus with property owners is on education and providing the right information. We know that many don't understand how the Minnesota assessing process works. Our experience is that they appreciate getting a full explanation, in terms they understand, and we do that well – in fact, that's our specialty!
5. Interfacing and working together with city departments to answer their questions, respond to requests, and communicate out to the public. For example: we will attend Town Hall or Neighborhood meetings whenever possible, to answer any property owners' questions that may arise. We will also provide printed and or electronic material for your city newsletter periodically.

Thank you for the opportunity to submit a proposal for your consideration and if selected we look forward to be a part of your community!

Best Regards,

Erik Skogquist &
Mary Wells

A. The identity of each person who will be supplying services to the city and a description of his/her experience and the assessor licenses he/she holds.



Erik Skogquist – Has worked as an assessor in multiple municipalities throughout Minnesota as both a staff and contract assessor since 2006. Erik has a breadth of experience with multiple property types and markets. He has worked in both rural and urban environments. As a lifelong resident of Anoka County and a current assessor for multiple cities in the county, he has a good understanding of the property types, unique geography, and systems that go into creating fair and equitable market values. Erik holds the Senior Accredited MN Assessor license (SAMA), License #3121.



Mary Wells – Has been a property assessor since 2012. She worked as a fulltime employee of the City of Coon Rapids until 2016 and then became an independent contractor. Mary has been a licensed MN Realtor since 2007 and that experience has been very valuable in the assessor role. Prior to real estate, Mary worked for many years at General Mills as a Marketing Research Project Manager. Mary is a lifelong Anoka County resident. She is very familiar with the City of Spring Lake Park as she lived in south Blaine for many years and her children attended the Spring Lake Park Schools through all grades. She was very active in parent volunteer committees over the years. Mary holds the Senior Accredited MN Assessor license (SAMA), License #3561.



Chris Larson – Has worked as an assessor in multiple municipalities throughout Minnesota since 2015. Currently providing services in several cities located in Anoka County for residential properties in both urban and rural areas as well as agricultural sites. Prior to the assessing career, Chris worked 23+ years for the City of Minneapolis in senior level facility and property management positions. Chris has lived in Anoka County since 1989. He is very familiar with the Spring Lake Park area as his children attended Spring Lake Park schools through all grades. Chris holds an Accredited MN Assessor license (AMA) License #4040.

B. A brief history of the firm, including, but not limited to size, specialty areas, and a description of the firm's experience working with municipal clients.

Erik and Mary's paths came together in 2012 while both working as staff assessors in the City of Coon Rapids. During that time Erik worked part-time for the city while simultaneously holding assessing

contracts in multiple smaller cities in southwest and central Minnesota. Mary began working part time with contract assessor Ken Tolzman in 2016. After leaving Coon Rapids, Mary worked for both Ken and Erik until she and Erik became partners holding multiple contracts in Anoka County beginning in 2018. At that time Chris Larson joined the group after working many years in facility and property management for the City of Minneapolis and then pursuing the dream of building his own home from the ground up.

Erik's Areas of Focus - Commercial, Industrial, Apartment, Residential, Agricultural and Tax Exempt. Building personal relationships and negotiating tax court petitions with attorneys, tax representatives and property owners.

Mary's Areas of Focus – Residential, Agricultural, Tax Exempt, Smaller Apartment buildings. Strong emphasis on educating property owners about the assessing process, which is guided by state statutes and the Department of Revenue. Writes city specific assessor articles for newsletters, websites, and provides community outreach to educate property owners in contracted cities.

Chris's Areas of Focus – Residential, Agricultural, Tax Exempt, Smaller Apartment buildings. Extensive knowledge of construction of buildings. Detail oriented and customer service focused.

C. Name and telephone number of three client references.

<i>Mark Statz</i>	<i>City Administrator Centerville, Anoka County MN</i>	<i>651-429-3232</i>
<i>Denise Webster</i>	<i>City Administrator Ham Lake, Anoka County MN</i>	<i>763-235-1680</i>
<i>Ginger Berg</i>	<i>City Clerk Bethel, Anoka County, MN</i>	<i>763-434-4366</i>

D. A description of any conflicts or potential or perceived conflicts of interest that would arise from providing services to the City.

None of the proposed contractors own property or have business relations within the city. Mary and Chris have a close relative that owns a home in the city so Erik would always cover the assessing services for that property. Mary is a MN licensed Realtor and in accordance with MN assessor licensing rules, she does not assist real estate clients in cities where she is providing assessing services.

E. A detailed description of any and all fees, costs, expenses and other charges being proposed. The City is interested in either a fixed price contract or a contract based on the parcels assessed annually.

For the assessment year 2025, 2026 and 2027, the Municipality will pay the City Assessor as follows:

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- a) *Ten and 25/100 Dollars (\$10.25) for each improved parcel of residential, seasonal recreational residential, and agricultural type property.*
 - b) *Four and 65/100 Dollars (\$4.65) for each unimproved parcel of residential, seasonal recreational residential, and agricultural type property.*
 - c) *Sixty two and 00/100 Dollars (\$62.00) for each improved and unimproved parcel of commercial, industrial and public utility type property.*
 - d) *Sixty two and 00/100 Dollars (\$62.00) for each improved and unimproved parcel of apartment or mobile/manufactured home park type property.*
 - e) *Four and 65/100 Dollars (\$4.65) for each improved and unimproved parcel of exempt type property.*

The City Assessor will remit quarterly billings to the Municipality totaling twenty-five (25%) percent of the estimated annual bill, with the fourth payment making up the difference between the estimated and actual amount of parcels assessed. In consideration for said assessment services, the Municipality will pay the City Assessor quarterly payments. The first quarterly payment will be billed on March 1, 2025, the second on June 1, 2025, the third on September 1, 2025, and the fourth on December 1, 2025. A 1.65% monthly interest shall be charged after the billing date on the unpaid balances, if not paid within thirty (30) days of the billing date.

The above fees constitute the entire amount and there are no other fees that will be charged to the city.

F. Documentation of current insurance coverage and limits, including professional liability insurance.

See attached.

G. Any other information that would be helpful to the City to better understand the proposal or the firm.

See attached proposed draft contract.

**AGREEMENT FOR ASSESSMENT SERVICES
BETWEEN THE CITY OF SPRING LAKE PARK
AND ERIK A. SKOGQUIST, SAMA AND MARY WELLS, SAMA
IN THE CITY OF SPRING LAKE PARK, MN**

This Agreement made and entered into this _____ day of _____, 20____, by and between the City of Spring Lake Park, 1301 81st Ave NE, Spring Lake Park, MN 55432, a municipal corporation under the laws of Minnesota, hereinafter referred to as the “Municipality”, and Erik Skogquist, Senior Accredited Minnesota Assessor #3121, 314 Monroe St, Anoka, MN 55303 and Mary Wells, Senior Accredited Minnesota Assessor #3561, 3405 Edmar Ln NE, East Bethel, MN 55092, hereinafter referred to as the “City Assessors”.

WITNESSETH:

WHEREAS, the City of Spring Lake Park, lying wholly within Anoka and Ramsey Counties, Minnesota is a city constituting a separate assessment district; and

WHEREAS, pursuant to Minnesota Statutes 273.05, the city assessor shall be appointed by the city council; and

WHEREAS, it is the wish of the Spring Lake Park to appoint Erik Skogquist and Mary Wells the Spring Lake Park City Assessors; and

WHEREAS, it is the wish of Erik Skogquist and Mary Wells to serve as the Spring Lake Park City Assessors and to cooperate with the Municipality to perform fair and equitable assessments of the real property within the Municipality for only the portion lying within Anoka County.

NOW, THEREFORE, in consideration of the mutual covenants herein contained, it is agreed as follows:

1. The effective period of this Agreement will be from January 1, 2025 to December 31, 2027 unless earlier terminated as provided herein.
2. The City Assessors represents that they are residents of the State of Minnesota, possesses the knowledge and training in the field of property taxation necessary to perform the duties of a local assessor, and is duly licensed to perform such duties in compliance with Minnesota Statutes 270.48 and Minnesota Department of Revenue Standards.
3. All real property within the geographical boundaries of Municipality solely within Anoka County will be assessed by the City Assessors for taxation beginning with the 2025 assessment payable 2026.
4. The duties of the City Assessors will be carried out consistently and in accordance with the provisions of Minnesota Statutes 273.05, 273.064 and 273.08.
5. In consideration for said assessment services, the Municipality will pay the City Assessors quarterly payments (unless earlier terminated as herein provided) as follows:

- a) The first quarterly payment will be billed on March 1, 2025, the second on June 1, 2025, the third on September 1, 2025, and the fourth on December 1, 2025.
 - b) The parties understand that to accomplish the delivery of the assessments on or before February 1, 2025, all work specific to the generation of that assessment must be done prior to February 1, 2025 and performed by the prior City Assessor with only finalization of values and miscellaneous items to be completed by the new City Assessors between January 1, 2025 and the February 1, 2025; thereafter all work for the assessment year 2026 assessment must be done prior to February 1, 2026 by the new City Assessors, etc.
6. For the assessment year 2025 assessment, the Municipality will pay the City Assessors as follows:
- a) Ten and 25/100 Dollars (\$10.25) for each improved parcel of residential, seasonal recreational residential, and agricultural type property.
 - b) Four and 65/100 Dollars (\$4.65) for each unimproved parcel of residential, seasonal recreational residential, and agricultural type property.
 - c) Sixty two and 00/100 Dollars (\$62.00) for each improved and unimproved parcel of commercial, industrial and public utility type property.
 - d) Sixty two and 00/100 Dollars (\$62.00) for each improved and unimproved parcel of apartment or mobile/manufactured home park type property.
 - e) Four and 65/100 Dollars (\$4.65) for each improved and unimproved parcel of exempt type property.
7. The same procedure and rates will be followed in the frequency and computation of payments for assessment services for subsequent years.
8. The City Assessors will remit quarterly billings to the Municipality totaling twenty-five (25%) percent of the estimated annual bill, with the fourth payment making up the difference between the estimated and actual amount of parcels assessed. It is hereby agreed that a 1.65% monthly interest shall be charged after the billing date on the unpaid balances, if not paid within thirty (30) days of the billing date.
9. Notwithstanding Section 1 above, the City Assessors and/or Municipality have the right to terminate the Agreement by providing twelve months written notice prior to the beginning of assessment work for the tax year. Such notice to terminate must be sent by certified mail to the other party at the address set forth above. For example, to terminate effective as of the assessment year 2027 assessment, the party must provide written notice of termination to the other party no later than February 1, 2025. Provided further, that this agreement may be terminated at any time by the Municipality on charges by the Minnesota Commissioner of Revenue on neglect of duty on the part of the City Assessors.

10. The relationship between the parties is that of an independent contractor. Nothing contained in this Agreement is intended to or should be construed as creating the relationship of copartners, employee/employer, or joint ventures between the Municipality and the City Assessors. No tenure or any rights or benefits, including Workers' Compensation, Unemployment Insurance, medical care, sick leave, vacation leave, severance pay, PERA, or other benefits available to Municipality employees will accrue to the City Assessors or employees of the City Assessors performing services under this Agreement. The relationship between the parties is that of an Independent Contractor, the Municipality having no control as to the details of the work nor over the hours or time devoted to said task to be accomplished, said concern of the Municipality being limited only to the results of said work and not the means by which it is accomplished.
11. The City Assessors agree they will defend, indemnify, and hold harmless the Municipality, its officers and employees, against any and all liability, loss, costs, damages, and expenses which the Municipality, its officers or employees, may hereafter sustain, incur, or be required to pay arising out of the City Assessors' performance or failure to adequately perform his obligations pursuant to this Agreement.
12. All data collected, created, received, maintained, or disseminated for any purposes by activates of the City Assessors because of this Agreement is governed by the Minnesota Government Data Practiced Act, Minnesota Statutes Chapter 13, as amended, the Minnesota Rules implementing such act now in force or as adopted, as well as federal regulations on data privacy.
13. Pursuant to Minnesota Statutes 16B.06 subd. 4, the City Assessors agree that the Municipality, the State Auditor, the Minnesota Department of Revenue, or any of their duly authorized representatives at any time during normal business hours and as often as they may reasonably deem necessary will have access to and the right to examine, audit, excerpt, and transcribe any books, documents, papers, records, etc, which are pertinent to the accounting practices and procedures of the City Assessors and involve transactions relating to this Agreement.
14. During the performance of this Agreement, the City Assessors agree that no person will, on the grounds race, religion, disability, national origin, sex, marital status, familial status, age, sexual orientation, and gender identity be excluded from full employment rights in, participation in, be denied the benefits of, or be otherwise subjected to discrimination under any and all applicable federal and state laws against discrimination.
15. a) The City Assessors warrant and represent that they are currently licensed as assessors by the State of Minnesota. In the event said license is cancelled, revoked, suspended or expires during the term of the contract, the City Assessors agree to immediately inform the Municipality. The Municipality will pay only for serviced pursuant to such licensing requirements.

b) The City Assessors will comply with all applicable federal and state statutes and regulations as well as local ordinances.

c) Failure to meet the requirements of Paragraphs a) and b) above may be cause for cancellation of this Agreement effective the date of receipt of notice of cancelation, notwithstanding the provisions of Sections 1 and 9 above.

16. Any reports, studies, photographs, negatives, or other documents prepared by the City Assessors in the performance of his obligations under this Agreement will be the exclusive property of the Municipality, and all such materials will be remitted to the Municipality by the City Assessors upon completion, termination, or cancellation of this Agreement upon the request of the Municipality. The City Assessors will not use, willingly allow, or cause to have such materials used for any purpose other than performance of the City Assessors' obligations under this Agreement without the prior written consent of the Municipality.

IN WITNESS THEROF, the Municipality and City Assessors have hereby executed this agreement this _____ day of _____, 20____.

CITY OF SPRING LAKE PARK

By: _____

Title: _____

Dated: _____

By: _____

Title: _____

Dated: _____

CITY ASSESSORS

By: _____

Title: Erik A. Skogquist, SAMA License #3121

Dated: _____

By: _____

Title: Mary Wells, SAMA License #3561

Dated: _____