



REQUEST FOR PROPOSAL
2026-2028 ASSESSMENT SERVICES
VILLAGE OF WESTON, WISCONSIN

KEY DATES:

Questions Due:	September 26, 2025
Proposal Due:	4:00 p.m. October 10, 2025
Expected Contract Award Date:	October 20, 2025
Effective Date:	January 1, 2026

Purpose of Document

The Village of Weston is requesting proposals (RFP's) from qualified assessment firms/individuals to provide annual assessment services for the Village of Weston, Wisconsin (hereafter, referred to as "Village") for the years 2026 through 2028. The Village is seeking a firm/individual to serve as its statutory assessor and to provide annual maintenance work in a competent, timely, efficient, and cost effective and customer service-oriented manner.

Background Information

The Village has an approximate population of 15,809, and is located in Marathon County, WI. The 2024 Equalized Value (including manufacturing and TID) for the Village is \$1,751,733,000. The 2024 Assessed Value (including manufacturing and TID) is \$1,755,747,700. The assessment ratio for 2024 is 1.002263001. The Village has two active Tax Incremental Financing Districts.

The Village has the following parcel counts (from 2024 Statement of Assessment):

	<u>Total Land</u>	<u>Improvements</u>	<u>Total Acres</u>
Residential	4,599	4,325	3,324
Commercial	592	457	1,547
Manufacturing	40	39	299
Agricultural	71	71	1,156
Undeveloped	141	141	1,391
Agricultural Forest	37	37	512
Forest Lands	116	116	1,782
Other	10	10	22
TOTAL	<u>5,606</u>	<u>4,831</u>	<u>10,033</u>

In addition, there are three mobile home parks located in the Village, with a total of approximately 455 home sites.

A Village-wide market revaluation was completed in 2024. The Village is not anticipating a revaluation in the next three years.

Due Date of Proposal

Proposals are due to the Finance Department by 4:00 PM, October 10, 2025, both electronic and paper proposals are accepted.

Finance Department
Village of Weston
4747 Camp Phillips Road
Weston, WI 54476
jtrautman@westonwi.gov

Proposals received after the above date and time will not be considered.

Questions/Surveying Premises

Questions regarding desired services or general operations are to be directed to:

Jessica Trautman
Finance Director
Village of Weston
4747 Camp Phillips Road
Weston, WI 54476

Phone: (715) 241-2605
Email: jtrautman@westonwi.gov

Key Dates

The following is a list of key dates up to and including the date proposals are due to be submitted:

Due date for proposals:	October 10, 2025 (4:00 PM)
Expected contract award date:	October 20, 2025
Selected firm notified (anticipated):	October 21, 2025
Coverage beginning date:	January 1, 2026

SPECIFIC SERVICES REQUIRED – ASSESSMENT SERVICES

1. The assessor will perform all of the work required to properly and professionally assess the real property of the Village in accordance with applicable Wisconsin State Statutes and in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue.
2. The assessor shall plan on scheduling regular office hours at the Village municipal center after assessment notices are sent out, during the open book review, and prior to the Board of Review. In addition, the assessor may be required to attend Village meetings as requested.
3. The assessor shall oversee and assist in all assessment related clerical duties including:
 - Answering routine telephone calls for assessment data
 - Walk-in requests for assessment data
 - Scheduling assessment-related appointments
 - Providing copies of all assessment-related open records requests
 - Preparing appointment mailers, stuffing envelopes and mailing all notices
 - Filing of all assessment property records cards and any other assessment-related records
 - Updating assessment data based upon building permits
 - Providing the Village Clerk updated, accurate, and timely assessment data for all required filings with the State of Wisconsin
 - All assessment data entry
4. The assessor shall provide a local or toll-free telephone number and email address for Village staff and Village residents to contact the assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
5. The assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
6. The assessor will review and assess new construction as of January 1st of the current year.
7. The assessor will review and assess interior inspections on all newly constructed homes, partially constructed homes from the previous year, and any interior remodeling including kitchen, bath, basement remodeling, and additions.
8. The assessor will review and assess all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning, and other miscellaneous permits.

9. The assessor will review and assess properties that have been sold, for which a building permit has not been issued.
10. The assessor will review and assess buildings moved, destroyed, or demolished.
11. The assessor will review and assess agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
12. The assessor will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
13. The assessor will post assessments to real estate transfer returns and record sales information to property record cards electronically.
14. The assessor will annually update all property owner information with new legal descriptions electronically.
15. The assessor will maintain plat and section/cadastral maps on file and updating yearly, as provided by the Marathon County Register of Deeds/Property Description office.
16. The assessor will mail Notice of Assessment letters to property owners and others as required by State Statutes.
17. The assessor will conduct open book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare a written statement regarding open book dates, times, and instructions on how to set up an appointment for an open book session, at least fifteen (15) days prior to the first open book session. The assessor shall notify the Village Clerk for publication prior to open book.
18. The assessor will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to May of each year. The Board of Review meeting shall then be held within 30 days after the second Monday in May. The assessor shall work with the Village Clerk to arrange for the hearings. The assessor will attend the Board of Review hearings, serve as Village staff at the hearings, and defend the assessor's valuations and work products. The assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved. In the event of an appeal to the courts, it is agreed that the assessor will be available to furnish expert testimony in defense of any of the assessed values.
19. The assessor will be responsible for providing the Wisconsin Department of Revenue (WDOR) with final reports as required by the WDOR.
20. The assessor will review and assess all mobile homes as required by law each year. The assessor shall view each mobile home in the three mobile home parks, re-photo as necessary, verify ownership of each unit with park owner/manager, prepare new billing forms and extend taxes on same calculating with and without lottery credit. The final reports for the mobile home parks shall be delivered to the Village Clerk by January 31st each year.
21. The assessor will create new property records for all parcels including those created from parcel splits and new plats and take digital pictures of all new parcels. The assessor will handle splits of property for the annual assessment roll.

22. The assessor will handle splits of property for the annual property tax bills, when requested by Village taxpayers or the Village Finance Director.
23. The assessor will assist in the coordination with the Marathon County Register of Deeds/Property Description office to facilitate the digital and manual transfer of data and values.
24. The assessor shall assist in the updating of market values on Village-owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation, and to establish lease values.
25. The assessor shall also perform all other duties incidental to the normal duties of the assessor.
26. All assessment files and records created and data collected by the assessor shall remain the property of the Village. Records shall not be removed from Village premises without the written permission of the Village.
27. The assessor will assist the Village Administrator, Village Finance Director, and/or Village Clerk in supplying statistical information, as needed.
28. The assessor will notify the Village's Building Inspector of missing building permits or apparent errors in property record files.
29. The assessor shall communicate openly and in a timely manner with proper Village personnel and the public regarding assessment matters. The assessor is encouraged to interface with the business and residential community and the media to provide greater clarity of the assessor's role in the property taxation and valuation process.
30. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with Village staff and the public.
31. All assessment personnel shall carry proper photo identification provided by the Village to assure the public of their identity and purpose for gaining access to private property.
32. The assessor is not permitted to assign, subcontract, or transfer the work without the written permission of the Village.
33. All personnel providing services requiring Wisconsin Department of Revenue Certificates shall be currently certified in compliance with Wisconsin Statute 70 and Administrative Rules of the Wisconsin Department of Revenue.
34. The assessor will provide and update the Village with a listing of all personnel assigned to work on the Village
35. The assessor shall review any complaint relative to the conduct of his/her employee(s). If the Village deems the performance of any of the assessor's employees to be unsatisfactory, the assessor shall remove, for good cause, such employee(s) from working for the Village upon written request from the Village, such request stating reasons for removal.
36. The assessor shall maintain insurance coverage to protect against claims, demands, actions, and causes of action arising from any act, error, or omission of the assessor, their agents and employees in the execution of work.

37. The assessor agrees to carry proper and sufficient insurance to cover loss of the Village's records, as well as assessor's records in process under this agreement, which are in possession of the assessor. The assessor shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the Village.
38. The assessor shall be responsible for the proper completion of the assessment roll in accordance with Wisconsin state law. Final assessment figures for each property shall be provided by the assessor to the Marathon County Register of Deeds/Property Description office. All necessary measures and cooperation shall be exercised to balance said roll between the county and assessor. The assessor shall prepare and submit the Municipal Assessment Report (MAR) and the TID Assessment Reports (TAR) to the Department of Revenue in a timely manner.
39. It is the responsibility of the Assessor to produce and present the Annual Assessment Report (AAR) as required by the Wisconsin Department of Revenue. The assessor should follow Uniform Standards of Professional Appraisal Practice (USPAP) standards in documenting the assessment work in the AAR.
40. All residential, commercial, agricultural, and mobile home park, data shall be maintained in electronic format at the Weston Municipal Center as required by the Wisconsin Department of Revenue

ASSESSMENT SOFTWARE

The Village of Weston uses Market Drive assessment software. All of the initial setup work has been completed (names, addresses, current and prior assessment values and class, and sales data). The Village would prefer the assessor to use and maintain assessment data in the current software system but can be flexible.

VILLAGE OBLIGATIONS

1. The Village will perform limited clerical services to assist the assessor, including the following:
 - Answering the telephone
 - Greeting and assisting the public in researching property information and requests for assessment data
 - Answering general correspondence concerning assessment related inquiries that Village staff can answer
 - Providing information to the taxpayers as to how to contact the assessor by mail, fax, email, or telephone
2. The Village shall furnish adequate space at the Village Municipal Center at no cost to the assessor. Office space may include desks, tables, chairs, file cabinets, computer, printer, copier, fax machine, heating, lighting, telephone, and janitorial services.
3. The Village shall allow access by the assessor to Village records including, but not limited to, prior assessment rolls, sewer and water layouts, building permits, tax records, building plans, records of special assessments, plats or any other maps and property files at no cost.
4. The Village shall furnish a current Village map including lot sizes, parcel numbers and addresses.
5. The Village shall aid the assessor with a reasonable promotion of public information concerning

the work under this agreement.

6. The Village shall publish public notices at appropriate times during the assessment and/or revaluation process.
7. The Village Board and its members shall refrain from interfering with or influencing any valuation calculated by the assessor.

GENERAL PROPOSAL REQUIREMENTS

All proposals must identify the individual/firm name, address, and specific assessment services experience in Wisconsin.

The proposal shall identify at least three (3) references from Wisconsin municipal clients for which the assessor has provided assessment services,

The proposal shall include the total annual compensation rate to provide the assessment services described in the above in accordance with the laws of the State of Wisconsin for assessment years 2026, 2027, and 2028 beginning January 1, 2026. It shall clearly list the fee for each year of the proposed contract years, a not-to-exceed sum, to include all the assessor's costs including, but not limited to: labor, materials, supplies, equipment, transportation costs, meals, lodging, computer software, and Board of Review expenses. The Village will pay the annual compensation pro-rata on a quarterly basis..

The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the RFP and is the most advantageous to the Village of Weston.

EVALUATION CRITERIA

The following evaluation criteria will be used to review the Assessment Services Proposals that are received and which meet the RFP specifications requirements:

- Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the Village of Weston.
- Past experience with providing assessment and revaluation services.
- Cost of Assessment Services.
- Evidence of positive customer interaction.

FINAL SELECTION

The Village Board will select an assessment firm based upon the recommendation of the finance/human resource committee. It is anticipated that a firm will be selected on October 20, 2025.

RIGHT TO REJECT PROPOSALS

By responding to this RFP, an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the Village is binding and without appeal.

The Village reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities, if deemed in the best interests of the Village. In addition, the Village reserves the

right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty.

The Village reserves the right to accept the proposal considered most advantageous to the Village, which, in its opinion, meets the specifications of the RFP regardless of whether or not the terms are the lowest cost.

All respondents accept the preceding terms and procedures in submitting a proposal.