



Franklin Assessment Services RFP

Notice of Solicitation

RFP #23-001 for professional service: statutory assessor, revaluation, and maintenance services issued on October 13, 2023, by:

Kelly Hersh
Director of Administration
City of Franklin
9229 W Loomis Road
Franklin, WI 53132

Please return all responses to Kelly Hersh by December 1, 2023, at 4:00 PM at the above address.

Table of Contents

Instructions for this RFP	2
Introduction to the City of Franklin.....	5
Summary of Needs.....	6
Detailed Requirements	8
Insurance Requirements	14
Miscellaneous General Requirements	15
Obligations of the City.....	16
Pricing Sheet	17

Instructions for this RFP

1. Questions?

All questions should be directed to Kelly Hersh by email at khersh@franklinwi.gov

2. Examination of the Request for Proposal

It is the responsibility of all prospective proposers to carefully read this entire Request for Proposals (hereafter referred to as RFP), which contains provisions applicable to successful completion and submission of a proposal, and consists of all documents shown in the Table of Contents. If you discover any ambiguity, inconsistency, error, or omission in the RFP, you must notify the Director of Administration in writing. Only interpretations or corrections of the RFP made in writing are binding. You shall not rely upon any interpretation or corrections given by any other method.

3. Preparation and Submission of Proposals

- a. Deadline: Proposals and Pricing Statement/Cost must be received in the Administration Office no later than 4:00 PM on December 1, 2023. The City will not consider proposals received after the deadline.
- b. Three (3) hard copies of the proposal, along with a separate pricing statement/cost of the proposal, shall be mailed to: Director of Administration, City of Franklin, 9229 W Loomis Road, Franklin, WI 53132, and one (1) electronic copy of the proposal shall be transmitted in pdf format emailed to khersh@franklinwi.gov. The following notation must appear in the subject line of the electronic (email) copy: RFP# 23-001 Professional Assessment Services
- c. The City of Franklin intends to engage an assessment firm that will provide professional services as described herein. However, at its sole discretion, the City reserves the right to terminate this RFP process or negotiations with a selected assessment firm and either perform the work with its staff or begin a new RFP process. Nothing herein, or in the process, shall be construed as having obligated the City to pay for any expenses incurred by respondents to this RFP or the selected assessment firm before approval by the City of Franklin of a professional services agreement.

4. Time and Materials vs Fixed Cost Quote

The City of Franklin recognizes that some of its needs cannot be measured without undue cost. Any response to this RFP is expected to have two parts. The first part is a "time and materials" quote that consists of hourly rates for items that the City of Franklin will be billed on effort. The second part is a fixed quote for all remaining items. A page at the end of this document has been provided for your convenience, listing items we anticipate will be time and materials and listing items we anticipate will be fixed bids.

5. Proposal Costs

The City shall not be liable for any costs incurred to prepare or submit a proposal for this project.

6. General

- a. Upon submission of a proposal to the City of Franklin, the offer to perform contractual services may not be withdrawn by the provider for a period of 60 days to allow the City of Franklin the opportunity to take official action.
- b. Payment will be made within 30 days of receipt of an itemized invoice.
- c. No part of the contract shall be subcontracted without prior written consent of the City. The winning assessment firm shall retain full responsibility for all work performed.
- d. The winning assessment firm agrees to indemnify, hold harmless, and defend the City, its officers, agents, and employees from any liability arising out of or in connection with this agreement where such liability is found upon or grows out of the errors, omissions, or negligent acts of any of the assessment firm, its agents or employees.
- e. The assessment firm shall maintain insurance coverage as required and identified in the section titled "Insurance Requirements." If you cannot meet the minimum insurance requirements outlined within this RFP:
 - i. Provide a copy of the insurance you currently carry; and,
 - ii. Provide an estimate of how much it would cost to attain the additional insurance required within this RFP.
- f. The City reserves the right to negotiate revisions to the Scope of Services and fees and to terminate negotiations if a final contract cannot be agreed upon.
- g. Contract shall be construed according to the laws of the State of Wisconsin.

7. **Timeline** - The following is the planned schedule for the selection process. The City reserves the right to modify the schedule.

RFP Released -	Friday, October 13, 2023
Notification of Intent to Respond -	Wednesday, October 25, 2023
Question Deadline -	Friday, October 27, 2023
City Response to Questions -	Friday, November 3, 2023
Proposals Due -	Monday, December 1, 2023
Interview of Finalists -	During the Period of December 4 - December 15, 2023
Selection -	Tuesday, December 19, 2023

8. Non-Discrimination Statement

The City of Franklin does not discriminate based on race, color, religion, age, marital or veterans' status, sex, national origin, disability, or any other legally protected status in the admission or access to, or treatment or employment in, its services, programs or activities.

9. Americans with Disabilities Act Notice

Upon reasonable notice, the City will furnish appropriate auxiliary aids and services when necessary to afford individuals with disabilities an equal opportunity to participate in and enjoy the benefits of a service, program, or activity provided by the City.

10. Limited English Proficiency Statement

It is the policy of the City of Franklin to provide language access services to populations of persons with Limited English Proficiency (LEP) who are eligible to be served or likely to be directly affected by our programs. Such services will be focused on providing meaningful access to our programs, services, and benefits.



Franklin Assessment Services RFP

Introduction to the City of Franklin

Thank you for your interest in providing Assessment Services to the City of Franklin. The City, with a 2023 population estimate of 35,785, is located in Milwaukee County, Wisconsin. The 2022 aggregate assessed value of all Property Subject to the General Property Tax for the City is \$5,409,710,900. The aggregate assessment ratio for 2022 was estimated to be 100%.

The City's current assessment contractor uses the "Prolorem" software to store and evaluate real estate and personal property. This software will not be used for 2024. The data must be converted to a different CAMA software product.

The City has the following parcel counts (from the 2022 Statement of Assessments):

REAL ESTATE (See Lines 18 - 22 for other Real Estate)	PARCEL COUNT		NO. OF ACRES WHOLE NUMBERS ONLY (Col. C)	VALUE OF LAND (Col. D)	VALUE OF IMPROVEMENTS (Col. E)	TOTAL VALUE OF LAND AND IMPROVEMENTS (Col. F)
	TOTAL LAND (Col. A)	IMPROVEMENTS (Col. B)				
RESIDENTIAL - Class 1	12,169	11,529	6,805	758,635,800	3,304,661,800	4,063,297,600
COMMERCIAL - Class 2	564	415	2,567	259,420,500	843,413,300	1,102,833,800
MANUFACTURING - Class 3	62	54	541	32,623,200	132,037,300	164,660,500
AGRICULTURAL - Class 4	218		3,676	885,900		885,900
UNDEVELOPED - Class 5	104		876	2,297,300		2,297,300
AGRICULTURAL FOREST - Class 5m	5		58	329,200		329,200
FOREST LANDS - Class 6	6		50	560,800		560,800
OTHER - Class 7	75	66	85	5,468,000	16,477,300	21,945,300
TOTAL - ALL COLUMNS	13,203	12,064	14,658	1,060,220,700	4,296,589,700	5,356,810,400
NUMBER OF PERSONAL PROPERTY ACCOUNTS IN ROLL			758	LOCALLY ASSESSED	MANUFACTURING	MERGED
BOATS AND OTHER WATERCRAFT NOT EXEMPT - Code 1				0	0	0
MACHINERY, TOOLS AND PATTERNS - Code 2					10,201,500	10,201,500
FURNITURE, FIXTURES AND EQUIPMENT - Code 3				29,315,300	4,216,700	33,532,000
ALL OTHER PERSONAL PROPERTY NOT EXEMPT - Codes 4A, 4B, 4C				7,686,500	1,489,500	9,176,000
TOTAL OF PERSONAL PROPERTY NOT EXEMPT (Total of Lines 11-14)				37,001,800	15,907,700	52,909,500
AGGREGATE ASSESSED VALUE OF ALL PROPERTY SUBJECT TO THE GENERAL PROPERTY TAX (Total of Lines 9F and 15F) MUST EQUAL TOTAL VALUE OF THE SCHOOL DISTRICTS (K-12 PLUS K-8) - Line 50, Col. F						5,409,719,900

Summary of Needs

The City of Franklin needs the following for the **2024** assessment year:

1. A conversion of all existing electronic assessment data to a CAMA software product to be used for the duration of this contract.
2. A cleanup of the property data after the conversion. This includes identifying missing and incorrect property data and filling in and correcting property data to be used with market-calibrated computer valuation models. Some of this cleanup work can be done in the office, and some will require re-inspections of properties.
3. Sketch all buildings using vectors and use computerized area calculations from those sketches to update all areas in each property's records used to calculate values.
4. Cleanup and verification of all sales data after the conversion.
5. Property listing, including updating legal descriptions, owner names, owner mailing addresses, and ownership rights.
6. Inspection, listing, and appraisal of all properties sold (at time of sale).
7. Inspect and update all sold properties' records (with re-appraisal as needed).
8. Inspecting and updating property records (with re-appraisal as needed) of properties with building permits.
9. Full inspection (with re-appraisal as needed) of 10% of all properties in the City. This can include properties with building permits and properties that sold but should also include properties most likely to need reinspection.
10. Revaluation of all land (as if vacant) using a computerized valuation model.
11. Revaluation of all residential improvements using a computerized valuation model.
12. Revaluation of all commercial improvements using a computerized valuation model.
13. Revaluation of all "other" improvements using a computerized valuation model.
14. Verification of all jurisdictional exceptions.
15. An analysis measuring the accuracy of all property records based on a full inspection of a representative sampling of the City with a sample size of at least 5%.
16. A sales ratio study measuring the uniformity of all 2024 assessed values.

The City of Franklin needs the following for the **2025** assessment year:

1. Property listing, including updating legal descriptions, owner names, owner mailing addresses, and ownership rights.
2. Inspection, listing, and appraisal of all sold properties (at time of sale).
3. Inspect and update all sold properties' records (with re-appraisal as needed).
4. Inspecting and updating property records (with re-appraisal as needed) of properties with building permits.
5. Full inspection (with re-appraisal as needed) of 10% of all properties in the City. This can include properties with building permits and properties that sold but should also include properties most likely to need reinspection.
6. Verification of all jurisdictional exceptions
7. An analysis measuring the accuracy of all property records based on a full inspection of a representative sampling of the City with a sample size of at least 5%.
8. A sales ratio study measuring the uniformity of all 2025 assessed values.

The City of Franklin needs the following for the **2026** assessment year:

1. Property listing, including updating legal descriptions, owner names, owner mailing addresses, and ownership rights.
2. Inspection, listing, and appraisal of all sold properties (at time of sale).
3. Inspect and update all sold properties' records (with re-appraisal as needed).
4. Inspecting and updating property records (with re-appraisal as needed) of properties with building permits.
5. Full inspection (with re-appraisal as needed) of 10% of all properties in the City. This can include properties with building permits and properties that sold but should also include properties most likely to need reinspection.
6. Verification of all jurisdictional exceptions
7. An analysis measuring the accuracy of all property records based on a full inspection of a representative sampling of the City with a sample size of at least 5%.
8. A sales ratio study measuring the uniformity of all 2026 assessed values.

Detailed Requirements

The following is a list of detailed requirements to achieve the City's needs outlined in the "Summary of Needs" above.

1. **Conformance to statutes** – all work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with all the rules and regulations officially adopted and promulgated by the DOR.
2. **Oath of office** – the Appraiser shall be required to take and subscribe to an oath or affirmation supporting the Constitution of the United States and of the State of Wisconsin and to perform the duties of the assessor faithfully. If the Appraiser is a corporation or partnership, the person(s) designated for the assessment shall comply with the above. The oath shall conform to Wisconsin Statute [19.01](#) and be filed with the municipal clerk before undertaking the duties.
3. **Personnel**
 - 3.1. All personnel providing services shall be currently certified in compliance with Wisconsin Statutes [70.055](#) and [73.09](#) and the administrative rules prescribed by the DOR
 - 3.2. The Appraiser shall review any complaint relative to the Appraiser's employee(s) conduct. If the municipality deems the performance of any of the Appraiser's employees to be unsatisfactory, the Appraiser shall, for good cause, remove such employee(s) from work upon written request from the municipality, such request stating reasons for removal.
 - 3.3. Prior to commencing any assessment work, the appraiser shall file with the municipal clerk names of all employees to be performing work and the type of work to be performed by each, except non-appraisal office clerical help. A corporation or partnership shall indicate the person(s) designated as responsible for the assessment. All persons on file must carry an up-to-date identification card and a letter of introduction from the municipality.
4. **Assessment manual** – the Appraiser shall make all assessments in accordance with the Wisconsin Property Assessment Manual as specified in Wisconsin Statutes [70.32](#) and [70.34](#).
5. **Computer-Aided Mass Appraisal (CAMA) software** - The Appraiser must use CAMA software to list, value, and classify all properties using professionally accepted mass appraisal techniques. This includes real estate, personal property, and mobile home parking permit fee assessments. The City must approve the CAMA software to be used as a condition of acceptance of any proposal. The City must be notified of and approve of any assessment work outside of the approved CAMA software.
6. **Data Conversion** – The City's current property assessment data is stored in a CAMA software called "Prolorem." This software will not be used going forward. The City's current assessment data must be converted to the CAMA software agreed upon by the Appraiser and the City. The conversion cost should be part of the "time and materials" quote, as it is difficult to estimate the effort required. Include in your RFP the hourly cost for:
 - 6.1. Programmer time – cost per hour for all computer programmer time to convert the data.
 - 6.2. Desktop review/cleanup – cost hour for all appraisers time to review and clean up the data.
 - 6.3. Field review – cost per hour for all appraiser time to re-inspect properties whose data is suspect.

7. **Finding Problems with Property Data Post Conversion** – the Appraiser shall use the converted data with minimally configured valuation models to identify parcels that need field review by comparing the newly calculated value to the prior year’s assessed value. Unusually large differences can indicate significant problems with the property data. The cost of this analysis and cleanup should be part of the “time and materials” quote as it is difficult to estimate the effort required. It shall be billed at the same rate as the Desktop review/cleanup rate in the previous item unless otherwise indicated.
8. **Accurate Parcel Identification** – the Appraiser shall review all legal descriptions as listed in the assessment roll for imperfections, including but not restricted to errors, incorrect acreages, omissions, overlap, or failure to close. If such discrepancies exist, the Appraiser shall correct or cause the same to be corrected.
9. **Data Collection**
 - 9.1. The Appraiser shall gather and list each parcel’s land information in the CAMA software, including size, area, frontage, width, depth, shape, topography, productivity, site improvements, utilities, access, zoning, and location. This information shall include a land sketch or a link to a land sketch in a GIS system.
 - 9.2. The Appraiser shall accurately measure, to the nearest foot, all improvements and prepare a complete outline sketch to scale (top view) of the major buildings showing all additions, porches, and appendages with dimensions and necessary identifications in the CAMA software.
 - 9.3. The Appraiser shall photograph all major buildings and store that photo, connected to each corresponding building, in the CAMA software.
 - 9.4. The date of inspection, attempted inspection with denial of entry, execution of special inspection warrant, or listing of all major buildings shall be indicated in the CAMA software.
 - 9.5. Notification Process with Request to View Property Notice – Wisconsin Statutes [70 .05\(4m\)](#) and [\(4n\)](#) require that assessors provide written notice to property owners when requesting an interior view of a building. The Appraiser shall send a letter allowing fourteen calendar days for a response. If no response is received, in-person contact may be attempted to obtain consent. A certified letter, including the notice, shall be sent if that step is unsuccessful.
 - 9.6. If the owner or occupant refuses the Appraiser’s request to view a major building, the Appraiser shall list and value the improvements according to the best information practicably obtainable. However, if facts make an interior view necessary for an accurate valuation, the assessor shall seek a special inspection warrant under state law (Wisconsin Statute [66 .0119](#)) to view the home's interior.
10. **Maintenance of Property Records** – Complete and accurate property records are imperative to uniformly assessing all properties in the City. Maintaining accurate property records is an ongoing effort that never ends. Each assessment year, the Appraiser shall:
 - 10.1. Audit the property records to identify any problem with incomplete or inaccurate property data.
 - 10.2. Fully reinspect at least 10% of the properties in the City. This can include properties with building permits and properties that sold but should also include properties most likely to need reinspection.
 - 10.3. Measure the accuracy of all property records based on a representative sampling of full inspections.

11. **Sketch all Buildings** – Vector based sketches were lost when the prior assessor failed to convert them. The Appraiser shall sketch each building from the existing (.jpg) sketches when the areas sketched match the areas in the property records. If there isn't an existing sketch that matches, a building will need to be re-measured and then resketched. The cost to do this should be part of the "time and materials" quote as the size of the effort is unknown. Include in your RFP the hourly cost for re-creating a vector-based sketch for each building.

12. Approaches to Value

- 12.1. The Appraiser shall consider the cost, sales comparison, and income approaches in the valuation of all vacant and improved parcels of property
- 12.2. The Appraiser shall use computerized valuation models to appraise property using the cost approach, sales comparison approach and/or income approach.
- 12.3. The Appraiser shall use a fee appraisal to value all unique properties that cannot be valued using mass appraisal techniques.
- 12.4. The Appraiser shall group similar properties into market segments and use the same approach to value for all properties in a single market segment.
- 12.5. The Appraiser shall not appraise a property based solely on a sale. The Appraiser shall use only professionally accepted appraisal methods to value all property.

13. Existing Undocumented Valuation Adjustments and Manual Overrides

- 13.1. The Appraiser shall remove all undocumented adjustments and all manual overrides from the City's existing assessment records before re-appraising all land and improvements.
- 13.2. All percentage and dollar adjustments made as a part of the re-assessment must be documented in a manner that makes it unambiguous what the adjustment is for. Labeling adjustments using generic terms like "obsolescence" or "market adjustment" is insufficient.

14. Valuation – Land

- 14.1. All land shall be valued "as if vacant"
- 14.2. All land affected by similar market influences shall be grouped by geographic area (e.g. neighborhoods).
- 14.3. All land shall be valued by neighborhood using a computerized valuation model.
- 14.4. Unit value ranges per acre for each grade of fallow agricultural land, agricultural forest land, and undeveloped and productive forest land shall be determined by analyzing sales and other available market data. Agricultural forest land and undeveloped land values shall be adjusted to 50% of full market value, per Wisconsin Statute [70.32\(4\)](#). Where available, soil surveys shall be used to classify land. Agricultural land shall be valued according to use, per Wisconsin Statute [70.32](#). In the analysis of sales, work forms shall be prepared for recording data on each sale analyzed and for correlating price data from the sales for the various classes of land and noting if land qualifies for use value or is fallow. Such forms shall be left with the municipality.
- 14.5. Aerial photographs shall also be used in the evaluation and classification of agricultural, agricultural forest, undeveloped, and forest lands. GIS layers, where available, should be provided, showing ownership lines and acreage. The minimum acceptable product under this specification shall be the most recent aerial photographs available from the county, along with soil classification and grades listed on the property record with a listing of the unit values used (use-value units for class 4 lands, market value units

for fallow tillable and idle pasture, class 5, class 5m, class 6 and class 7 lands). Aerial photographs shall be supplied, where necessary, by the Appraiser and shall be left with the municipality, along with classification and unit values documentation.

- 14.6. Basic unit values shall be determined for residential and commercial lands from an analysis of sales, rents, leases, and other available market data. In the analysis of market data, adequate records shall be prepared showing data collected and unit value determinations. Such records shall be left with the municipality.
- 14.7. Having determined basic unit values the Appraiser shall apply such to each parcel, making adjustments to account for the particular characteristics of the parcel. Land computations shall be documented for each parcel in the CAMA software.
- 14.8. A copy of all parts of the computerized land valuation model used in the valuation of land shall be left with the City.

15. Valuation – Cost Approach

- 15.1. When valuing improvements using a cost approach, the Appraiser shall use up-to-date costs from the WPAM Vol II or some other professionally recognized source.
- 15.2. When valuing improvements using a cost approach, the Appraiser shall clearly delineate replacement cost new, physical depreciation, functional obsolescence and economic/market adjustments. Each component must be properly calculated and supported.
- 15.3. A copy of all parts of the computerized cost models used in the valuation of improvements shall be left with the City.

16. Valuation – Sales Comparison Approach

- 16.1. The Appraiser shall use a minimum of 5 comparable sales when using the sales comparison approach.
- 16.2. The Appraiser shall select sales using a computer drive model and without regard to the value of the subject property. In other words, the comparable sales cannot be selected with the goal of supporting a pre-determined valued.
- 16.3. A copy of all parts of the computerized sales comparison models used in the valuation of improvements shall be left with the City.

17. Valuation – Income Approach

- 17.1. The Appraiser shall consider the income approach for all types of property that typically produce income.
- 17.2. In valuing income-producing properties, the Appraiser shall collect information from owners, tenants, realtors, financial institutions, and any other necessary sources for use in the valuation process. Data to be analyzed shall include economic rents for each type of property, typical vacancy rates, and typical operation expense ratios. All data shall be properly documented and adequate records shall be prepared for each parcel showing the determination of value by the income approach. For improved parcels this shall include a reconstruction of income and expenses, an estimate of remaining economic life, and the capitalization rate applied. Capitalization rates shall be accurately documented by information obtained from the market.
- 17.3. A copy of all parts of the computerized income valuation models used to evaluate improvements shall be left with the City.

18. **Sales** – The Appraiser shall validate all sales and then list and value all sales deemed to be arms-length transactions.
 - 18.1. The Appraiser shall collect and analyze all available sales data for the municipality in order to become familiar with prevailing market conditions, market activity, and specific transactions which may be utilized in determining the market value of properties throughout the municipality. Assessor must use a CAMA software product that is capable of storing data “at time of sale”, independent of any data collected as of January 1st which is used for assessment purposes.
 - 18.2. The Appraiser shall collect data concerning sales of land and sales of improved parcels which may indicate the residual value of land. From these and other sources the Appraiser shall value all land in the municipality using a computerize land model.
 - 18.3. The Appraiser shall fully inspect all arms-length transactions at time of sale.
 - 18.4. The Appraiser shall do a credible appraisal of each property sold using the same approach to value and in the same manner as other properties in the same market segment.
 - 18.5. The Appraiser shall audit all sales records to identify any problem with incomplete or inaccurate sales data.
 - 18.6. The Appraiser shall consider all arms-length sales when calibrating all computer valuation models.

19. **Personal Property** – Although the implementation of current legislation surrounding the assessment of “personal property” is in flux, the Appraiser shall be responsible for listing, valuing, and classifying buildings on leased land, leasehold improvements, and whatever other property (previously assessed as personal property) remains in the City of Franklin.
 - 19.1. All forms used in the valuation of personal property shall be approved by the DOR.

20. **Mobile Homes in Mobile Home Parks** - The City of Franklin has 3 mobile home parks. Mobile homes contained within the mobile home parks are assessed a “monthly municipal parking permit fee”.
 - 20.1. The Appraiser shall value all mobile homes in the mobile home park in accordance with the City of Franklin’s Municipal Parking Permit Fee Ordinance, which follows the State of Wisconsin’s model ordinance.
 - 20.2. The Appraiser shall calculate the monthly fee for all municipal and give the notice of fee to the clerk for distribution to the parks.
 - 20.3. Due to the income-producing nature of a mobile home park, the Appraiser shall consider the income approach when valuing the three mobile home parks themselves.

21. **Omitted Property** – The Appraiser shall identify and quantify by value all property that should have been assessed in a year prior to the current year and assess that property on the omitted property roll.

22. **Final Field Review** – prior to the Open Book conference, the Appraiser shall review each appraisal and assessment.
 - 22.1. The Appraiser shall audit the entire assessment roll to look for and eliminate known errors.

- 22.2. The Appraiser shall review all grade and condition ratings to ensure accuracy and consistency in the listing of all structures.
 - 22.3. The Appraiser shall attempt to corroborate the appraised value using the selected approach to value with another approach to value (e.g. corroborate a cost approach using a sales comparison approach). For those parcels whose value cannot be corroborated using another approach, the Appraiser shall manually review its appraised value for accuracy and uniformity amongst the other parcels in the market segment.
23. **Open Book** – After mailing the Notice of Assessments to taxpayers, the Appraiser shall hold Open Book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values.
24. **Board of Review** – The Appraiser shall defend all assessments at the Board of Review
- 24.1. The Appraiser shall attend all meetings of the Board of Review, to be held no sooner than seven days after Open Book closes, to explain and defend the assessed values and be prepared to testify under oath in regard to such values. Compensation shall be as specified in the contract.
 - 24.2. The Appraiser shall explain all changes to assessments made after the Notice of Assessments was mailed to the Board of Review. This includes identifying the error corrected and providing evidence that uniformity has been maintained despite the adjustment to an individual property.
 - 24.3. The Appraiser shall not make offers to ‘settle’ assessed values in the days or weeks leading up to the Board of Review to reduce the number of Board of Review cases.
 - 24.4. In the event of an appeal to the DOR or the courts, it is agreed that the Appraiser shall be available upon written request from the municipality to furnish testimony in defense of the values established by the revaluation in all cases which might arise within one (1) year of the completion date specified for the revaluation. Compensation shall be as specified in the contract.

Insurance Requirements

The Appraiser shall, during the life of the AGREEMENT, maintain insurance coverage with an authorized insurance carrier at least equal to the minimum limits set forth below:

A. General/Commercial Liability	<p>\$2,000,000 per each occurrence for bodily injury, personal injury, and property damage \$4,000,000 per general aggregate,</p> <p>CITY shall be named as an additional insured on a primary, non-contributory basis.</p>
B. Automobile Liability	<p>\$1,000,000 combined single limit (together with excess or umbrella coverage with a combined minimum limit of \$5,000,000)</p>
C. Umbrella or Excess Liability Coverage for General/Commercial and Automobile Liability	<p>\$5,000,000 per occurrence for bodily injury, personal injury, and property</p> <p>\$2,000,000 minimum aggregate per person, per aggregate</p> <p>CITY shall be named as an additional insured on a primary, non-contributory basis.</p>
D. Worker’s Compensation and Employers’ Liability	<p>\$1,000,000 single limit \$500,000 per accident</p>
E. Errors and Omissions (Professional Liability)	<p>\$2,000,000 single limit</p>

Upon the execution of an agreement, the Appraiser shall supply the CITY with a suitable statement (Certificate of Liability Insurance) and any Additional Insured Policy Endorsements, in a form acceptable to the City, certifying said protection and defining the terms of the policy issued and naming the City as an additional insured for General/Commercial Liability and Automobile Liability and Umbrella or Excess Liability and Property Coverage. The City shall be listed as “The City of Franklin, including its employees and elected or appointed officials.”

All sub-assessment firms shall be required to obtain commensurate coverages as broad as those noted above for the Appraiser. If sub-assessment firm employees are not covered by workers compensation or by Appraiser’s worker’s compensation, the sub-assessment firm shall provide employer’s liability insurance for the protection of sub-assessment firms employees, which coverage limits shall at least be \$100,000 for bodily injury by accident/each accident; \$500,000 bodily injury by disease/policy limit; and \$100,000 bodily injury by disease/each employee.

If said policies are thereafter canceled, permitted to expire, or changed, the Appraiser shall immediately notify the City and shall immediately cease all work until such replacement policies meeting the requirements of this AGREEMENT and the City are fully in place and force, and all required documentation and certificates are provided to the City.

The City's acceptance of certificates or original insurance policies or both and the allowance to commence work does not release the Appraiser, nor the Appraiser's sub-assessment firm, from the required level of insurance and required level of security and protection provided the CITY by the insurance requirements set forth herein. In the event the Appraiser fails to ensure the Appraiser and all sub-assessment firms are insured and continue to remain insured, the Appraiser shall indemnify and hold the City and its officers and employees harmless against any claim or suit and against any costs, losses, and damages (including but not limited to reasonable fees and charges of attorneys or other professionals and reasonable court or arbitration or other dispute resolution costs). The entire obligation to ensure required coverage for all sub-assessment firms shall remain with the Appraiser, and the City, for any reason including but not limited to not having documentation or certificates of liability, shall not, in any way, have or share any obligation or responsibility to ensure Appraiser and sub-assessment firms have the required insurance coverage.

Acceptability of Insurers: Insurance shall be placed with insurers authorized as an admitted insurance company in Wisconsin. Insurance shall be placed with insurers with a Best's Insurance Reports rating of no less than A and a Financial Size Category of no less than Class VI.

Miscellaneous General Requirements

1. **Municipal Assessment Report (MAR) – The Appraiser shall complete and submit the** MAR to the DOR. The completed MAR shall be filed within 10 days of the completion of the BOR, no later than the second Monday in June. If the BOR is incomplete on the second Monday in June, an estimated MAR must be filed, and a final MAR must be filed within 10 days of completion.
2. **Confidential Information** – The Appraiser shall ensure employees maintain strict confidence regarding all privileged information received because of this agreement.
3. **Full Disclosure** – The Appraiser shall inform the City of any situation or condition which adversely affects their ability to uniformly assess all property in the City, including but not limited to:
 - 3.1. Discovery of unexpected problems, such as loss of data
 - 3.2. Problems too large to correct, such as inconsistent grading or bad property data
 - 3.3. Inability to obtain data such as income and expenses
 - 3.4. Illegal activity, such as unlawful attempts by persons to influence assessed values

Obligations of the City

1. **Office Space** – The City shall furnish adequate office space at no cost to the Appraiser in or near the municipal hall. Office space shall include desks, tables, chairs, file cabinets, heating, lighting, and janitorial services
2. **Computer and Office Equipment** – The City shall furnish adequate and typical computer and office equipment as requested. This is only for work that is required to be done at the City.
3. **Access to Records** – the City shall allow access and make available to the Appraiser municipal records such as, but not limited to, previous assessment rolls and records, sewer and water layouts, building permits, tax records, records of special assessments, plats, and any other maps currently in the possession of the municipality, at no cost.
4. **Maps** – The City shall allow access to plat maps, section maps, and any other maps currently in the possession of the City to the Appraiser at no cost.
5. **Public Introduction**– The City shall aid the Appraiser in reasonably promoting public information concerning the work under this agreement.
6. **Support for Uniform Assessments** – The City shall support the constitutional right of each taxpayer to uniform taxation and refrain from interfering with or influencing the assessed value of any property.

Pricing Sheet

The following is provided for your convenience and consideration. As previously mentioned, some of the items in this RFP are difficult to quantify. As such, the City will accept a time and materials bid for some items.

Cost the City will Cover – the following is a list of costs the City will cover and therefore you do not need to provide an estimate and **you should not include in your bid.**

Item
All necessary printing and mailing costs

Time and Materials Costs – Please provide a rate per hour for the following services

Item	Rate per Hour
Conversion – Programmer time to convert the data	
Conversion – Appraiser time to review/cleanup	
Sketching – Technician time to sketch buildings	
Sketching – Appraiser time to re-measure buildings	

Fixed Price – Please provide a fixed bid for the following services

Item	Bid Amount
Assessment work for 2024	
Assessment work for 2025	
Assessment work for 2026	