



City of Verona

FINANCE COMMITTEE
MONDAY, APRIL 25, 2022 – 6:30 P.M.
VERONA CITY CENTER-Conference Room D110
111 LINCOLN STREET

AGENDA

1. Call to order.
2. Roll call
3. Discussion and Possible Action re: Recommended Approval of the April 11, 2022 Finance Committee Minutes
4. Discussion and Possible Action re: Recommending to the City Council regarding the Assessment Contract from Associated Appraisal Consultants, Inc. for 2023-2027
5. Discussion and Possible Action re: Payment of Bills
6. Adjournment

Chairperson Chad Kemp

POSTED: Verona City Hall
Verona Public Library
Miller's Market
City Web Page at www.ci.verona.wi.us

4/22/2022

Notice is hereby given that a quorum of the members of the City Council or other standing committees of the City Council may be present at the meeting of the Finance Committee to gather information about a subject over which they have decision-making responsibility. The City Council and any other standing committees will not take formal action at this meeting

IF YOU NEED AN INTERPRETER, MATERIALS IN ALTERNATIVE FORMATS, OR OTHER ACCOMMODATION TO ACCESS THE MEETINGS, PLEASE CONTACT THE CITY CLERK AT 845-6495 AT LEAST 48 HOURS PRECEDING THE MEETING. EVERY REASONABLE EFFORT WILL BE MADE TO ACCOMMODATE YOUR REQUEST.



City of Verona

Finance Committee
City Hall – 111 Lincoln Street
Verona, WI 53593-1520

MINUTES
FINANCE COMMITTEE
APRIL 11, 2022

The meeting was called to order by Chairperson Chad Kemp at 6:30 p.m.

Roll Call: Chairperson Chad Kemp, Alder Kate Cronin and Alder Christine Posey were present.

Also present: Mayor Luke Diaz, City Administrator Adam Sayre, Finance Director Brian Lamers and Matt Slowinski from DANA Investment Advisors

Presentation by DANA Investment Advisors regarding the City's Investment: Matt Slowinski went over the handout that was included in the packet regarding the City's Investments.

Discussion and Possible Action regarding approval of March 14, 2022, Finance Committee minutes: Motion was made by Cronin, seconded by Posey to approve the March 14, 2022, Finance Committee minutes with no changes noted. Motion carried 3-0.

Discussion and Possible Action regarding the City Investment Report-March 2022: Lamers stated that the increase was due to receiving the 2022 bonds for \$5 million which will get paid out in June to refund the 2014 bonding.

Discussion and Possible Action regarding the Revenue and Expenditure Summary Report-March 2022: Lamers stated the main concerns are interest revenue and cost of goods going up which may impact budgets.

Discussion and Possible Action regarding the payment of bills: Motion was made by Kemp, seconded by Cronin to approve the payment of bills totaling \$1,138,326.36. Motion carried 3-0.

Adjournment: Motion was made by Cronin, seconded by Posey to adjourn the Finance Committee Meeting at 6:40 p.m. Motion carried 3-0.

Respectfully submitted,
Brian Lamers CPA
Finance Director

**CONTRACT FOR
MAINTENANCE
ASSESSMENT SERVICES**

Prepared for the
City of Verona
Dane County

By

***Associated Appraisal
Consultants, Inc.***



**Appleton Office
W6237 Neubert Rd. | P.O. Box 291
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Lake Geneva Office
Walworth County
Lake Geneva, WI 53147

Ironwood, Michigan Office
Ironwood, MI 4993

Hurley Office
Iron County
Hurley, WI 54534

CONTRACT FOR MAINTENANCE ASSESSMENT SERVICES

This Contract is by and between the **City of Verona, Dane County, State of Wisconsin**, a municipal corporation (hereafter "Municipality and or City") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter "Assessor") as follows:

I. SCOPE OF SERVICES. All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the *Wisconsin Property Assessment Manual* and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this Contract and any amendments thereto. The terms and conditions included in the Specific Services Required attached hereto as Exhibit D are incorporated herein, are made a part of this Contract, and shall be services performed under the base compensation for this Contract identified in Section IV.A. This Contract is being provided under the assumption all property records are in a digital format. Digital property records include digital photographs, sketches and property record data compliant with Wisconsin Department of Revenue mandates. In the event the records are not digital, there shall be an additional cost for conversion and or collection of the required property data. Additional scope of services performed by the Assessor are further described in Appendix A, and Appendix B that are attached hereto and incorporated herein by reference.

INSPECTIONS. The following inspection cycle is to be completed by the Assessor annually:

- 1) New construction, annexed properties, and properties with a change in exemption status shall be physically inspected, and the property record card prepared or updated as needed.
- 2) Properties affected by building removal, fire, significant remodeling (those requiring a building permit), or other major condition changes shall be physically inspected.
- 3) Improved properties under construction over a period of years shall be re-inspected.
- 4) All sales properties, legal description changes, and zoning changes shall be reviewed and inspected if deemed necessary to ensure a fair assessment.
- 5) Requests for review by property owners, made after the close of the municipal Board of Review, and prior to signing the affidavit for the next assessment roll, shall be physically inspected during the current assessment cycle.
- 6) A classification review shall be conducted annually to determine eligibility for agricultural use value assessment and the assessment of agricultural forestland and undeveloped land.

A. PARCEL IDENTIFICATION. The legal description and size of each land parcel shall be contained in the existing property records. The drawings and measurements of each primary improvement shall be contained in the existing property records. For all new records, the Assessor shall provide digital drawings and digital photographs of each primary improvement. In the event of a discrepancy found in existing records, the Assessor shall investigate and correct the record.

B. PREPARATION OF RECORDS. Appropriate records shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and agricultural improvements. All information relating to the improvements shall be obtained and shown as provided on the respective forms. The Assessor shall supply to the Municipality a complete set of

property records in a computer readable format compatible with the Municipality's computer system and update records within fourteen (14) days of final adjournment of the Board of Review. Records shall be updated prior to open book and again to reflect any changes made at Board of Review.

C. **APPROACH TO VALUE.** Assessor shall assess all taxable real estate according to market value, as established by professionally acceptable appraisal practices, except where otherwise provided by law. Assessor shall consider the sales comparison approach, the cost approach and the income approach in the valuation of all property.

- 1) **Sales Comparison Approach.** Assessor will collect, compile and analyze all available sales data for the Municipality in order to become familiar with the prevailing market conditions and activity. A detailed analysis of sales data will be prepared, including a picture book of recent residential and agricultural sales. Vacant land sales will also be compiled and analyzed. In valuing property by the sales comparison approach, subject properties will be appraised through a detailed comparison to similar properties that have recently sold, making careful consideration of similarities and differences between the subject and comparable sale properties.
- 2) **Cost Approach.** The cost approach to value will be considered for all taxable improved property. Replacement costs for residential and agricultural improvements will be calculated per Volume II of the *Wisconsin Property Assessment Manual*. Replacement costs for commercial improvements will be calculated using Marshall & Swift valuation service. All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence will be accurately documented and deducted from current replacement costs.
- 3) **Income Approach.** Consideration of the income approach to value will be made when the income or potential income generated by the real estate is deemed likely to affect the property's resale value. Data to be analyzed will include economic rents, typical vacancy rates and typical operation expense ratios. In the valuation of property by the income approach, adequate records will be prepared, showing a reconstruction of income and expenses, as well as all calculations used to arrive at market value, including formulas and capitalization rates as appropriate to the type of property being appraised.

D. **OPEN BOOK CONFERENCE.** Upon completion of the Assessor's review of assessments and prior to completion of the assessment roll, the Assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values. The Assessor shall mail a notice of assessment for each taxable parcel of property whose assessed value has changed from the previous year. The notice form used shall be that prescribed by the Department of Revenue, and include the time and place the open book conference(s) will be held. Mailing shall not be less than fifteen days prior to the first day of the conference for the convenience of property owners. The Assessor shall take the phone calls to schedule appointments for the open book conference as needed. The assessor shall be present at the open book conference for a time sufficient to meet with the property owners or their agents and shall be present at least two hours or as needed. Assessor shall provide the necessary staff to handle the projected attendance.

E. **COMPLETION OF ASSESSMENT ROLL AND REPORTS.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the *Wisconsin Property Assessment Manual* and any amendments thereto. The Assessor shall provide final assessment figures for each property to the Municipality, and the roll shall be totaled to exact balance. Assessor shall prepare and submit all reports required of the Assessor by the

Wisconsin Department of Revenue including: Municipal Assessment Report (MAR) with integrated Tax Incremental District Assessment Report (TAR). MAR and TAR reports shall be discussed during quarterly conference call(s) or meeting(s) with Municipality staff and sent to the Municipality Finance Director for approval before submission to the State. Assessor shall follow the Uniform Standards of Professional Appraisal Practice (USPAP) as required by the Wisconsin Property Assessment Manual; postage is at the Assessor's expense.

F. BOARD OF REVIEW ATTENDANCE. Assessor shall attend all hearings of the Municipal Board of Review to explain and defend the assessed value and be prepared to testify under oath regarding the values determined. In the event of appeal to the Wisconsin Department of Revenue or a Circuit Court, Assessor shall be available upon request of Municipality to furnish testimony in defense of the values determined for up to eight employee hours per parcel. Testimony in excess of eight employee hours will require an addendum to this Contract. Assessor shall arrange and provide the Personal Property and Real Estate Assessment Roll for viewing by the public as prescribed in Chapter 5 of the Wisconsin Property Assessment Manual, as amended each year, and adhere to any county or Municipality business requirements as prescribed under Wis. Stat. § 70.09(3)(c). Any outside counsel services shall be provided and paid for by the Municipality as agreed upon by both parties.

G. PERSONAL PROPERTY ASSESSMENTS. The Assessor shall prepare and distribute annual personal property statements to all businesses; postage is at the Assessor's expense. When personal property returns are not received by March 1 or an extended date allowed by Assessor for good cause, pursuant to Wis. Stat. § 70.35(3), Assessor shall give priority to these cases and may make a doomsday assessment. By May 1st each year the Assessor will review statements and follow up with un-filed or incorrect statements. The Assessor shall determine the appropriate assessment. The Assessor shall exercise particular care so that personal property as a class on the assessment roll bears the same relation to statutory value as real property as a class.

H. PUBLIC REQUESTS. If Assessor receives any request to inspect, copy, or receive copies of any records concerning property in the City, this Contract, or Assessor's work under this Contract (a "request"), Assessor shall as soon as possible, and in any event within twenty-four hours, forward a copy of the request to the City Clerk and the City Attorney, by facsimile and by email. If Assessor or the City receives a request, Assessor shall:

(a) As directed by the City Administrator or City Attorney, permit the requester to inspect and copy records or provide the requester with copies of records at a cost to the requester that shall not exceed the costs that may be charged under Wis. Stat. § 19.35(3).

(b) As directed by the City Administrator or City Attorney, if Assessor maintains property assessment records in a computer database, extract the data from the database and place it in a separate electronic file in a format approved by the City Administrator or City Attorney, at a cost to the requester that shall not exceed the costs that may be charged under Wis. Stat. § 19.35(3).

(c) Communicate with the requester only as authorized by the City Administrator or City Attorney.

(d) As directed by the City Administrator or City Attorney, refrain from permitting the requester to inspect or copy records and from providing the requester with copies of records.

(e) Indemnify, hold harmless, and defend the City from any loss, liability, cost, or expense arising from any failure by Assessor to comply with the requirements of this Paragraph 20.

In this Section, the word "record" shall have the meaning set forth in Wis. Stat. § 19.32.

I. **AVAILABILITY.** The Assessor shall maintain telephone service to receive calls from the Municipality or property owners five days a week from 8:00 a.m. to 4:30 p.m. excluding holidays and company paid time off. Internet communication is available twenty-four hours per day. The Assessor shall timely respond to all telephone inquiries within two working days or sooner. The Assessor shall copy the municipal clerk on those issues that have been raised to the clerk or board and subsequently passed on to the Assessor. Assessor shall be available to attend City meetings at the request of the Municipality for up to eight (8) hours annually not including annual assessment required meetings. Any additional meetings the Assessor shall be asked to attend beyond eight (8) hours shall be compensated at the customary rates charged by the Assessor. The Municipality and the Assessor shall discuss the cost prior to attendance.

J. **MUNICIPAL RECORDS.** The Municipality shall allow access and make available to the Assessor municipal records such as, but not limited to, previous assessment rolls and records, sewer and water layouts, permits, tax records, records of special assessments, plats, and any other maps currently in the possession of the Municipality at no cost.

K. **MAPS.** Municipality shall provide at no cost to Assessor any plat maps, zoning maps, cadastral maps, or other maps currently in the possession of the Municipality. If such maps necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County surveyor, Register of Deeds, or other sources at the Municipality's expense.

II. GENERAL REQUIREMENTS

A. **OATH OF OFFICE.** As the Assessor is a corporation, the person designated as responsible for the assessment shall take and subscribe to an oath or affirmation supporting the Constitution of the United States and to the State of Wisconsin and to faithfully perform the duties of Assessor. The oath shall conform to Section 19.01 and 62.09(1)(c), Wis. Stats. and be filed with the Municipal Clerk prior to commencing duties. Assessor shall assume the appointed office of City assessor as per Wisconsin Statutes 70.05 (1) for the duration of this Contract and shall perform all statutory duties appertaining to such office. Assessor shall not assign, subcontract or transfer the work described in this Contract, or any part thereof, without written approval from the City.

B. **INDEMNITY AND CLAIMS.** Assessor shall indemnify, hold harmless, and defend the City against claims and liabilities based on alleged intentional or negligent acts or omissions of Assessor, or its employees, agents or representatives, including, but not limited to, liability under Wis. Stat. § 70.503 and any penalties imposed by law. The City shall indemnify, hold harmless, and defend Assessor from all claims and liabilities based on an alleged excessive assessment of property or an unlawful tax, except claims and liabilities based on alleged intentional or negligent acts or omissions of Assessor, or its employees, agents or representatives.

C. **QUALIFICATIONS AND CONDUCT OF PERSONNEL.** The Assessor shall provide at its own expense any personnel necessary and shall comply with the following:

- 1) All personnel providing services shall be currently certified in compliance with Sec. 70.05 and 73.09, Wis. Stats. and the administrative rules prescribed by the Wisconsin Department of Revenue.
- 2) Assessor's field representatives shall carry photo identification cards.

- 3) All employees, agents, or representatives of the Assessor shall conduct themselves in a safe, sober, and courteous manner while performing services within the Municipality.
- 4) The Assessor shall review any complaint relative to the conduct of the Assessor's employees and take appropriate corrective action. If the Municipality deems the performance of any of Assessor's employees unsatisfactory, the Assessor shall, for good cause, remove such employees from work upon written request by Municipality.

D. ASSESSOR PROVIDED INSURANCE. The Assessor agrees as follows:

- 1) The Assessor shall obtain and maintain during the term of this Contract full coverage insurance to protect and hold harmless the Municipality which insurance is to include:
 - (a) Workers Compensation State of Wisconsin requirements
 - (b) General Liability

General Aggregate	\$ 2,000,000
Products/Completed Operations	\$ 1,000,000
Each Occurrence	\$ 1,000,000
Personal & Advertising	\$ 1,000,000
Fire Damage	\$ 100,000
Medical Expense	\$ 10,000
 - (c) Comprehensive Auto Liability

Combined Single Limit	\$ 1,000,000
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- 2) The Assessor shall provide the Municipality with certificates for all required insurance, with the Municipality as a named insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall timely pay all insurance premiums.
- 3) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the Assessor within the Municipality shall be assumed by that Assessor.
- 4) Assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of Assessor, its agents or employees in the execution of work. Assessor shall be responsible for any and all of its agents and employees, whether within or without the scope of employment, while performing acts under the terms of this Contract. Certificates of Insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City, listing the City of Verona as an additional insured.

E. OWNERSHIP OF RECORD. All records prepared or maintained in connection with assessments in the Municipality shall at all times be and remain the sole property of the Municipality, including (a) all records prepared in connection with assessments in the Municipality including, but not limited to property records, personal property forms, maps, and any other schedules or forms, (b) all records and materials obtained

from the municipality and not previously returned to include maps, and Assessor's records, and (c) materials specifically obtained and/or used for performance of assessment work for the Municipality, to include aerial photos, maps, depth factor tables, copies of leases, correspondence with property owners, sales data, copies of real estate transfer returns, and operating statements of income property, and (d) if the record system is computerized, at a minimum, provide that the software be able to create an exportable text file of data.

III. TERM AND TERMINATION

A. **TERM.** The term of this Contract is for the **2023, 2024, 2025, 2026 and 2027** assessment year(s). The assessor shall have completed all work under this Contract on or before July 1 of each year, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this Contract and by mutual consent.

B. **TERMINATION.** Either party may terminate this Contract at any time only with cause, cause being defined as default of the other party of terms of this Contract, by giving written notice of termination specifying the effective date of termination, which shall be at least thirty (30) days from the date the notice is given. After the term or termination of this Contract, the City shall continue to have the obligation to pay Assessor, and shall be liable to Assessor, for any of Assessor's services that were completed prior to the effective date of termination. If this Contract expires or is terminated, Assessor shall promptly deliver to the City or a successor assessor designated by the City all data related to the assessment or exemption of all property in the City. All data maintained by Assessor in digital form shall be delivered in digital form in a format approved by the City, including, if necessary, extracting the data from any software used by Assessor under this Contract. All data maintained in paper form shall be delivered by personally delivering the originals to the City or the successor assessor. Assessor shall cooperate with the successor assessor as may be necessary. The indemnification provisions contained in Section II.B. shall continue to apply to both parties after the term or termination of this Contract until any applicable statutory of limitations periods have ended.


C. **AUTOMATIC RENEWAL.** This Contract will automatically renew for successive annual assessment years unless either party, on or before July 1 of the preceding year, notifies the other party by certified mail of their desire to non-renew.

IV. COMPENSATION

- A. The Municipality shall pay the Assessor **Seventy-One Thousand Dollars (\$71,000.00)** for each of the 2023, 2024, 2025, 2026 and 2027 assessment year(s) for maintenance assessment services through December 31, 2027.
- B. The compensation due the Assessor shall be paid in monthly installments throughout the 2023, 2024, 2025, 2026 and 2027 assessment year(s).
- C. The Municipality shall not be billed for postage, mileage or supplies unless otherwise specified in this Contract and/or addenda.
- D. **Renewal Adjustments:** A cost of living adjustment of not more than three percent (3.0%) will be applied on an annual basis for each year of automatic renewal after 2027.
- E. Additional compensation that may be due to the Assessor as a result of services that are beyond the scope of this Contract will be invoiced in the month subsequent to the month in which the services were provided.

- F. **Optional Website Posting:** The Municipality shall have the option to post their assessment data on our website for no additional charge.
***** Please initial yes or no to post data to the website. *****
Yes ___ No ___

V. **SIGNATURES**



Mark Brown
President
Associated Appraisal Consultants, Inc.

02/12/2022
Date

Authorized Signature
City of Verona

Date

**APPENDIX A
ADDITIONAL SCOPE OF SERVICES**

This Appendix A is attached to and incorporated into the Contract for maintenance assessment services made by and between the **City of Verona, Dane County, State of Wisconsin**, a municipal corporation (hereafter "Municipality") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter "Assessor").

In consideration of the promises and agreements hereinafter set forth, and in consideration of the execution of those promises, both parties agree to the following:

INTERIM MARKET UPDATE REVALUATIONS

- I. **SCOPE OF SERVICES.** Assessor shall perform an interim market update revaluation for the **2024** and **2026** assessment year(s) of all taxable real estate and personal property during this additional scope of services agreement.

- II. **DURATION.** Assessor shall complete all work on or before October 30th of the year in which the revaluation service is conducted. If reasonably unforeseen circumstances outside the control of Assessor cause a delay completion of the work, the parties agree to cooperate in good faith to reach an agreement on an extension of time.

- III. **COMPENSATION**
This additional scope of services Contract runs simultaneously with the 2023-2027 Contract for Maintenance Assessment Services. The Municipality shall pay the Assessor an additional Sixty Thousand Dollars (\$60,000.00) for each interim market update revaluation. Total compensation during each revaluation year shall be **One Hundred and Thirty-One Thousand Dollars (\$131,000.00)**. If Municipality requires Assessor to send letters by certified mail, Municipality shall be responsible for the postage costs of certified mail.
 - A. The compensation due the Assessor shall be made on a monthly basis for services and expenses incurred during a revaluation year. Monthly invoices shall reflect the percentage of work completed, less 10 percent retained by the Municipality until completion of the revaluation and final adjournment of the Board of Review.

SIGNATURES



Mark Brown
President
Associated Appraisal Consultants, Inc.

02/12/2022

Date

Authorized Signature
City of Verona

Date

**APPENDIX B
OPTIONAL REVALUATION PAYMENT AGREEMENT**

This Appendix B is attached to and incorporated into the Contract for maintenance assessment services made by and between the **City of Verona, Dane County, State of Wisconsin**, a municipal corporation (hereafter "Municipality") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter "Assessor").


In consideration of the promises and agreements hereinafter set forth, and in consideration of the execution of those promises, both parties agree to the following:

1. INTERIM MARKET UPDATE REVALUATIONS:

- a. The Municipality shall pay the Assessor **Ninety-Five Thousand Dollars (\$95,000.00)** for each of the 2023, 2024, 2025, 2026, and 2027 assessment year(s) for the combined 2023-2027 Contract for Maintenance Assessment Services and the 2024 and 2026 Interim Market Update Revaluation(s).

- b. The compensation due the Assessor shall be paid in monthly installments throughout the 2023, 2024, 2025, 2026, and 2027 assessment year(s).

2. SIGNATURES:



Mark Brown
President
Associated Appraisal Consultants, Inc.

02/12/2022
Date

Authorized Signature
City of Verona

Date

EXHIBIT D

Specific Services Required

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the City in accordance with applicable Wisconsin State Statutes and the Wisconsin Property Assessment Manual.
2. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
3. Assessor will review and assess new construction as of January 1st of the current year.
4. Assessor will mail out state approved blotters to all holders of personal property in the City, audit the returned forms and place new values in the assessment roll.
5. Assessor will account for all buildings destroyed or demolished.
6. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue and complete all applicable reports.
7. Assessor will process parcel subdivisions, lot line adjustments, new plats, and any other land divisions.
8. Assessor will correct legal descriptions as appropriate.
9. Assessor will take digital photographs of new construction and also during the review process if needed.
10. Assessor will maintain property owner lists, with current name and address changes.
11. Assessor will mail Assessment Change Notices to property owners and others as required.
12. Assessor will post assessments to real estate transfer returns and record sale information to property record cards.
13. Assessor will be responsible for maintaining recent plat and subdivision maps on file and updated accordingly.
14. Assessor will meet with City Administration on a quarterly basis to review property changes, building permit information, and State reporting criteria.
15. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. At a minimum the Assessor shall provide at least two (2) full days or sixteen hours of time each year for Open Book sessions. 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 one month prior to the first Open Book session. The intent is to post this information on the City's website and to issue a statement to the local press prior to Open Book.
16. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of May each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products. The date for the Board of Review shall be no later than July 1 of each year unless

extenuating circumstances exist that would require a mutually agreeable date to be selected after this date.

17. Assessor will be responsible for providing all assessment data to Dane County Property Listing and for ensuring that the County's assessment roll is balanced to the records submitted by the Assessor.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue (WI DOR) with final reports of assessed valuations after the Board of review meeting. Assessor will also be responsible for providing the WI DOR with assessments for all TIF Districts by the prescribed deadlines.
19. Assessor shall maintain a computerized database of property assessment records, including digital photographs of each property using assessment software provided by the City. The City currently uses Market Drive software for both residential and commercial properties. Proposer should indicate their ability to maintain records in Market Drive format and indicate any potential additional costs to the City such as additional license fees.
20. Assessor will maintain the assessment records in a format accessible to by the public and will promptly and without delay comply with proper open records requests under the Wisconsin Public Records Law. The Assessor shall also provide assessment records in electronic format such as Access or Excel as requested by Dane County or City of Verona staff.
21. The assessor shall communicate openly and in a timely fashion with the proper City personnel and the public in the handling of all appeals to ensure the Board of Review has all available information to render its decisions. The assessor is expected to present a positive professional image in both dress and conduct while interfacing with City staff and the public, especially during the appeals process. All assessor personnel shall carry proper photo identification to assure the public of their identity and purpose of gaining access to private property.
22. Assessor shall provide advice and opinion for assessment matters and will defend values through the appeal process beyond the Open Book and Board of Review to the Circuit Court, the Department of Revenue, or other agencies that may be available for hearing appeals on assessment matters.
23. Assessor shall review, upon request, developer proposals with the City'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.
24. Assessor, as the Contract Assessor, shall be responsible to fulfill the duties of the statutory assessor and shall perform all other duties incidental to the normal duties of Assessor.
25. Determining which real and personal property in the City is exempt from property taxation, after consultation with the City Attorney whenever Assessor proposes to change the tax status of any property from taxable to exempt or exempt to taxable and where Assessor needs legal advice to make its determination.
26. Valuing all exempt properties that are subject to an agreement under which the owner agrees to make payments to the City in lieu of taxation. Assessor shall value these properties in accordance with the terms of such agreement, and on the same schedule as taxable properties are assessed, unless otherwise specified by such Contractor would be in violation of Wisconsin Statutes, the Wisconsin Property Assessment Manual and all rules

and regulations officially adopted and promulgated by the Wisconsin Department of Revenue.

27. Assisting the City in charging back refunded taxes pursuant to Wis. Stat. § 74.41, as requested by the City.
28. A minimum of one public meeting shall be held prior to the start of the revaluation program at which time a qualified Assessor representative shall be present to explain the procedures and answer questions.