



312 W. Whitewater St., P.O. Box 178
Whitewater, Wisconsin
Walworth and Jefferson Counties
June 18, 2025

REQUEST FOR PROPOSALS FOR FULL VALUE CITY PROPERTY ASSESSMENT SERVICES.

The City of Whitewater is soliciting proposals from qualified firms to provide property assessment services for the **City of Whitewater, Wisconsin** (hereafter, referred to as “City”). The following information is provided to assist qualified firms with their proposals in response to this request for proposals (“RFP”):

Background Information

The City is located in both Jefferson and Walworth Counties with a current estimated population of 15,773. The 2024 Statements of Assessment are attached to this request. The City has maintained full value assessments of property since 1996.

Specific Services Required

1. Assessor will perform all of the work required to properly and professionally assess the real property of the City in accordance with applicable Wisconsin State Statutes.
2. Assessor shall maintain “full-value” assessments for all non-manufacturing parcels in the City. The City has requests the following annual inspection process to be completed: (a) new construction, annexed properties, exempt status changes, and zoning changes shall be inspected; (b) properties affected by legal description changes, building removal, fire, significant remodeling, or other major condition changes shall be inspected; (c) all

properties sold shall be inspected; and (d) requests for review by property owners made to the Board of Review shall be inspected during the next assessment cycle.

3. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
4. Assessor will review and assess new construction as of January 1st of the current year.
5. Assessor will account for all buildings destroyed or demolished.
6. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
7. Assessor will process parcel subdivisions, lot line adjustments, new plats and any other land divisions.
8. Assessor will correct legal descriptions as appropriate.
9. Assessor will take digital photographs of all properties, and post updated photographs to electronic record cards over the course of the term of the contract.
10. The City will provide limited clerical services to aid the assessor. This limited support will include answering routine telephone and walk-in requests for assessment data, providing the Assessor's phone number to residents as necessary, and provide copies of all building permits and commercial building plans as requested. The Assessor will be responsible for all other clerical duties, including: preparing appointment mailers, stuffing envelopes and mailing all notices; maintaining building permit information and sales data on all electronic assessment cards, all filing of assessment cards and records; all assessment data entry, and scheduling/rescheduling all assessment related appointments.

The City shall not be responsible for any Assessor office supplies with the exception of providing for assessment file folders and other items that are kept in the permanent custody of the City. Sufficient office space, desks, chairs, telephone and data connections will be provided for the Assessor's use while at the Whitewater Municipal Building.

11. Assessor will maintain property owner lists, with current name and address changes. Said files will be kept at the Whitewater Municipal Building.
12. Assessor will post assessments to real estate transfer returns and record sale information to (electronic) property record cards.
13. Assessor will be responsible for maintaining recent plat and subdivision maps on file and updated accordingly.
14. Assessor will mail Notices of Increased Assessment to property owners and others as required.

15. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes, however, at a minimum the Assessor shall provide at least two (2) half days or eight hours of time each year for Open Book sessions. Assessor shall prepare the Notice of Changed Assessment for the City's approval and should include Open Book dates, times, and instructions on how to set up an appointment for an Open Book session, at least one month prior to the first Open Book session. The intent is to broadcast this statement in as many locations as possible and to issue the statement to the local press for publication prior to Open Book.
16. Assessor will be responsible for insuring that all procedures are properly completed for the Board of Review proceedings to be held prior to June 11th each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products. The Assessor shall be available for any subsequent Circuit Court proceedings resulting from Board of Review appeals, and shall provide supporting documentation, attend hearings, and assist the City Attorney as necessary.
17. Assessor will be responsible for providing the Clerk and Counties with final reports of assessed valuations after the Board of review meeting.
18. The City currently has five (5) Tax Increment Districts. The Assessor shall be required to complete all State of Wisconsin Department of Revenue TID reports regarding valuations on or before the due date(s).
19. Assessor will also provide a phone number for City officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
20. Assessor will supply to the City a complete set of computer property assessment records (including digital photographs of each property) that are compatible with the City's computer equipment and software. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the Assessor shall update the City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.

The choice of assessment software is up to the assessor, subject to acceptance by the City. However, any software selected should have the following attributes/abilities:

- A. Have a statistical package that includes descriptive statistics and regression analysis.
- B. Comparative sales report that can be used to support individual assessments with adjustments shown.
- C. Flexible cost and depreciation tables that can be adjusted to capture specific markets.
- D. The ability to electronically export the completed assessment roll to both the Jefferson County and Walworth County Tax Listing Offices in the format required. This eliminates any manual data entry of the completed roll.
- E. The ability to import "start-up data" from both the Jefferson and Walworth County Information Technology offices. This would also be used to set up the City's

computerized system, to avoid time/cost consuming initial data entry. Typical imported data would include owners name(s), mailing address, parcel address, legal description, parcel number, etc.

- F. All data is to be compatible with Excel, and shall be provided to the municipality as requested by the municipality.
 - G. Building Permit record keeping.
 - H. Sales data can be kept, stored and accessed.
 - I. Has the ability to create a wide range of reports, including assessment roll, Assessor's final report, etc.
 - J. Has the ability to run queries to locate specific data.
 - K. Must use standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages.
 - L. Assessor will annually provide municipality with a copy of the database used, together with file maps and descriptions, and all associated digital photos. This database will become the property of the municipality. Proprietary database formats exclusive to a particular software package are unacceptable.
 - M. Hard copy printouts for all parcels shall be provided and placed in existing property record cards. The printout's 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 should have digital photos attached.
 - N. Homogenous neighborhoods should be delineated and noted on assessment software.
 - O. Assessment data shall be compatible with the City's GIS system and utilize a standard SQL Server-readable database architecture to support full integration with municipal systems.
21. The assessor shall communicate openly and in a timely fashion with the proper City personnel and the public in the handling of all appeals to ensure the Board of Review has all available information to render its decisions. The assessor is expected to present a positive professional image in both dress and conduct while interfacing with City staff and the public, especially during the appeals process. All assessor personnel shall carry proper photo identification to assure the public of their identity and purpose of gaining access to private property.
22. The municipality requests that new digital photos of the property are to be taken and provided for all improvements.
23. The assessor is encouraged to interface with the business and residential community and media to provide greater clarity of the assessor's role in the property taxation process and communicate assessment scheduling.
24. The assessor shall update market values on City owned land and public buildings, if requested by the municipality. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
25. The Assessor shall provide an annual public education component, including the development of outreach materials or informational sessions to explain the assessment process, appeal procedures, and valuation methods.

26. Upon request by the City Manager or Economic Development staff, the Assessor shall provide projected valuation estimates for proposed or conceptual development projects to assist in fiscal modeling and planning.
27. The Assessor shall ensure that detailed property assessment records, including images and parcel data, are made available with free public access online, either through a City-hosted platform or a contractor-provided web portal approved by the City.
28. Assessor will also perform all other duties incidental to the normal duties of Assessor.

Staffing Continuity & Substitution Policy

To ensure consistent service quality and institutional knowledge throughout the contract term, the following Staffing Continuity and Substitution Policy shall apply:

1. Designation of Key Personnel

The Contractor shall identify all key personnel assigned to this engagement in its proposal and contract documents. Key personnel include, but are not limited to:

- The lead assessor and/or project manager
- Any certified staff responsible for final valuations or Board of Review preparation
- Any personnel directly interfacing with city staff or the public

2. Staffing Continuity Requirement

The Contractor shall make every reasonable effort to ensure continuity of staffing for all key personnel assigned to the project. This includes minimizing reassignments, departures, or role changes that could affect the delivery or quality of services.

3. Substitution and Replacement Procedure

If substitution of key personnel becomes necessary due to resignation, illness, reassignment, or other causes:

- The Contractor shall notify the City in writing as soon as reasonably possible.
- The Contractor must provide a written request for substitution, including:
 - The reason for the proposed change
 - Resume and qualifications of the proposed replacement
 - Statement of assurance that the replacement meets or exceeds the qualifications of the individual being replaced
- The substitution must be approved in writing by the City prior to the replacement assuming duties under the contract.

4. City's Right to Reject

The City reserves the right to reject any proposed substitute personnel if it determines that the individual does not meet the required qualifications or if the substitution would negatively impact service continuity or performance.

5. Failure to Comply

Failure to comply with this policy may be considered a material breach of contract and may result in penalties, including withholding of payments, contract review, or termination for cause.

Performance Metrics & Standards

1. Assessment Ratio Compliance

- **Standard:** Maintain an overall assessment ratio between 90% and 110% of market value, in accordance with Wis. Stat. § 70.05(5)(b).
- **Metric:** Annual ratio based on comparison of total assessed value to equalized value.
- **Reporting Requirement:** Provide an annual summary showing compliance with the acceptable ratio range, including sales analysis and supporting data.

2. Uniformity of Assessments

- **Standard:** Ensure assessments are equitable across property classes, with minimal variation in similar property types.
- **Metric:** Coefficient of Dispersion (COD) should not exceed DOR-recommended limits:
 - Residential: $\leq 15\%$
 - Commercial: $\leq 20\%$
- **Reporting Requirement:** Submit annual sales ratio study with COD, Price-Related Differential (PRD), and narrative summary.

3. Timeliness of Deliverables

- **Standard:** Meet or exceed statutory deadlines for:
 - Completion of the assessment roll (July 1 or another agreed upon date)
 - Notices of assessment changes
 - Open Book and Board of Review support
 - Submission of Statement of Assessment and Net New Construction
- **Metric:** 100% of deadlines met.
- **Reporting Requirement:** Annual timeline report with confirmation of submission dates and any variances.

4. Accuracy and Completeness of Records

- **Standard:** Maintain accurate and up-to-date records for 100% of parcels, including photos, sketches, land data, and improvement details.
- **Metric:** Periodic audit of property records with $\geq 95\%$ accuracy rate.
- **Reporting Requirement:** Summary of records maintenance activities, including updates to property records and quality control results.

5. Customer Service Responsiveness

- **Standard:** Respond to taxpayer inquiries and complaints within 2 business days.
- **Metric:** Log and track all public contacts and responses with a 95% compliance rate.
- **Reporting Requirement:** Annual log of taxpayer inquiries and resolution times.

6. Board of Review Preparation and Participation

- **Standard:** Prepare documentation for all contested assessments and attend all Board of Review hearings.
- **Metric:** Attendance at 100% of scheduled hearings; full case files prepared for each case.
- **Reporting Requirement:** Summary of BOR activity, contested cases, outcomes, and assessor performance.

Performance Holdback and Deficiency Clause

To ensure satisfactory performance and completion of all deliverables in accordance with the scope of work, the City reserves the right to withhold **ten percent (10%)** of the total contract value as a **performance holdback**.

1. Grounds for Withholding

The City may hold back payment under the following conditions:

- Failure to meet contract milestones or deadlines without prior written approval.
- Material deficiencies in deliverables or services, as determined by the City.
- Incomplete or inaccurate documentation or reports.
- Non-compliance with applicable Wisconsin statutes or Department of Revenue requirements.
- Failure to respond adequately to requests for clarification, corrections, or resubmissions.

2. Criteria for Release of Holdback

The withheld amount may be released upon the following:

- Completion of all services and deliverables to the satisfaction of the City.
- Submission of all required reports and documentation, verified as complete and accurate.
- Correction of any identified deficiencies, confirmed in writing by the City.
- Compliance with all contractual and statutory obligations.
- Final written approval from the City Administrator or designated contract administrator.

The City reserves the right to **retain the holdback** in part or in full if deficiencies are not remedied within a specified timeframe or if overall performance is deemed unsatisfactory.

General Quotation Requirements

1. All quotations must identify the firm name, address and specific assessment services experience in Wisconsin. The proposals shall also include: the names, educational background and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed; experience with

conducting a regular full value assessment process; identify experience with assessment evaluation of potential tax-exempt properties and any specific assessment experience with a large number of multi-family properties; demonstrate accuracy of assessment work; and provide examples of going above and beyond the “call of duty”, with respect to serving the community and its property owners.

2. The proposal shall include the total annual compensation rate to provide the assessment services described in the above Specific Services Required and in accordance with the laws of the State of Wisconsin for assessment years 2026, 2027, 2028, 2029, 2030, 2031 beginning no later than January 1, 2026 (preparation work for 2026 assessment year). The City will pay the annual compensation rate in equal monthly installments.
3. Proposals should include three options: (1) annual interim market updates, (2) a blended approach that alternates between maintenance years and interim market updates every other year, and (3) other alternatives.
4. Bidders shall express their fee for each year of this proposed contract (2026 through 2031) 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. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm. The City will retain 10% of the total fee subject to timely delivery of the certified tax roll.
5. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
6. The proposals shall identify five references from municipal clients for which the bidder and the person or persons to be assigned as the City’s point of contact for the work to be performed has provided assessment and/or revaluation services within the past two (2) years. References must include the name, title, address and business phone number of the contact person.
7. Bidders shall provide a detailed resume of the person or persons to be assigned as the City’s point of contact for the work to be performed.
8. The proposals shall also identify any and all contractual requirements that the bidder currently has.
9. Identify the date when the firm would be available to begin providing assessment services to the City.
10. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the Wisconsin Department of Revenue, and shall maintain certification throughout the duration of this assignment.

11. Bidders are advised to carefully inspect the community, the entire records and facilities of the City of Whitewater and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the 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 bid.
12. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
13. The successful bidder will have a minimum of three to five years' experience in municipal government assessing, including maintaining full value assessments, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
14. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the solicitation and is the most advantageous to the City of Whitewater, considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received. The evaluation rubric is included in Appendix A.
15. This proposal may not be withdrawn for a period of sixty (60) days after the date and time set for the opening of quotes. Any company may withdraw their proposal at any time prior to the submittal deadline.
16. If a proposal is accepted, the Assessor shall maintain insurance coverage to protect and hold harmless the Municipality against claims, demands, actions, and causes of action, arising from any act or omission of the Assessor, its agents and employees in the execution of work. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the municipality naming the City of Whitewater as an additional insured. Limits of liability shall not be less than:
 - a. **Worker's Compensation**.....Statutory
 - b. **Comprehensive General and Public Liability**
 - i. Bodily Injury
 1. Per Person.....\$1,000,000
 2. Per Occurrence.....\$1,000,000
 - ii. Property Damage
 1. Each Occurrence.....\$1,000,000
 - iii. Comprehensive Auto Liability Including Non-Ownership Coverage:
 1. Each Person.....\$1,000,000
 2. Each Occurrence.....\$1,000,000
 - iv. Property Damage
 1. Each Occurrence.....\$2,000,000
17. If a proposal is accepted, the accepted assessor agrees to indemnify and hold harmless the City of Whitewater, its board members, manager, administration, staff and employees from and against all losses, claims, damages, liabilities, judgments, costs and expenses, including attorneys' fees and other legal expenses in connection with

defending the City of Whitewater in any litigation, whether commenced or threatened, in connection with any claim, action or proceeding to which the City of Whitewater becomes subject, whether or not resulting in any liability, caused by, arising out of any services provided the accepted assessor under this Agreement.

18. If a proposal is accepted, the City of Whitewater will enter into a one-year agreement with the accepted assessor. This agreement will automatically renew each year on January 1st. If either party seeks to terminate the agreement for any reason, they shall notify the other party before September 1st of the current term. Upon such notice, both parties shall meet to implement a transition plan before October 1st of the current term. Failure to give notice before September 1st of the current term will result in automatic renewal of the contract on January 1st.
19. All proposers are required to disclose any actual or potential conflicts of interest involving current or former public officials or staff. The Conflict of Interest Disclosure Form is provided in Appendix B.

Information

An emailed copy of the proposal must be received at the Whitewater City Clerk's Office no later than 4:00 p.m. on July 18, 2025. Proposals shall be sent to HBoehm@whitewater-wi.gov.

The Assessor will be selected by a special city assessor selection committee which will recommend a firm to be hired to the City Council. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected.

Questions regarding this Request for Proposal can be directed to City Clerk Heather Boehm at (262) 473-0102 or e-mail HBoehm@whitewater-wi.gov.

Submittal Questions

All questions shall be submitted in written form to HBoehm@whitewater-wi.gov by 5:00 p.m. on Monday, July 7, 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., Monday, July 14, 2025.

Solicitation Schedule

RFP Release	June 18, 2025 (website)/June26, 2025 Newspaper
RFP Questions Due	July 7, 2025
RFP Response Date	July 14, 2025
RFP Response Due Date	July 24, 2025
Evaluation Committee Meeting	Week of July 28, 2025
Interview/Presentations (if needed)	Week of August 4, 2025
Council Approval	August 19, 2025
Service Start Date	January 1, 2026

Appendix A

Evaluation Rubric

Criteria	Description	Weight
1. Qualifications & Certification	Assessor's DOR certification level (e.g., Level II or III), education, licensure, and continuing education.	15%
2. Experience with Similar Municipalities	Experience serving communities of comparable size, complexity, and property diversity. Include client references.	15%
3. Methodology & Work Plan	Comprehensive description of assessment approach, data collection, valuation methods, public interaction, and compliance with statutory deadlines.	15%
4. Technology & Tools	Use of Computer-Assisted Mass Appraisal (CAMA), GIS integration, digital property records, and online services for taxpayers.	10%
5. Communication & Public Engagement	Plan for taxpayer communication, transparency, Open Book session handling, and Board of Review support.	10%
6. Reporting & Compliance	Proven ability to submit required state reports (SOA, personal property statements, Net New Construction data), and meet state timelines.	10%
7. Cost Proposal	Total cost of services, clarity of pricing structure, and value for taxpayer dollars.	15%
8. References & Reputation	Quality and relevance of references, as well as the firm's reputation for professionalism and accuracy.	5%
9. Innovation & Value-Added Services	Additional services or features that provide added value beyond statutory requirements.	5%

Scoring Guide

Each criterion will be scored on a scale of 1 to 5, then weighted as outlines above.

5	Excellent – Exceeds all expectations
4	Good – Meets all expectations
3	Satisfactory – Meets most expectations
2	Fair – Partially meets expectations
1	Poor – Meets few expectations
0	Unacceptable – Not addressed

The proposal receiving the highest weighted total score will be considered for selection, pending reference checks and compliance with all RFP requirements.

Appendix B

Conflict of Interest Disclosure Form

City of Whitewater

Assessor Services Proposal Submission

In accordance with ethical procurement practices and to ensure transparency, all proposers must disclose any actual or potential conflicts of interest. This includes relationships with current or former elected officials, employees, or representatives of the City of Whitewater.

Proposer Information

Firm/Individual Name:	_____
Business Address:	_____
City, State, ZIP:	_____
Phone:	_____
Email:	_____

Disclosure Questions

1. 1. Do you or any officer, partner, principal, or employee of your firm have a current or past relationship (within the last five years) with any elected official or staff member of the City of [Insert City Name]?

☐Yes ☐No

2. 2. If yes, please provide the following details for each individual:

Name of City Official/Employee: _____

Position/Title with the City: _____

Nature of Relationship (e.g., personal, financial, employment):

Duration of Relationship: _____

Current Status of Relationship: _____

(Attach additional pages if necessary.)

Certification

I hereby certify that the information provided above is true and complete to the best of my knowledge. I understand that failure to disclose a conflict of interest, or providing false or misleading information, may result in disqualification of this proposal or termination of a resulting contract.

Signature: _____

Name (Print): _____

Title: _____

Date: _____