

**Town of Burlington,
Wisconsin**

Request for Proposals

Assessment Services

Issue Date: June 2, 2025

Due Date & Time: June 27, 2025
at 3:00 PM Central Time

Town of Burlington
Attn: Rachel Naber, Administrator/Treasurer
32288 Bushnell Rd
Burlington, WI 53105
rachel.naber@townofburlingtonwi.gov

I. Introduction

The Town of Burlington is requesting proposals from qualified assessment firms (“Assessor”) to perform the duties of Assessor for the Town of Burlington, Wisconsin (hereafter, referred to as “Town”) for the years 2026-2028. The Town is seeking a firm to serve as its statutory assessor to include three years of assessment maintenance and one market update revaluation in a competent, timely, efficient, and cost effective and customer service-oriented manner.

The Town reserves the right to revise any part of this RFP by issuing an addendum at any time prior to the submittal deadline. The Town reserves the right to accept or reject, in whole or part, all proposals submitted and/or to cancel this announcement if any such action is determined to be in the Town’s best interest. All materials submitted in response to this RFP become the property of the Town. The Town will not be responsible for costs associated with preparing proposals. By submitting a proposal, each Assessor agrees to be bound in this respect and waives all claims regarding such costs and fees.

II. Town Background

The Town of Burlington, in Racine County, has an estimated 2024 population of 6,465. The 2024 Equalized Value (including manufacturing) for the Town is \$1,223,052,700. The Town has no active Tax Incremental Financing Districts. The assessment ratio for 2024 was approximately 85.68%. The Town has the following parcel counts (2024 Statement of Assessment):

	Parcels	Improved
Residential	3168	2862
Commercial	77	61
Manufacturing	0	0
Agricultural	322	
Undeveloped	311	
Ag Forest	160	
Forest Lands	58	
All Others	69	69
Total	4165	2992

There are approximately 205 tax exempt parcels within the Town. The last full, Town-wide revaluation was completed in 2022.

III. Anticipated Scope of Assessment Services Work

The selected assessor shall be the statutory assessor for the Town of Burlington and complete in a professional manner all work required under this proposal in accordance with WI State Statutes. The selected assessor shall complete the assessment work of all taxable real and personal property within the Town for 2026, 2027, and 2028 assessment rolls to include assessment maintenance services and one market update revaluation.

The Town is open to recommendations and alternative options to the scope. This may include multiple alternatives, as long as each alternative also includes a cost estimate as an option. These options should be called out separately and have a separate cost associated with each one.

A. Specific Assessor Services Required

1. Assessor will perform all work required to properly and professionally assess real and personal property of the Town in accordance with applicable WI State Statutes and all rules and regulations officially adopted by the WI Department of Revenue. The Assessor shall designate a qualified and responsible employee to supervise the operation of the Assessor's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. Should the supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the Town.
2. The Assessor shall report to and be accountable to the Town Administrator or his/her designee. The Town reserves the right to inspect the data and progress of the work performed at any time without limitation.
3. The Assessor shall maintain a local or toll-free telephone number and an email address for Town Officials and property owners to contact the Assessor during regular business hours. The Assessor shall respond to telephone and email inquiries within one business day.
4. Assessor will field review new construction properties, remodeling and additions. Assessor will take digital photographs of new construction on or about January 1 annually. Assessor will field review as deemed necessary sale properties and properties for which no building permit has been issued. Field reviews may only take place Monday through Friday between 8 am and 6 pm. Assessor personnel must carry photo ID during field review work.
5. Assessor will be diligent in discovering and assessing all personal property. Assessor will mail State approved Personal Property Forms to all holders of personal property in the Town by January 15 of each year, audit the returned forms, and place the new values in the assessment roll. The Assessor shall provide a doomage listing to the Administrator or his/her designee prior to the Open Book review.
6. Assessor will account for all buildings destroyed or demolished.
7. Assessor will implement use value assessments of agricultural lands per specifications set forth by the WI Department of Revenue.
8. Assessor will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
9. Assessor will maintain and annually update property owner lists with current name and address changes.
10. Assessor will post assessments to real estate transfer returns and record sale information to property record cards electronically.
11. Assessor will electronically update all property owner record cards with new legal descriptions on at least an annual basis.
12. Assessor will mail Notice of Assessment to property owners and others as required by State Statutes.
13. Assessor will conduct Open Book sessions in accordance with WI State Statutes.

14. 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. Board of Review hearings shall be held within 45 days of the fourth Monday in April during maintenance years. Alternative dates may be allowed with during a revaluation year. The Assessor shall work with the Town Administrator to arrange for the hearings. The Assessor will attend the Board of Review hearings, serve as Town staff at the hearings and defend the 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.
15. Assessor shall update the assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
16. Assessor will be responsible for providing the WI Department of Revenue with Open Book and BOR dates, complete forms and final reports as required by the DOR.
17. Assessor will coordinate with the Dane County Real Property Listing offices to facilitate the digital and manual transfer of data and values.
18. Assessor will place property assessment records on the web for access to the public.
19. Assessor shall also collaborate with Town staff to perform all other duties incidental to the normal duties of the assessor, including, but not limited to, coordinating payments in lieu of tax and a top taxpayer report with the Administrator, tracking omitted property values for future rolls, work associated with ag use conversion notices, municipal boundary agreements and cooperating with/coordinating responses to requests for open records.
20. All assessment files and records created, and data collected by the Assessor shall remain the property of the Town. Records shall not be removed from Town premises without the written permission of the Town.
21. All records shall be converted to and stored in a digital format.
22. Assessor shall be available to attend, upon the request of the Chair, or other department head, other prescribed meetings upon reasonable prior notice.
23. Assessor shall communicate openly and in a timely manner with proper Town personnel and the public regarding assessment matters.
24. Assessor is not permitted to assign, subcontract, or transfer the work without the written permission of the Town.
25. All Assessor personnel providing services requiring WI Department of Revenue Certificates shall be currently certified in compliance with WI Statute 70 and Administrative Rules of the WI Department of Revenue.
26. Assessor shall maintain professional liability 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. Further, the Assessor shall be responsible for any and all of their agents while performing acts under the terms of this contract. The successful Assessor will be required to provide

proof of required insurance coverage, naming the Town as an additional insured, to the Town Administrator prior to the start of work. The minimum requirements include at least \$2,000,000 general liability on an occurrence basis, evidence of automobile liability, and statutory workers compensation.

27. Assessor agrees to carry proper and sufficient insurance to cover loss of the Town's records, as well as Assessor's records in the process under this agreement which is in the possession of the Assessor. The Assessor shall not be responsible for the loss of records accidentally destroyed by fire, theft or Act of God while kept in office supplied by the Town.
28. Assessor shall be responsible for the proper completion of the assessment roll in accordance with State law. Final assessment figures for each property shall be provided by the Assessor to Dane County in the appropriate electronic format, and the roll shall be totaled to exact balance between the County and the Assessor. The Assessor shall prepare and submit the Municipal Assessment Report (MAR) to the Department of Revenue in a timely manner.
29. Assessor shall ensure that employees maintain strict confidentiality regarding all privileged information received by reason of this contract. Disclosure of this or any appraisal information to any individual, firm, or corporation other than appropriate public officials or their authorized agents is expressly prohibited.
30. Materials and supplies, other than standard office supplies and postage identified below as Town Obligations, necessary to perform the duties of the contract shall be the responsibility of the Assessor.
31. Assessor shall assist with the Town Attorney and the Town's outside legal counsel with any legal challenges to property values, including claims for excessive assessment.
32. The successful Assessor shall be required to execute a contract with the Town that incorporates the information included in this RFP.

B. Town Obligations

1. With guidance and support from the Assessor, Town staff shall publish required notices with the local media. This applies to Open Book and any other required notices.
2. The Town shall allow access by the Assessor to Town 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.
3. The Town shall aid the Assessor with a reasonable promotion of public information concerning the work under this agreement.

IV. Proposal Requirements

Proposals should be organized in the following order and contain all of the following information:

1. **Firm and Contact Information:** Identify the firm name and address. Provide the name(s) of the person(s) authorized to make representations for your firm, their title, address, email address, and telephone number(s). If different, also provide the name, title, address, email address, and telephone number of the qualified and responsible individual that will be designated as the key contact person and that will supervise the operation of the Assessor's staff for the entire contract period.
2. **Individual Qualifications:** Include the names, educational background, municipal assessment experience, and current WI Department of Revenue certification level, of the person or persons to be assigned to perform the Scope of Work.
3. **Firm Qualifications:** Include with your proposal a summary of the firm's experience that identifies the following for Wisconsin municipalities for which your firm currently provides assessment services:
 - a. Name of municipality
 - b. Population
 - c. Equalized value
 - d. Total parcel count
4. **Assessor Service Cost:** State the total annual compensation rate to provide the services described in the above Scope of Work and in accordance with the laws of the State of WI for assessment years 2026-2028 beginning not later than January 1, 2026. The Town will pay installments as invoiced based on the percentage of work completed. Clearly, list the fee for each year of the proposed contract in a not-to-exceed sum including all of the Assessor's costs, but not necessarily limited to: labor, materials, supplies, equipment, transportation, meals, lodging, computer software, and Board of Review expenses. All expense reimbursements will be the responsibility of the firm.

Software: Describe the software to be utilized for property records, including the level of accessibility to Town staff and any additional fees related to software.

5. **References:** Identify references and provide contact information for at least five references from Wisconsin municipal clients. References should be of a size similar to the Town of Burlington for which the firm and the person/persons to be assigned as the Town's point of contact for the work to be performed and has provided assessment and/or revaluation services with the past two (2) years.
6. **Submittal Requirements:** Proposals must be received by the Town of Burlington by 3:00 pm on June 27, 2025. Submissions are to be made in paper form with at least one electronic copy via email to rachel.naber@townofburlingtonwi.gov

V. Selection Criteria and Process

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 Town of Burlington considering experience, price, and other factors. The Town reserves the right to accept or reject any and all proposals received.

Following initial review of the proposals, the Town Board will determine whether interviews are needed, or it may make a selection based on the proposals alone. The following is the anticipated schedule for Assessor selection but is subject to change.

Submittal Deadline	June 27, 2025
Staff Review Begins	June 30, 2025
Consideration/Possible Award by Board	July 10, 2025

All questions shall be submitted in written form to the contact information provided below. Answers will then be provided, via the Town website, in written form as a part of an addendum to this RFP. No pre-proposal meeting is anticipated at this time but can be added to the schedule if deemed necessary by the Town.

Town of Burlington
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