



# ASSESSMENT SERVICES PROPOSAL

PREPARED FOR:



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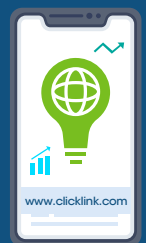
Accurate is an independent contractor pursuant to Sec. 62.09(1)(c) Wis. Stats. Accurate will never subcontract any portion of the contract with the City of Whitewater to any other firms or individuals.

## This proposal is built to be INTERACTIVE!

Throughout this document you will see QR codes. Use your cell phone camera app and point your camera at the QR code. A link will pop up. Click on the link to watch videos, visit websites and much more!



Open your camera app and hover your phone over the QR Code. Your camera will automatically scan the QR code.



A clickable link will appear. Select the link and enjoy the content!

Test this link to our website!



Viewing this as a digital copy?  
You can click the QR codes to view the content in the proposal.

# INTRODUCTION

We're excited to have the opportunity to continue to work with the City of Whitewater

After 17 years of serving as your assessor, we have developed a deep understanding of the White-water community, its neighborhoods, its growth, and its unique character. As the City continues to evolve, we are confident that our experience and proven track record make us the most qualified to continue this important work.

Our commitment to accuracy is reflected in the consistency of our assessments over nearly two decades. We firmly believe that every property owner deserves to be engaged in the assessment process not just presented with the outcome. That belief drives our efforts to ensure transparency, fairness, and equity in every interaction.

## TRANSPARENCY

is our core principle in educating and empowering those we serve.  
our employees.  
municipalities.  
the community.



PO BOX 415 | Menasha WI 54952-0415 | [info@accurateassessor.com](mailto:info@accurateassessor.com) | 920.749.8098 | [accurateassessor.com](http://accurateassessor.com)

## WHITEWATER ASSESSMENT TEAM

**Shanda Stachurski**  
*Account Coordinator*

**Colin Loughrin**  
*Statutory Assessor*

**Terri Muskevitsch**  
*Customer Service Manager*

**Colin Loughrin**  
*Review Manager*

**Bill Gaber**  
*Operations Manager*

**Lori Sacco**  
*Fieldwork Manager*

## Our Mission:

Engaging our employees to collaborate, educate, and deliver the most reliable and transparent assessment solutions through innovation, communication and technology.

# OUR HISTORY

Accurate was founded 25 years ago on the idea of complete transparency and communication. For many years it was common practice for assessors to suppress information from the public. This resulted in a lack of understanding and mistrust within the community. The founders of Accurate recognized these shortcomings and began pioneering new innovative assessment standards. Over the last 25 years we have developed web-based digital property record cards, created online scheduling options, and built our own CAMA to update data digitally in the field. With a combined experience of over 180 years Accurate has continuously improved the assessment experience through innovation, education, and technology.

## 2000 - 2005

20 municipalities  
Building digital data online  
New Website  
Full Value Service Options  
Blend Options - more affordable and budget friendly

## 2010 - 2015

90 Municipalities  
Started building proprietary CAMA  
Still growing - added more employees

## 2005 - 2010

75 municipalities  
Built online scheduling  
Moved to new location on Midway Rd.  
Growing - added new employees

## 2015 - 2025

100+ municipalities  
Digital in the field  
CAMA software Prolorem launches  
Live assessor certified customer service  
Intentional community education plan

At Accurate we make a concerted effort to connect and learn the nuances of each community. There is no "cookie-cutter" way to assess unique communities. We tailor our services to fit the needs of everyone we serve. [Here is a small sample:](#)

## UNIQUE ASSESSMENTS

Views of the Capital Building - Dane County  
Views of the lake - Lake Geneva & Fontana  
Bayshore Mall - Glendale  
Access to the Chain of Lakes - Dayton  
All of Menominee County  
Dock-O-Miniums - Fontana

## CORPORATE BUSINESS

Secura - Fox Crossing  
Johnson Controls - Glendale  
Foth - De Pere  
Miron - Fox Crossing  
Cleary Building - Greenville  
Humana Insurance - De Pere

## TAX EXEMPT EXPERIENCE

St. Norbert College - De Pere  
Divine Savior Hospital - Portage  
Skaalen Retirement Services - Stoughton

## DISTRIBUTION/WAREHOUSING

WALMART Distribution center - Beaver Dam  
Amazon - Greenville  
TARGET - Oconomowoc

## OUR ALL INCLUSIVE SERVICES

- Online roll books
- Digital property record cards, with photos online
- Assessment data integrated into your website
- Live, assessor operated, telephone-based open books
- Cloud based CAMA system with dedicated support
- Assessor certified customer service
- Assessors available to answer questions daily over the phone or via video chat

- Multiple assessors at open book to keep waiting to a minimum
- Interactive videos and educational materials at open book
- Active live chat function available on our website
- Community education planning with dedicated marketing person
- Virtual walk-through options
- Access to your own dedicated assessor
- Maintenance inspections included





# OUR CORE VALUES

We strive to always put others first and maintain transparency about our assessment process. The values we believe in are not just empty statements. The words were carefully selected, not by the owners but by the employees of Accurate. Our core values express who we are as a company, as your assessors, and how we treat each other.

## WE ARE FAMILY

We have an unwavering loyalty to each other and our customers. We Respect & Encourage each other and appreciate uniqueness. We value and support each other's health, safety and work/life balance.

## ALWAYS TRANSPARENT

We are Open & Honest in ALL interactions, sharing our data, processes, information, mistakes, and victories. We hold each other accountable. Our availability to our customers and family members is abundant.

## EMBRACE GROWTH & INNOVATION

We are comfortable being uncomfortable while striving to get better every day. We foster and enhance customer relationships while seeking to learn and develop. We offer to teach and mentor customers and family members.

## BE ADMIRABLE

We guard our integrity by doing the right thing-ALWAYS. We strive for quality and precision in our work, our products, and our services. We act like owners and honor our word and commitments. We choose candor, respect, and kindness.

## WE ARE A BOATLOAD OF FUN!

Positivity is our attitude of choice. We have infectious spirits bringing enthusiasm and excitement to all we do. We are passionate and value diversity and inclusion. There's no reason too small to celebrate.



# WHO WE SERVE

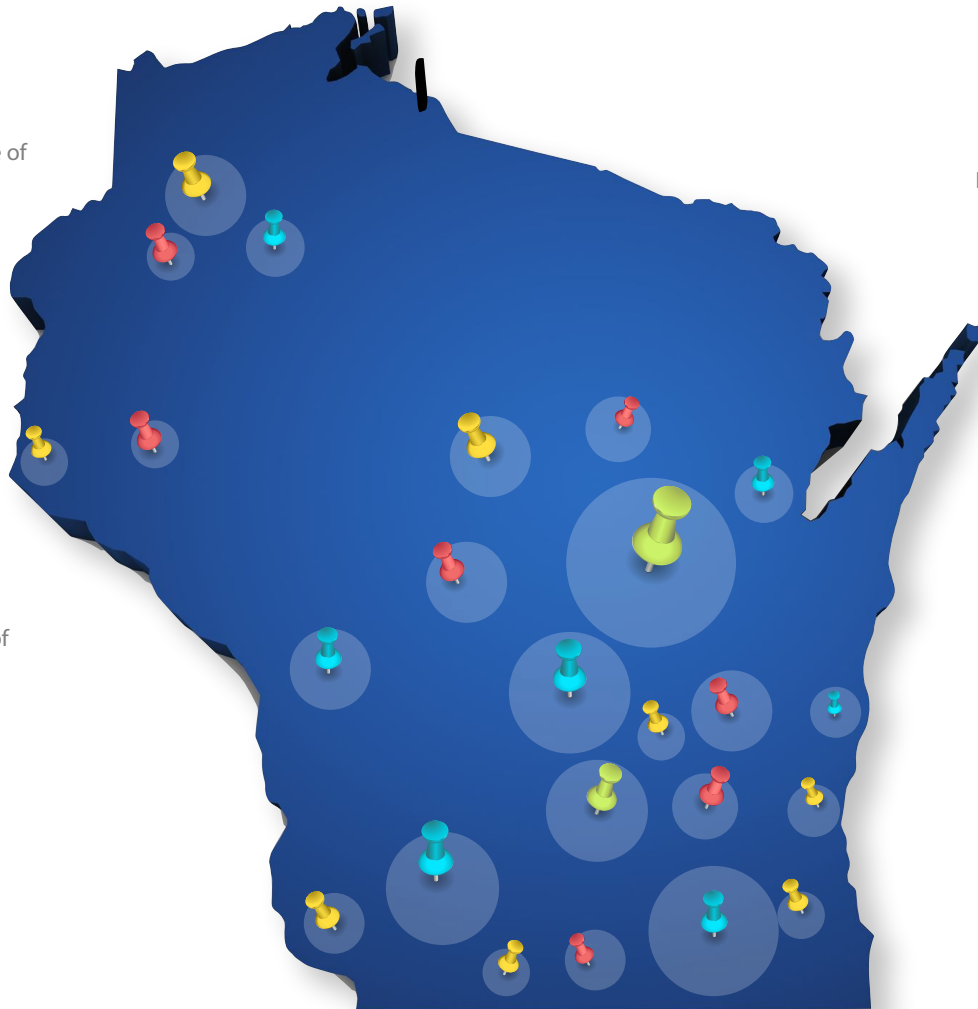
Accurate assesses for **over 100 municipalities across Wisconsin**. Our assessors live in the areas closest to their region which allows us to be more reactive to our customer's needs.

Albion, Town of  
Altoona, City of  
Baraboo, City of  
Bayside, Village of  
Beaver Dam, City of  
Beloit, Town of  
Berry, Town of  
Blooming Grove, Town of  
Blue Mounds, Village of  
Boscobel, City of  
Brillion, City of  
Brooklyn, Village of  
Buchanan, Town of  
Burlington, City of  
Caledonia, Town of  
Cambria, Village of  
Cambridge, Village of  
Chilton, City of  
Cleveland, Village of  
Coloma, Village of  
Combined Locks, Village of  
Courtland, Town of  
Cross Plains, Village of  
Cudahy, City of  
Dale, Town of  
Darien, Town of  
Dayton, Town of  
De Pere, City of  
Deerfield, Town of  
Deerfield, Village of  
Dekorra, Town of  
Delavan, Town of  
Edgerton, City of  
Eldorado, Town of  
Elkhorn, City of  
Fontana, Village of  
Footville, Village of  
Fort Winnebago, Town of  
Fox Crossing, Village of  
Fox Lake, Town of  
Friesland, Village of  
Fulton, Town of  
Geneva, Town of  
Glendale, City of  
Grand Chute, Town of  
Green Valley, Town of  
Greenville, Village of  
Harrison, Village of  
Hazel Green, Village of  
Jamestown, Town of  
Jefferson, City of  
Kewaunee, City of  
Lancaster, City of

## New Contracts for 2025

|                                 |               |
|---------------------------------|---------------|
| T of Rutland                    | V of Summit   |
| T of Belleville                 | V of Whitelaw |
| C of Richland Center            | V of Lisbon   |
| C of Waukesha - Commercial Only |               |

Lyons, Town of  
Marathon, Town of  
McFarland, Village of  
Medford, City of  
Menominee, Town of  
Monona, City of  
Monroe, City of  
Mosinee, City of  
Mt Horeb, Village of  
New Glarus, Village of  
New Richmond, City of  
Oakland, Town of  
Oconomowoc, City of  
Oconto Falls, City of  
Onalaska, City of  
Oregon, Town of  
Oregon, Village of  
Pacific, Town of  
Pardeeville, Village of  
Perry, Town of  
Platteville, City of  
Pleasant Springs, Town of  
Portage, City of  
Poynette, Village of  
Prairie du Sac, Village of  
Prescott, City of  
Primrose, Town of  
Randolph, Town of  
Richmond, Town of  
River Falls, City of  
Rose, Town of  
Rothschild, Village of  
Saukville, Village of  
Seymour, City of  
Sheboygan Falls, Town of  
Shorewood, Village of  
Sparta, City of  
Spring Prairie, Town of  
Stoughton, City of  
Sugar Creek, Town of  
Sullivan, Village of  
Two Rivers, City of  
Union, Town of  
Upham, Town of  
Walworth, Town of  
Walworth, Village of  
Watertown, City of  
Wescott, Town of  
West Baraboo, Village of  
Whitefish Bay, Village of  
Whitewater, City of  
Williams Bay, Village of  
Windsor, Village of



# ASSESSMENT TEAM

Your assessment team has access to over **200 YEARS** of assessing experience!

Our approach of the **Assessment Team** means each assessor coordinates their efforts from accountability officers to our field team and customer service. Throughout the entire assessment process - field work, attending open books and closing boards of review, our services are completed as a team. You will have full access to an account coordinator as your main point of contact throughout the contract.

**Shanda Stachurski**

*Account Coordinator*

**Colin Loughrin**

*Statutory Assessor*

**31 EMPLOYEES**

26 ASSESSOR I & II

5 ASSESSOR III

**Terri Muskevitsch**  
*Customer Service Manager*

**Colin Loughrin**  
*Review Manager*

**Bill Gaber**  
*Operations Manager*

**Lori Sacco**  
*Fieldwork Manager*



**Shanda Stachurski** is your Account Manager. She absolutely loves working with Heather at the City and really hopes to continue their great relationship. Shanda has over 3 years of an experience as an assessor II. She is also well experienced in ever aspect of the account managment position. She strives to bring joy to the world of assessments.

**Colin Loughrin** is your Statutory Assessor and our Review Manager. He will be in charge of all aspects of the valuing process. He is responsible for permits, review, and commercial review for the Market Updates. Colin is assessor II. and III with 7 years of experience, and has completed over a hundred market updates.

**Bill Gaber** has over 12 years of assessing experience. Bill came through the ranks as a field assessor, then account manager and is now the overall operations manager at Accurate. Bill is our most qualified assessor completing hundreds of market updates with a strong background in assessing commercial property. He mentors our assessment team, and works closely with the DOR to enhance assessment practices statewide. Bill is an assessor II and III.

**Terri Muskevitsch** is our senior customer service agent. Terri works closely with commercial property owners that call or email our office. She will track correspondence to share with you. Terri is an assessor II, for over 16 years.

**Lori Sacco** is our Fieldwork Manager. She is the brains behind our fieldwork logistics and is able to keep all of our fieldwork on pace. She's an assessor II and III. Lori has 5 years of experience.



**PROUD PARTNERS WITH:**

**LEAGUE**  
OF WISCONSIN  
MUNICIPALITIES



**WAAO**

Wisconsin Association of Assessing Officers

# Account Coordinator



## SHANDA STACHURSKI

### Account Coordinator - Assessor II

shandas@accurateassessor.com 920.716.9658

### WHY ME?

I am an energetic self-starter with professional success in the fields of Assessing, Compliance, Finance, Sales and Education. I am an effective communicator, dedicated to achieving goals while building professional relationships. I am a quick learner committed to maintaining open communication. I enjoy working with Heather and the entire Whitewater team.

"I've learned to be very prompt, organized, and resourceful...  
communication is my top priority"

### EXPERIENCE

- Determine values using the three approaches: Market, Income, Cost
- Performed over 20 Market revaluations
- Statistically analyze market trends
- Closing Board of Review
- 3 years of Tax exempt property
- Estimate valuations for TID creations
- GIS mapping

### STRENGTHS/SKILLS

Communication  
Organization  
Financial  
Work Ethic

Prompt  
Education  
Flexibility  
Responsibility

### CERTIFICATION

WI07740CA

\* Will attend proposed interview

"Being part of the entire assessing process creates ownership  
and a deep understanding of the community."





# STATUTORY ASSESSOR



## COLIN LOUGHRIN

Associate Assessor Support Specialist - Assessor II

colinl@accurateassessor.com 920.749.8098

### WHY ME?

I am a motivated individual with 5 years assessing experience. I enjoy using my background in communication to build professional relationships with my colleagues and building friendly, trustworthy relationships with everyone I interact with. I pride myself on being someone who is constantly looking to learn as much as possible, in order to accurately and fairly assess every property in your community.

"My passion is learning and sharing my knowledge of assessing with property owners."

### EXPERIENCE

- Participate in Open Book Sessions
- Represent Company at Boards of Review
- Help Customer Service with parcel specific questions
- Communicating with Property Owners
- Validating Property Sales
- Entering and Reviewing Building Permits
- Reviewing New Construction in the Field
- Preparing Assessor Forms for Board of Review
- Determine values using the three approaches:  
Market, Income, Cost

### EDUCATION

UW Stevens Point - 2017  
Communication

### STRENGTHS/SKILLS

|                |              |
|----------------|--------------|
| Communication  | Organization |
| Work Ethic     | Flexibility  |
| Multi-Tasking  | Prioritizing |
| Responsibility | Propmt       |

### CERTIFICATION

|  |  |
|--|--|
|   | <b>State of Wisconsin</b><br>DEPARTMENT OF REVENUE<br>PO BOX 8971, MADISON WI 53708-8971 |
| <b>Assessor Certification Program</b>  |  |
| Certification Level  | ASSESSOR 2   |
| Certification Period   | Nov 1, 2019 - Oct 31, 2024   |
| Certification Number   | WI95838CA  |
| COLIN M LOUGHRIN<br>PO BOX 415<br>MENASHA WI 54952   |  |
| <small>The person named above complied with Wisconsin Statute 73.09 and is authorized to engage in the indicated practice.</small> |  |



# OPERATIONS MANAGER



## BILL GABER

### Operations Manager - Assessor II & III

billg@accurateassessor.com 920.213.1916

## ABOUT ME

I have a thorough background in business and finance. I also have over 12 years of experience in the assessment industry. My involvement in coaching youth sports has increased my leadership skills to develop successful teams. Watching teams grow and learn is my passion. I look forward to working with you and your community.

"I like to lead by example both at home for my son (20 years old) and for those that I work with."

## EXPERIENCE

- Determine values using the three approaches Sales, Income, Cost
- Managed over 150 Market revaluations
- 100+ Open Book and Boards of Review
- 10+ years of scheduling fieldwork assignments
- Statistically analyze market trends
- Land valuation review
- Filed word duties
- Estimate valuations for TID creations
- GIS mapping
- Closing Boards of Review
- Logistics Coordinator

## EDUCATION

University of Wisconsin - Oshkosh 1996  
Business

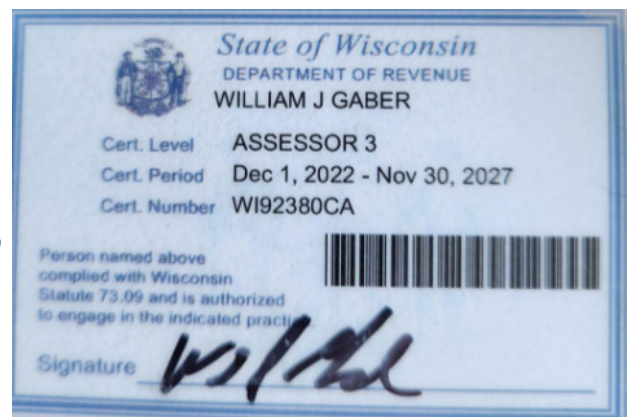
## COMMUNITY INVOLVEMENT

Little League coach for 9 years  
American Legion Baseball Coach for 4 years -  
Won the Wisconsin AA state title in 2021  
Coached youth Football for 6 years

## STRENGTHS/SKILLS

|                 |                 |
|-----------------|-----------------|
| Management      | Self-Motivation |
| Organization    | Creativity      |
| Team Leadership | Communication   |
| Operations      | Development     |

## CERTIFICATION



# CUSTOMER SERVICE

**When property owners call us they get a live person.**

Our agents are trained assessors that answer questions quickly and educate property owners on the assessment process. Our **online appointment scheduling tool** is available 24/7.

**Property owners have full access to us on our main line,** email address, and over the phone appointments. We utilize a visual voicemail service which speeds up our response time. Voicemails are monitored daily to we make sure respond within 24 to 48 hours. All of these services are included at no additional cost to you.



## MEET OUR CUSTOMER SERVICE TEAM MEMBERS:



"Being the first connection with property owners, my goal is to be able to help them understand the process of assessing and how it affects them. Being a property owner, I understand how confusing and daunting the process can seem. It is extremely rewarding when I answer their questions, help them understand the process, and make someone's day a little better."

**TERRI MUSKEVITSCH** since 2007

**Customer Service Manager - Assessor II**

terrim@accurateassessor.com 920.749.8098



"Talking with property owners on a daily basis gives me the opportunity to educate them on the assessment process. I take it as a challenge to convey positivity when not all of my interactions start out that way. Fairness and equity is paramount in my job and I take it very seriously."

**AMY BAJI** since 2011

**Assessment Analyst - Assessor II**

amyb@accurateassessor.com 920.749.8098



"The best feeling in the world is hanging up a phone and knowing I was able to help property owners understand their assessment. My background in hospitality gives me the tools I need to be empathetic to their needs. I have been known to make people laugh - because my laughter is infectious."

**PATTI PETERS** since 2010

**Customer Service - Assessor I**

pattip@accurateassessor.com 920.749-8098

# SCOPE OF WORK

## 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 - 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 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 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 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 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 fortyeight (48) hours.

# SCOPE OF WORK

## Specific Services Required Continued

1. 20. Assessor will supply to the City a complete set of computer property assessment records 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 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.

**Accurate has reviewed, understands, and acknowledges  
each point in the Specific Service Required, detailed by  
the City of Whitewater**

# ASSESSMENT ACCURACY

There is no stronger demonstration of our ability to effectively serve a municipality like Whitewater than our longterm **partnership** with you. Since implementing our full value maintenance system, we have consistently had residential values **above 96%** assessment ratio. This track record reflects our commitment to accuracy, transparency, and excellence in assessments. Please see the Department of Revenue major class data below, which highlights our sustained performance since 2018.

2024 = 98.11%

2023 = 97.98%

2022 = 98.07%

2021 = 99.04%

2020 = 98.21%

As we continue to maintain strong assessment ratio performance through our full value maintenance system and effectively manage your 15,773 total parcels (2024), we remain committed to continuous improvement. We are consistently refining our processes to enhance accuracy, strengthen communication, and elevate our outreach and marketing efforts.



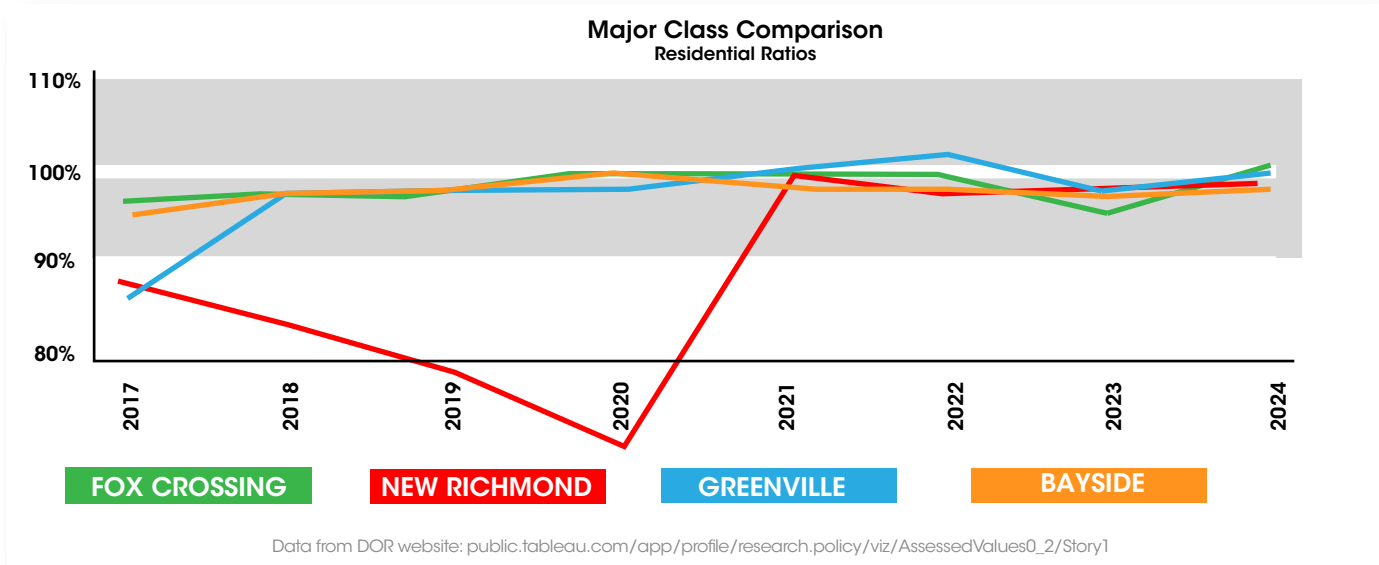


# ASSESSMENT ACCURACY

## Continued

Various statistical methods are used to gauge property assessment accuracy. **The DOR emphasizes the equalized value ratio, requiring assessments of major classes to be within 10% of fair market value in a 5 year period.** Non-compliance triggers an Interim Market Update using previous year(s) sales for reassessment.

A good test of accuracy in assessments is after reviewing sales and setting new values during a market update, **have the assessments been brought back to 100% market value?**



**The table above shows the impact of regular market updates.** The center white line is the state's 100% fair market value determination or equalized value. The green line shows the impact of annual market updates in Fox Crossing. Deviations in the red line show maintenance years before New Richmond started annual market updates in 2020. Greenville's blue line shows the maintenance year before the 2018 full revaluation follow years of annual market updates. Bayside's orange line shows annual market updates and the continued success of staying in compliance. **The closer to overall values are to 100% after a market update shows how accurate the assessments are.**

Deviations in the natural market affect the ratio during maintenance years.

Since 2020 the market has become extremely volatile, setting new precedent when comparing assessments to market sales. We are working very hard to insure our values remain in compliance with the every changing market. It is important to ensure **assessments are close to 100% every year.**

**We must also address statistics our competition might try to exploit:**

concentration and dispersion, both of which are uncontrollable lagging measures comparing last year's assessments to the following year's market sales. **Assessors can't predict the future market nor control property factors like style, age, non-permitted work, or homogeneity/make-up of property in a municipality.** Our competitors divert attention to uncontrollable statistics in a volatile market with numerous variables. We could also share samples of their so called "sub standard" results in this RFP but we would rather focus on the controllable factors when it comes to assessing fairly and equitably.

# EXAMPLES OF WORK

We have experience working on special projects with multiple municipalities throughout the state. Below are a few examples our ability to adapt our services and work with municipalities we that are not currently contracted with. We are committed to helping move the assessment experience forward through education, building partnerships, and supporting those in need.

## 1. SUMMIT

### Background:

The Village of Summit was in need of measurements for exempt properties to determine the sq ft of the buildings as they had no data on file. Their assessor could not complete the work in their timeframe so their clerk reached out other assessors in the state and we were the only one to respond to their request.

### Accurate's Solution:

We developed a plan to review the properties from any practicable data we could find assisted by aerial GIS to measure the sq ft of each property and store the data in a spreadsheet. We supplied them with images of the measurements along with a letter format to send to each owner for verification. We were happy to help out a municipality in need.



## 2. GREENVILLE

### Background:

We have been the assessors for Greenville well over 10 years now. The town was incorporating to be a village in 2021. During this transition they didn't have much time to plan or execute a message to the community.

### Accurate's Solution:

We reached out to Wendy at Greenville about what their plan was to educate property owners on the transition. Based on our initial meeting we offered to help them with social media posts, inserts, and explanations for what happens during an incorporation and the dates surrounding their meetings. We have also helped them update their social media with assessment education and have recently been working with them to incorporate their building permit process into our new Online Permit Portal.

The figure shows two pieces of assessment education material for the Village of Greenville. The left piece is a flyer titled "VILLAGE of GREENVILLE" with the text "Before incorporating, Greenville was the 5th largest town in the State larger than most Cities. The population has increased 380% since 1990, with over 12,000 people now living here." It includes sections for "Why incorporate as a Village?", "Will taxes be higher?", and "Misconception #1" and "Misconception #2". The right piece is a flyer titled "VIEW THE ROLL BOOK TONIGHT SEPTEMBER 2nd" with the text "Where: Village Hall When: 6:00pm to 7:00pm" and "You have until OCTOBER 4th to talk to an assessor about your new value." It includes contact information for the assessor's office.

## 3. WAUKESHA

### Background:

Sam Walker, the City of Waukesha's assessor reached out to us for help with assessment education content. The City was performing a market update and had been following our linked in posts. They liked what we were sharing and wanted to use some it for their website and social media.

### Accurate's Solution:

Without hesitation we connected with Sam and shared our entire library of newsletter content, post card mailings, videos, and social media content. We worked together on a few verbiage changes and stayed in touch throughout the market update process to make sure they had what they needed. They even updated some of the pieces that we now use so it was mutually beneficial. Sam still stays in touch and we are working on other projects with him.

The figure shows two pieces of assessment education material for the City of Waukesha. The left piece is a flyer titled "2023 Assessment Re-Evaluation" with the text "MY NEIGHBOR'S HOUSE IS THE SAME DIFFERENT" and "Waukesha". The right piece is a flyer titled "ASSESSMENTS" with the text "FACT" and "MY NEIGHBOR'S HOUSE IS THE SAME DIFFERENT". It includes a diagram of a house with different parts labeled and a list of factors that can affect a property's value.

We have many more projects we would like to share with you during the interview process, such as our recent inspections and social media education.



# SOFTWARE

Our proprietary CAMA system is completely **CLOUD BASED.**

With Prolorem, all property record cards are digital. They are available on our website **FREE** to you and your community 24/7. There are no costs to use our software and convert your Market Drive data. Prolorem converts data from any program to easily and quickly update permits. All property record cards have **images and detailed information** about each parcel. We believe in 100% transparency therefore **all data and programs gathered are the property of the City of Whitewater** should you ever change assessors.



Our assessors utilize computer tablets to assess properties in the field. With Prolorem there is no need to take hand written notes back to the office to update the value on a property. Our assessors are trained to complete assessments **on premise**, eliminating errors from re-entering data. All **property record cards are updated in real time** and saved to the cloud instantly. Our CAMA is the only software that updates property record cards in real time.

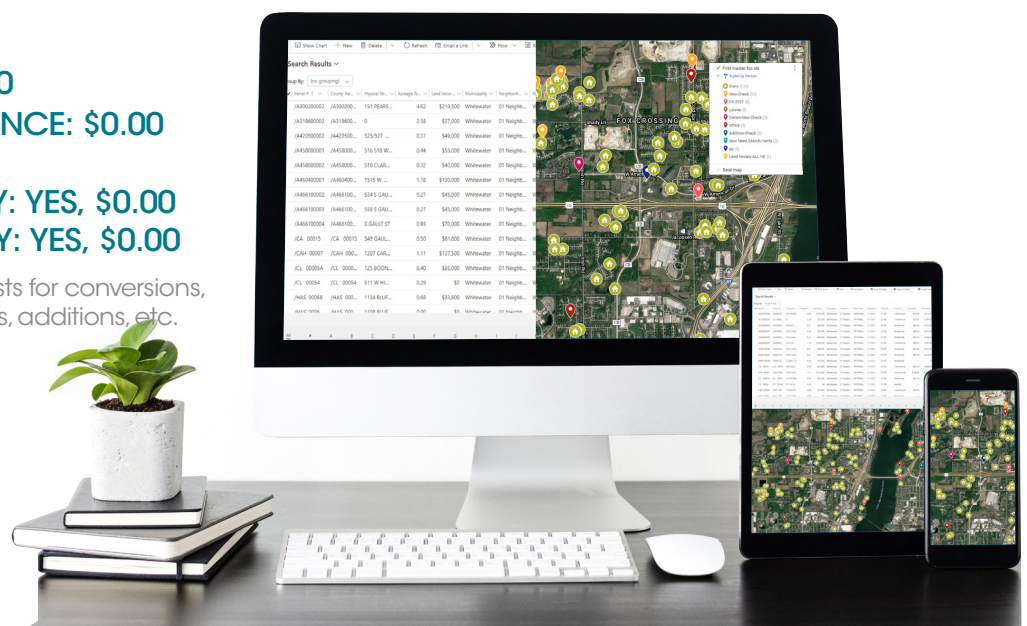
Accurate has **converted data into Prolorem** from multiple forms of CAMA systems including Market Drive, Tyler Technologies, GVS, TC Win, and many more. Our on staff IT integrates multiple platforms like GIS, Apex Sketching Tool, iWorQ, etc to streamline our process. Because our software is proprietary we have the ability to add or remove features the City of Whitewater requests at no additional cost.

## PROLOREM

## A REVOLUTION IN ASSESSING SOFTWARE

**SOFTWARE COST: \$0.00**  
**LICENSING/MAINTENANCE: \$0.00**  
**SOFTWARE:**  
**INTEGRATION ABILITY: YES, \$0.00**  
**CONVERSION ABILITY: YES, \$0.00**

There are never additional costs for conversions, updates, licensing, integrations, additions, etc.





# EDUCATION PLAN

On average, most property owners have about 40 days from the time they first learn about the Market Update to when their new value is finalized.

It is standard practice for an assessor to send notices and wait for the community to reach out with questions or concerns. However, this one-way communication is not transparent and often leaves property owners scrambling to understand what's happening. Frequently, this leads to a disconnect between property owners, the municipality, and the assessor.

Our education plan puts your community first. We leverage your existing communication channels to start the conversation early. With our approach, your community will be informed about potential value changes 80 to 190 days before notices are sent out. Together, we'll establish a **two-way communication** channel through social media, council meetings, newsletters, postcard mailings, custom videos, and much more.

## EXPERIENCE OUR EDUCATION PLAN:

### 1. SOCIAL MEDIA



Utilize your channels of social media preparing to share the process of Market Updates. We mix this with a schedule of postings over the coming year to educate property owners on what to expect and the status of the current market. Involving the community ensures we have a two-way communication through the process.

### 2. COUNCIL MEETINGS

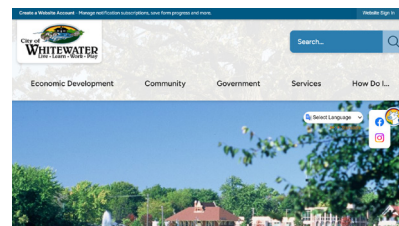


Your community will inevitably have questions about the how Market Updates work. We will attend council meetings to educate your council members arming them with the knowledge they need to explain the revaluation assessment process with property owners.

### 3. NEWSLETTER

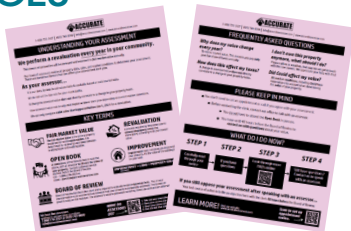
Writing articles that address the assessments, what to expect, and the schedule of social media postings keep your community engaged. We can invite readers to sign up for text alerts or email updates throughout the year.

### 4. WEBSITE



Updating the Village website with marketing helps explain what assessors do and what to expect. The community utilizes your website as a resource, we serve them best by keeping them up to date.

### 5. NOTICES



A notice of new value will be mailed to every property owner. Inserted with the notice will be an Understanding Your Assessment information sheet explaining the assessment process with QR codes, links to videos, an online appointment scheduler, and access to our customer service team.

### 6. OPEN BOOK & BOR

We will offer over the phone Open Book appointments as well as in person options. We provide computers for property owners to search for their record cards.



# SOCIAL MEDIA

**We post content 4 times a week!** If you haven't been using our educational content, we highly recommend meeting with our social media team to work on a regular schedule.

Through **Social Media** we build a positive and informative **two-way communication** with your community. Over 85% of 25-45 year olds use social media, and over 70% over the age of 50 use it daily.

With a simple share you can instantly connect with thousands of property owners to **quell the stigma of taxes and assessed values**. By not involving your community they may feel left out and discouraged about the assessment process. Let us help you with continual education on social media.

### 5 FACT CHECKS ABOUT ASSESSMENTS

**MYTH**

Assessors raise property value to collect more taxes.

Assessed values only go up, they never go down.

The assessor didn't visit my house, they don't know the condition of my property.

Assessed values can only be changed every 5 to 10 years.

My neighbor's house is the same size as mine but I am assessed more.

**FACT**

Assessed values cannot be used to increase or decrease taxes. Assessors don't set tax rates.

Assessed values tend to follow market values. Over time, assessments increase and decrease just as the market does.

Assessors have a database of every property that is updated regularly through permits, sales, and reviewing property periodically.

### HOUSING MARKET COMPARISON

| 2022 Jan-April | 2021 quarterly averages     | 2022 May-Aug |
|----------------|-----------------------------|--------------|
| \$265,500      | Median Home Value \$235,000 | \$276,200    |
| 20,908 Sales   | Number of Sales 27,172      | 32,293 Sales |
| 4.9%           | Interest Rate 2.9%          | 6.2%         |
| 8.1%           | Inflation Rate 2.5%         | 8.6%         |

### WHAT'S A MILL RATE?

The Mill Rate is calculated by dividing the total taxes needed by the total assessed value of the community. An increase in assessed value does not equate to an increase in your taxes.

$$\text{MILL RATE} = \frac{\text{TOTAL TAXES NEEDED}}{\text{TOTAL ASSESSED VALUE}}$$

It is a simple mathematical fact, if taxes stay the same and assessed values increase the mill rate will fall and your taxes will stay about the same.

Taxes are set annually by these 4 entities:

- Municipality
- School District
- County
- Technical College

2021

Assessed Value: \$140,000  
X Mill Rate: .018  
Taxes: \$2,520

2022

Assessed Value: \$189,000  
X Mill Rate: .013

35% COMMUNITY WIDE INCREASE (EXAMPLE NOT ACTUAL)

### 2023 HOUSING MARKET FACT SHEET

BROWN COUNTY, WI

MEDIAN PROPERTY VALUES INCREASED BY **12.5%** FROM 2021 to 2022

**\$240,000 IN 2021** **\$270,000 IN 2022**

Brown County property values have been increasing year after year. When property values are re-assessed your assessment changes to mirror the current market.

The interest hike in 2022 was meant to slow down the market. However, the housing shortage has not demand. This is evident in the property value in drop in the number of homes sold.

**FOR SALE**

**3,233** HOME SALES IN 2022  
3,671 SALES IN 2021

**11.9%** Drop in the # of homes sold

**-1.9%** # of sale JANUARY 2023 IN 2022

Presented by: Accurate

### 2023 ASSESSMENT TIMELINE

January 1, 2023: January 1, 2023 Cutoff

February: Personal Property

March: Visit New Construction

April: Submit 2022 Sales to DOR

May: Mail Sales Questionnaires

June: Review New Values

July: Set Values For Market Revolutions

August: State Equalized Values Reported

September: Run Initial State For New Values

October: Permit & Building Inspection Checks

November: Mail Notices of New Values

December: Open Book

January 2024: Board of Review

February 2024: Field Checks

March 2024: 2023 Tax Bills Mailed By Municipality

### DID YOU KNOW?

The State of WI is a **Market Value** state. Assessors are regulated to use a full year (or multiple previous years) worth of sales to determine your assessed value.

In 2022, based on statistics from the Wisconsin Realtors Association, the average property value increased 8% to 10% higher than 2021.

Even if property values drop significantly in 2023, assessors are not allowed to use sales from the current year to determine value. If you would like to know more about the assessment process please read the 2023 Property Owners Guide.

LEARN MORE! VISIT: [accurateappraisal.com](http://accurateappraisal.com)

CHECK US OUT ONLINE!



[www.facebook.com/accurateappraisal](https://www.facebook.com/accurateappraisal)



[www.linkedin.com/company/accurate-appraisal-llc](https://www.linkedin.com/company/accurate-appraisal-llc)



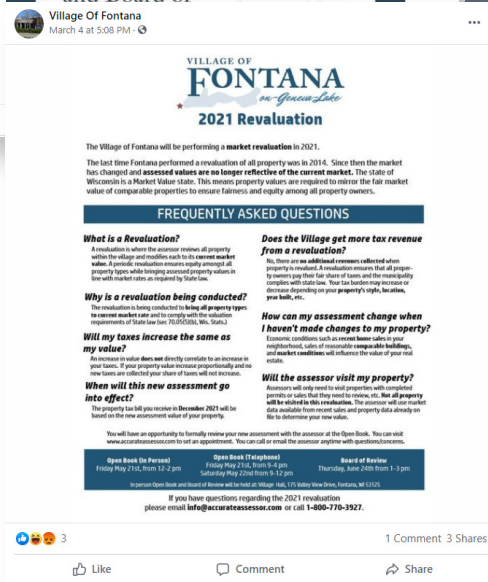


# POSITIVE INTERACTION

Through social media we establish an important **two-way communication** with the people in your community. Social media helps us instantly connect with thousands of property owners. We are all aware of the stigma of taxes and assessed values. By not involving your community they feel left out and discouraged about the assessment process. Our transparency ensures they feel like they're informed about any value changes. Engaging with your community through social media allows us to **inform, educate, and empower** them. Here are just a few examples of how we engage with our current municipalities:

**Village of Bayside**  
May 6, 2020 · 🌐

Due to the pandemic, the Open Book and Board of Review property assessment process will take place via phone call this year. You can schedule your appointment today by visiting: <https://accurate.rogcalendar.com/appointments>



**City of Oconomowoc**  
February 4 · 🌐

The City of Oconomowoc will be performing a market revaluation of all property this year. The last time Oconomowoc performed a revaluation of all property was in 2014. Since then, the market has changed and assessed values are no longer reflective of the current market.



**City of De Pere**  
41m · 🌐

The City of De Pere's annual property assessments are based on revaluation means smaller changes in value each year instead of every 4 years. All across Wisconsin the housing shortage and high demand of buyers is driving up sale prices. Annual assessments keep your value in line with market value. We have compiled some statistics from the WRA to help illustrate the impact of the housing market on new assessed values. Notices of new values will be sent very soon. Please contact the assessor's office with any questions about the 2021 revaluation. [info@accurateassessor.com](mailto:info@accurateassessor.com) or 920-749-8098



## What To Expect 2021 Revaluation

**Permits:**  
Contact Building Inspection 339-4053.  
Assessors are calling to verify all 2020 permits.

**Notices:**  
Notices will be mailed in March.

**City of Manitowoc**  
March 1 at 2:34 PM · 🌐

2021 Property Revaluation Information:  
The City of Manitowoc will be performing a market revaluation of all property this year. The last time Manitowoc performed a revaluation of all property was in 2007, 14 years ago. Since then, the market has changed and assessed values are no longer reflective of the current market.  
A periodic revaluation ensures fairness and equity among all property, while bringing assessed property values in line with current market rates as required by State law.  
What is a revaluation? A revaluation is where the assessor reviews all property within the city and modifies each to its current market value.

Accurate builds relationships with the community. For example our Building Permit Portal - We use this to help residents answer questions that can help the process be easier for Building permits.

"Just wanted to let you know, I was not looking forward to filling out the form. But the instructional video and the information on your website made the process a lot easier than I thought it would be. Thank you!"

Barr Resort - Kika Barr



Our assessors go above and beyond just valuing property. The classification of land changed for this property owner. We helped him by working with the DOR on properly classifying his land.

"Paul at Accurate was very helpful with my land classification and working with the DOR. He was very gracious and professional through the journey."

Resident - Duane Wagner



# OUR COMMITMENT

Accurate has been at the forefront of moving the assessment experience forward. To accomplish this, we are fully **committed to building a culture of assessment knowledge**. Every assessor that works for accurate is required to attend knowledge sessions on each assessment process. Knowledge sessions are established by our senior assessors and encompass each aspect of assessing such as: Ag land calculations, vacant land valuation, roll books, exemptions, board of review and open book, statistics, commercial valuation, and many more.

Additionally, our assessors have book club meetings regularly to read, review, and interpret the WPAM which is our guideline for assessment practices. Spring of 2023, our assessors joined in on the first ever **listening sessions with the DOR to update and bring the WPAM guidelines and statutes into the 21st century**. 14 of our assessors attended and led 6 of the round-table discussions on assessment practices. We shared the experience with our entire team at our weekly Monday Morning Meeting.



**Technology** allows assessors to be more accurate in our assessments. We have been **working on a project with the WI Department of Revenue (DOR) to standardize the import and export of assessment data files**. Our IT team will continue to work with the DOR on this project to make it easier on municipalities and assessors when collecting and sharing data.

Finally, **we attend conferences annually to connect with clerks, administrators, mayors, etc.** to share ideas and build relationships with those we serve. It's our way to educate municipal officials on the assessment process. **We also enjoy having fun with the municipal officials who do so much for their communities!**



Wisconsin Association of Assessing Officers



Wisconsin Municipal Clerks Association





# ASSESSMENT TIMELINE

Before January of each year we will sit with you and **discuss the options for open book and board of review dates**. We will work with you to schedule new construction checks, field work, data entry, and the date notices are mailed. Below is a suggested timeline of what happens throughout the assessment process. These dates are for example only.

## January

We start every year by visiting new construction to verify the % completion of new property. Trespass notices are mailed to property owners so they know we will be in the area.

If the property is not complete as of January 1st (each year) we update our records accordingly and flag the parcel/s for a final visit to measure and list the property as complete.



This timeline may change depending on the agreed upon dates for Open Book and Board of Review. We are flexible on the date for Open Book and Board of Review that works best for you.

## February

New construction field checks are reviewed and verified by our office. Sales, permits, exemptions and any other assessment related data is updated in our records.

Initial DOR equalized values are reviewed.

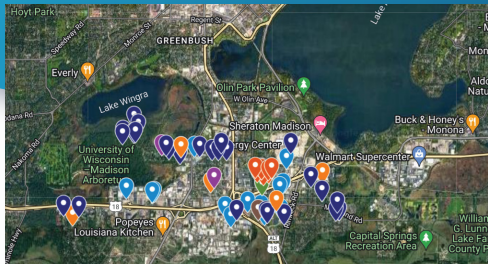
During the market update - education is implemented through social media, newsletters, and custom content.



## March

Properties are sorted and mapped for field inspections based on permits, sales, inspection requests, etc. Assessors update data on premise with their laptops.

Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



## April

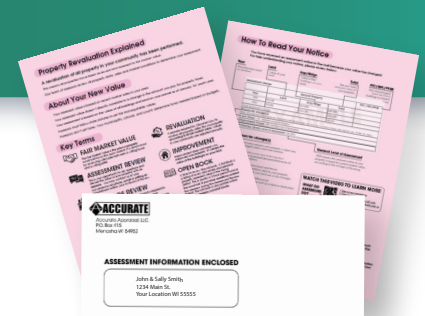
Initial values are forecasted. Value checks are performed and revisions are made. Our import/export team works with the county to verify assessment and mailing data. Initial statutory board meeting must be held if needed.

Notices are printed and mailed. Every notice includes an educational insert with links to videos and FAQ's. Rolls are posted online.

## May - June

The assessment review period starts. Property owners can contact Accurate by phone, email, or online appointment. The open book period begins the day they receive their notice up to 7 days before board of review begins.

Final rolls are verified with the county and prepared for Board of Review. The assessor signs the final roll.



The assessment cycle is a long process of many different moving parts coming together to complete an overall task. Each week is vital to the success of the overall assessment timeline. Below are a few of the ways we manage a weekly workload to stay on track.

The Master Schedule is the heart of the entire process. Each year we go through and set up the master scheduling tool, this organizes all of our municipalities as well as all of our teams. Once the master schedule is completed the work flows into a multitude of different organizational tools.

Office Calendar

Our office Calendar is filled out along with the master at the start of the year. This holds all of our open book and board dates as well as any special items that accurate will be attending. Each week will have an entire layout of what is happening for that week.

## 2 Week Schedule


Each week we unveil our two week schedule. The schedule allows all employees to know where they are required to be at each day of the next two weeks. Vital to our team as it allows us to know where everyone is at any given time.

# AC Tab

The Account Managers use the AC tab to be able to plan our their weekly activities as well as keep track of all dates and events happening in their municipalities. From clerks information to building permits everything to keep them organized is all in this tab.

# Muni Timeline

At any point in during our assessment timeline its healthy to know where the municipality sits overall. That is when we would look over the muni timeline. This allows us to make adjustments on the fly to make sure our weekly tasks are getting us to the overall goals to keep the muni on time.

| Bayside, Village of   |       | Initial Field Work       |                   |
|---|-------|--------------------------|-------------------|
| Assessment Type   | A-IMU | Land Review              | November 24, 2024 |
|  |       | New Construction Checks  | January 10, 2025  |
|   |       | Statistics Completed     | March 14, 2025    |
|   |       | Roll Work                | April 08, 2025    |
|   |       | Final Field Work         | April 15, 2025    |
|   |       | Sales Analysis           | April 18, 2025    |
|   |       | Valuation Modeling       | April 22, 2025    |
|   |       | Initial Export           | April 28, 2025    |
|   |       | Send Notices             | April 29, 2025    |
|   |       | Roll Viewing (Open Book) | May 19, 2025      |
|   |       | Send Change Notices      | May 26, 2025      |
| ** This report is intended as a GUIDE early in the year.                            |       | Board of Review          | June 25, 2025     |
| ** Dates are the estimates set at the start of the year                             |       | Final Export             | July 02, 2025     |
|   |       | MAR                      | July 08, 2025     |



# WORKLOAD

On a regular basis Shandawill meet with your team to go over accountability for our assessment team. **There will be a standard agenda to ensure open communication and that all metrics are being followed.** Below is an example of a progress report that will be created to ensure you know the progress of current processes.

## City of Kenosha Interim Market Update (2024)

| Project Start: Mon, 7/24/2023   |             |          |         |          |            |              |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
|---|-------------|----------|---------|----------|------------|--------------|----|----|----|----|--------------|----|----|---|---|-------------|---|---|---|---|--------------|---|----|----|----|----|----|----|----|----|----|----|---|
| Display Week: 1   |             |          |         |          |            | Jul 24, 2023 |    |    |    |    | Jul 31, 2023 |    |    |   |   | Aug 7, 2023 |   |   |   |   | Aug 14, 2023 |   |    |    |    |    |    |    |    |    |    |    |   |
|   |             |          |         |          |            | 24           | 25 | 26 | 27 | 28 | 29           | 30 | 31 | 1 | 2 | 3           | 4 | 5 | 6 | 7 | 8            | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |   |
| TASK  | ASSIGNED TO | PROGRESS | START   | END      | TOTAL DAYS | DAYS LEFT    | M  | T  | W  | T  | F            | S  | S  | M | T | W           | T | F | S | S | M            | T | W  | T  | F  | S  | S  | M  | T  | W  | T  | F  | S |
| Education / Publication   |             |          |         |          |            |              |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Prep and share Education Plan   | Chris       | 100%     | 8/1/23  | 8/30/23  | 30         | -19          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Update website - Add video  | Chris       | 1%       | 8/1/23  | 4/1/24   | 245        | 196          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Create content on current Res Market  | Chris       | 1%       | 8/1/23  | 4/1/24   | 245        | 196          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Initiate education through all forms of communication   | Chris       | 1%       | 9/1/23  | 9/30/23  | 30         | 12           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Mill Rate Education with Tax Bill (if allowed)  |             | 100%     | 11/1/23 | 12/31/23 | 61         | 61           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Prepare notice letter and insert for 2024 market update (if allowed)  |             | 1%       | 11/1/23 | 4/1/24   | 153        | 153          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Connect Accurate's Facebook to Kenosha website  |             | 1%       | 1/1/24  | 1/15/24  | 15         | 15           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Send Mailer   |             | 1%       | 1/15/24 | 4/1/24   | 78         | 78           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Use all avenues of Education  |             | 1%       | 2/1/24  | 4/1/24   | 61         | 61           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Additional education on the BOA and BOR   |             | 1%       | 5/1/24  | 5/31/24  | 31         | 31           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Data Transfer & Analysis  |             |          |         |          |            |              |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Data Transfer   |             | 1%       | 1/1/24  | 1/15/24  | 15         | 15           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Code Table Data Reviews & Return  |             | 1%       | 1/1/24  | 3/10/24  | 70         | 70           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Fieldwork (Permits & New Construction)  |             |          |         |          |            |              |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Permit Reviews (Verify permits (occ) and what our next step is, actionable or non-actionable)(Value partial Construction) |             | 5%       | 8/14/23 | 12/31/23 | 140        | 104          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Commercial Permit Value (Permits completed after 1/1/23 (value them))   |             | 5%       | 8/14/23 | 12/31/23 | 140        | 104          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| New Construction Checks   |             | 1%       | 8/14/23 | 12/31/23 | 140        | 104          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| New Construction Alterations/Progress   |             | 1%       | 8/14/23 | 12/31/23 | 140        | 104          |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Ag Checks (Kenosha mails letter, Lori onsite visit)   |             | 10%      | 9/8/23  | 9/29/23  | 22         | 11           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |
| Ag Checks (Kenosha 2nd letter, data update)   |             | 10%      | 10/1/23 | 11/15/23 | 46         | 46           |    |    |    |    |              |    |    |   |   |             |   |   |   |   |              |   |    |    |    |    |    |    |    |    |    |    |   |

Additional meetings will be held throughout the year. Four main annual meetings will cover:

### Kick-Off Meeting:

Setting the Open Book and Board dates, education plan with reminders, reviewing the notice letter, preparing the timeline for assessments, compare permits to make sure we have all of them.

### Pre Open Book Meeting:

Preparing your board with educational materials they need, reviewing the assessment rolls with the clerk, reminders about when to send out education.

### Pre Board of Review Meeting:

Cover the expectations at the BOR, go over all objections to ensure both teams are on the same page.

### End of the Year Wrap Up:

What went well, what needs to be addressed, prep for late fall field work, prepare for the next assessment year.



# SERVICE OPTIONS

The service options below are reflective of our all-inclusive services. **There will never be an additional invoice for any reason.** You may retain 10% of the total fee subject to delivery of certified tax roll.

## 6 YEAR MARKET UPDATES

|                        | 2026          | 2027          | 2028          | 2029          | 2030          | 2031          | Total     |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| Assessor Services      | Market Update | Market Update | Market Update | Market Update | Market Update | Market Update | Total     |
| Service Cost           | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$288,000 |
| Annual Amortized Price | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$48,000      | \$288,000 |

## 6 YEAR ALTERNATING Market Updates in odd years

|                        | 2026        | 2027          | 2028        | 2029          | 2030        | 2031          | Total     |
|------------------------|-------------|---------------|-------------|---------------|-------------|---------------|-----------|
| Assessor Services      | Maintenance | Market Update | Maintenance | Market Update | Maintenance | Market Update | Total     |
| Service Cost           | \$33,000    | \$48,000      | \$33,000    | \$48,000      | \$33,000    | \$48,000      | \$243,000 |
| Annual Amortized Price | \$40,500    | \$40,500      | \$40,500    | \$40,500      | \$40,500    | \$40,500      | \$243,000 |

## 6 YEAR ALTERNATING Market Updates in even years

|                        | 2026        | 2027          | 2028        | 2029          | 2030        | 2031          | Total     |
|------------------------|-------------|---------------|-------------|---------------|-------------|---------------|-----------|
| Assessor Services      | Maintenance | Market Update | Maintenance | Market Update | Maintenance | Market Update | Total     |
| Service Cost           | \$33,000    | \$48,000      | \$33,000    | \$48,000      | \$33,000    | \$48,000      | \$243,000 |
| Annual Amortized Price | \$40,500    | \$40,500      | \$40,500    | \$40,500      | \$40,500    | \$40,500      | \$243,000 |

### Maintenance:

We will inspect all permits, new construction and any demolitions. Every sale will be entered and reviewed. If there are changes to condition or missing information we will update the data to reflect. Any request for inspection from your community will also be visited during a maintenance year.

### Market Update:

We will conduct the same services as in a maintenance year. On top of our maintenance services every year we will break down each property by neighborhood, style, age, location etc. Each will be evaluated and re-assessed to its new fair market value. A notice of new value will be mailed to the property owner. It is important to maintain a schedule of social media education to ensure your community understands how the assessment process works.

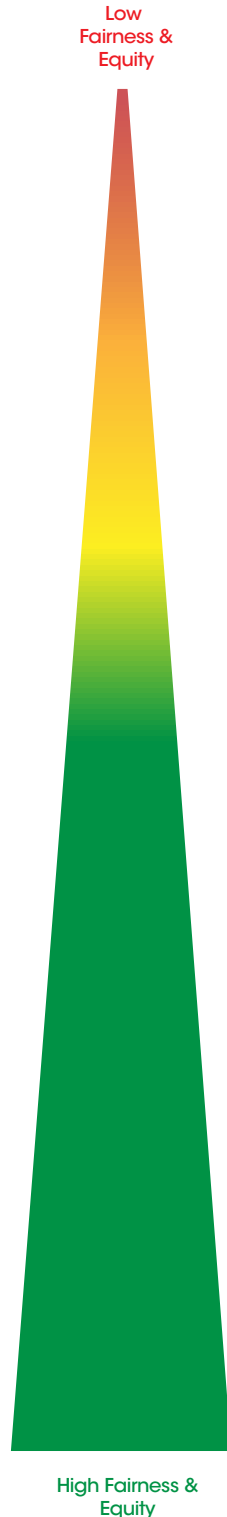
## ALL INCLUSIVE SERVICES

- ✓ **FREE** Web Data Access
- ✓ **CUSTOM** Community Education
- ✓ **LIVE** Customer Service
- ✓ **ZERO** Cost to Convert Assessment Data

Would you like to see additional options?  
We will work with you to customize any  
assessment plan to fit your community's needs.



# SERVICE DEFINITIONS



## MAINTENANCE

We physically view any property that has changed from the previous year. This includes all new construction, property splits, and properties that have been issued a building permit, etc. Maintenance keeps property values stagnant and creates inequities each year you remain in a maintenance cycle

## BLEND

Blending years of maintenance with a market revaluation creates a budget friendly option to spread the cost of a market update over the life of the contract. Using this process you could potentially bounce in and out of compliance.

## REVALUATION

The purpose of a 1 year Village-wide revaluation is to bring all real estate values to 100% market value. This can be done by physically inspecting all of the properties, or partial inspections over multiple years. Waiting multiple years between revaluations causes large increases or decreases in values. Fairness and equity is only high during the year the revaluation takes place, years of maintenance start the cycle over again.

## ANNUAL MARKET UPDATES

We pioneered the process of Full Value Maintenance. Our proprietary service **aggressively maintains 100% market value by performing annual market revaluations.** This ensures every property owner is paying only their fair share of taxes on an annual basis and prevents large value adjustments while producing the most fair and equitable value.

# INSURANCE

This sample insurance copy is for reference. A copy of this insurance will be automatically emailed to you annually to save in your files. If you would like additions or changes to the insurance we can make those any time at no additional cost to you.



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
9/19/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

|  |   |
|--|---|
| <b>PRODUCER</b><br>Fox Cities Insurance A Division of Ansay & Associates<br>4351 W College Ave<br>Suite 310<br>Appleton WI 54914 | <b>CONTACT</b><br>NAME: Theresa Vorpahl<br>PHONE (A/C, No, Ext): 920-739-0424<br>FAX (A/C, No): 920-560-7079<br>E-MAIL ADDRESS: Theresa.Vorpahl@ansay.com                                       |
| <b>INSURED</b><br>Accurate Appraisal, LLC & Municipal Assessment Software Sol<br>PO Box 415<br>Menasha WI 54952                  | <b>INSURER(S) AFFORDING COVERAGE</b><br>INSURER A: West Bend Mutual Insurance Company<br>INSURER B: Houston Specialty Insurance Company<br>INSURER C:<br>INSURER D:<br>INSURER E:<br>INSURER F: |
| ACCUPP-01  | NAIC #<br>15350<br>12936  |

### COVERAGES

CERTIFICATE NUMBER: 1287743460

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE   | ADDL INSR | SUBR WVD | POLICY NUMBER     | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS  |
|----------|---|-----------|----------|-------------------|-------------------------|-------------------------|---|
| A        | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: |           |          | 1421930           | 2/22/2023               | 2/22/2024               | EACH OCCURRENCE \$ 2,000,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000<br>MED EXP (Any one person) \$ 10,000<br>PERSONAL & ADV INJURY \$ 2,000,000<br>GENERAL AGGREGATE \$ 4,000,000<br>PRODUCTS - COM/PO/ AGG \$ 6,000,000 |
| A        | AUTOMOBILE LIABILITY<br><input type="checkbox"/> ANY AUTO<br><input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY   |           |          | 1421930           | 2/22/2023               | 2/22/2024               | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$   |
| A        | <input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR<br><input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$  |           |          | 1421930           | 2/22/2023               | 2/22/2024               | EACH OCCURRENCE \$ 5,000,000<br>AGGREGATE \$ 5,000,000  |
| A        | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | Y/N       | N/A      | 1421932           | 2/22/2023               | 2/22/2024               | PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/><br>E.L. EACH ACCIDENT \$ 100,000<br>E.L. DISEASE - EA EMPLOYEE \$ 100,000<br>E.L. DISEASE - POLICY LIMIT \$ 500,000  |
| B        | Professional Liability  |           |          | MEO-HS-0003754-00 | 10/3/2022               | 10/3/2023               | Limit 2,000,000   |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

### CERTIFICATE HOLDER

### CANCELLATION

|  |  |
|--|--|
|  | SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|  | AUTHORIZED REPRESENTATIVE<br>Theresa Vorpahl   |

# REFERENCES



## DE PERE

Accurate Appraisal has served as the statutory assessor for the City of De Pere since 2005. In 2018, the City decided to adopt their annual Full Value Maintenance program. This transition has been beneficial to the City, because market trends over the past few years would have otherwise forced another city-wide revaluation. It also makes budget planning easier by supplying consistent information year-to-year. Our account manager at Accurate is extremely knowledgeable, and has always been responsive to our questions and needs. Accurate's proactive public relations campaign, which provides social media posts and additional website content, has been very helpful in communicating with and educating our citizens.



**Carey Danen**  
CLERK/TREASURER

[www.deperewi.gov](http://www.deperewi.gov)  
[cdanen@mail.de-pere.org](mailto:cdanen@mail.de-pere.org)  
(920) 339-4072 ext 1355



## GREENVILLE

We have worked with Accurate over the last three years, who performed a total revaluation of our municipality. Their leadership in the industry is one of the reasons why we chose Accurate as our Assessor. Their friendly, reliable service is why we continue to utilize Accurate. Timely, professional response has been appreciated and we trust them to serve our residents with dependable service and fair assessments.



**Wendy Helgeson**  
CLERK

[www.townofgreenville.com](http://www.townofgreenville.com)  
[whelgeson@greenvillewi.gov](mailto:whelgeson@greenvillewi.gov)  
(920) 757-5151 ext 1100



## CITY OF NEW RICHMOND THE CITY BEAUTIFUL

It is with enthusiasm that I recommend Accurate Appraisal, LLC. We could not have asked for a better partner to go through a full revaluation with this year. Their depth of experience allows them to handle even the most complicated of situations and their professionalism is obvious to our team, but more importantly to our residents. A revaluation is a big deal to a community, but doesn't have to be a strain on City Staff - Accurate will get you through every step.



**Michelle Scanlin**  
CLERK

[www.newrichmondwi.gov](http://www.newrichmondwi.gov)  
[mscanlan@newrichmondwi.gov](mailto:mscanlan@newrichmondwi.gov)  
(715) 246-4268



Accurate Appraisal has professionally served as the Assessor for the Village of Fox Crossing since 2015. Over the past several years, Accurate Appraisal expertly conducted a full revaluation of the Village in 2017, and has maintained the Village at full value since 2019. A full value contract with Accurate Appraisal has provided a tremendous benefit to Fox Crossing. With the large increase in property values over the past few years, having the Village's assessed value grow incrementally over the past several years rather than a large increase in value in one year, is much easier to explain to Village residents. Accurate Appraisal has been a great partner with Fox Crossing in managing the difficult task of assessing.



**Jeffrey S. Sturgell**  
Village Manager

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[JSturgell@foxcrossingwi.gov](mailto:JSturgell@foxcrossingwi.gov)  
(920) 720-7101



**Cindy Bauer**  
CLERK

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