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1.3 Description of Services

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**AGREEMENT FOR ASSESSMENT SERVICES**

THIS AGREEMENT made this \_\_\_\_\_ day of \_\_\_\_\_, 2019 by and between the **CITY OF LODI**, hereinafter referred to as "City" and **MILDE APPRAISAL SERVICE, LLC**, hereinafter referred to as "Assessor".

**SCOPE OF SERVICES**

Assessor shall supply the City with consulting, assessing and appraisal services and property assessment computer services as follows:

1. Appraise all newly constructed buildings and check major remodeling of real property as reported through building permits for the above-mentioned assessment year. New construction changes will be drawn and provided in an electronic format for the electronic property card.
2. Respond to all taxpayer and public inquiries within 24 hours. Grant all inspections requested by property owners and/or the Board of Review.
3. If the City elects Option B in the Fee Proposal, Assessor will perform an Interim Market Update in the year chosen by the City. If the City elects Option C in the Fee Proposal, Assessor will perform a Full Revaluation in the year chosen by the City.
4. If the City elects the Office Hours Option in the Fee Proposal, Assessor will perform office hours from 8:00 a.m. to 3:00 p.m. on the 4<sup>th</sup> Wednesday of each month at City Hall.
5. Assessor agrees to hold City harmless and indemnify the City against loss for all injuries/damages Assessor may sustain or receive while on duty in the performance of their job. Assessor shall provide their own Worker's Compensation and General Liability Insurance and provide proof to City upon request.
6. Transfer returns will be posted and returned to the Department of Revenue and assessed value complaints will be answered.

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7. Reappraise land values where property has been divided or where significant changes in value are indicated by recent sales of property or by owner request. Reassess agricultural use parcels per determined use value annually as required by Department of Revenue.
8. Maintain computer information and provide software to adequately track and maintain assessment valuation information utilizing the *Wisconsin Property Assessment Manual*.
9. Make a thorough search of all locally assessed personal property accounts and enter the same into a computer database accessible to City to adequately track and maintain valuation information. Prepare and mail personal property blotters from a list supplied by the City and updated by the assessor's search of the accounts to be appraised. Analyze the information returned on the personal property blotters which have been sent out to merchants in order that a personal property assessment may be made.
10. Enter real estate and personal property assessments into the local assessment roll database so that it may be submitted to the Board of Review. Said database shall be accessible by City and enable the property to be located by the situs address.
11. Fill out and file Municipal Assessment Report and Annual Assessment Report for the Department of Revenue as required by law.
12. In each year attend Open Book session/s and attend all Board of Review meetings to assist the Board in its proceedings and attend any subsequent legal action to defend the appraised value. The Board of Review meetings shall be completed no later than June 30<sup>th</sup> for regular maintenance years and September 30<sup>th</sup> for an interim market update year or a full revaluation year.
13. Maintain minimum certification to perform duties of assessor.
14. Maintain digital photographs of each major improvement located in the City. Costs associated with this requirement are specifically included in this contract.
15. Provide all expenses incurred during the contract, such as postage, supplies, phone calls, etc. at no additional cost to the City.
16. Update existing property assessment data and provide property assessment software to meet the compliance standards of the Department of Revenue. The Assessor will maintain a software license to utilize Market Drive CAMA software. All fees for such software are specifically included in this contract.
17. Assessor shall meet all electronic records as required by law.

18. Assessor shall consider the cost approach, sales comparison approach and income approach in the valuation of all land and improvements, where applicable.
19. All photographs, documents and working papers generated or otherwise obtained under this contract shall be and remain the property of the City. Upon expiration or termination of this contract, Assessor shall promptly deliver to the City all such items.
20. Assessor will work with the City to better inform the public about the assessment process and to promote strong public relations throughout all areas of the assessment cycle.
21. All costs to convert property record data from the previous assessment software into Market Drive are specifically included in this contract.

**TERM**

This agreement shall be for a term commencing on the 1<sup>st</sup> day of January 2020 until the 31<sup>st</sup> day of December 2022. Work will commence with the mailing of personal property blotters and be completed after the final adjournment of Board of Review or appeals of Board of Review decisions have been concluded. Either party may void this agreement with 60-day written notice.

**FEE PROPOSAL**

<b>Contract Proposal</b>	<b>2020 Assessment Year</b>	<b>2021 Assessment Year</b>	<b>2022 Assessment Year</b>
<b>Option A: Maintenance</b>	<b>\$6,000</b>	<b>\$6,000</b>	<b>\$6,000</b>
<b>Option B: Blend of 2 Years Maintenance &amp; 1 Year Market Update (Only Maintenance Inspections Completed)</b>	<b>\$11,000</b>	<b>\$11,000</b>	<b>\$11,000</b>
<b>Option C: Blend of 2 Years Maintenance &amp; 1 Year Full Revaluation (All Properties Physically Inspected)</b>	<b>\$17,800</b>	<b>\$17,800</b>	<b>\$17,800</b>
<b>Office Hours Option: 7 Hours of Monthly Office Hours (Add-on Service to Options A-C)</b>	<b>\$1,600</b>	<b>\$1,600</b>	<b>\$1,600</b>

#### **INVOICE PROCEDURE**

The compensation due to Assessor shall be paid in equal monthly installments throughout the 2020, 2021 and 2022 assessment years. The monthly installment amount is dependent on which assessment option has been chosen by the City.

#### **OBLIGATIONS OF CITY**

The City shall provide Assessor with adequate space at City Hall at no cost to Assessor.

#### **RECORDS**

Assessor agrees to provide electronic property records to City each year.

#### **REVALUATION/MARKET UPDATE TIMELINE**

Early January: Check status of new construction from the previous year.

February: Set Open Book and Board of Review dates with Clerk.

March-July: Field work will be completed, and assessment notices will be mailed out. The preliminary assessment roll will be delivered to the Clerk.

August: Open Book will be held.

September: Board of Review will be completed prior to September 30<sup>th</sup>.

- Open Book and Board of Review dates are adjustable.

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**ASSESSOR:**

Dated: 11/14/19

Heather Wolf

Heather Wolf, Sole Member  
Milde Appraisal Service LLC

**CITY OF LODI:**

Dated: 11/13/2019

James W. Nese  
Mayor

Dated: 11/13/2019

Bruce Collins  
City Clerk

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1.4 Current Client List

Municipality	Type	Work Type	County	Acquired	Contact	Phone #
Onalaska	City	Maintenance/Interim Market Update/Full Revaluation	La Crosse	2001	Fred Buehler	(608) 781-9530
Tomah	City	Maintenance/Full Revaluation	Monroe	1995	JoAnn Cram	(608) 374-7426
Bangor	Village	Maintenance/Full Revaluation	La Crosse	1995	Jeri Wittmershaus	(608) 486-4084
Rockland	Village	Maintenance/Full Revaluation	La Crosse	1995	Stephanie Rowell	(608) 486-4037
Medary	Town	Maintenance/Full Revaluation	La Crosse	1993	Linda Seidel	(608) 781-2275
Dayton	Town	Maintenance	Richland	1984	Richard Wastlick	(608) 647-2682
Scott	Town	Maintenance	Crawford	1985	Wayne Jarrett Jr	(608) 872-2129