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**Request for Proposals
 Village of Sherwood
 Assessment Services**

RFP Issued: April 9, 2024
 Proposals due: May 8, 2024 (end of day)
 Tentative award of contract: May 13, 2024

SUMMARY

The Village of Sherwood is seeking proposals from qualified assessment firms/individuals to provide annual assessment services for the Village of Sherwood in Calumet County, Wisconsin for assessment rolls beginning with assessment year 2025. The Village is seeking a firm/individual to serve as its statutory assessor. The scope of work is to provide annual maintenance work in a competent, timely, efficient, cost-effective and customer service-oriented manner.

BACKGROUND

The Village of Sherwood’s population in 2020 was 3,194. The 2023 equalized value was \$491M with an average assessment ratio of 0.72. The Village has 3 active Tax Incremental Districts (TID) and is in the process of creating a 4th. There are several new subdivisions and are expected to add approximately 25 new single-family homes per year. A village-wide revaluation was completed in 2004. An interim market update was completed in 2020.

	Parcel Count	
	Total Land	Improvements
Residential	1,370	1,230
Commercial	53	39
Manufacturing	0	0
Agricultural	30	
Undeveloped	22	
Ag Forest	10	
Forest	0	
Other	5	4
Total	1,490	1,273

	Village of Sherwood Permits			
	2023	2022	2021	2020
New dwellings	15	9	35	14
Other	92	90	88	95

VILLAGE OBLIGATIONS

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

- Answer general correspondence concerning assessment related inquiries that Village staff is capable of answering.
- Provide information as to how to contact the Assessor by mail, fax, e-mail or telephone.
- Provide copies of all building permits and commercial plans, previous assessment rolls and records at no cost.
- Publish public notices at appropriate times during the assessment and revaluation process.
- Provide adequate office space for assessment personnel for office hours, if necessary.
- Maintain current Village map including lot sizes, parcel numbers, and addresses.
- Provide access to the office open during normal Village Hall hours.

The Assessor will be responsible for all other clerical duties, including: preparing appointment mailers, stuffing envelopes and mailing all notices; all filing of assessment cards and records; all assessment data entry, and scheduling/rescheduling all assessment related appointments.

SCOPE OF WORK FOR CONTRACTED GENERAL ASSESSMENT SERVICES

As the contract assessor, the firm chosen is expected to fulfill the duties of the statutory assessor and all other duties incidental to the normal duties of Assessor in accordance with applicable Wisconsin State Statutes and the Wisconsin Property Assessment Manual. Such duties include:

1. Review and assess all properties that were under partial construction as of January 1 of the previous year.
2. Review and assess all new construction as of January 1st of the current year.
3. If applicable, mail out state approved forms to all holders of personal property in the Village, audit the returned forms and place the new values in the assessment roll. If applicable, Doomage assessments will be made on any personal property account that has not sent in a return.
4. Account for all buildings moved, destroyed or demolished.
5. Process parcel subdivisions, lot line adjustments, new plats, and any other land divisions. All property records shall be updated as needed.
6. Maintain property owner lists, with current name and address changes.
7. Correct legal descriptions as needed.
8. Take digital photographs of new construction and during the review process if needed.
9. Record assessment data, prepare appointment mailers, stuff envelopes and mail notices and schedule and reschedule appointments as necessary.
10. Mail Assessment Change Notices to property owners and others as required.
11. Be responsible for completing the real estate assessment rolls, and personal property assessment rolls (If applicable).
12. Stay informed about zoning changes, conditional use permits, and other municipal decisions that impact value.
13. Stay informed about court decisions, Department of Revenue advisories, and other governmental decisions that impact value.
14. Post assessments to real estate transfer returns and record sale information to property records.
15. Supply all office supplies, postage and other supplies necessary to perform the duties of the contract.
16. Maintain recent plat and subdivision maps on file and updated accordingly.
17. Conduct Open Book sessions in accordance with Wisconsin State Statutes.
18. Assessor will attend the Board of Review meetings and testify under oath while defending the Assessor's valuation and work products.
19. Be available to furnish expert testimony in defense of any of the assessed values in the event of an appeal to the courts.
20. Provide all assessment data to Calumet County Property Listing and ensure that the County's assessment roll is balanced to the records submitted by the Assessor.
21. Provide the Wisconsin Department of Revenue (WI DOR) with final reports of assessed valuations after the Board of Review meeting.
22. Provide the WI DOR with assessments for all TIF Districts by the prescribed WI DOR regulations and deadlines.
23. Provide a local or toll-free phone number for Village officials and residents to contact Assessor during regular business hours.
24. Supply to the Village a complete set of property assessment records
25. Maintain the assessment records in a format accessible to the public and comply with proper open records requests under the Wisconsin Public Records Law.
26. Review, upon request, developer proposals with the Village's TIF districts for the purpose of estimating the potential valuation of the project and to provide City staff with comments regarding the reasonableness of the real estate market assumptions included within the development proformas.

All existing property information including existing property records and any associated data remain the property of the Village. Any newly created property information, property records, and associated data will become the property of the Village upon creation.

SUBMITTAL REQUIREMENTS

1. Firm name and address.
2. Firm's specific assessment service experience in Wisconsin.
3. Names, educational background, and municipal assessment experience of the person(s) to be assigned as the Village's point of contact for the work to be performed.
4. Experience with conducting a revaluation process and demonstrate accuracy of assessment work.
5. Listing of Wisconsin municipalities that your firm currently provides assessment services.
6. Total annual cost to provide assessment services for assessment years 2025, 2026, 2027, 2028, and 2029.
 - a. Annual assessment maintenance costs for each assessment in a not-to-exceed sum.
 - b. Full revaluation cost for one assessment year during the contract period as a one-year lump sum and an option to amortize the cost of revaluation equally over the term of the contract.

QUESTIONS

All questions must be submitted via email with the subject line of "Question: RFP-Assessment Services." All inquiries or questions for clarification should be sent to the administrator at administrator@villageofsherwood.org no later than May 1, 2024.

SUBMITTAL OF PROPOSAL

Please email, mail, or hand deliver the proposal by May 8, 2024 to the following address:

Village of Sherwood
RFP: Assessment Services
administrator@villageofsherwood.org
W482 Clifton Road
Sherwood, WI 541699