



Finance/Personnel Committee

Regular Meeting

335 South Broadway
De Pere, WI 54115
www.deperewi.gov

Agenda

Tuesday, August 12, 2025

7:30 PM

Council Chambers and Virtual

Pursuant to Wisconsin Statute 19.84, Notice is hereby given to the public that a meeting of the **Finance/Personnel Committee** of the City of De Pere will be held on **August 12, 2025 at 7:30 PM** in the **COUNCIL CHAMBERS, 2ND FLOOR CITY HALL, 335 S. BROADWAY STREET. DE PERE.**

The Public or Members of the Finance/Personnel Committee, which may count toward an official quorum, may attend the meeting either in person in the Council Chambers or telephonically or electronically via video conferencing or other appropriate technological means. Telephonic or electronic access to the meeting is provided below:

Computer/smart phone accessing <https://www.gotomeet.me/DePere>

OR

You can also dial in using your phone.
United States (Toll Free): [1 866 899 4679](tel:18668994679)
United States: [+1 \(312\) 757-3117](tel:+13127573117)
Access Code: 154-883-285

This meeting may also be rebroadcast on TV throughout the week and available on demand at <https://deperewi.portal.civicclerk.com/>.

- I. Call to Order
 1. Roll Call
 2. Approval of the Minutes of the July 8, 2025 Regular Meeting of the Finance/Personnel Committee.
 3. Public Comment on Matters not on the Agenda. Comments made during the public comment period shall pertain only to matters under the jurisdiction of the Finance and Personnel Committee. §6-3(f) DPMC
 4. Consideration and Possible Action on Police Request to Spend \$10,000 from Unassigned Reserves due to Garage Fire.*
 5. Consideration and Possible Action on Police Department Request for Over Hire.*
 6. Consideration and Possible Action on Approval of the Paramedic Reimbursement Program.*
 7. Consideration and Possible Action on Assessor Services Agreement.*

8. Consideration and Possible Action on 2024-2025 Property Tax Bill Preparation Agreement with Brown County.*
9. Cash and Investments Report.
10. 2026 Budget Status Discussion.
11. Future agenda items.
12. Consideration of request by Haisan T. Williams, owner of Buddy's Breakfast Burgers, LLC to appear before the Finance-Personnel Committee regarding the denial of his Mobile Food Establishment application.

PLEASE TAKE NOTICE that the Finance Personnel Committee may convene in closed session pursuant to Wis. Stat. §19.85(1)(a): Deliberating concerning a case which was the subject of any judicial or quasi-judicial trial or hearing before that governmental body. The Finance Personnel Committee may then reconvene thereafter in open session pursuant to Wis. Stat. §19.85(2) to take action on any matter discussed in closed session or for such other purposes as are allowed by law.

13. Consideration and Possible Action on the Findings of Fact and Conclusions of Law to approve the appeal of Chad Zeske, agent for Holy Smokes, as to the denial of his Cigarette, Tobacco and Electronic Vaping Device Retail License Application.

PLEASE TAKE NOTICE that the Finance Personnel Committee may convene in closed session pursuant to Wis. Stat. §19.85(1)(a): Deliberating concerning a case which was the subject of any judicial or quasi-judicial trial or hearing before that governmental body. The Finance Personnel Committee may then reconvene thereafter in open session pursuant to Wis. Stat. §19.85(2) to take action on any matter discussed in closed session or for such other purposes as are allowed by law.

14. Adjournment.

Any person wishing to attend this meeting who, because of disability, requires special accommodations should contact the Clerk's office at 339-4050 by Noon, the previous day so that arrangements can be made.

Agenda Sent To:

Alderspersons
City Administrator
Mayor
Department Heads
TV, Newspapers & Radio Stations
Kress Family Library
De Pere Chamber of Commerce
Accurate Assessor
Forward Appraisal



City of De Pere, Wisconsin

I.2

Request for Finance/Personnel Committee Action

MEETING DATE: August 12, 2025
DEPARTMENT: Administration
FROM: Amy Darnick, Administrative Assistant
SUBJECT: Approval of the Minutes of the July 8, 2025 Regular Meeting of the Finance/Personnel Committee.
RECOMMENDED ACTION: Motion to approve.

Minutes

ATTACHMENTS:
July 8, 2025 Finance Personnel Minutes_draft



Finance/Personnel Committee

Regular Meeting

Draft Minutes

335 South Broadway
De Pere, WI 54115
www.deperewi.gov

Tuesday, July 8, 2025

7:30 PM

335 S. Broadway, De Pere, WI 54115

I. Call to Order

The meeting was called to order at 7:30 PM by Mayor James Boyd.

1. Roll Call

Present: James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kundinger

2. Approval of the Minutes of the June 10, 2025 Regular Meeting of the Finance/Personnel Committee.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	Pamela Gantz
SECONDER:	John Quigley
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kundinger

3. Public Comment on Matters not on the Agenda. Comments made during the public comment period shall pertain only to matters under the jurisdiction of the Finance and Personnel Committee. §6-3(f) DPMC

None.

4. For consideration and possible action on the approval of the 2024 Management Letter and Financial Statements.*

Scott Sternhagen and Elizabeth McMasters from CliftonLarsonAllen LLP presented the management letter and executive audit summary to the Committee. They reported that the audit resulted in an unmodified opinion, which is the highest mark the City can get. The City received two findings on internal controls; one of them occurs every year because the auditors prepare the financial statements, which is common with many municipalities. The second finding relates to an adjustment in the way sick leave is recorded in the general fund. The auditors reported that they were able to do an examination letter instead of a single audit on the status of the City's ARPA funds.

Sternhagen and McMasters then provided a summary of the City's governmental fund balances. They reported that the unassigned fund balance had a 14% increase last year; some of this was due to budget carryover requests, and some was due to Police Department/Fire Department back pay. The auditors then reviewed the City's self-insured medical funds. Finance Director/Treasurer Pam Manley reported that premiums were increased 10% last year, and staff will be proposing another increase this year.

Sternhagen reported that the water utility is spending significantly more than what is coming in through user fees. He urged the City to limit spending to the amount budgeted for the water utility, and make

sure to follow the capital plan. The auditors then answered questions about the ratings process and remaining ARPA fund obligations.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	Devin Perock
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

5. For consideration and possible action on Parameters Resolution for the 2025A G.O. promissory notes.*

Justin Fischer, managing director for Baird, distributed a report to committee members containing an overview of this year's borrowing, and provided an update on the current municipal bond market. He explained that there are three different elements to the 2025 borrowing plan: Note A will fund a variety of capital improvement projects, while Note B will fund capital improvement projects for the TIDs. Note C will fund the City-owned parking ramp in TID 18. Fischer then reviewed the tentative timeline for the approval, sale, and closing of the promissory notes. He reported that the City's outstanding general obligation debt has been going down every year, and that we will still have 49% of our borrowing capacity after the 2025 financings are complete.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	Pamela Gantz
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

6. For consideration and possible action on Parameters Resolution for the 2025B Taxable G.O. promissory notes.*

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	John Quigley
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

7. For consideration and possible action on Initial Resolution for G.O. promissory notes.*

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	Pamela Gantz
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

8. For consideration and possible action on Parameters Resolution for the 2025C Note Anticipation notes.*

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	Devin Perock
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

9. Cash and Investments Report

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	John Quigley

AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding
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10. Future agenda items.

None.

11. Consideration of request by Chad Zeske, agent for Holy Smokes, to appear before the Finance-Personnel Committee regarding the denial of his Cigarette, Tobacco, and Electronic Vaping Device Retail License application.

City Attorney Joanne Bungert explained the hearing process for committee members and the petitioner. City Clerk Carey Danen swore in petitioner Chad Zeske, who made a statement regarding the circumstances which prompted the denial of his renewal application, and answered questions from Assistant City Attorney Eric Erdman. The Clerk then swore in De Pere Police Officer Joe Johnson, who provided witness testimony regarding the results of the background check conducted by his department. Clerk Danen explained that the Department of Revenue created agent forms for CTV license applications last year, and that 2025 is the first year that the Clerk's office sent these agent forms to the PD for background checks. Assistant Attorney Erdman then posed follow-up questions to the petitioner.

Assistant Attorney Erdman reviewed the options that the Finance-Personnel Committee has in making a determination on this request, as well as the types of documentary evidence that can be considered for rehabilitation as described by state statute.

Mayor Boyd moved, seconded by Alderperson Kunding to enter into closed session at 9:08 PM. Upon vote, motion carried unanimously. Mayor Boyd moved, seconded by Alderperson Quigley to return to open session at 9:30 PM. Upon vote, motion carried unanimously.

Mayor Boyd moved, seconded by Alderperson Gantz to approve the petitioner's appeal, contingent upon submission of evidence confirming successful completion of probation for the petitioner's 2020 felony conviction.

RESULT:	APPROVED [UNANIMOUS]
MOVER:	James Boyd
SECONDER:	Pamela Gantz
AYES:	James Boyd, Pamela Gantz, John Quigley, Devin Perock, Amy Kunding

12. Adjournment.

Mayor Boyd moved, seconded by Alderperson Gantz to adjourn the meeting at 9:32 PM. Upon vote, motion carried unanimously.

Respectfully submitted,
Carey Danen, City Clerk



City of De Pere, Wisconsin

I.4

Request for Finance/Personnel Committee **Action**

MEETING DATE: August 12, 2025
DEPARTMENT: Police
FROM: Jeremy Muraski, Police Chief
SUBJECT: Consideration and Possible Action on Police Request to Spend \$10,000 from Unassigned Reserves due to Garage Fire.*
RECOMMENDED ACTION: Please see attached memo

ATTACHMENTS:
Request for Fire Damage Deductible August 2025

DE PERE

POLICE DEPARTMENT

325 S. Broadway
De Pere, WI 54115
920-339-4079

Jeremy A. Muraski
Chief of Police



To: Finance and Personnel Committee, De Pere City Council

From: Jeremy A. Muraski, Chief of Police

Date: August 5, 2025

Subject: Request for Authorization to Spend \$10,000 for Department facility repairs, cleaning, remediation, and equipment replacement due to electrical fire in the police garage.

The Police Department recently had an electrical fire in the Sergeants' Garage. The fire appears to have been caused by an air compressor cord shorting out, however it also burned up a few rechargeable batteries. The fire was undetected for a couple of hours, resulting in heavy smoke concentrating in the garage causing it to contaminate uniforms, jackets, squad car upholstery fabric, etc. The burning and arcing of the rechargeable batteries also resulted in significant chemical residue and scorching on one of the garage walls, as well as a tremendous amount of smoke and scent damage to a large number of tools, uniforms, and other miscellaneous equipment stored in that garage.

Because of the toxic chemicals that were expelled, certified remediation specialists are required to clean, decontaminate, and refresh the garage wall itself. We accordingly obtained quotes from three separate firms who specialize in hazardous materials remediation, and would propose going with the lowest of the three quotes. The quote, along with the cleaning and replacement costs of clothing and equipment exceed the city's \$10,000 insurance deductible for this type of occurrence, so we are requesting authorization to spend \$10,000 from unassigned reserves to cover the cost of the deductible, with insurance then covering the remaining amount.

Thank you for your time and consideration.

A handwritten signature in black ink, appearing to read "Jeremy A. Muraski".

Jeremy A. Muraski, Chief of Police



City of De Pere, Wisconsin

L5

Request for Finance/Personnel Committee **Action**

MEETING DATE: August 12, 2025
DEPARTMENT: Police
FROM: Jeremy Muraski, Police Chief
SUBJECT: Consideration and Possible Action on Police Department Request for Over Hire.*
RECOMMENDED ACTION: See memo

ATTACHMENTS:
Request for Overhire Fall 2025

DE PERE

POLICE DEPARTMENT

325 S. Broadway
De Pere, WI 54115
920-339-4079

Jeremy A. Muraski
Chief of Police



To: Finance and Personnel Committee, De Pere City Council
From: Jeremy A. Muraski, Chief of Police
Date: August 6, 2025
Subject: Request for Authorization to Over Hire 2 Police Officers

As mentioned in a previous spending request, law enforcement recruitment is extremely challenging and high-quality, high-character candidates are in relatively short supply. As of today, we have one lateral transfer candidate in the hiring pipeline which would give us our previously authorized over hire for 2025. We would only be at top staffing for a very brief time however as our department has two anticipated retirements in the next 4 months which would drop us back down to having one vacancy from our normal authorized staffing level, and leaving us with no over hire. I am also anticipating another retirement in September of 2026.

I am therefore asking for permission to hire two individuals, most likely in November or December, which would be short term over hires, allowing us to at least partially train the officers prior to the two officers retiring. This process would be for experienced, certified, lateral transfer type officers only. The maximum impact to the 2025 Budget would be approximately \$19,333 if both officers were hired and started December 1st. Moving into 2026, the anticipated retirements are taking place in early January, so at that time, the single over hire would be in place until September. The total cost of the overhire, assuming there were no other vacancies would be approximately \$87,000 against the 2026 budget.

Time-to-fill Gap

Any new officer we hire requires approximately 16 weeks of field training with our agency before they are certified for solo patrol. We often do not have the benefit of 16 weeks of notice when we are going to be losing an employee to retirement or transition to another job. In some cases, we may only have 2-4 weeks of notice. Between the time it takes to run a recruitment, perform all of the necessary background checks, and adding the 16 weeks of field training, there is usually a gap of at least 8 or 9 months before we actually have that vacancy filled. That vacancy creates staffing overtime in the interim because we still need to staff the position during the 8-9 month time-to-fill gap.

Thank you for your time and consideration.

A handwritten signature in black ink, appearing to read "Jeremy A. Muraski".

Jeremy A. Muraski, Chief of Police



City of De Pere, Wisconsin

I.6

Request for Finance/Personnel Committee **Action**

MEETING DATE: August 12, 2025
DEPARTMENT: Fire
FROM: Lea Taylor, Executive Assistant
SUBJECT: Consideration and Possible Action on Approval of the Paramedic Reimbursement Program.*
RECOMMENDED ACTION: Approval of Paramedic Reimbursement Program.

ATTACHMENTS:
20250806084257010

Memo



To: Honorable Mayor James Boyd
Members of the Finance & Personnel Committee

From: Brett Jansen, Fire Chief *BT*
Shannon Metzler, Human Resources Director

Date: August 12, 2025

Re: Approval of the Paramedic Reimbursement Program

De Pere Fire Rescue is committed to providing the highest level of fire and emergency medical service (EMS) to our community. A critical component of delivering this service is employing qualified, dedicated personnel through training and education. The fire service industry is currently experiencing a decline in the number of certified paramedic applicants, and we have been seeing the same result.

Students that come out of the fire training program have an emergency medical technician (EMT) basic certification. These students then put themselves through a paramedic program or get hired onto a department that sends them through the paramedic program. We have seen a trend of fewer qualified paramedics applying due either to being hired as an EMT or not having the ability to send themselves through paramedic school. Because of this situation, we are seeing other local departments decrease their EMS requirements from paramedic to EMT to attract more qualified candidates. These departments are then sending the EMT employee to paramedic school or offering to reimburse the tuition for the program upon completion. We are recommending we follow the same style reimbursement program to stay competitive in the job market.

Upon successful completion of the paramedic program, the City may reimburse the employee for tuition and textbooks, equipment expenses which may be around \$10,000. In return, the employee would sign a conditional offer of employment outlining program completion requirements and a repayment agreement if the employee resigns or is terminated within three years of reimbursement.

When an EMT is sent to paramedic school and paramedic training occurs during a duty shift, the members would be released from duty for the duration of the scheduled class hours and for commuting to and from the class, if it is not held in the City of De Pere. The release from duty will not reduce the member's pay. If the release to training caused a vacancy due to predetermined approved time off from other members on shift, the department will supplement the staffing with overtime staff per the Collective Bargaining Agreement (CBA), when needed.

The Paramedic class runs from fall to spring, Monday through Friday, in which the student will average about 30 hours a week total. The employee would only be attending school while on shift approximately 15 hours per week and then attending school off duty the remainder of the week. When the employee attends class on their assigned shift day, they would return to shift once the class session is over.

When members who are not on their assigned duty day, and attending the paramedic program, the employee would not be compensated for their time at class unless the member had prior approval from the Fire Chief.

De Pere Fire Rescue has received an EMS Funding Assistance Program (FAP) Grant from the Wisconsin Department of Health Services to help provide training and equipment to departments providing EMS. These funds will roll over each year but are not always guaranteed. We would request that funds from the FAP be used to reimburse new hire paramedic program tuition and books when the FAP funding is available. De Pere Fire Rescue would have the availability to reimburse the paramedic program cost for three to four new hires. Once the FAP funds are used up, De Pere Fire Rescue will assess and budget for future paramedic training reimbursement if needed.

The fire employee's union is in support of the recruitment and reimbursement program and the agreed upon contract language is in the attached Side Letter Agreement.

As part of the reimbursement program, the employee will enter into a reimbursement agreement with the City, which will govern the terms of the reimbursement, the amounts, required repayment upon early resignation/termination, and other relevant terms and conditions of the reimbursement program to align with the language of the Collective Bargaining Agreement. This agreement will be prepared and approved as to form by the City Attorney.

This approach will help ensure the continued reliability and effectiveness of our department while responding proactively to the challenges currently facing the fire service industry.

Thank you for your consideration. If you have any questions, please do not hesitate to ask.

**SIDE LETTER OF AGREEMENT BETWEEN
THE CITY OF DE PERE AND
THE DE PERE PROFESSIONAL FIREFIGHTER'S ASSOCIATION
IAFF LOCAL 141
REGARDING
PARAMEDIC REIMBURSEMENT PROGRAM**

This Side Letter of Agreement ("Agreement") is made and entered into this ____ day of _____, 2025 by and between the City of De Pere ("City") and the De Pere Professional Firefighters Association IAFF Local #141 ("Bargaining Unit"), collectively referred to as the "Parties".

WHEREAS the Parties are the contracting entities to a Collective Bargaining Agreement (CBA) between them covering the years 2024 through and including 2026; and

WHEREAS the Parties desire to revise CBA Articles 5, 7 and 12 to provide for language to expand and further define reimbursement policies and rules for paramedic training and reimbursement for costs thereof; and

WHEREAS the Parties have agreed that the provisions of this Agreement shall supersede the applicable sections of Article 5 Probationary Period, Article 7 Employment and Promotion and Article 12 Salaries, section Initial Paramedic Training, of the CBA as set forth and agreed to herein.

NOW THEREFORE, it is hereby agreed as follows:

- 1) The following language shall be added immediately following the first sentence of the paragraph to amend Article 5 Probationary Period of the CBA:

"In the event such newly hired probationary employee is, at the time of probationary hire, enrolled in a paramedic program, the probation period will begin upon hiring but will be extended for an additional period concluding one (1) year following the successful completion of the National Registry certification, but in case shall such probationary period exceed more than two (2) years."

- 2) The following language shall be added to the end of the paragraph of Article 7 Employment and Promotion of the CBA:

"All employees hired after September 1, 2025, who hold an Emergency Medical Technician Basic (EMT-B) license, or are a current employee of the Department holding a current EMT-B license, will be required to maintain a paramedic certification through the duration of their employment, if such paramedic certification was obtained through the paramedic reimbursement program as defined in this Agreement."

- 3) The entire section titled Initial Paramedic Training shall be deleted in Article 12 Salaries of the CBA and replaced with the following:

“Initial Paramedic Training and Paramedic Reimbursement Program

Members who successfully complete initial paramedic certification requirements during their employment with the Department shall be reimbursed by the Department upon application by the member, for actual tuition costs and book expenses incurred, with such total reimbursement amount to not exceed the actual cost of the applicable paramedic certification program. To qualify for reimbursement the member shall enter into a reimbursement agreement with the Department and the City of De Pere, which will contain terms substantially similar to the provisions set forth in this section. Reimbursement will be contingent on the members successful completion of training and submission of certain required proof of tuition costs and expenses as determined by the department, which include but are not limited to receipts for tuition, books, clothing and/or equipment required for the paramedic certification program.

In further, members who receive reimbursement pursuant to this section shall be required to remain employed with the Department for a period of no less than three (3) years following the date of the reimbursement, (“Retention Period”). If the member resigns or is otherwise terminated prior to the end of the Retention Period, the employee shall be required to repay to the Department the total reimbursement amount on a prorated basis as follows:

- (i) If the member resigns or is terminated within the first year, they shall be required to repay 100% of the reimbursement amount.
- (ii) If the member resigns or is terminated within the second year, they shall be required to repay 66% of the reimbursement amount.
- (iii) If the member leaves or is terminated within the third year, they shall be required to repay 33% of the reimbursement amount.

The Department, may at its sole discretion, waive the repayment requirement under extenuating circumstances, including but not limited to layoff, injury or other situations approved by the Fire Chief.

Due to variables with budget funding and availability of grant funds, members who are enrolled in the paramedic reimbursement program may, at the sole discretion of the Fire Chief, receive compensation for time spent off-duty completing requirements for the program. Receiving no compensation for non-schedule workday hours shall not be precedent setting and specific only to members who are in the paramedic reimbursement program.”

- 4) This Agreement shall not establish precedent or practice and shall not be used in any grievance, arbitration, or bargaining context beyond enforcement of its specific terms.
- 5) This Agreement shall be effective upon ratification by the Bargaining Unit and approval by the City's Common Council and shall remain in effect until modified or rescinded by mutual written agreement of the Parties.

Dated this _____ day of _____, 2025

DE PERE PROFESSIONAL
FIREFIGHTERS ASSOCIATION

CITY OF DE PERE

Ryan Hintz, President

Kimberly T. Flom, City Manager

Dan Gatz, Executive Board Member
Clerk-Treasurer

Carey E. Danen, City Clerk



City of De Pere, Wisconsin

I.7

Request for Finance/Personnel Committee **Action**

MEETING DATE: August 12, 2025
DEPARTMENT: City Clerk
FROM: Carey Danen, City Clerk
SUBJECT: Consideration and Possible Action on Assessor Services Agreement.*
RECOMMENDED ACTION: Approve

ATTACHMENTS:

Memo to Finance_8-12-25, De Pere Assessor RFP 2025_final, Accurate Appraisal Proposal, Forward Appraisal Proposal, Accurate Proposal_one year option, Forward Proposal - one year option

CITY OF DE PERE MEMO



To: Honorable Mayor James G. Boyd
Members of the Finance/Personnel Committee
From: Carey Danen, Clerk
Date: August 12, 2025

RE: **Assessor services agreement proposals**

BACKGROUND:

In April of this year, the Clerk's office issued a request for proposal (RFP) for statutory assessment services. The RFP was sent to ten firms, and they were asked to provide proposals for two options: 1) annual interim market updates over a three-year term; and 2) a blend of interim market updates and maintenance in alternating years over a four-year term.

Proposals were received from Accurate Appraisal and Forward Appraisal. Below is a cost breakdown for the two firms:

Accurate Appraisal

	<u>Annual Interim Market Update</u>	<u>Alternating Blend</u>
2026	\$76,800	\$36,000
2027	\$76,800	\$76,800
2028	\$76,800	\$36,000
2029	-	\$76,800
Total	\$230,400	\$225,600

Forward Appraisal

	<u>Alternating Blend</u>
2026	\$250,000
2027	\$90,000
2028	\$90,000
Total	\$430,000

Forward Appraisal recommended the maintenance blend approach, and therefore did not provide cost estimates for the annual interim market update option. Forward’s higher cost for the first year includes onboarding costs for data conversion, cleanup, and updates. This is a not-to-exceed figure and the consultant intentionally estimates high to avoid unnecessary cost overruns.

REVIEW:

A staff review team consisting of myself, Development Services Director Dan Lindstrom, Finance Director/Treasurer Pam Manley, City Manager Kim Flom, and Mayor James Boyd evaluated the two proposals.

Contract Term

Because only two RFPs were submitted, we recommend moving forward with a one-year term with an interim market update, and then repeating the RFP process in 2026 in hopes of receiving a wider pool of proposals. Both firms provided us with the following quotes for a one-year term:

Accurate Appraisal	Forward Appraisal
\$76,800	\$250,000

Assessment Schedule

The team reviewed the considerations of an annual assessment or a blended assessment (every other year).

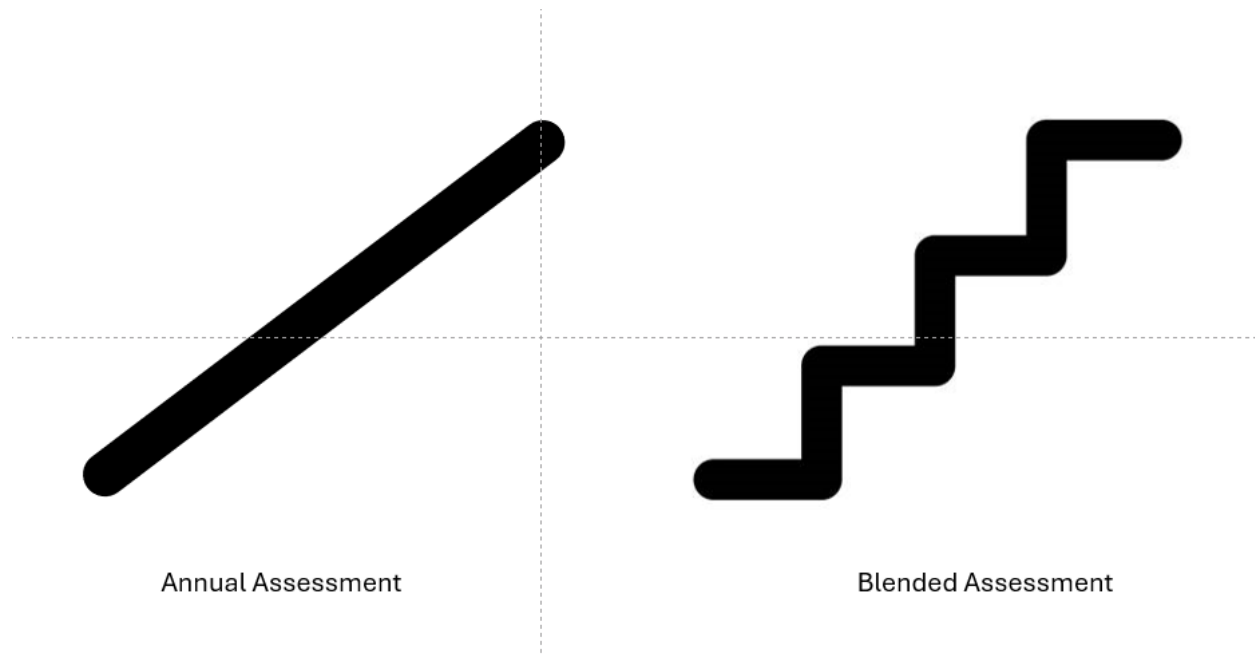
Annual Assessment (full assessment every year):

- Provides most accurate reflection of current market conditions.
- Annual cost to contractor in order to conduct assessment.
- De Pere has been operating under an annual assessment since 2018, and residents are familiar with the schedule.
- Annual assessments have meant annual increases for property owners, which has spurred negative reactions by some.
- Recent property increase percentages have resulted in the mill rate decreasing from 20.44 East/20.53 West in 2018, to 14.52 East/14.76 West in 2024. These decreases are detrimental to TID earnings.

Blended Assessment (full assessment every other year with a maintenance year in between):

- Reduced annual cost for contractor because full assessment is every other year.
- Maintenance year would likely not result in increases or changes for the majority of property owners.
- The percent change in value in this format can be more significant because it captures the values from the maintenance year.
- Mill rates would likely change in two-year steps with a blended approach rather than a change every year. This provides some additional stability to the TIDs, but the end result is still the same.

It is helpful to understand the impact of an annual assessment versus a blended assessment by visualizing a straight line and a staircase. The end result is the same, but the path of travel is different.



Staff Recommendation

Staff recommends hiring Accurate Appraisal for a one-year interim market update for \$76,800 and publishing an RFP for Assessment services in 2026.

Staff seeks insight and comments from the Council related to assessment timing in order to prepare for the 2026 RFP.



**REQUEST FOR PROPOSALS:
Assessment Services
for the City of De Pere**

City of De Pere, Wisconsin

Clerk's Office

Issued: April 15, 2025

Proposal Questions: May 2, 2025 by 5:00 p.m.

Proposals Due: May 30, 2025 by 5:00 p.m.

A. INTRODUCTION AND SUMMARY

The City of De Pere, Wisconsin (hereafter referred to as “City”) invites proposals from qualified assessment firms (“Consultant”) to provide annual assessment services.

The City is investigating three options for the provision of services in a competent, timely, efficient, cost effective, and customer service-oriented manner. For Option 1, the City is seeking a firm to serve as its statutory assessor and to provide annual interim market updates over a three-year term. For Option 2, the City is seeking a firm to provide a blend of interim market updates and maintenance in alternating years over a four-year term. Option 3 invites proposers to recommend alternatives not encompassed by the first two. This Request for Proposal seeks professional services, and statutory bidding laws do not apply.

Submissions must be received by the Clerk’s Office no later than 5:00 p.m. on May 30, 2025.

B. COMMUNITY OVERVIEW

The approximately 25,500 people who call the City of De Pere, Wisconsin home know that the community provides a high quality of life in the Greater Green Bay metropolitan area. The excellent schools, a dynamic downtown, successful business parks, and safe neighborhoods served by ample parks and natural areas have resulted in considerable loyalty and community pride among

residents. The residences, businesses, and commercial areas are connected with a transportation and green space network that accommodates cars, bikes, and pedestrians. The beautiful Fox River is the focal point of the City Center, and the Claude Allouez Bridge unites the two sides of our dynamic Downtown. Whether on the east or west side, historic buildings thoughtfully blend with new redevelopment to provide a mix of housing, employment, shopping, dining, and entertainment.

A city-wide reassessment was last completed in 2016. Since 2018, the City has conducted annual full-value maintenance services. The City’s assessment ratio for 2024 was 98.35% for residential and 101.15% for commercial.

The City’s Equalized Value (including manufacturing and TIDs) was \$3,584,193,000. The City has 11 active Tax Incremental Financing Districts accounting for \$344,990,500 in increment or 9.63% of the equalized value. The 2024 Statement of Assessment indicates that the City has 95 tax-exempt properties and has the following parcel counts from the 2024 Final Statement of Assessment (next page):



Property Class	Total Parcels	Improved Parcels
Residential	7,790	7,382
Commercial	545	434
Manufacturing	60	60
Agricultural	47	0
Undeveloped	13	0
Agricultural Forest	14	0
Forest Lands	4	0
Other	4	4
Total	8,477	7,880

C. OBJECTIVES

The following statement of goals outlines the City's overall desires for the results of its tax assessment program:

1. Provide tax assessment services that are **technically sound** – free from errors and defensible from an equity standpoint.
2. Utilize consultant services in a way that meets the needs for both ongoing maintenance, market adjustment, and revaluation in a **cost-effective** manner. This may mean that large revaluation projects are avoided completely by more aggressively maintaining equity on an ongoing basis.
3. Provide a level of **customer service** that is consistent with the expectations for other City services. Consultants will endeavor to work seamlessly with City staff to achieve this.

D. SCOPE OF WORK

The City desires to form a strategic partnership with the selected Consultant in a way that best utilizes City resources and creates a seamless delivery of service from the customer perspective. The Consultant shall be the statutory assessor for the City and complete in a professional manner all the work required under this proposal in accordance with Wisconsin State Statutes. The Consultant shall complete revaluation, statutory assessor, and full-value maintenance services for all taxable real property within the City for the term of the agreement. It is anticipated that the selected Consultant will begin work under contract in the fall of 2025.

1. Option 1 – Annual Interim Market Updates:

Consultant will conduct a full value maintenance program annually, to maintain 100% market

value on all taxable property for the assessment years of 2026, 2027, and 2028.

2. Option 2 – Interim Market Update/Maintenance Blend:

Consultant will conduct an interim market update followed by a maintenance program in alternating years, to maintain all taxable property within 10% of full value for the assessment years of 2026, 2027, 2028, and 2029.

3. Option 3 – Other Alternatives:

Proposals may also include other alternatives as recommended by the Consultant, as long as each alternative also includes a cost estimate. Consultants may consider various methods and timing for accomplishing equitable valuations throughout the City, from city-wide revaluation as a single project, to aggressive yearly maintenance, to neighborhood-level market updates, and everything in between. At this time, the preference is for more aggressive yearly maintenance.

4. Required Services for any options:

- a) Consultant shall perform all the work required to properly and professionally assess the real property of the City 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.
- b) Consultant shall designate a qualified and responsible employee to supervise the operation of the Consultant's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. The individual designated as such shall be available to the City for the entire contract. Should the supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval by the City.
- c) Consultant shall report to and be accountable to the City Clerk or his/her designee. Consultant shall meet with the Clerk on a regular basis to discuss the progress of the work and to review the data and the completed reports. The City reserves the right to inspect the data, and the progress of the work performed at any time without limitation.
- d) Consultant shall be available to attend, upon the request of the City Clerk, other department head, or Mayor, City Council and committee meetings upon reasonable prior notice on an as-needed basis.
- e) Consultant shall provide an e-mail address and a local (or toll free) phone number for City officials and customers to contact the Consultant during regular business hours, Monday through Friday, and shall return e-mails and calls within two business days/48 hours.
- f) Consultant shall provide an educational outreach program for the City related to the activity and responsibility of Consultant's assessment services.

- g) Consultant shall field review and assess all properties that were under partial construction as of January 1st of the previous year.
- h) Consultant shall field review and assess new construction as of January 1st of the current year.
- i) Consultant shall perform 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 if allowable.
- j) Consultant shall field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, and other miscellaneous permits.
- k) Consultant shall field review as deemed necessary sale properties and properties for which no building permit has been issued.
- l) Consultant shall account for all buildings destroyed or demolished.
- m) Consultant shall provide projected assessed values for potential development projects upon the request of the Development Services Director.
- n) Consultant shall coordinate with City staff for an annual meeting to discuss the previous year's development projects and building permit data.
- o) Consultant shall determine the fair market value of mobile home units in the municipality subject to the monthly municipal permit fee, in accordance with State Statute 66.0435.
- p) Consultant shall implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
- q) Consultant shall create, print, and mail State-approved Notices of Changed Assessment to property owners and others as required by State Statutes.
- r) Consultant shall conduct Open Book sessions in accordance with Wisconsin State Statutes. Consultant 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 thirty (30) days prior to the first Open Book session.
- s) Consultant shall be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to the deadline each year. Consultant shall work with the City Clerk to arrange for the hearings. Consultant will provide digital photographs and data for comparable properties in advance of the Board of Review meeting so that the Board and the petitioner have evidence of comparability.

- t) Consultant will attend the Board of Review hearing(s), serve as City staff at the hearing(s) and defend the valuations and work products. Consultant will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved. The consultant will be available for any Circuit Court proceedings that may result from appeals or other assessment-related matters.
- u) Consultant shall be responsible for providing all assessment data to Brown County's Real Property Listing office to facilitate the digital and manual transfer of data and values and for ensuring that the County's assessment roll is balanced to the records submitted by the Consultant. Consultant will provide printed copy of assessment roll to the City.
- v) Consultant shall be responsible for providing the Wisconsin Department of Revenue (WI DOR) with both preliminary and final reports of assessed valuations after the Board of Review meeting. Consultant will also be responsible for providing WI DOR with assessments for all TIF districts by the prescribed deadlines.
- w) Consultant shall place detailed property assessment records with images and full parcel information on the internet with free access to the public and the City. This may be accomplished through the City's existing online resources or through the Consultant's software package. Property record cards will be updated on at least an annual or bi-annual basis. Consultant shall provide the City with unlocked, freely accessible databases upon request. Consultant will provide an annual export of one PDF property card per parcel ID, or a suitable alternative.
- x) Consultant is not permitted to assign, subcontract, or transfer the work of providing assessment services without the prior written approval of the City Council.
- y) Assessment Software:
The City currently consults with an outside contractor for Assessor Services, and as such the City requires the Consultant software platform be able to complete the following items:
 - i. Comparative sales reports that can be used to support individual assessments with adjustments shown to be derived from the regression analysis.
 - ii. Flexible cost and depreciation tables that can be adjusted to capture specific markets. For commercial properties, a system-generated income approach to value.
 - iii. The ability to electronically export the completed assessment roll to the Brown County Real Property Listing office in the format required, eliminating any manual data entry of the completed roll.

- iv. The ability to import "start-up data" from any existing databases to avoid time/cost-consuming initial data entry.
- v. The ability to accept and import the City's existing building permit records utilizing either a CSV or MS Excel file.
- vi. Maintains a separate sales listing file to record and store data on sale properties as of the date of sale.
- vii. Maintains an ownership history.
- viii. The ability to create a wide range of reports, including Assessment Roll, Assessor's Final Report; and neighborhood attributes and values.
- ix. The ability to run queries to locate specific data.
- x. Has an electronic sketch for each property.
- xi. Uses standard database format that can be read or easily converted to be read by other software packages and managed by Microsoft Sequel (SQL) Server.
- xii. The data should be capable of being uploaded to the City's GIS system.

5. City Obligations:

- a) With guidance and support from the Consultant, the City shall publish required notices with the local media. This applies to Open Book and any other required notices.
- b) The City shall furnish adequate space at De Pere City Hall at no cost to the selected Consultant.
- c) The City shall allow access by the Consultant to City 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.
- d) The City shall aid the Consultant with a reasonable promotion of public information concerning the work under this agreement.

E. SUBMITTAL QUESTIONS

All questions shall be submitted in written form to the portal link provided below by 5:00 p.m. on Friday, May 2, 2025. Answers will be provided via the City website as an addendum to the RFP as they become available. The City anticipates releasing responses by 5:00 p.m., Friday, May 9, 2025. Multiple addenda may be released.

Question Portal: <https://deperewi.seamlessdocs.com/f/RFPQuestions>

F. SUBMISSION REQUIREMENTS

The City wishes to evaluate each proposal under the same uniform review standards. Proposals for this project should be organized in the following order and contain all the following information: Respondent shall submit one (1) electronic copy in PDF format through the City's online portal. To be considered, proposals must be received no later than 5:00 p.m., May 30, 2025, at the portal link below:

RFP Site: [Assessor RFP](#)

Submission Portal: <https://deperewi.seamlessdocs.com/f/RFPSubmittal>

The following format and sequence should be followed to provide consistency in the firm's responses and ensure that each proposal receives full consideration. Use 8 ½ x 11 sheet pages with a minimum font size of 10 points and separate sections as defined below. Do not place more than one section on one page so that those evaluating your submittal can easily compare each section with others submitted. Undesignated information shall be inserted at the rear of each package. Proposal documents containing links to other web pages shall be clearly marked. If any of the information provided by the Proposer is found to be substantially unreliable, their proposal may be rejected in the sole opinion of the Evaluation Committee.

Proposals should include all the following categories. The categories below coincide with the evaluation criteria listed in Section G:

1. Cover Letter (2 pages):

Include a cover letter outlining why the City should select your firm/team. The letter shall identify the firm name and address. Provide the name(s) of the person(s) authorized to make representation 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 Consultant's staff for the entire contract period.

2. Qualifications and Capabilities (up to 10 pages):

- a. Demonstration of successful experience in providing general assessment services and software to Wisconsin municipalities of similar size. Include a summary of the firm's experience providing assessment services for Wisconsin municipalities with a population greater than 20,000. Include name of municipality, population, equalized value, total parcel count, and type of assessment services provided. The summary should also include evidence of the accuracy of the firm's work.
- b. The qualifications of key personnel and past experience with providing assessment and revaluation services for both residential and commercial properties. Include the names, educational background, Wisconsin Department of Revenue certification level, and municipal assessment experience of the person or persons to be assigned to perform the scope of work. Include the key contact person's experience with conducting a revaluation process and experience with assessment evaluation of potential tax-exempt properties.

- c. Provide a staff organization chart. Identify key individuals involved in this project, their affiliation, and office location. For each staff member identified in the organization chart, provide DOR certification level.
 - d. Please indicate which individuals will attend the proposed interview if an interview is requested.
- 3. Understanding and Approach (up to 10 pages):**
- a. Demonstrate understanding of the project opportunities and challenges facing the City of De Pere assessment process.
 - b. Provide your firm/team's approach to achieving the project's scope of work, as presented in Section D above.
 - c. Provide any value-added services your firm/team can provide above that are not identified within the request.
- 4. Project Timeline (up to 3 pages):**
- a. Overview of the professional team's resources available to complete the services requested in the scope of services.
 - b. Recommended annual schedules for all the elements listed in Section D of this RFP.
- 5. Budget (up to 2 pages):**
- State the total annual compensation rate to provide the services described in the above Specific Services Required section and in accordance with the laws of the State of Wisconsin for assessment years 2026-2028 (and 2029 if applicable) beginning not later than October 1, 2025. Clearly list the fee for each year of the proposed contract with a not-to-exceed sum including all the Consultant'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. The City will pay Quarterly as invoiced on the basis of the percentage of work completed; however, the City is open to other payment structures suggested by the Consultant.
- 6. References (up to three pages):**
- Identify and provide contact information for three references from Wisconsin municipal clients for which the Consultant has provided assessment and/or revaluation services within the past two (2) years; at least one reference shall be from a client listed in the Firm Qualification section listed above. References should be of a size similar to the City of De Pere. References must include the name, title, email address, and business phone number of the contact person.
- 7. Insurance and Legal Responsibilities (up to three pages):**
- List the names and addresses of the insurance companies that have written commercial liability insurance policies for your organization and the projects listed in the experience section of this RFP during the past three (3) years. Joint ventures should list the insurers for the company or

person expected to be the major owner of the joint venture. Has any insurance company paid on behalf of the persons or organizations covered? If so, indicate names and addresses of insurance companies, particulars of payment, and date(s). Is your firm now, or has it been, within the past five (5) years, involved in any legal action related to any projects? If yes, please explain in detail and identify any judgments entered in such action. Also, provide all details of any declaration of default, non-conformance notices, or termination for cause against your firm with respect to such services. In addition, state whether during the past five (5) years your firm or sub-consulting firms have been suspended from either bidding or entering into any government contract.

8. Conflict of Interest:

Disclose any potential conflict of interest including, but not limited to, familial relationships between members of the consulting team and elected officials and/or employees of the City of De Pere.

G. SELECTION PROCESS, SCHEDULE, AND CRITERIA

All proposals will be evaluated based on the technical and professional expertise and experience of the submitting firm(s), the proposed method and the procedures for completion of the work, and the proposal's cost. The firm's apparent ability to be independent and objective in performing the requested work will also be considered.

1. Solicitation Schedule:

This solicitation's critical dates and times are listed below. The City may need to change any of these dates or times. All dates are subject to change.

<u>Action</u>	<u>Estimated Completion Date</u>
RFP Release	April 14, 2025
RFP Questions Due	May 2, 2025
RFP Question Response	May 9, 2025
RFP Response Due Date	May 30, 2025
Evaluation Committee Meeting	week of June 9, 2025
Interview/Presentation (if needed)	week of June 24, 2025
Finance and Personnel Committee	July 8, 2025
Council Approval	August 5 or 19, 2025
Service Start Date	October 1, 2025 (no later than)

2. Proposal Opening:

The RFP opening is public on the date and at the time specified on the proposal form. The proposer is responsible for ensuring the proposal is delivered at the proper time and place.

3. Evaluation Committee:

The City Manager may appoint an internal evaluation committee to review and evaluate the proposals using the following criteria. At its sole discretion, the City may contact the references and/or visit one or more of the projects listed in response to this solicitation as part of the

evaluation process. A shortlist of proposers may be interviewed for final ranking.

4. Selection Criteria:

Any proposal not meeting the minimum qualifications stated above will be rejected. The criteria below are not necessarily listed in order of importance. Proposals will be evaluated on the following criteria:

Cover Letter:	0 PTs
Qualifications and Capabilities:	20
Project Understanding and Approach:	40
Project Timeline:	10
Budget:	15
References:	15
Total	100

Based on the evaluation process and selection criteria results, the Evaluation Committee will prepare a prioritized ranking of the firm/team. City staff will present an agreement to the top-ranked firm/team. The final contract will then be forwarded to the Finance and Personnel Committee for recommendation to the Common Council for final approval.

H. GENERAL TERMS AND STATEMENT OF RIGHTS AND UNDERSTANDING

The City reserves and may, in its sole discretion, exercise any and all of the following rights and options with respect to this RFP:

1. Each Proposer should carefully read and review all such items and address them in its proposal. However, the final description of the services and/or specifications to be provided to the City under this RFP is subject to negotiations with the successful Proposer and the City's final approval.
2. The City reserves the right to reject any or all proposals, to divide responsibilities among one or more applicants or the project team, to waive formalities, and to select the individual or firm/team which, in the City's sole judgment, can best perform the scope of services required.
3. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP. The City has prepared this RFP and does not purport to be all-inclusive or to contain all of the information a prospective applicant may desire. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP.
4. Ownership of all data, material, and documentation originated and prepared for the City pursuant to the RFP shall belong to the City and be subject to public inspection in accordance with the Freedom of Information Act (FOIA) and Wisconsin Public Records law. Trade secrets or proprietary information submitted by the Proposer shall not be subject to public disclosure unless otherwise required by law or a court.

5. The City is not liable for any costs incurred by any Proposer in connection with this RFP or any response by any Proposer to this RFP. The expenses incurred by a Proposer in the preparation, submission, and presentation of the proposal are the sole responsibility of the Proposer and may not be charged to the City, regardless of whether or not the City ultimately selects a Proposer's Proposal for completion of the work detailed in this RFP.
6. The City of De Pere does not discriminate on the basis of race, color, religion, age, marital or veterans' status, sex, national origin, disability, or any other legally protected status in the admission or access to, or treatment or employment in, its services, programs or activities.
7. Submission:
 - a. Submission of a proposal does not bind the City to any action or any applicant.
 - b. Proposals received after the deadline will not be accepted. Proposals will not be opened publicly. It is neither the City's responsibility nor practice to acknowledge receipt of any proposal. It is the responder's responsibility to ensure that a proposal is received in a timely manner.
 - c. No official or employee on the evaluation committee shall have any financial interest, either direct or indirect, in the contract. No official or employee of the evaluation committee shall exercise any undue influence in the awarding of the contract.
 - d. Amendment/Clarification of proposals may be done as follows:
 - i. By City: The RFP may be amended by the City in response to need for further clarification, specifications and/or requirement changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors and must be signed and returned by the vendor as specified in the amendment.
 - ii. By Consultant: Proposals may only be amended after receipt by the City by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the City.
 - e. Proposals may be withdrawn only in total, and only by a written request to the City prior to the time and date scheduled for opening of proposals.
8. To negotiate with one or more applicants.
9. To select any submission as the basis for negotiations and to negotiate with applicants for amendments or modifications to their submission.
10. To conduct investigations with respect to the qualifications of each applicant.
11. The City is not responsible for costs associated with preparing proposals or for costs incurred before a formal notice to proceed is issued if a contract is awarded.
12. The Proposer shall maintain, during the life of the Agreement, public liability and property damage insurance to cover claims for injuries, including accidental death, as well as claims for property damages

that may arise from the performance of work under the Agreement.

13. Insurance:

The Consultant shall maintain during the life of the Agreement, the following minimum public liability and property damage insurance to cover claims for injuries, including accidental death, as well as from claims for property damages which may arise from the performance of work under the Agreement as stated below:

- a) Comprehensive general liability insurance, including personal injury liability, blanket contractual liability and broad form property damage liability. The combined single limit for bodily injury and property damage shall not be less than \$1,000,000; with additional umbrella liability insurance coverage for a total of not less than \$5,000,000.
- b) Automobile bodily injury and property damage liability insurance covering owned, non-owned, rented and hired cars. The combined single limit for bodily injury and property damage shall be not less than \$1,000,000.
- c) Statutory workers compensation and employers' liability insurance as required by the state having jurisdiction.
- d) Consultant shall also maintain professional liability insurance covering damages to City resulting from errors and omissions of the Consultant. The limit of liability under said policy shall be \$1,000,000 or the total consultant's fee on the project, whichever is greater.
- e) Proof of Insurance. The Consultant shall furnish the City with a Certificate of Insurance and additional insured endorsement countersigned by a Wisconsin Resident Agent or Authorized Representative of the insurer indicating that the Consultant meets the insurance requirements identified above. The Certificate of Insurance shall include a provision prohibiting cancellation of said policies except upon 30 days' prior written notice to the City and shall name the City as an additional insured under Consultant's general and professional liability policies for the specific contract or project covered. A copy of the Certificate of Insurance and endorsement shall be delivered to the City prior to execution of the agreement for final approval.



ASSESSMENT SERVICES PROPOSAL

PREPARED FOR:

DE PERE



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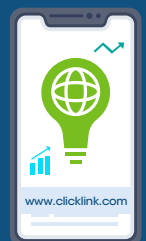
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This proposal is built to be INTERACTIVE!

Throughout this document you will see QR codes. Use your cell phone camera app and point your camera at the QR code. A link will pop up. Click on the link to watch videos, visit websites and much more!



Open your camera app and hover your phone over the QR Code. Your camera will automatically scan the QR code.



A clickable link will appear. Select the link and enjoy the content!

Test this link to our website!



Viewing this as a digital copy?
You can click the QR codes to view the content in the proposal.

INTRODUCTION

We're excited to have the opportunity to continue to work with the City of De Pere!

After 17 years of serving as your assessor, we have developed a deep understanding of the De Pere community, its neighborhoods, its growth, and its unique character. As the city continues to evolve, we are confident that our experience and proven track record make us the most qualified to continue this important work.

Our commitment to accuracy is reflected in the consistency of our assessments over nearly two decades. We firmly believe that every property owner deserves to be engaged in the assessment process—not just presented with the outcome. That belief drives our efforts to ensure transparency, fairness, and equity in every interaction



TRANSPARENCY

is our core principle in educating and empowering those we serve.
our employees.
municipalities.
the community.



PO BOX 415 | Menasha WI 54952-0415 | info@accurateassessor.com | 920.749.8098 | accurateassessor.com

DE PERE ASSESSMENT TEAM

Shanda Stachurski

Main Point of Contact



Jamie Busha

Statutory Assessor



Terri Muskevitsch
Customer Service Manager

Colin Loughrin
Review Manager

Bill Gaber
*Authorized Agent
Operations Manager*

Lori Sacco
Fieldwork Manager

Our Mission:

Engaging our employees to collaborate, educate, and deliver the most reliable and transparent assessment solutions through innovation, communication and technology.

SERVICE TEAM

At Accurate we form service teams to ensure the accuracy and effectiveness of our assessing. Bill Gaber will lead the Accurate team. **Shanda Stachurski is your key point of contact.** Shanda will take all correspondence from the City and handle the process of assessment for the City of De Pere. Jamie Busha will be your statutory assessor. She is a certified assessor II and will be supervising the assessment schedule, attending the Board of Review, and signing the roll.

Jamie will also be reviewing all data for quality & accuracy. Shanda will also be involved in the process of building an intentional community education plan with creative videos, mailings and social media content.



"Taking the time day in and day out to make sure the clerk has a better experience has made my job a blast. Carey has been amazing to work with these last 3 years. I look forward to continuing our relationship."

Shanda Stachurski

Main Point of Contact

Marketing and Account Development Coordinator - Assessor II

Shandas@accurateassessor.com 920.749.8098



"The world is always changing as it often leads to something better. Making sure our quality stays first-class prior to and during change is what I really get energized about. I have loved being apart of De Pere's Board of Review process"

Jamie Busha

Satutory Assessor

Quality Manager - Assessor II

jamieb@accurateassessor.com 920.749.8098



"Being able to ensure each step of the process is completed has been amazing. We've been able to take big leaps in process improvments and look forward to continuing to innovate."

Bill Gaber

Autherized Agent

Operations Manager - Assessor III

billg@accurateassessor.com 920.749.8098



WHO WE SERVE

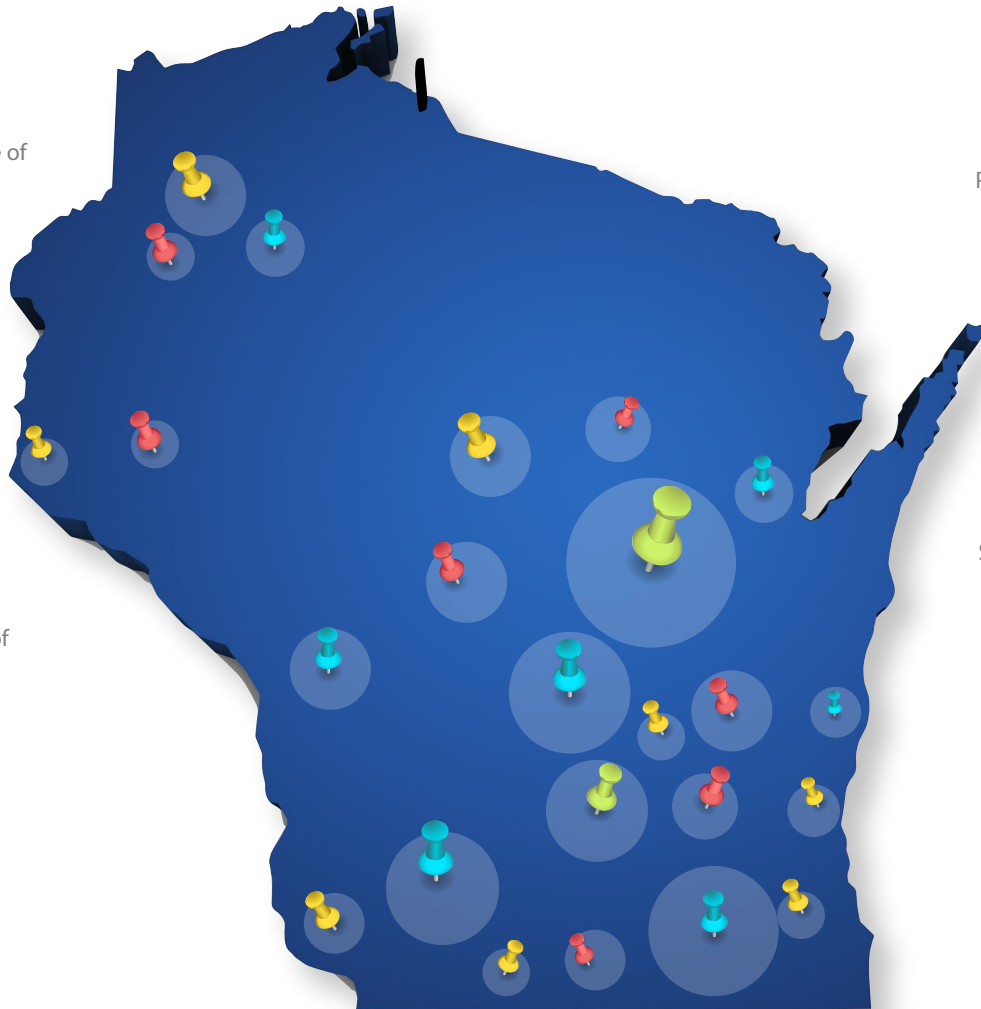
Accurate assesses for **over 100 municipalities across Wisconsin**. Our assessors live in the areas closest to their region which allows us to be more reactive to our customer's needs.

Albion, Town of
 Altoona, City of
 Baraboo, City of
 Bayside, Village of
 Beaver Dam, City of
 Beloit, Town of
 Berry, Town of
 Blooming Grove, Town of
 Blue Mounds, Village of
 Boscobel, City of
 Brillion, City of
 Brooklyn, Village of
 Buchanan, Town of
 Burlington, City of
 Caledonia, Town of
 Cambria, Village of
 Cambridge, Village of
 Chilton, City of
 Cleveland, Village of
 Coloma, Village of
 Combined Locks, Village of
 Courtland, Town of
 Cross Plains, Village of
 Cudahy, City of
 Dale, Town of
 Darien, Town of
 Dayton, Town of
 De Pere, City of
 Deerfield, Town of
 Deerfield, Village of
 Dekorra, Town of
 Delavan, Town of
 Edgerton, City of
 Eldorado, Town of
 Elkhorn, City of
 Fontana, Village of
 Footville, Village of
 Fort Winnebago, Town of
 Fox Crossing, Village of
 Fox Lake, Town of
 Friesland, Village of
 Fulton, Town of
 Geneva, Town of
 Glendale, City of
 Grand Chute, Town of
 Green Valley, Town of
 Greenville, Village of
 Harrison, Village of
 Hazel Green, Village of
 Jamestown, Town of
 Jefferson, City of
 Kewaunee, City of
 Lancaster, City of

New Contracts for 2025

T of Rutland	V of Summit
T of Belleville	V of Whitelaw
C of Richland Center	V of Lisbon
C of Waukesha - Commercial Only	

Lyons, Town of
 Marathon, Town of
 McFarland, Village of
 Medford, City of
 Menominee, Town of
 Monona, City of
 Monroe, City of
 Mosinee, City of
 Mt Horeb, Village of
 New Glarus, Village of
 New Richmond, City of
 Oakland, Town of
 Oconomowoc, City of
 Oconto Falls, City of
 Onalaska, City of
 Oregon, Town of
 Oregon, Village of
 Pacific, Town of
 Pardeeville, Village of
 Perry, Town of
 Platteville, City of
 Pleasant Springs, Town of
 Portage, City of
 Poynette, Village of
 Prairie du Sac, Village of
 Prescott, City of
 Primrose, Town of
 Randolph, Town of
 Richmond, Town of
 River Falls, City of
 Rose, Town of
 Rothschild, Village of
 Saukville, Village of
 Seymour, City of
 Sheboygan Falls, Town of
 Shorewood, Village of
 Sparta, City of
 Spring Prairie, Town of
 Stoughton, City of
 Sugar Creek, Town of
 Sullivan, Village of
 Two Rivers, City of
 Union, Town of
 Upham, Town of
 Walworth, Town of
 Walworth, Village of
 Watertown, City of
 Wescott, Town of
 West Baraboo, Village of
 Whitefish Bay, Village of
 Whitewater, City of
 Williams Bay, Village of
 Windsor, Village of



ASSESSMENT ACCURACY

There is no stronger demonstration of our ability to effectively serve a municipality with a population exceeding 20,000 than our **17-year partnership** with you. Since implementing our full value maintenance system, we have consistently remained in compliance and have **never fallen below a 95%** overall assessment ratio. This track record reflects our commitment to accuracy, transparency, and excellence in assessments. Please see the Department of Revenue major class data below, which highlights our sustained performance in a municipality of this size since 2018.

DATE: 02/07/2025

Wisconsin Department of Revenue
Final Major Class Comparison

EQMCC701FWI

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EQ ADMIN AREA 81 Green Bay
COUNTY 05 Brown County
CITY 216 De Pere

Year	Property Class	Municipal Assessed Value	DOR Base Value	% of DOR Base Value	Ratio (%)	Major Class Municipal Compliance Status	Type Of Notice Issued
2024	Residential	2,457,500,500	2,498,936,400	75.30	98.34	YES	
	Commercial	828,294,100	818,877,500	24.67	101.15	YES	
	Agricultural	183,700	183,300	0.01	100.22		
	Sum Of 5, 5M, 6, 7	798,800	753,800	0.02	105.97		
	Personal	0	0	0.00	0.00		
	Total	3,286,777,100	3,318,751,000	100.00	99.04	YES	
2023	Residential	2,219,994,700	2,256,656,800	74.11	98.38	YES	
	Commercial	710,611,600	750,368,900	24.64	94.70	YES	
	Agricultural	201,000	197,500	0.01	101.77		
	Sum Of 5, 5M, 6, 7	726,500	672,700	0.02	108.00		
	Personal	37,184,800	37,184,800	1.22	100.00		
	Total	2,968,718,600	3,045,080,700	100.00	97.49	YES	
2022	Residential	1,959,266,100	2,007,542,300	75.10	97.60	YES	
	Commercial	573,155,500	636,619,400	23.81	90.03	YES	
	Agricultural	181,400	183,600	0.01	98.80		
	Sum Of 5, 5M, 6, 7	675,800	655,000	0.02	103.18		
	Personal	28,279,000	28,279,000	1.06	100.00		
	Total	2,561,557,800	2,673,279,300	100.00	95.82	YES	
2021	Residential	1,722,330,644	1,722,355,300	74.10	100.00	YES	
	Commercial	523,382,235	577,252,800	24.83	90.67	YES	
	Agricultural	187,100	185,300	0.01	100.97		
	Sum Of 5, 5M, 6, 7	603,000	636,500	0.03	94.74		
	Personal	23,931,500	23,931,500	1.03	100.00		
	Total	2,270,434,479	2,324,361,400	100.00	97.68	YES	
2020	Residential	1,598,630,469	1,618,168,000	73.85	98.79	YES	
	Commercial	495,302,735	546,735,500	24.95	90.59	YES	
	Agricultural	182,800	182,600	0.01	100.11		
	Sum Of 5, 5M, 6, 7	590,200	679,700	0.03	86.83		
	Personal	25,324,000	25,324,000	1.16	100.00		
	Total	2,120,030,204	2,191,089,800	100.00	96.76	YES	
2019	Residential	1,501,238,469	1,503,176,100	73.53	99.87	YES	
	Commercial	493,873,600	510,873,800	24.99	96.67	YES	
	Agricultural	182,200	182,400	0.01	99.89		
	Sum Of 5, 5M, 6, 7	647,400	654,200	0.03	98.96		
	Personal	29,497,900	29,497,900	1.44	100.00		
	Total	2,025,439,569	2,044,384,400	100.00	99.07	YES	
2018	Residential	1,401,029,999	1,421,706,000	72.58	98.55	YES	
	Commercial	490,327,900	505,011,100	25.78	97.09	YES	
	Agricultural	175,500	175,800	0.01	99.83		
	Sum Of 5, 5M, 6, 7	635,700	654,400	0.03	97.14		
	Personal	31,200,000	31,200,000	1.59	100.00		
	Total	1,923,369,099	1,958,747,300	100.00	98.19	YES	

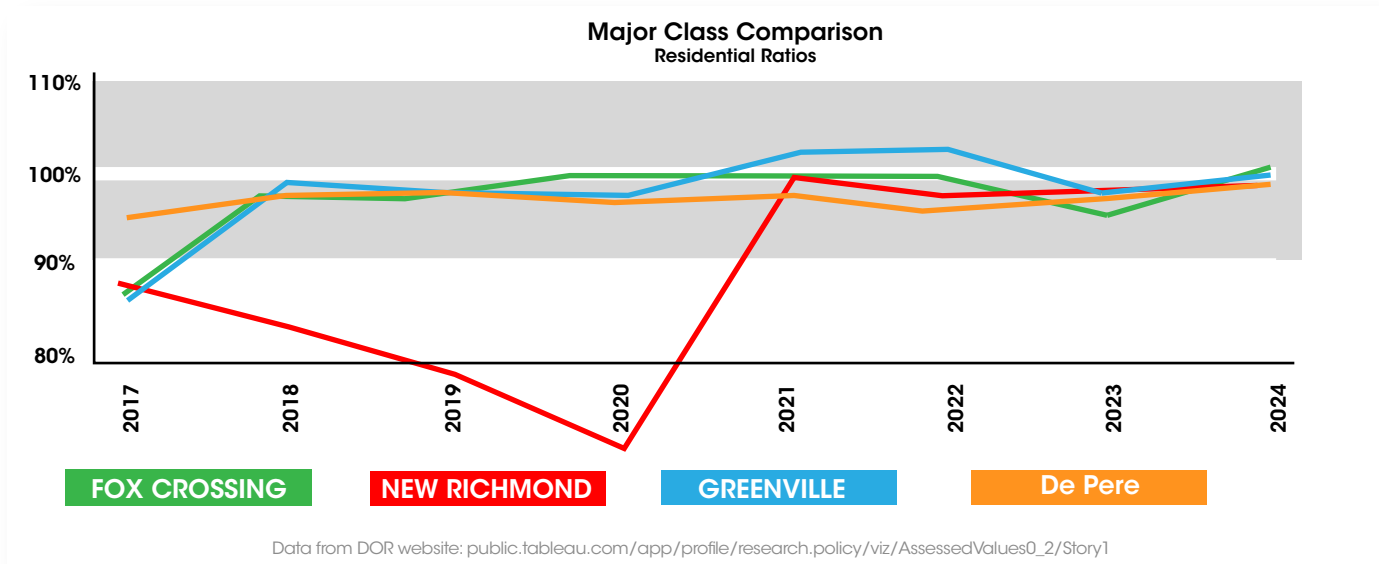
As we continue to maintain strong assessment ratio performance through our full value maintenance system and effectively manage your 8,477 total parcels, including 7,880 improved parcels, we remain committed to continuous improvement. We are consistently refining our processes to enhance accuracy, strengthen communication, and elevate our outreach and marketing efforts.

ASSESSMENT ACCURACY

Continued

Various statistical methods are used to gauge property assessment accuracy. **The DOR emphasizes the equalized value ratio, requiring assessments of major classes to be within 10% of fair market value in a 5 year period.** Non-compliance triggers an Interim Market Update using previous year(s) sales for reassessment.

A good test of accuracy in assessments is after reviewing sales and setting new values during a market update, **have the assessments been brought back to 100% market value?**



The table above shows the impact of regular market updates. The center white line is the state's 100% fair market value determination or equalized value. The green line shows the impact of annual market updates in Fox Crossing. Deviations in the red line show maintenance years before New Richmond started annual market updates in 2020. Greenville's blue line shows the maintenance year before the 2018 full revaluation follow years of annual market updates. De Pere's orange line shows the start of Full Value Maintenance and the continued success of Full Value Maintenance system in staying in compliance. **The closer to overall values are to 100% after a market update shows how accurate the assessments are.**

Since 2020 the market has become extremely volatile, setting new precedent when comparing assessments to market sales. This RFP requesting an every other year market update. In many ways you want to ensure **assessments are close to 100% every year.**

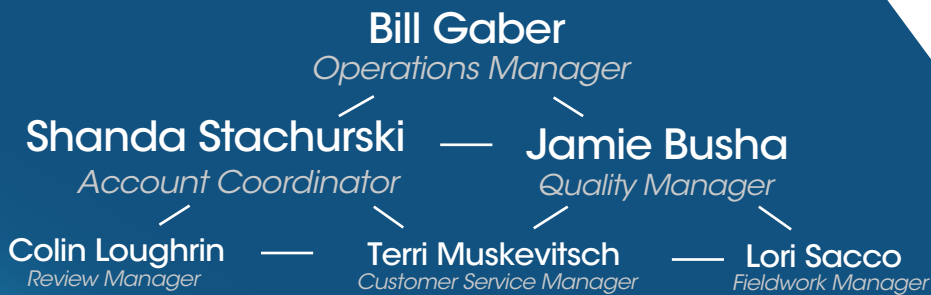
We must also address statistics our competition might try to exploit:

concentration and dispersion, both of which are uncontrollable lagging measures comparing last year's assessments to the following year's market sales. **Assessors can't predict the future market nor control property factors like style, age, non-permitted work, or homogeneity/make-up of property in a municipality.** Our competitors divert attention to uncontrollable statistics in a volatile market with numerous variables. We could also share samples of their so called "sub standard" results in this RFP but we would rather focus on the controllable factors when it comes to assessing fairly and equitably.

ASSESSMENT TEAM

Your assessment team has access to over **200 YEARS** of assessing experience!

Our approach of the **Assessment Team** means each assessor coordinates their efforts from accountability officers to our field team and customer service. Throughout the entire assessment process - field work, attending open books and closing boards of review, our services are completed as a team. You will have full access to an account coordinator as your main point of contact throughout the contract.



31 EMPLOYEES

26 ASSESSOR I & II

5 ASSESSOR III



Bill Gaber has over 12 years of assessing experience. Bill came through the ranks as a field assessor, then account manager and is now the overall operations manager at Accurate. Bill is our most qualified assessor completing hundreds of market updates with a strong background in assessing commercial property. He mentors our assessment team, and works closely with the DOR to enhance assessment practices statewide. Bill is an assessor II and III.

Shanda Stachurski will be your main point of contact. You will have access to Shanda for tracking the workload, pulling reports, regular meetings and any training you may need. She will work with your statutory assessor on the timeline and sharing of information with you and your community. Shanda is an assessor II with 3 years of experience.

Jamie Busha is your Statutory Assessor and Quality Manager. She reviews all changes made during the assessment process before notices are sent. She has been your assessor for the past 3 years. She is an assessor II with 10 years of experience.

Colin Loughrin is our Review Manager. He will be in charge of all aspects of the valuing process. He is responsible for permits, review, and commercial review for the Market Updates. Colin is assessor II, and III with 7 years of experience, and has completed over a hundred market updates.

Terri Muskevitsch is our senior customer service agent. Terri works closely with commercial property owners that call or email our office. She will track correspondence to share with you. Terri is an assessor II, for over 16 years.

Lori Sacco is our Fieldwork Manager. She is the brains behind our fieldwork logistics and is able to keep all of our fieldwork on pace. She's an assessor II and III. Lori has 5 years of experience.



PROUD PARTNERS WITH:



WAAO

Wisconsin Association of Assessing Officers

AUTHORIZED AGENT



BILL GABER

Operations Manager - Assessor II & III

billg@accurateassessor.com 920.213.1916

ABOUT ME

I have a thorough background in business and finance. I also have over 12 years of experience in the assessment industry. My involvement in coaching youth sports has increased my leadership skills to develop successful teams. Watching teams grow and learn is my passion. I look forward to working with you and your community.

"I like to lead by example both at home for my son (20 years old) and for those that I work with."

EXPERIENCE

- Determine values using the three approaches Sales, Income, Cost
- Managed over 150 Market revaluations
- 100+ Open Book and Boards of Review
- 10+ years of scheduling fieldwork assignments
- Statistically analyze market trends
- Land valuation review
- Filed word duties
- Estimate valuations for TID creations
- GIS mapping
- Closing Boards of Review
- Logistics Coordinator

EDUCATION

University of Wisconsin - Oshkosh 1996
Business

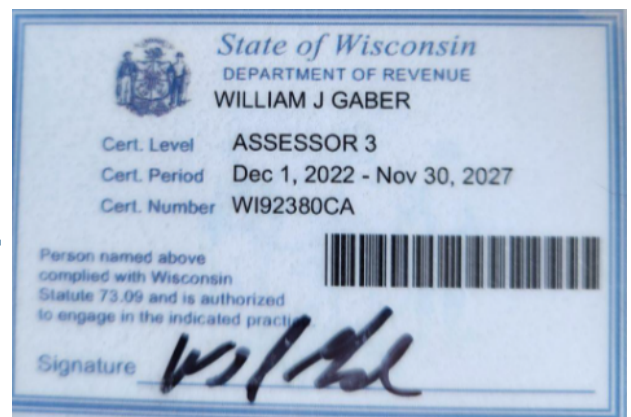
COMMUNITY INVOLVEMENT

Little League coach for 9 years
American Legion Baseball Coach for 4 years -
Won the Wisconsin AA state title in 2021
Coached youth Football for 6 years

STRENGTHS/SKILLS

Management	Self-Motivation
Organization	Creativity
Team Leadership	Communication
Operations	Development

CERTIFICATION



* Will attend proposed interview



KEY CONTACT PERSON



SHANDA STACHURSKI

Account Coordinator - Assessor II

shandas@accurateassessor.com 920.716.9658

WHY ME?

I am an energetic self-starter with professional success in the fields of Assessing, Compliance, Finance, Sales and Education. I am an effective communicator, dedicated to achieving goals while building professional relationships. I am a quick learner committed to maintaining open communication and building the best education plan for your community.

"I've learned to be very prompt, organized, and resourceful...
communication is my top priority"

EXPERIENCE

- Determine values using the three approaches: Market, Income, Cost
- Performed over 20 Market revaluations
- Statistically analyze market trends
- Closing Board of Review
- 3 years of Tax exempt property
- Estimate valuations for TID creations
- GIS mapping

STRENGTHS/SKILLS

Communication
Organization
Financial
Work Ethic

Prompt
Education
Flexibility
Responsibility

CERTIFICATION

WI07740CA

* Will attend proposed interview

"Being part of the entire assessing process creates ownership
and a deep understanding of the community."



STATUTORY ASSESSOR



Jamie Busha

Quality Manager - Assessor II

jamieb@accurateassessor.com 920.749.8098

WHY ME?

I am fun and outgoing! I love working with people to help them learn about the assessment process. I have a background in Real Estate. In my free time I enjoy going on trips. Mexico is my favorite place to travel to.

"I'm never late. Nothing bad comes from being early, nothing good comes from being late."

EXPERIENCE

- Determine values using the three approaches: Market, Income, Cost
- Commercial and Residential valuation
- Quality Checks
- Closing Boards of Review
- Roll Book Review
- Sales Checks
- Notice Checks
- Participate in Open Book sessions
- Preparing assessor forms for Board of Review
- Fieldwork Checks

STRENGTHS/SKILLS

Communication
Committed
Trustworthy
Personable
Optimistic

Continuing Education
Building Relationships
Punctual
Attention to Detail
Process Improvement

CERTIFICATION

WI07740CA

* Will attend proposed interview

"There's no reason why the glass can't always be half full."



CUSTOMER SERVICE

When property owners call us they get a live person.

Our agents are trained assessors that answer questions quickly and educate property owners on the assessment process. Our **online appointment scheduling tool** is available 24/7.

Property owners have full access to us on our main line, email address, and over the phone appointments. We utilize a visual voicemail service which speeds up our response time. Voicemails are monitored daily to we make sure respond within 24 to 48 hours. All of these services are included at no additional cost to you.



MEET OUR CUSTOMER SERVICE TEAM MEMBERS:



"Being the first connection with property owners, my goal is to be able to help them understand the process of assessing and how it affects them. Being a property owner, I understand how confusing and daunting the process can seem. It is extremely rewarding when I answer their questions, help them understand the process, and make someone's day a little better."

TERRI MUSKEVITSCH since 2007

Customer Service Manager - Assessor II

terrim@accurateassessor.com 920.749.8098



"Talking with property owners on a daily basis gives me the opportunity to educate them on the assessment process. I take it as a challenge to convey positivity when not all of my interactions start out that way. Fairness and equity is paramount in my job and I take it very seriously."

AMY BAJI since 2011

Personal Property Coordinator- Assessor II

amyb@accurateassessor.com 920.749.8098



"The best feeling in the world is hanging up a phone and knowing I was able to help property owners understand their assessment. My background in hospitality gives me the tools I need to be empathetic to their needs. I have been known to make people laugh - because my laughter is infectious."

PATTI PETERS since 2010

Customer Service - Assessor I

pattip@accurateassessor.com 920.749-8098

SCOPE OF WORK

Specific Services Required

- a) Consultant shall 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 in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue.
- b) Consultant shall designate a qualified and responsible employee to supervise the operation of the consultant's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. The individual designated as such shall be available to the City for the entire contract. Should the supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval by the City.
- c) Consultant shall report to and be accountable to the City Clerk or his/her designee. Consultant shall meet with the Clerk on a regular basis to discuss the progress of the work and to review the data and the reports completed. The City reserves the right to inspect the data and the progress of the work performed at any time without limitation.
- d) Consultant shall be available to attend City Council and committee meetings on an as-needed basis.
- e) Consultant shall provide an e-mail address and a local (or toll free) phone number for City officials and customers to contact the Contractor during regular business hours, Monday through Friday, and shall return e-mails and calls within two business days/48 hours.
- f) Consultant shall provide an educational outreach program for the City related to the activity and responsibility of Contractor's assessment services.
- g) Consultant shall field review and assess all properties that were under partial construction as of January 1st of the previous year.
- h) Consultant shall field review and assess new construction as of January 1st of the current year.
- i) Consultant shall preform 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 if allowable.
- j) Consultant shall field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, and other miscellaneous permits.
- k) Consultant shall field review as deemed necessary sale properties and properties for which no building permit has been issued.
- l) Consultant shall account for all buildings destroyed or demolished.
- m) Consultant shall provide projected assessed values for potential development projects upon the request of the Development Services Director.
- n) Consultant shall coordinate with City staff for an annual meeting to discuss the previous year's development projects and building permit data.
- o) Consultant shall determine the fair market value of mobile home units in the municipality subject to the monthly municipal permit fee, in accordance with State Statute 66.0435.
- p) Consultant shall implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
- q) Consultant shall create, print, and mail State-approved Notices of Changed Assessment to property owners and others as required by State Statutes.
- r) Consultant shall conduct Open Book sessions in accordance with Wisconsin State Statutes. Consultant 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 thirty (30) days prior to the first Open Book session.
- s) Consultant shall be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to the deadline each year. Consultant shall work with the City Clerk to arrange for the hearings. Consultant will provide digital photographs and data for comparable properties in advance of the Board of Review meeting so that the Board and the petitioner have evidence of comparability.
- t) Consultant will attend the Board of Review hearing(s), serve as City staff at the hearing(s) and defend the valuations and work products. Consultant will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved. The consultant will be available for any Circuit Court proceedings that may result from appeals or other assessment-related matters.
- u) Consultant shall be responsible for providing all assessment data to Brown County's Real Property Listing office to facilitate the digital and manual transfer of data and values and for ensuring that the County's assessment roll is balanced to the records submitted by the Consultant. Consultant will provide printed copy of assessment roll to the City.
- v) Consultant shall be responsible for providing the Wisconsin Department of Revenue (WI DOR) with both preliminary and final reports of assessed valuations after the Board of Review meeting. Consultant will also be responsible for providing WI DOR with assessments for all TIF districts by the prescribed deadlines.

SCOPE OF WORK

Specific Services Required - Continued

w) Consultant shall place detailed property assessment records with images and full parcel information on the internet with free access to the public and the City. This may be accomplished through the City's existing online resources or through the Consultant's software package. Property record cards will be updated on at least an annual or bi-annual basis. Consultant shall provide the City with unlocked, freely accessible databases upon request. Consultant will provide an annual export of one PDF property card per parcel ID, or a suitable alternative.

x) Consultant is not permitted to assign, subcontract, or transfer the work of providing assessment services without the prior written approval of the City Council.

y) Assessment Software:

The City currently consults with an outside contractor for Assessor Services, and as such the City requires the Consultant software platform be able to complete the following items:

- i. Comparative sales reports that can be used to support individual assessments with adjustments shown to be derived from the regression analysis.
- ii. Flexible cost and depreciation tables that can be adjusted to capture specific markets. For commercial properties, a system-generated income approach to value.
- iii. The ability to electronically export the completed assessment roll to the Brown County Real Property Listing office in the format required, eliminating any manual data entry of the completed roll.
- iv. The ability to import "start-up data" from any existing databases to avoid time/cost-consuming initial data entry.
- v. The ability to accept and import the City's existing building permit records utilizing either a CSV or MS Excel file.
- vi. Maintains a separate sales listing file to record and store data on sale properties as of the date of sale.
- vii. Maintains an ownership history.
- viii. The ability to create a wide range of reports, including Assessment Roll, Assessor's Final Report; and neighborhood attributes and values.
- ix. The ability to run queries to locate specific data.
- x. Has an electronic sketch for each property.
- xi. Uses standard database format that can be read or easily converted to be read by other software packages and managed by Microsoft Sequel (SQL) Server.
- xii. The data should be capable of being uploaded to the City's GIS system.

Accurate has reviewed, understands, and acknowledges each point in the Specific Service Required, detailed by the City of De Pere.

OUR HISTORY

Accurate was founded 20 years ago on the idea of complete transparency and communication. For many years it was common practice for assessors to suppress information from the public. This resulted in a lack of understanding and mistrust within the community. The founders of Accurate recognized these shortcomings and began pioneering new innovative assessment standards. Over the last 20 years we have developed web-based digital property record cards, created online scheduling options, and built our own CAMA to update data digitally in the field. With a combined experience of over 180 years Accurate has continuously improved the assessment experience through innovation, education, and technology.

2000 - 2005

20 municipalities
Building digital data online
New Website
Full Value Service Options
Blend Options - more affordable and budget friendly

2010 - 2015

90 Municipalities
Started building proprietary CAMA
Still growing - added more employees

2005 - 2010

75 municipalities
Built online scheduling
Moved to new location on Midway Rd.
Growing - added new employees

2015 - 2020

100+ municipalities
Digital in the field
CAMA software Prolorem launches
Live assessor certified customer service
Intentional community education plan

At Accurate we make a concerted effort to connect and learn the nuances of each community. There is no "cookie-cutter" way to assess unique communities. We tailor our services to fit the needs of everyone we serve. [Here is a small sample:](#)

UNIQUE ASSESSMENTS

Views of the Capital Building - Dane County
Views of the lake - Lake Geneva & Fontana
Bayshore Mall - Glendale
Access to the Chain of Lakes - Dayton
All of Menominee County
Dock-O-Miniums - Fontana

CORPORATE BUSINESS

Secura - Fox Crossing
Johnson Controls - Glendale
Foth - De Pere
Miron - Fox Crossing
Cleary Building - Greenville
Humana Insurance - De Pere

TAX EXEMPT EXPERIENCE

St. Norbert College - De Pere
Divine Savior Hospital - Portage
Skaalen Retirement Services - Stoughton

DISTRIBUTION/WAREHOUSING

WALMART Distribution center - Beaver Dam
Amazon - Greenville
TARGET - Oconomowoc

OUR ALL INCLUSIVE SERVICES

- Online roll books
- Digital property record cards, with photos online
- Assessment data integrated into your website
- Live, assessor operated, telephone-based open books
- Cloud based CAMA system with dedicated support
- Assessor certified customer service
- Assessors available to answer questions daily over the phone or via video chat

- Multiple assessors at open book to keep waiting to a minimum
- Interactive videos and educational materials at open book
- Active live chat function available on our website
- Community education planning with dedicated marketing person
- Virtual walk-through options
- Access to your own dedicated assessor
- Maintenance inspections included



ASSESSMENT HISTORY OF DE PERE

The City of De Pere and Accurate have been working together for over 17 years. Throughout that time we have integrated new assessment technologies and built a strong relationship with your community. We can proudly say that since Accurate has been involved with De Pere your ratio's have never fallen out of compliance with State regulations.



From 2010 to 2025 De Pere has grown about 6%. During those 15 years there have been about 650 new improved parcels added to the roll. We are sharing this to be completely transparent about our role in assessing for the City of De Pere. With additional parcels comes additional time needed to complete assessments in the City. We know

In 2018 Accurate began tracking hours on every aspect of our services. From entering sales, tracking field work, checking permits, collecting customer service data and much more. The data has been very consistent. Based on the last 4 years we can share that on average Accurate spends **696 hours a year assessing the City of De Pere.**

	2022	2023	2024	2025
Hours Spent	658	675	839	612+
Service Cost	\$76,000	\$76,000	\$76,000	\$76,000
Per Hour	\$115	\$112	\$91	>\$124

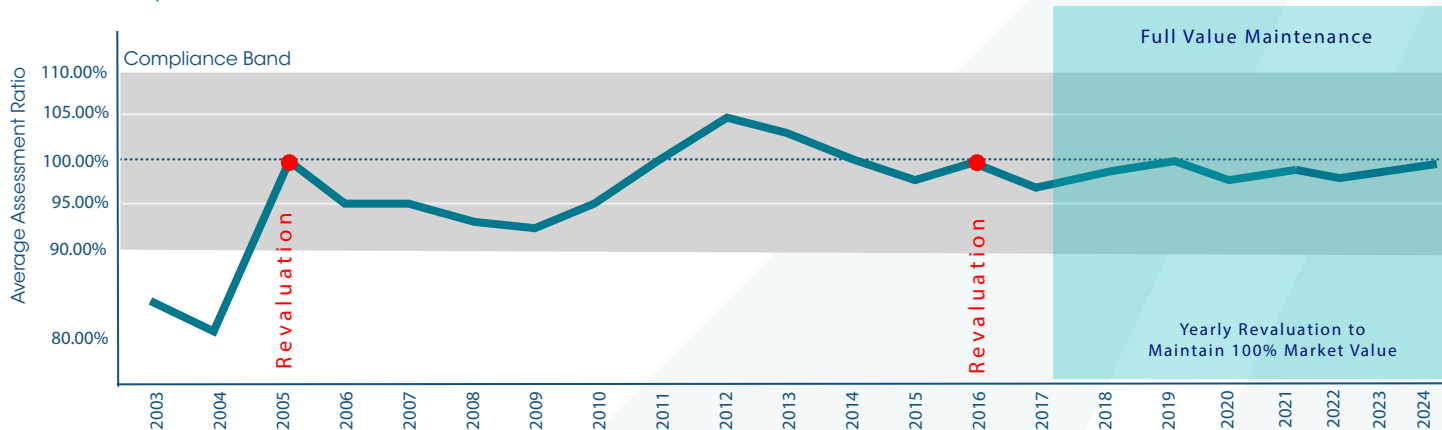
The industry average for assessment services ranges from \$125 to \$150+ an hour depending on the type of contract and services needed. By understanding the increase in improved parcels, additional sales, and hours spent during the open book and board of review means we can now accurately quote a fair cost for our services that meets the needs of your community.

FAIRNESS & EQUITY

There is no better way to express the fairness and equity of our work than to show a visual example. The center dotted line represents true fairness and equity, where assessed values are in line with market value. When assessments maintain 100% market value they mirror the state's equalized value to ensure every property owner is paying their fair share of taxes.

City of De Pere

Brown County

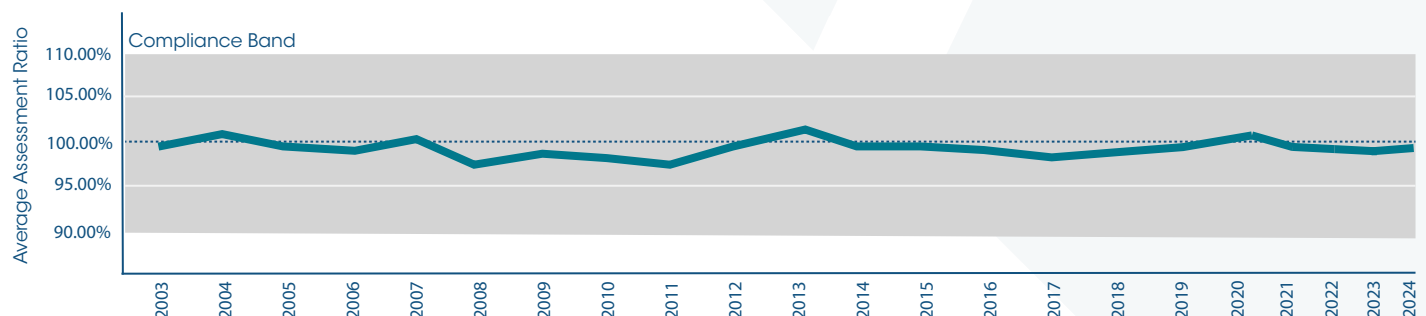


From 2003 through 2013 De Pere property was revalued only twice. Every year of maintenance creates **natural market inequity**, in which the market value of properties rise and fall while assessed values stay the same. This market inequity means property owners are no longer paying their fair share of taxes until a revaluation is performed.

You can see that the ratios stay close to 100% once De Pere started the Full Value Maintenance program. This is the most fair and equitable assessment process. The graph below shows the ratios for the City of Stoughton. We have performed our **Full Value Maintenance** program over the same time period, since 2003. You can see that by revaluing property every year the **assessment ratio stays within** 10% of state's 100% guideline never going more than 5% away from 100%.

City of Stoughton

Dane County



Full Value Maintenance is not just "keeping you in compliance" with a market update every few years. It means we perform **a market update every year!**

The benefits of Full Value Maintenance is three-fold. 1.) It maintains 100% market value, 2.) keeps you from saving up for revaluations every 6 to 8 years, and 3.) is the **most fair and equitable way** to make sure every property owner is paying taxes on their property at 100% market value every year.



EXAMPLES OF WORK

We have experience working on special projects with multiple municipalities throughout the state. Below are a few examples our ability to adapt our services and work with municipalities we that are not currently contracted with. We are committed to helping move the assessment experience forward through education, building partnerships, and supporting those in need.

1. SUMMIT

Background:

The Village of Summit was in need of measurements for exempt properties to determine the sq ft of the buildings as they had no data on file. Their assessor could not complete the work in their timeframe so their clerk reached out other assessors in the state and we were the only one to respond to their request.

Accurate's Solution:

We developed a plan to review the properties from any practicable data we could find assisted by aerial GIS to measure the sq ft of each property and store the data in a spreadsheet. We supplied them with images of the measurements along with a letter format to send to each owner for verification. We were happy to help out a municipality in need.



2. GREENVILLE

Background:

We have been the assessors for Greenville well over 10 years now. The town was incorporating to be a village in 2021. During this transition they didn't have much time to plan or execute a message to the community.

Accurate's Solution:

We reached out to Wendy at Greenville about what their plan was to educate property owners on the transition. Based on our initial meeting we offered to help them with social media posts, inserts, and explanations for what happens during an incorporation and the dates surrounding their meetings. We have also helped them update their social media with assessment education and have recently been working with them to incorporate their building permit process into our new Online Permit Portal.



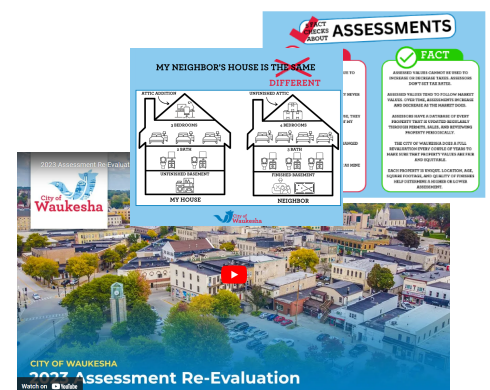
3. WAUKESHA

Background:

Sam Walker, the City of Waukesha's assessor reached out to us for help with assessment education content. The City was performing a market update and had been following our linked in posts. They liked what we were sharing and wanted to use some it for their website and social media.

Accurate's Solution:

Without hesitation we connected with Sam and shared our entire library of newsletter content, post card mailings, videos, and social media content. We worked together on a few verbiage changes and stayed in touch throughout the market update process to make sure they had what they needed. They even updated some of the pieces that we now use so it was mutually beneficial. Sam still stays in touch and we are working on other projects with him.



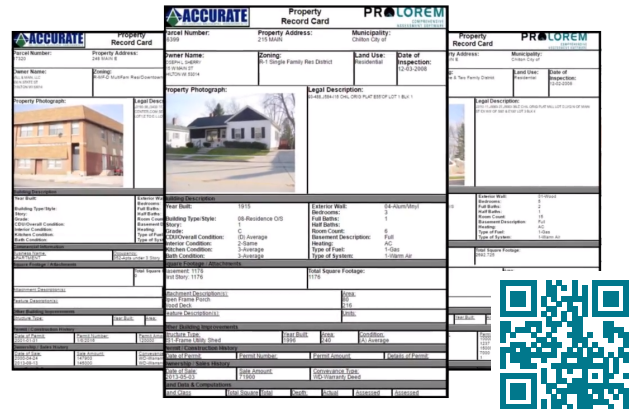
We have many more projects we would like to share with you during the interview process, such as our recent inspections and social media education.



SOFTWARE

Our proprietary CAMA system is completely **CLOUD BASED.**

With Prolorem, all property record cards are digital. They are available on our website **FREE** to you and your community 24/7. There are no costs to use our software and convert your Market Drive data. Prolorem converts data from **iWorQ** to easily and quickly update permits. All property record cards have **images and detailed information** about each parcel. We believe in 100% transparency therefore **all data and programs gathered** are the property of the City of De Pere should you ever change assessors.



Our assessors utilize computer tablets to assess properties in the field. With Prolorem there is no need to take hand written notes back to the office to update the value on a property. Our assessors are trained to complete assessments **on premise**, eliminating errors from re-entering data. All **property record cards are updated in real time** and saved to the cloud instantly. Our CAMA is the only software that updates property record cards in real time.

Accurate has **converted data into Prolorem** from multiple forms of CAMA systems including Market Drive, Tyler Technologies, GVS, TC Win, and many more. Our on staff IT integrates multiple platforms like GIS, Apex Sketching Tool, iWorQ, etc to streamline our process. Because our software is proprietary we have the ability to add or remove features the City of De Pere requests at no additional cost.

PROLOREM

A REVOLUTION IN ASSESSING SOFTWARE

SOFTWARE COST: \$0.00
LICENSING/MAINTENANCE: \$0.00
SOFTWARE:
INTEGRATION ABILITY: YES, \$0.00
CONVERSION ABILITY: YES, \$0.00

There are never additional costs for conversions, updates, licensing, integrations, additions, etc.



EDUCATION PLAN

On average, most property owners have about 40 days from the time they first learn about the Market Update to when their new value is finalized.

It is standard practice for an assessor to send notices and wait for the community to reach out with questions or concerns. However, this one-way communication is not transparent and often leaves property owners scrambling to understand what's happening. Frequently, this leads to a disconnect between property owners, the municipality, and the assessor.

Our education plan puts your community first. We leverage your existing communication channels to start the conversation early. With our approach, your community will be informed about potential value changes 80 to 190 days before notices are sent out. Together, we'll establish a **two-way communication** channel through social media, council meetings, newsletters, postcard mailings, custom videos, and much more.

EXPERIENCE OUR EDUCATION PLAN:

1. SOCIAL MEDIA



Utilize your channels of social media preparing to share the process of Full Value Assessments. We mix this with a schedule of postings over the coming year to educate property owners on what to expect and the status of the current market. Involving the community ensures we have a two-way communication through the process.

2. COUNCIL MEETINGS

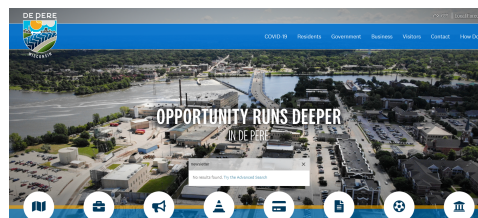


Your community will inevitably have questions about the how Full Value works. We will attend council meetings to educate your council members arming them with the knowledge they need to explain the revaluation assessment process with property owners.

3. NEWSLETTER

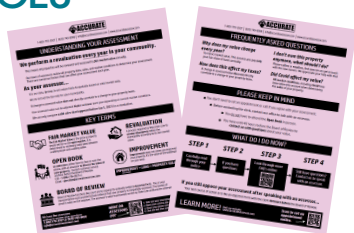
Writing articles that address the assessments, what to expect, and the schedule of social media postings keep your community engaged. We can invite readers to sign up for text alerts or email updates throughout the year.

4. WEBSITE



Updating the City website with a custom video helps explain what a revaluation is and what to expect. We can build links to property record cards and show a timeline for the revaluation. The community utilizes your website as a resource, we serve them best by keeping them up to date.

5. NOTICES



A notice of new value will be mailed to every property owner. Inserted with the notice will be an Understanding Your Assessment information sheet explaining the assessment process with QR codes, links to videos, an online appointment scheduler, and access to our customer service team.

6. OPEN BOOK & BOR

We will offer over the phone Open Book appointments as well as in person options. For in person Open Book property owners will be greeted with a TV slideshow with assessment videos playing. We provide computers for property owners to search for their record cards.



SOCIAL MEDIA

We post content 4 times a week! If you haven't been using our educational content, we highly recommend meeting with our social media team to work on a regular schedule.

Through **Social Media** we build a positive and informative **two-way communication** with your community. Over 85% of 25-45 year olds use social media, and over 70% over the age of 50 use it daily.

With a simple share you can instantly connect with thousands of property owners to **quell the stigma of taxes and assessed values**. By not involving your community they may feel left out and discouraged about the assessment process. Let us help you with continual education on social media.

5 FACT CHECKS ABOUT ASSESSMENTS

MYTH

Assessors raise property value to collect more taxes.

Assessed values only go up, they never go down.

The assessor didn't visit my house, they don't know the condition of my property.

Assessed values can only be 5 to 10 years.

My neighbor's house is the same but I am assessed more.

FACT

Assessed values cannot be used to increase or decrease taxes. Assessors don't set tax rates.

Assessed values tend to follow market values. Over time, assessments increase and decrease just as the market does.

Assessors have a database of every property that is updated regularly through permits, sales, and reviewing property periodically.

HOUSING MARKET COMPARISON

2022 Jan-April	2021 quarterly averages	2022 May-Aug
\$265,500	Median Home Value \$235,000	\$276,200
20,908 Sales	Number of Sales 27,172	32,293 Sales
4.9%	Interest Rate 2.9%	6.2%
8.1%	Inflation Rate 2.5%	8.6%

UPLOAD PERSONAL PROPERTY ONLINE

VISIT: accurateassessor.com/personal-property

SELECT: Your municipality

ENTER: Your account number

WHAT'S A MILL RATE?

The Mill Rate is calculated by dividing the total taxes needed by the total assessed value of the community. An increase in assessed value does not equate to an increase in your taxes.

$$\text{MILL RATE} = \frac{\text{TOTAL TAXES NEEDED}}{\text{TOTAL ASSESSED VALUE}}$$

Taxes are set annually by these 4 entities:

- Municipality
- School District
- County
- Technical College

It is a simple mathematical fact, if taxes stay the same and assessed values increase the mill rate will fall and your taxes will stay about the same.

Mill Rate .018

\$140,000

2021

Assessed Value: \$140,000
X Mill Rate: .018
Taxes: \$2,520

35% COMMUNITY WIDE INCREASE
EXAMPLE NOT ACTUAL

Mill Rate .013

\$189,000

2022

Assessed Value: \$189,000
X Mill Rate: .013

2023 HOUSING MARKET FACT SHEET

BROWN COUNTY, WI

MEDIAN PROPERTY VALUES INCREASED BY **12.5%** FROM 2021 to 2022

\$240,000 IN 2021 **\$270,000 IN 2022**

Brown County property values have been increasing year after year. When property values are re-assessed your assessment changes to mirror the current market.

The interest hike in 2022 was meant to slow down market. However, the housing shortage has not demand. This is evident in the property value in drop in the number of homes sold.

FOR SALE

3,233 HOME SALES IN 2022
3,671 SALES IN 2021

11.9% Drop in the # of homes sold

-1.9% # of sale JANU. 2022 IN 2021

Presented by: Accurate

2023 ASSESSMENT TIMELINE

- January 1, 2023: January Cutoff
- February: Personal Property
- March: Visit New Construction
- April: Submit 2022 Sales to DOR
- May: Mail Sales Questionnaires
- June: Review New Values
- July: Set Values for Market Revitalization
- August: State Equalized Values Reported
- September: Run Initial State For New Values
- October: Permit & Building Inspection Checks
- November: Mail Notices of New Values
- December: Open Book
- January 2024: Board of Review
- February 2024: Field Checks
- March 2024: 2023 Tax Bills Mailed by Municipality

DID YOU KNOW?

The State of WI is a **Market Value** state. Assessors are regulated to use a full year (or multiple previous years) worth of sales to determine your assessed value.

In 2022, based on statistics from the Wisconsin Realtors Association, the average property value increased 8% to 10% higher than 2021.

Even if property values drop significantly in 2023, **assessors are not allowed to use sales from the current year to determine value**. If you would like to know more about the assessment process please read the **2023 Property Owners Guide**.

LEARN MORE! VISIT: accurateassessor.com

CHECK US OUT ONLINE!



www.facebook.com/accurateappraisal



www.linkedin.com/company/accurate-appraisal

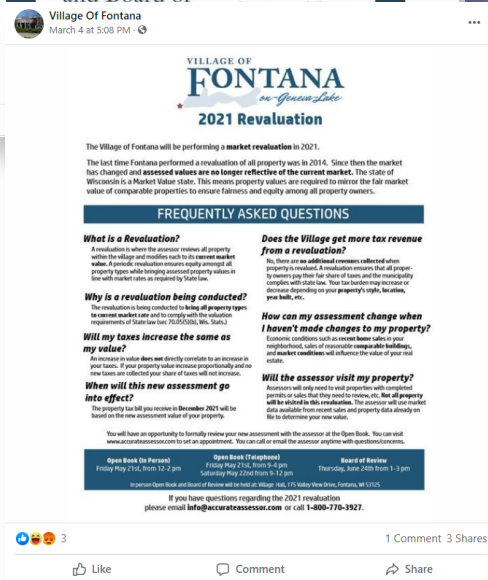
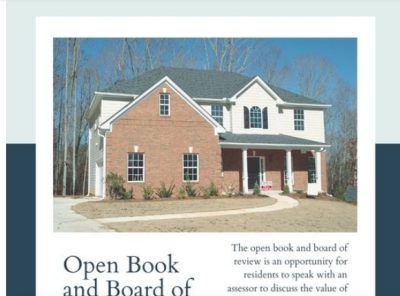


POSITIVE INTERACTION

Through social media we establish an important **two-way communication** with the people in your community. Social media helps us instantly connect with thousands of property owners. We are all aware of the stigma of taxes and assessed values. By not involving your community they feel left out and discouraged about the assessment process. Our transparency ensures they feel like they're informed about any value changes. Engaging with your community through social media allows us to **inform, educate, and empower** them. Here are just a few examples of how we engage with our current municipalities:

Village of Bayside
May 6, 2020 · 🌐

Due to the pandemic, the Open Book and Board of Review property assessment process will take place via phone call this year. You can schedule your appointment today by visiting: <https://accurate.rogcalendar.com/appointments>



City of Oconomowoc
February 4 · 🌐

The City of Oconomowoc will be performing a market revaluation of all property this year. The last time Oconomowoc performed a revaluation of all property was in 2014. Since then, the market has changed and assessed values are no longer reflective of the current market.



City of De Pere
41m · 🌐

The City of De Pere's annual property assessments are based on a revaluation means smaller changes in value each year instead of every 4 years. All across Wisconsin the housing shortage and high demand of buyers is driving up sale prices. Annual assessments keep your value in line with market value. We have compiled some statistics from the WRA to help illustrate the impact of the housing market on new assessed values. Notices of new values will be sent very soon. Please contact the assessor's office with any questions about the 2021 revaluation. info@accurateassessor.com or 920-749-8098



What To Expect 2021 Revaluation

Permits:
Contact Building Inspection 339-4053. Assessors are calling to verify all 2020 permits.

Notices:
Notices will be mailed in March.

City of Manitowoc
March 1 at 2:34 PM · 🌐

2021 Property Revaluation Information:
The City of Manitowoc will be performing a market revaluation of all property this year. The last time Manitowoc performed a revaluation of all property was in 2007, 14 years ago. Since then, the market has changed and assessed values are no longer reflective of the current market. A periodic revaluation ensures fairness and equity among all property, while bringing assessed property values in line with current market rates as required by State law. What is a revaluation? A revaluation is where the assessor reviews all property within the city and modifies each to its current market value.

Accurate builds relationships with the community. For example our Personal Property department created an instructional video on our website walking through how to fill out PP statements.

"Just wanted to let you know, I was not looking forward to filling out the form. But the instructional video and the information on your website made the process a lot easier than I thought it would be. Thank you!"

Barr Resort - Kika Barr



Our assessors go above and beyond just valuing property. The classification of land changed for this property owner. We helped him by working with the DOR on properly classifying his land.

"Paul at Accurate was very helpful with my land classification and working with the DOR. He was very gracious and professional through the journey."

Resident - Duane Wagner



OUR COMMITMENT

Accurate has been at the forefront of moving the assessment experience forward. To accomplish this, we are fully **committed to building a culture of assessment knowledge**. Every assessor that works for accurate is required to attend knowledge sessions on each assessment process. Knowledge sessions are established by our senior assessors and encompass each aspect of assessing such as: Ag land calculations, vacant land valuation, roll books, exemptions, board of review and open book, statistics, commercial valuation, and many more.

Additionally, our assessors have book club meetings regularly to read, review, and interpret the WPAM which is our guideline for assessment practices. Spring of 2023, our assessors joined in on the first ever **listening sessions with the DOR to update and bring the WPAM guidelines and statutes into the 21st century**. 14 of our assessors attended and led 6 of the round-table discussions on assessment practices. We shared the experience with our entire team at our weekly Monday Morning Meeting.



Technology allows assessors to be more accurate in our assessments. We have been **working on a project with the WI Department of Revenue (DOR) to standardize the import and export of assessment data files**. Our IT team will continue to work with the DOR on this project to make it easier on municipalities and assessors when collecting and sharing data.

Finally, **we attend conferences annually to connect with clerks, administrators, mayors, etc.** to share ideas and build relationships with those we serve. It's our way to educate municipal officials on the assessment process. **We also enjoy having fun with the municipal officials who do so much for their communities!**



Wisconsin Association of Assessing Officers



ASSESSMENT TIMELINE

Before January of each year we will sit with you and **discuss the options for open book and board of review dates**. We will work with you to schedule new construction checks, field work, data entry, and the date notices are mailed. Below is a suggested timeline of what happens throughout the assessment process. These dates are for example only.

JANUARY

We start every year by visiting new construction to verify the % completion of new property. Trespass notices are mailed to property owners so they know we will be in the area.

If the property is not complete as of January 1st (each year) we update our records accordingly and flag the parcel/s for a final visit to measure and list the property as complete.



This timeline may change depending on the agreed upon dates for Open Book and Board of Review. We are flexible on the date for Open Book and Board of Review that works best for you.

February

New construction field checks are reviewed and verified by our office. Sales, permits, exemptions and any other assessment related data is updated in our records.

Initial DOR equalized values are reviewed.

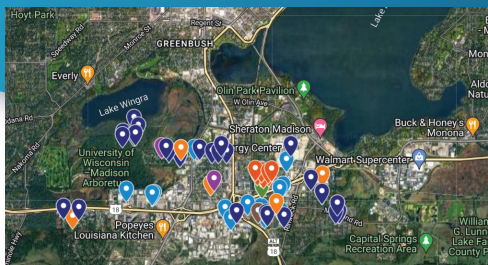
During the market update - education is implemented through social media, newsletters, and custom content.



March

Properties are sorted and mapped for field inspections based on permits, sales, inspection requests, etc. Assessors update data on premise with their laptops.

Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



April

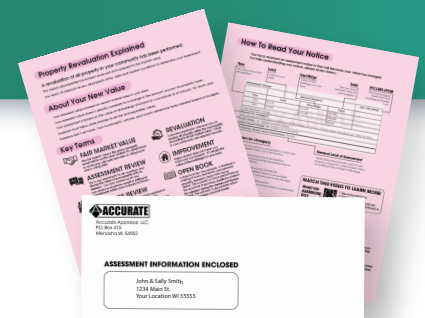
Initial values are forecasted. Value checks are performed and revisions are made. Our import/export team works with the county to verify assessment and mailing data. Initial statutory board meeting must be held if needed.

Notices are printed and mailed. Every notice includes an educational insert with links to videos and FAQ's. Rolls are posted online.

May-June

The assessment review period starts. Property owners can contact Accurate by phone, email, or online appointment. The open book period begins the day they receive their notice up to 7 days before board of review begins.

Final rolls are verified with the county and prepared for Board of Review. The assessor signs the final roll.



WORKLOAD

On a regular basis Shanda will meet with your team to go over accountability for our assessment team. **There will be a standard agenda to ensure open communication and that all metrics are being followed.** Below is an example of a progress report that will be created to ensure you know the progress of current processes.

City of Kenosha Interim Market Update (2024)

						Project Start: Mon, 7/24/2023																													
						Display Week: 1		Jul 24, 2023					Jul 31, 2023					Aug 7, 2023					Aug 14, 2023												
								24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	
TASK	ASSIGNED TO	PROGRESS	START	END	TOTAL DAYS	DAYS LEFT	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S		
Education / Publication																																			
Prep and share Education Plan	Chris	100%	8/1/23	8/30/23	30	-19																													
Update website - Add video	Chris	1%	8/1/23	4/1/24	245	196																													
Create content on current Res Market	Chris	1%	8/1/23	4/1/24	245	196																													
Initiate education through all forms of communication	Chris	1%	9/1/23	9/30/23	30	12																													
Mill Rate Education with Tax Bill (if allowed)		100%	11/1/23	12/31/23	61	61																													
Prepare notice letter and insert for 2024 market update (if allowed)		1%	11/1/23	4/1/24	153	153																													
Connect Accurate's Facebook to Kenosha website		1%	1/1/24	1/15/24	15	15																													
Send Mailer		1%	1/15/24	4/1/24	78	78																													
Use all avenues of Education		1%	2/1/24	4/1/24	61	61																													
Additional education on the BOA and BOR		1%	5/1/24	5/31/24	31	31																													
Data Transfer & Analysis																																			
Data Transfer		1%	1/1/24	1/15/24	15	15																													
Code Table Data Reviews & Return		1%	1/1/24	3/10/24	70	70																													
Fieldwork (Permits & New Construction)																																			
Permit Reviews (Verify permits (occ) and what our next step is, actionable or non-actionable)(Value partial Construction)		5%	8/14/23	12/31/23	140	104																													
Commercial Permit Value (Permits completed after 1/1/23 (value them))		5%	8/14/23	12/31/23	140	104																													
New Construction Checks		1%	8/14/23	12/31/23	140	104																													
New Construction Alterations/Progress		1%	8/14/23	12/31/23	140	104																													
Ag Checks (Kenosha mails letter, Lori onsite visit)		10%	9/8/23	9/29/23	22	11																													
Ag Checks (Kenosha 2nd letter, data update)		10%	10/1/23	11/15/23	46	46																													

Additional meetings will be held throughout the year. Four main annual meetings will cover:

Kick-Off Meeting:

Setting the Open Book and Board dates, education plan with reminders, reviewing the notice letter, preparing the timeline for assessments, compare permits to make sure we have all of them.

Pre Open Book Meeting:

Preparing your board with educational materials they need, reviewing the assessment rolls with the clerk, reminders about when to send out education.

Pre Board of Review Meeting:

Cover the expectations at the BOR, go over all objections to ensure we have all of them, reminder to set meeting after board ensuring the manufacturing values are in the roll for export to LaCrosse county.

End of the Year Wrap Up:

What went well, what needs to be addressed, prep for late fall field work, prepare for the next assessment year.

SERVICE OPTIONS

The service options below are reflective of our all-inclusive services. **There will never be an additional invoice for any reason.** You may retain 10% of the total fee subject to delivery of certified tax roll.

3 YEAR FULL VALUE MAINTENANCE

	2026	2027	2028	Total
Assessor Services	Market Update	Market Update	Market Update	Total
Service Cost	\$76,800	\$76,800	\$76,800	\$230,400
Annual Amortized Price	\$76,800	\$76,800	\$76,800	\$230,400

4 YEAR ALTERNATING 2027, 2029 Market Update

	2026	2027	2028	2029	Total
Assessor Services	Maintenance	Market Update	Maintenance	Market Update	Total
Service Cost	\$36,000	\$76,800	\$36,000	\$76,800	\$225,600
Annual Amortized Price	\$56,400	\$56,400	\$56,400	\$56,400	\$225,600

5 YEAR FULL VALUE MAINTENANCE

	2026	2027	2028	2029	2030	Total
Assessor Services	Market Update	Market Update	Market Update	Market Update	Market Update	Total
Service Cost	\$76,800	\$76,800	\$76,800	\$76,800	\$76,800	\$384,000
Annual Amortized Price	\$76,800	\$76,800	\$76,800	\$76,800	\$76,800	\$384,000

Maintenance:

We will inspect all permits, new construction and any demolitions. Every sale will be entered and reviewed. If there are changes to condition or missing information we will update the data to reflect. Any request for inspection from your community will also be visited during a maintenance year.

Market Update:

We will conduct the same services as in a maintenance year. On top of our maintenance services every year we will break down each property by neighborhood, style, age, location etc. Each will be evaluated and re-assessed to its new fair market value. A notice of new value will be mailed to the property owner. It is important to maintain a schedule of social media education to ensure your community understands how the assessment process works.

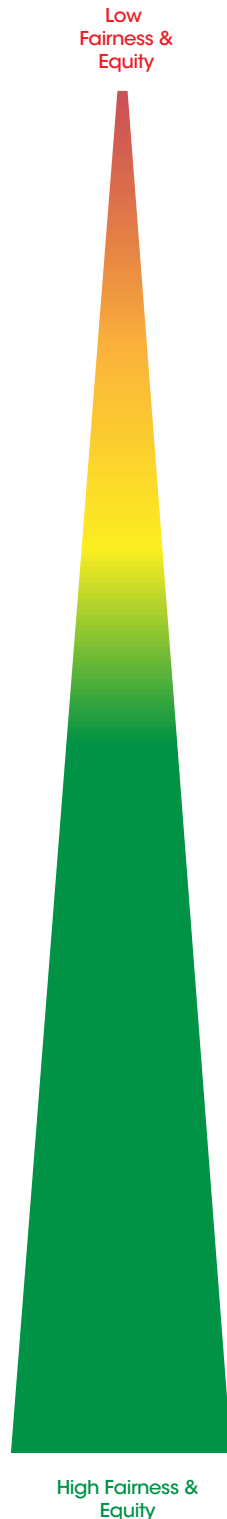
ALL INCLUSIVE SERVICES

- ✓ **FREE** Web Data Access
- ✓ **CUSTOM** Community Education
- ✓ **LIVE** Customer Service
- ✓ **ZERO** Cost to Convert Assessment Data

Would you like to see additional options?
We will work with you to customize any
assessment plan to fit your community's needs.



SERVICE DEFINITIONS



MAINTENANCE

We physically view any property that has changed from the previous year. This includes all new construction, property splits, and properties that have been issued a building permit, etc. Maintenance keeps property values stagnant and creates inequities each year you remain in a maintenance cycle

BLEND

Blending years of maintenance with a market revaluation creates a budget friendly option to spread the cost of a market update over the life of the contract. Using this process you could potentially bounce in and out of compliance.

REVALUATION

The purpose of a 1 year city-wide revaluation is to bring all real estate values to 100% market value. This can be done by physically inspecting all of the properties, or partial inspections over multiple years. Waiting multiple years between revaluations causes large increases or decreases in values. Fairness and equity is only high during the year the revaluation takes place, years of maintenance start the cycle over again.

FULL VALUE MAINTENANCE

We pioneered the process of Full Value Maintenance. Our proprietary service **aggressively maintains 100% market value by performing annual market revaluations.** This ensures every property owner is paying only their fair share of taxes on an annual basis and prevents large value adjustments while producing the most fair and equitable value.

REFERENCES



DE PERE

**We are proud to have featured you as a reference in several of our proposals, and we greatly value your continued support and partnership*

Accurate Appraisal has served as the statutory assessor for the City of De Pere since 2005. In 2018, the City decided to adopt their annual Full Value Maintenance program. This transition has been beneficial to the City, because market trends over the past few years would have otherwise forced another city-wide revaluation. It also makes budget planning easier by supplying consistent information year-to-year. Our account manager at Accurate is extremely knowledgeable, and has always been responsive to our questions and needs. Accurate's proactive public relations campaign, which provides social media posts and additional website content, has been very helpful in communicating with and educating our citizens.



Carey Danen
CLERK/TREASURER

www.deperewi.gov
cdanen@mail.de-pere.org
(920) 339-4072 ext 1355



GREENVILLE

We have worked with Accurate over the last three years, who performed a total revaluation of our municipality. Their leadership in the industry is one of the reasons why we chose Accurate as our Assessor. Their friendly, reliable service is why we continue to utilize Accurate. Timely, professional response has been appreciated and we trust them to serve our residents with dependable service and fair assessments.



Wendy Helgeson
CLERK

www.townofgreenville.com
whelgeson@greenvillewi.gov
(920) 757-5151 ext 1100



CITY OF NEW RICHMOND THE CITY BEAUTIFUL

It is with enthusiasm that I recommend Accurate Appraisal, LLC. We could not have asked for a better partner to go through a full revaluation with this year. Their depth of experience allows them to handle even the most complicated of situations and their professionalism is obvious to our team, but more importantly to our residents. A revaluation is a big deal to a community, but doesn't have to be strain on City Staff - Accurate will get you through every step.



Michelle Scanlin
CLERK

www.newrichmondwi.gov
mscanlan@newrichmondwi.gov
(715) 246-4268



Accurate Appraisal has professionally served as the Assessor for the Village of Fox Crossing since 2015. Over the past several years, Accurate Appraisal expertly conducted a full revaluation of the Village in 2017, and has maintained the Village at full value since 2019. A full value contract with Accurate Appraisal has provided a tremendous benefit to Fox Crossing. With the large increase in property values over the past few years, having the Village's assessed value grow incrementally over the past several years rather than a large increase in value in one year, is much easier to explain to Village residents. Accurate Appraisal has been a great partner with Fox Crossing in managing the difficult task of assessing.



Jeffrey S. Sturgell
Village Manager

www.fccommunity.com
JSturgell@foxcrossingwi.gov
(920) 720-7101



Cindy Bauer
CLERK

www.ci.altoona.wi.us
cindyb@ci.altoona.wi.us
(715) 839-6092



Insurance & Legal

Insurance Providers and Legal History Statement

Over the past three (3) years, Accurate Appraisal, LLC has held commercial liability insurance policies with the following insurance providers:

Houston Casualty Company
13403 Northwest Freeway
Houston, TX 77040

West Bend Mutual Insurance Company
1900 South 18th Avenue
West Bend, WI 53095

With regard to claims activity:

Houston Casualty Company is currently representing Accurate Appraisal in ongoing litigation involving the City of Franklin. This matter is pending, and no judgment has been entered.

Legal Actions:

Apart from the ongoing Franklin case mentioned above, Accurate Appraisal has not been a party to any other legal actions related to our appraisal projects in the past five (5) years. There have been no judgments entered against Accurate Appraisal in relation to any of our services.

Defaults and Non-Conformance:

Accurate Appraisal has never been declared in default, issued a non-conformance notice, or terminated for cause with respect to any of our services.

Government Contract Participation:

At no point in the past five (5) years has Accurate Appraisal or any of our sub-consultants been suspended from bidding on or entering into any government contracts.

Additional Information:

Accurate Appraisal works closely with the Wisconsin Department of Revenue (DOR) through its annual assessment review process. We have developed and maintained a strong, collaborative relationship with the DOR and are committed to upholding the highest standards of accuracy, transparency, and regulatory compliance in all our work.

OUR CORE VALUES

We strive to always put others first and maintain transparency about our assessment process. The values we believe in are not just empty statements. The words were carefully selected, not by the owners but by the employees of Accurate. Our core values express who we are as a company, as your assessors, and how we treat each other.

WE ARE FAMILY

We have an unwavering loyalty to each other and our customers. We Respect & Encourage each other and appreciate uniqueness. We value and support each other's health, safety and work/life balance.

ALWAYS TRANSPARENT

We are Open & Honest in ALL interactions, sharing our data, processes, information, mistakes, and victories. We hold each other accountable. Our availability to our customers and family members is abundant.

EMBRACE GROWTH & INNOVATION

We are comfortable being uncomfortable while striving to get better every day. We foster and enhance customer relationships while seeking to learn and develop. We offer to teach and mentor customers and family members.

BE ADMIRABLE

We guard our integrity by doing the right thing-ALWAYS. We strive for quality and precision in our work, our products, and our services. We act like owners and honor our word and commitments. We choose candor, respect, and kindness.

WE ARE A BOATLOAD OF FUN!

Positivity is our attitude of choice. We have infectious spirits bringing enthusiasm and excitement to all we do. We are passionate and value diversity and inclusion. There's no reason too small to celebrate.

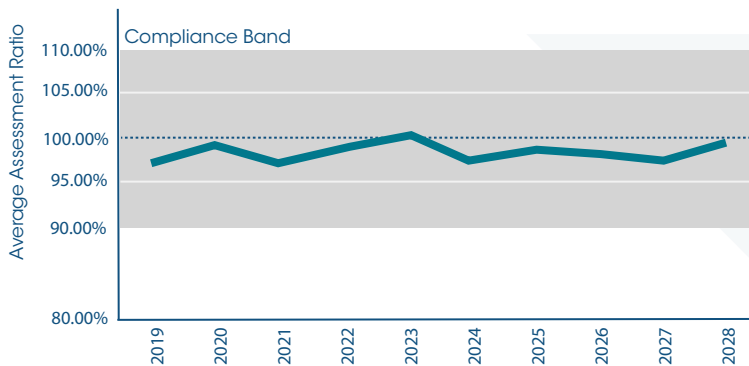
SUMMARY

Thanks again for taking the time to review our proposal. We have enjoyed working with the City of De Pere over the last 17 years. We look forward to building an even stronger relationship with you and your community over the next 3 to 5 years. We will work together to build a [progressive public education plan](#). Our Transparency will put your community first, keeping them involved in the assessment process. Our team of assessors will be responsive to your needs and offer the best customer service to your community.

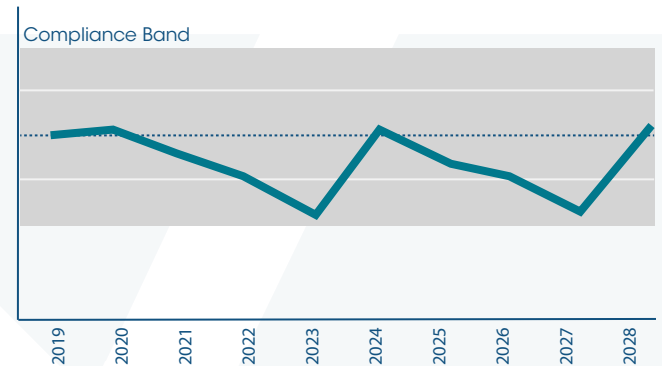
In the RFP you expressed to us that the assessor is to maintain 100% market value annually on all taxable property if you continue with Full Value Maintenance. With our Full Value Maintenance program, we perform yearly revaluations to ensure [fairness and equity](#) among all property owners. [Our recommendation](#) would be to continue with Full Value Maintenance services.

The term Full Value does not mean simply [staying in compliance](#). In order to maintain 100% market value annually a yearly revaluation should be performed. You can see the difference of Full Value and staying in compliance in the graphs below. Every year a revaluation is not completed assessed values are no longer in line with the states equalized values. This means ratios are above or below 100% until the next revaluation is performed.

Full Value



Cyclical Revaluations



Based on the current market forecasts and trends from the last 5 years of market sales data.

We have 17 years of experience in De Pere and over 20 years of experience with similar sized cities. We are not the standard 'cookie cutter' assessment firm that tells you how you should assess the City of De Pere. We will collaborate with you to adapt to the needs of your community so we can give you the best services tailored to fit your every property owner.

[Transparency](#) between the property owners, the City of De Pere and the assessor is paramount to build a successful assessment program.

It has been an absolute honor to serve the City of De Pere over the past 17 years. We've truly valued every moment and every connection made along the way. We sincerely hope to continue this trusted partnership and remain your Assessors for many years to come.



PROPOSAL FOR ASSESSMENT SERVICES

City of De Pere, WI

Forward Appraisal LLC
P.O. Box 13434
Green Bay, WI 54307

Submitted:
May 30th, 2025

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From: Forward Appraisal, LLC
P.O. Box 13434
Green Bay, WI 54307

To: City Clerk Carey Danen
City of De Pere
335 S Broadway
De Pere, WI 54115

I'd like to begin by thanking you for considering us for this opportunity. The City of De Pere is like a second home to us, as we live and work in the Green Bay area. It is exciting to see all the development occurring each year on both the east and west side of the river.

Our company, which is based in Green Bay, has extensive assessment experience and has been contracted to perform commercial and residential assessments and revaluations throughout the state of Wisconsin. Our work has included reviewing and valuing commercial and residential properties, supporting the use of CAMA software Market Drive, designing custom database queries, submitting state-required reports, coordinating with other City departments, and other work functions of the Assessor's office.

Our goal is to educate and bring an understanding of the appraisal process to our clientele. This philosophy makes our job easier and makes for a more confident experience for the property owners and City officials. This confidence is built by having accurate and current information while maintaining solid business relationships with the community and City staff.

I look forward to meeting you to further discuss the City's assessment needs. I'm available any time to answer questions. Thank you for your consideration.

Sincerely,



Nichole J. Tesch – Assessor II & III
nichole@forwardappraisal.com
608-444-6216

Qualifications and Capabilities

A. Experience

In 2006, after more than a decade in the appraisal business, Forward Appraisal was created to meet the demand for a more customized service for municipalities and statutory Assessors. By contracting specific assessment needs, Forward Appraisal has been able to focus and specialize in meeting the needs of each individual Assessor or Municipality.

Forward Appraisal is a locally owned, Wisconsin-based company offering valuation and assessment services for communities throughout Wisconsin. Our background includes the valuation of residential, commercial and agricultural property using CAMA systems such as CLT, Market Drive, GVS, and Marshall & Swift. We provide the following assessment services:

- Full statutory assessment services
- Annual maintenance of all property classes (building permits, property splits, new deeds, owner requested reviews, exemption requests, photographs, and sketching)
- Valuation of exempt properties
- Analysis of commercial income and expense data
- Defense of property values for Open Book, Board of Review, and 70.85 hearings
- Consulting
- Sales Analysis – Reviews and modeling
- Revaluations

Forward Appraisal has been providing assessment services for the City of Green Bay Assessor's Office for the past twenty years; we recently worked with the Assessor's office to complete a city-wide revaluation in 2022. Additionally, Forward Appraisal has recent experience following Accurate Assessor: in 2024, we replaced Accurate in the City of Franklin and successfully completed a city-wide Interim Market Update.

In many of our municipalities, Forward Appraisal has been responsible for converting data from a prior assessor's CAMA software/vendor into the Market Drive software we use. We've converted from GVS (Stevens Point), CLT (Green Bay), Prolorem (Franklin), and more.

Municipality: City of Green Bay
 Population: 107,395
 2024 Equalized Value: \$10,834,009,900
 Total Parcel Count: 33,393
 Statutory Assessor: No
 Maintenance Services: Commercial (2005-present)
 Revaluation Services: Commercial and Residential (2022)
 Evidence of Accuracy: Compliance achieved through successful revaluation, maintenance work completed with no ongoing objections by property owners or Department of Revenue.

Municipality: City of Franklin
 Population: 36,816
 2024 Equalized Value: \$6,486,517,200
 Total Parcel Count: 7,515
 Statutory Assessor: Yes
 Maintenance Services: Commercial and Residential (2024-present)
 Revaluation Services: Commercial and Residential (2024)
 Evidence of Accuracy: Compliance achieved through successful revaluation, maintenance work completed with no ongoing objections by property owners or Department of Revenue.

Municipality: City of Stevens Point
 Population: 25,666
 2024 Equalized Value: \$2,861,259,100
 Total Parcel Count: 8,336
 Statutory Assessor: Yes
 Maintenance Services: Commercial and Residential (2013-present)
 Revaluation Services: Commercial and Residential (2017, 2023)
 Evidence of Accuracy: Compliance achieved through successful revaluation, maintenance work completed with no ongoing objections by property owners or Department of Revenue.

Municipality: City of La Crosse
 Population: 52,680
 2024 Equalized Value: \$5,638,471,900
 Total Parcel Count: 15,864
 Statutory Assessor: No
 Maintenance Services: Commercial (2022-2024)
 Revaluation Services: Commercial (2022)
 Evidence of Accuracy: Compliance achieved through successful revaluation, maintenance work completed with no ongoing objections by property owners or Department of Revenue.

B. Personnel and Staff Organization (sub-items B, C, & D)

Staff Organization Chart (sub-item C):

Steven J Shepro, Owner/Assessor
Commercial and Residential Appraiser
Certified Assessor II; first licensed 1993

Nichole J Tesch, Assessor
Commercial and Residential Appraiser
Certified Assessor II & III; first licensed 2007

Scott D Alvey, Assessor
Commercial and Residential Appraiser
Certified Assessor II; first licensed 2017

Beth I Polacek, Appraiser
Residential Appraiser and Administrative
Certified Assessor II; first licensed 2021

Sandy L Kratzke, Appraiser
Remote Administrative Support
Certified Assessor I; first licensed 2000

Key Individuals (sub-item C):

Nichole and Scott live and work in the Green Bay area; Nichole and Scott will be responsible for the City of De Pere assessment services, with ad hoc support from Sandy, Steve, and Beth as needed. Nichole and Scott will attend the proposed interview (sub-item D).

Qualifications of Key Personnel (sub-item B):

Nichole and Scott are the contracted commercial appraisers for the City of Green Bay and the statutory assessors for the City of Franklin; Nichole and Scott were responsible for the 2022 commercial and residential revaluation for the City of Green Bay.

Nichole and Scott have reviewed and made exemption determinations in the City of Franklin and supported the City of Green Bay Assessor on exemption determinations. That said, Forward Appraisal works as a team to review and make determinations on exemption requests for our municipalities.

In addition to being wholly responsible for Green Bay and Franklin revaluations, Nichole and Scott supported the modeling and valuation processes for all revaluations that the company has completed. This includes the revaluations listed on the prior page, along with smaller municipalities including the City of Wisconsin Rapids, the City of Marshfield, and the Town of Coloma.

NICHOLE J. TESCH

EDUCATION

2003-2007 University of Wisconsin – Green Bay Green Bay, WI
 Bachelor's Degree in Business Administration, Emphasis in Marketing
 Spanish Minor
 International Studies Certificate
 ■ Graduated Cum Laude

QUALIFICATIONS

Certified Assessor II and Assessor III by the Wisconsin Department of Revenue
 Active member of the Wisconsin Association of Assessing Officers

EXPERIENCE

2007 – Current Forward Appraisal, LLC Green Bay, WI
Assessor and Technical Support

- Valuation of residential, commercial, personal and mobile home properties.
- Planning and implementation of several data conversions from various CAMA systems.
- Development of Microsoft Access custom queries and reports for the purposes of defending value, internal statistical analysis, and providing information to other departments.
- Organization, preparation and presentation of documents presented at Board of Review.
- Preparation of materials for valuation estimates and progress reports to various City departments.
- Statistical analysis of annual sales ratio studies and review of sales studies conducted by the Department of Revenue.
- Completion of Department of Revenue required reports; including the Annual Assessor's Report, Municipal Assessment Report, TID Assessment Report and Exempt Computer Report

2007 – Ongoing Bowmar Appraisal, Inc. Appleton, WI
Administrative Assistant

- Prepare reports for Board of Review cases
- Input and sketch residential properties using Market Drive
- Create spreadsheets for commercial property changes in each municipality
- Extract data from Market Drive to import and organize into a workable database

RELATED SKILLS

Advanced knowledge of Microsoft Excel, Access, Word, and PowerPoint

Experienced utilizing CAMA Software CLT, Market Drive, and GVS

Specialized in Market Drive import specification writing, custom query writing, valuation modeling and troubleshooting

SCOTT D. ALVEY

EDUCATION

2012-2014	University of Wisconsin – Green Bay	Green Bay, WI
Bachelor's Degree in Mathematics		
Minor in Human Development		
Minor in Spanish		

QUALIFICATIONS

Certified Assessor II by the Wisconsin Department of Revenue
 Active member of the Wisconsin Association of Assessing Officers (WAAO)
 Active member of the WAAO Education Committee

EXPERIENCE

2017 – Current	Forward Appraisal, LLC	Green Bay, WI
<i>Assessor and Technology Manager</i>		
■ Valuation of residential, commercial, personal and mobile home properties ■ Planning and implementation of data conversion ■ Organization, preparation and presentation of documents presented at Board of Review. ■ Management of technology infrastructure including server and VPN functions ■ Preparation of materials to assist in the presentation of progress reports to various City offices ■ Assistance in organization and analysis of annual sales ratio studies and review of sales studies conducted by the Department of Revenue ■ Assistance with Department of Revenue required reports including the Municipal Assessment Report (MAR)		
2015 - 2017	Shopko	Green Bay, WI
<i>Category Assistant, Operations Supervisor</i>		
■ Analyze daily, weekly, monthly sales metrics ■ Create spreadsheets to track merchandise movement, orders, and data flow ■ Preparation of reports for executive meetings ■ Communicate with vendors, stores, and technical support teams ■ General category management and upkeep ■ As Operations Supervisor, supervise up to ten people on a given day		

RELATED SKILLS

Advanced knowledge of Microsoft Excel, Access, Word, Outlook, and PowerPoint

Experience utilizing CAMA software (CLT and Market Drive) and sketching programs (RapidSketch, Apex, AutoCAD, Revit)

Specialized in report generation and mathematical analysis of same

Interpersonal (soft) skills from a history of sports (competing and coaching), volunteer positions, and previous customer service and supervisory roles

Understanding and Approach

A. Project Opportunities and Challenges

The City of De Pere, as a well-developed suburb of Green Bay, has experienced property value growth consistent with what we've witnessed around the state. As outlined in the City of De Pere's 2023 Housing Affordability Report, single-family housing market trends show the average sale price of \$338,944 and time on market of 3 months, which is comparable to the single-family housing market trends in Brown County overall.

Unlike a decade ago, when property values saw modest increases of 2-3% annually, we've seen property values climb 8-10% per year or more for the last few years. The result has been a steady increase in demand to complete revaluations on a more frequent basis. We emphasize that, with more frequent revaluations, municipalities must also be willing to revalue in a declining market. As such, we tend to recommend the approach of reliable cyclical revaluations. This cyclical approach allows us to respond to the market smoothly and holistically, rather than immediate reactions up or down to any given year's sales.

Based on prior conversion experience, there is a fair amount of data cleanup that will need to occur to ensure reliable information from which to model new cost tables. This includes the following tasks:

1. Initiate the conversion process with Market Drive support or third-party programmer to convert all data into Market Drive CAMA software format
2. Ensure all buildings have vector sketches (using the Apex sketching program) and use area calculations from those sketches to update all areas in each property's records
Sketches will be vectorized in an ongoing process, not all in one year. Records are assumed to be correct until resketched or discovered otherwise.
3. Review and correct all items on the Assessment Roll Audit Report
This Market Drive report identifies errors such as ranch homes with second floor square footage, homes with rec rooms listed but no basement square footage, commercial buildings with mismatched occupancies, etc.
4. Review and correct all items on the Incomplete Records Report
This Market Drive report identifies properties that are missing data required to generate a value, as well as properties that are missing electronic sketches and digital photos
5. Review all assessment "neighborhood" boundaries and ensure all parcels are correctly assigned
Given the City of De Pere's 64 current assessment neighborhoods, it's likely that neighborhood delineations are too narrow. In Green Bay, we analyzed and delineated about 25 neighborhoods; Franklin only needed 15.
6. Compare and correct acreage differences between the County and Market Drive
7. Assign all land an appropriate and consistent unit of measure

Further, detailed analysis of sales data is the foundation for establishing models that produce market values. Generally, much of this work is done by the Assessor each year when reviewing the validity of sales; since we will be working with converted data, auditing will be necessary to make sure the sales being used for modeling are listed properly within the program:

1. Review of land sales from prior 5 years, or as deemed relevant
2. Review of improved sales from prior 2 years, or as deemed relevant

These sale reviews will be based on the prior assessor's validation, with a once-over for confirmation.

Based on our experience, we recommend an initial three-year term for the transition between assessment firms. This begins with a market interim update (revaluation) for assessment year 2026 as described in the City's Request for Proposal under Scope of Work (Page 3) and any services outlined in the Wisconsin Property Assessment Manual as part of a market interim revaluation. For 2027 and 2028, we recommend maintenance years to attain record accuracy and verification of sales data for modeling purposes.

After the initial onboarding triennial, we recommend continuing that same triennial cycle. Alternatively, we would welcome other preferred scheduling as desired by the City.

B. Approach

Forward Appraisal shall comply with and complete all required services listed under Scope of Work, Items 4a through 4y.

Detailed Scope of Services – Every Year

The following is a list of tasks that will be performed annually, whether the year is a designated maintenance or revaluation year:

1. Field review and assess all properties that were under partial construction as of January 1st of the previous year
2. Field review and assess new construction as of January 1st of the current year
3. Perform 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 as allowed
4. Field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, and other miscellaneous permits
5. Mail surveys to buyers and sellers of any properties which have sold for indication of sale validity (nature of the openness of transaction, impact of non-real estate considerations on price, etc.)
6. Field review as necessary and allowed properties which have sold and properties for which no building permit has been issued
7. Account for all buildings destroyed or demolished
8. Provide projected assessed values for potential development projects at the request of the Development Services Director
9. Coordinate with City staff for an annual meeting to discuss the previous year's development projects and building permit data
10. Determine the fair market value of mobile home units in the municipality subject to the monthly municipal permit fee, in accordance with State Statute 66.0435
11. Implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue
12. Create, print, and mail State-approved Notices of Changed Assessment to property owners and others as required by State Statutes

13. Conduct Open Book sessions in accordance with Wisconsin State Statutes; 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
14. Prepare for the annual Board of Review hearing proceedings as required by State Statutes prior to the deadline each year; work with the City Clerk to arrange for the hearings
15. Provide digital photographs and data for comparable properties so that the Board and the petitioner have evidence of comparability
16. Attend the Board of Review hearing(s), serve as City staff at the hearing(s) and defend the valuations and work products; promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved
17. Be available for any Circuit Court proceedings that may result from appeals or other assessment-related matters
18. Provide all assessment data to Brown County's Real Property Listing office to facilitate the digital and manual transfer of data and values and to ensure that the County's assessment roll is balanced. A printed or digital copy of the assessment roll will be provided to the City.
19. Complete Municipal Assessment Report: provide the Wisconsin Department of Revenue (WI DOR) with both preliminary and final reports of assessed valuations after the Board of Review meeting; provide WI DOR with assessments for all TIF districts by the prescribed deadlines
20. Place detailed property assessment records with images and full parcel information on the internet with free access to the public and the City. This will be accomplished through a combination of the City's existing online resources and Market Drive. Property record cards will be updated annually.
21. Provide the City with the unlocked, freely accessible Data Warehouse and full database backup at least once annually, and as requested; export PDF property cards as requested

Detailed Scope of Services – Interim Market Update

In addition to the tasks above, any year in which we perform an Interim Market Update (revaluation) will also include the following tasks:

1. Review and confirm all neighborhood delineations, making modifications if necessary; all modifications will be supported and followed up with a new boundary map, which will be given to GIS maintenance staff to create a new neighborhood map
2. Research and review all valid land sales for the purpose of establishing land values
3. Land models will be created based on valid vacant land sales, and improved sales using the abstraction method where necessary; this will include commercial, residential, and other land not subject to use-value rates. Unique lots (irregular shape, access, contamination etc.) will be identified and adjusted appropriately—any land adjustments on individual properties will be systematic in nature and detailed for clarity
 - a. Land models will use common units of measure (square foot, acre, front foot, etc.); no land will be "site valued" or "gross valued"
 - b. Land models will be set up for each neighborhood
 - c. Unique land circumstances will be identified by GIS review and proper adjustments made for items such as size, shape, location, contamination etc.
 - d. All exempt properties will be assigned to an appropriate neighborhood so market value for land can be estimated when requested

- e. Test land models for accuracy
- 4. Research and review all valid improved sales for the purpose of establishing improvement values
- 5. Establish new models in Market Drive for valuing all improvements—this will include commercial, residential, agricultural, and any other non-manufacturing taxable improvements
 - a. Residential improvements will be valued using Wisconsin Property Assessment Manual Volume II with modifications made to reflect local market conditions identified through the following studies:
 - i. Analysis of new construction costs and new home sales to determine local modifier
 - ii. Analysis of depreciation based on sales studies
 - iii. Analysis of necessary market modifiers for residential components (style, interior and exterior ratings, basement egress, etc.) using regression techniques
 - b. Commercial improvements will be valued using the Marshall & Swift Cost Manual with modifications made to reflect local market conditions identified through the following studies:
 - i. Analysis of new construction costs and sales to determine local modifier
 - ii. Distribution, collection, and analysis of custom Commercial Income and Expense surveys to build a thoroughly supported Income Valuation Model; we will supplement with CoStar data should the surveys be incomplete
 - iii. Identify custom market adjustments for commercial property types based on sales data
 - c. Test improvement models for accuracy
- 6. Adjust models based upon observations in the field and any new verifiable sales
- 7. Review final new values and amounts of change, paying special attention to atypical or very large percentage changes

C. Value Added Services

Forward Appraisal creates and provides an annual assessment summary to municipalities. This report summarizes the work completed each assessment cycle. It also illustrates the state of assessments relative to the market. Additionally, we summarize and explain reports that are published by the Wisconsin Department of Revenue and how they relate to assessments and the municipality.

We will work to digitize any remaining paper records.

Market value estimates of exempt properties can be provided as needed.

Communication with property owners via phone and email will be seamlessly integrated with the city's existing infrastructure.

Project Timeline

Overview of Resources

Below is a summary of current contracts and their maintenance and revaluation schedules. Typically, we try to limit our revaluations to no more than 3 in any given assessment cycle. This ensures that we have enough staff available to assist in all areas and continue to deliver responsive and quality maintenance services throughout the year.

Municipality	2026	2027	2028
Green Bay	Maintenance	Revaluation	Maintenance
Stevens Point	Maintenance	Revaluation	Maintenance
Wisconsin Rapids	Maintenance	Maintenance	Revaluation
Marshfield	Maintenance	<i>Likely Maintenance</i>	<i>Likely Revaluation</i>
Franklin	Maintenance	<i>Likely Revaluation</i>	<i>Likely Maintenance</i>
Nekoosa	Revaluation	Maintenance	Maintenance
Coloma	Maintenance	Maintenance	Maintenance

Our work is a team effort and staff are cross trained to be able to do nearly every part of the assessment process. While we do assign personnel to specific municipalities, we all support the work required to complete each assessment roll.

Annual Schedules

The following is a timetable for the completion of each element in the scope of work for Year One:

October 1, 2025	Onboarding ☐ Draft and publish online introductory letter to property owners ☐ Receive database from prior assessor (sooner if possible) ☐ Initial set-up of software and deliver database to developer to begin conversion (estimated 6-8 weeks for conversion delivery) ☐ Request test building permit data file and build import specification file to electronically import all permit data ☐ Import all sales data from the Wisconsin Department of Revenue PAD system ☐ Gather all data and review for carry-over reminders and partially completed construction from prior assessor ☐ Send Buyer/Seller Surveys of all sales occurring in 2025 (year to date) ☐ Send Income and Expense Surveys to all commercial properties ☐ Begin sketching all properties to convert to vector-based Revaluation Work ☐ Review GIS mapping, school districts, water and sewer services, amenities etc. to delineate appropriate neighborhoods for residential and commercial properties ☐ Establish Land Models ☐ Establish Residential Improvement Models ☐ Establish Commercial Improvement Models
-----------------	---

December 1, 2025	Maintenance Work ☐ Begin field work to determine status of all permitted work (partial complete from prior year, new for this year, unpermitted work found during sale review process) ☐ Send letters requesting full inspection of sales requiring further review ☐ Gather data on all mobile homes through site visit ☐ List and value all mobile homes at full value, review lottery credit status, and provide fee schedule to City by January 10th
January – March	Maintenance Work ☐ List and value all changes from properties fielded ☐ Research and value all changes from properties where entrance was refused, or no response was received ☐ Submit all sales validation data to the Department of Revenue ☐ Update Use Value rates from the Department of Revenue ☐ Download starting work roll from the County ☐ Process and track all splits, combinations and changes in legal description or acreage ☐ Perform stratification of residential and/or commercial sales to provide additional feedback to the Department of Revenue ☐ Review Manufacturing Notification Roll to ensure no parcels are double assessed or missed ☐ Review any new exemption request PR-230 forms Revaluation Work ☐ Valuation Modeling ☐ Establish Commercial Income Approach Models based on returned survey data
April	Model Calibration ☐ Test models by comparing newly computed values with recent sales data Final Review Finalize Assessment Roll ☐ Review Assessment Roll Audit Report ☐ Review all changes ☐ Coordinate with City Clerk for Open Book and Board of Review meeting times and applicable deadlines for posting notices to the public
May - June	Open Book and Board of Review ☐ Deliver roll to City Clerk (electronic or paper as preferred) ☐ Upload assessment data to AssessorData.org website ☐ Upload assessment roll to City website for Open Book ☐ Discuss valuations with property owners and make appropriate changes ☐ Defend valuations at Board of Review ☐ Submit final roll to the City Clerk and County ☐ Upload final property data to website ☐ Submit the Municipal Assessment Report to the Department of Revenue

Budget

For the performance of the services as stated in the Request for Proposal and as outlined in this proposal response:

Assessment Year	Work Period	Description of Work	Total Cost
2026	October 1, 2025 (or sooner if possible) – June 30, 2026	Onboarding, Maintenance, and Market Interim Revaluation	\$250,000
2027	July 1, 2026 – June 30, 2027	Maintenance	\$90,000
2028	July 1, 2027 – June 30, 2028	Maintenance	\$90,000

Billing is typically monthly, but we can bill quarterly if that is the City's preference. The three-year total could also be spread out flexibly via a payment schedule through the length of the contract.

Of note, future revaluation projects would be at a reduced cost because the 2026 budget factors in conversion and onboarding, which are one-off costs that will have already been completed. An estimate of future revaluation costs can be provided upon request.

References

Company Name:	City of Green Bay
Address:	100 N Jefferson St Green Bay, WI 54301
Telephone:	920-448-3066
Contact Person:	Russ Schwandt – City Assessor
Services Used:	Revaluation and Commercial Maintenance
How long have you been working with this company?	20 years

Company Name:	City of Stevens Point
Address:	1515 Strong's Ave Stevens Point, WI 54481
Telephone:	715-346-1567
Contact Person:	Jarod Kivela – Community Development Director
Services Used:	Statutory Assessor, Maintenance and Revaluation
How long have you been working with this company?	12 Years

Company Name:	City of Franklin
Address:	9229 W Loomis Rd Franklin, WI 53132
Telephone:	715-427-7504
Contact Person:	Kelly Hersh – Director of Administration
Services Used:	Statutory Assessor, Maintenance and Revaluation
How long have you been working with this company?	1.5 Years

Insurance and Legal Responsibilities

Appraisers shall indemnify, hold harmless and defend the City for losses, costs and expenses arising from liability claims resulting from alleged negligence of our firm, its officers, employees, and subcontractors. Forward Appraisal maintains a \$1,000,000.00 dollar public liability insurance policy through American Family, underwritten by Midvale Indemnity Company. Forward Appraisal also maintains commercial auto liability and worker's compensation coverage.

American Family Insurance

2671 Continental Dr A.
Green Bay, WI 54311
920-965-1515

Midvale Indemnity Company

6000 American Parkway
Madison, WI 53783

Errors and Omissions (Professional Liability)

Forward Appraisal does not currently carry Errors and Omissions insurance, as it is not required under any contract with which we have engaged. Errors and omissions are corrected or remedied through State-prescribed procedures such as Correction of Errors (70.43) or Omitted Property (70.44) statutes.

We would request the City accept the exclusion of Errors and Omissions insurance. If this is a requirement, we would ask the City to grant us time to seek out qualifying coverage.

Forward Appraisal is not in violation of any statutes or regulatory rules that might have an impact on our firm's operations or our ability to comply with the requirements of this contract.

Has any insurance company paid on behalf of the persons or organizations covered? No

Is your firm now, or has it been, within the past five (5) years, involved in any legal action related to any projects? No

Provide all details of any declarations of default, non-conformance notices, or termination for cause against your firm with respect to such services. None

State whether during the past five (5) years your firm or sub-consulting firms have been suspended from either bidding or entering into any government contract. No

Conflict of Interest

There are no known conflicts of interest between members of Forward Appraisal and elected officials and/or employees of the City of De Pere.



Agreement for Assessment Services

Prepared for:

City of De Pere

By:

Accurate Appraisal, LLC

Section I

Agreement for Maintenance and Interim Market Update Assessment Services

Provided by Accurate Appraisal LLC.

For
City of De Pere, Brown County,
for the assessment years of 2026 with a three-year opt in option.

Dated this _____ day of _____ 2025.

Fee for services rendered:

2026 Interim Market Update

Accurate shall be paid a yearly sum of:

\$78,000

**3-year opt in is available for Interim Market
Updates for 2027-2029 at \$78,000 per year.**

Scott McFarlane

Scott McFarlane
Member
Accurate Appraisal LLC

6/30/2025

Date

Authorized Client Signature

Date

Section II

Contract Details

Municipality: City of De Pere

	BLEND CONTRACT
Assessor Services	2026 – Interim Market Update
CAMA Software	Included
Community Education	Included
Online Property Data	Included
Payments	Monthly Installments
Yearly Cost	\$78,000
Term of Contract	1 year
Total Contract	\$78,000

Opt in Contract Details

	opt In Option
3-year opt in Option	2027 – Interim Market Update 2028 – Interim Market Update 2029 – Interim Market Update
Yearly Cost	\$78,000
Term of contract	3 years
Total cost of opt in	\$234,000

*** The option to opt in may be exercised at any time. Upon written notice of the request to opt in, Accurate will provide an amended agreement reflecting the three-year term.**



Section III

This agreement made this _____ day of _____, 2025 by and between the City of De Pere, Brown County, State of Wisconsin, party of the first part, hereinafter referred to as "Client",

AND

ACCURATE APPRAISAL LLC., PO BOX 415, MENASHA, WI 54952, party of the second part, hereinafter referred to as "Accurate or Assessor".

BASIC SCOPE OF SERVICES

The assessor understands that the project requires the maintenance assessment services and 1 interim market updates of all taxable and nontaxable real property within the corporate limits of the City of De Pere, Wisconsin. Any updated data will be noted on the individual property record cards. All data and programs gathered will always remain the property of the City of De Pere.

All work will be carried out and all forms, materials and supplies utilized by the Assessor in this project shall conform to, and be carried out in accordance with, the Wisconsin Statutes. The values to be determined shall be the present true and actual value of each parcel of real property as that term is used in Chapter 70 of the Wisconsin Statutes. They shall be based upon recognized methods of appraisal and conform to Uniform Standards of Professional Appraisal Practices, as required by Wisconsin Statutes for the licensing and certification of all individuals involved in the appraisal of real estate.

Accurate shall provide the Client with assessing services by Wisconsin Department of Revenue Certified Personnel for the 2026 assessment years which includes the following:

1. Accurate shall update and maintain 100% real property assessment records for the Client. Said service shall include all assessing services so as to comply with all applicable Wisconsin statutes, codes, rules, and/or regulations, including the assessment of all new construction, remodeling, additions and changes relating to improvements removed for any reason such as fire, demolition, etc. through building

permits. Accurate shall reapportion value brought about through property splits.

2. Accurate shall, without additional expense to the Client, be required to attend Open Book and all Board of Review meetings and shall be responsible for defending all assessments. The Open Book meeting shall be conducted as needed. The meetings shall be scheduled by Accurate with the Clerk. The Open Book meetings shall be completed at an agreed date of each assessment year.
3. Accurate shall retain the right to employ additional certified personnel at Accurate's expense as deemed necessary to complete the assessment roll in a timely manner. Responsibility for the content and accuracy of the assessment roll regardless of the use of other personnel shall, however, rest with Accurate.
4. The Client shall not receive compensation from Accurate for sharing and charging back of taxes due to palpable errors which may be recompensed through State of Wisconsin statute 74.33. A submission of refunded or rescinded taxes should be submitted by the client before October 1 of each year to the State of Wisconsin.
5. The Client's responsibility will be to supply Accurate with adequate office space in or near the Client's Hall.
6. The Client will hold Accurate harmless from third party claims and liabilities due to the assessment of property except claims or liabilities, which result from the intentional or negligent acts or omissions of Accurate, its employees, agents and representatives, shall be the responsibility of Accurate.
7. This agreement between the Client and Accurate shall be for the assessment year beginning January 1st, 2026, and ending December 31st, 2026 It is expected the work will commence with review of new construction and be completed after the final adjournment of the Board of Review and any necessary follow-up questions and/or work because of appeals of Board of Review decisions.

8. The client will be invoiced in monthly installments for each contracted year
9. Accurate shall provide advice and opinion for assessment matters and will defend values through the appeal process beyond the Open Book and Board of Review.
10. Accurate shall complete its Open Book hearings under this agreement no later than the agreed date between Accurate and the Client of each assessment year or an agreement date, except for delays caused by the Client, county, or state. Accurate may request a thirty-day extension to the contract upon written agreement with the Client.
11. Accurate shall maintain full insurance coverage to protect and hold harmless the Client. Limits of liability shall not be less than the amounts listed below in this contract:

INSURANCE COVERAGE

General Liability

General Aggregate	\$ 4,000,000
Each Occurrence	\$ 2,000,000
Personal & Adv Injury	\$ 2,000,000
Products-Comp/Op Agg	\$ 4,000,000
Fire Damage	\$ 300,000
Medical Expense	\$ 10,000

12. Accurate shall consider the cost approach, market approach, and income approach in the valuation of all land and improvements where applicable.

13. Accurate shall use Computer Assisted Mass Appraisal software to accurately provide the Client with records of the maintenance and interim market updates. For both residential and commercial valuations, Accurate's Assessing Software will be utilized following market data, Volume II of the Assessor manual and Marshall & Swift cost tables. The yearly maintenance fee associated with the use of either program will be at no additional cost to the Client. The data will be available to the public on www.accurateassessor.com; building data and appointment scheduling will also be available at no additional expense to the Client.
14. Photographs of all improved parcels will be taken digitally at no additional expense to the Client.
15. All expenses incurred by Accurate during the contract such as postage, phone calls, etc., will be at no additional expense to the Client.
16. Accurate will implement a public education plan to build understanding of the assessment process with taxpayers and the Client. The Client and Accurate shall work to maintain good public relations throughout the assessment program.
17. In the best interest of the City of De Pere, the board of review in the interim market update year will be held no later than 10/31 of that year.

Budget

For the performance of the services as stated in the Request for Proposal for the 2026 Assessment Year only and as outlined in this proposal response for the 2026 Assessment Year:

Assessment Year	Work Period	Description of Work	Total Cost
2026	October 1, 2025 (or sooner if possible) – June 30, 2026	Onboarding, Maintenance, and Market Interim Revaluation	\$250,000
2027	July 1, 2026 – June 30, 2027	Maintenance	\$90,000
2028	July 1, 2027 – June 30, 2028	Maintenance	\$90,000

Billing is typically monthly, but we can bill quarterly if that is the City's preference. ~~The three-year total could also be spread out flexibly via a payment schedule through the length of the contract.~~

Of note, future revaluation projects would be at a reduced cost because the 2026 budget factors in conversion and onboarding, which are one-off costs that will have already been completed. An estimate of future revaluation costs can be provided upon request.



City of De Pere, Wisconsin

I.8

Request for Finance/Personnel Committee Action

MEETING DATE: August 12, 2025
DEPARTMENT: Finance
FROM: Pamela Manley, Finance Director
SUBJECT: Consideration and Possible Action on 2024-2025 Property Tax Bill Preparation Agreement with Brown County.*
RECOMMENDED ACTION: Consideration and Possible Action on 2024-2025 Property Tax Bill Preparation Agreement with Brown County.

This agreement is consistent with last year's agreement. Staff's recommendation is to approve with Option A-County mails tax bills for municipality. Please feel free to contact Finance Director Pam Manley prior to the meeting with any questions.

ATTACHMENTS:

23 City of De Pere - Brown County Property Tax Bill Agreement 2025-2026

BROWN COUNTY INTERGOVERNMENTAL 2025-2026 PROPERTY TAX BILL AGREEMENT

(TAX BILL PREPARATION, WITH MAILING OPTION)

This Agreement is entered into by and between **the County of Brown ('County')**, a body corporate as that term is used in Wis. Stat. § 59.01, and the **City of De Pere ('Municipality')**. This Agreement is made pursuant to Wis. Stat. § 66.0301, which allows a Wisconsin County to enter into Intergovernmental Agreements with other Wisconsin Municipalities.

Municipality desires for County to **prepare** (and, **depending on the Mailing Option selected on Page 2, to mail**) its **Real Property Tax Bills** on its behalf, and the County agrees to perform said Services, pursuant to the terms and conditions specified below.

1. The term of this Agreement is from the date the last signature on this Agreement is obtained to February of 2026.
2. Municipality's Clerk shall provide all **approved** 2025 tax rates to the Brown County Treasurer's Office by November 30, 2025, **and** on or before February 27, 2026 Municipality shall pay County **\$1,500 per year** to contribute to the cost of tax collection software.
3. County, via the Brown County Treasurer Office, shall prepare appropriate tax bills for Municipality, specifying the first installment payment, second installment payment and/or full payment of Real Property Taxes along with Special Charges and Special Assessments to be due on or before January 31st, 2026. Tax bill preparation includes providing forms, printing, folding, sealing, presorting, and mailing the tax bills on or before December 9, 2025.
4. **County shall not provide First Installment Property Tax Collection Services.** Municipality **shall** collect Real Property Taxes (including Special Charges and Special Assessments) per Wis. Stats. § 74.11(6). **County Treasurer shall collect Second Installment and Delinquent Real Property Taxes** per Wis. Stat. Sec. 74.11(6)(b).
5. **On or before January 15, 2026,** Municipality shall settle with County for all collections received *prior to* January 1, 2026, including collections for Special Assessments, Special Charges, and Special Taxes, and for General Property Taxes, and Municipality shall pay all taxing districts their proportionate share of levies collected per Wis. Stats. § 74.23.
6. **On or before February 20, 2026,** Municipality shall settle with County for all collections received *on or after* January 1, 2026, and *on or before* February 6, 2026, including collections for Special Assessments, Special Charges, and Special Taxes, and for General Property Taxes, and Municipality shall pay all taxing districts their proportionate share of levies collected per Wis. Stats. § 74.25.
7. If changes in state law occur during the course of this Agreement which substantially affect the obligations of the County or Municipality under this Agreement, such as a change to Property Tax Preparation and/or Billing requirements, then either County or Municipality may elect to terminate this Agreement by providing the other with thirty days prior written notice on or before October 3, 2025. Any material violation of the terms and conditions of this Agreement shall be grounds for termination upon ninety days written notice.

8. **Mailing Option** (Municipality shall select **one Option** by checking one of the below boxes):

☒ **OPTION A – COUNTY MAILS TAX BILLS FOR MUNICIPALITY**

County shall mail tax bills to taxpayers on behalf of Municipality, and County shall invoice Municipality for actual postage costs incurred due to mailing tax bills to taxpayers, which shall be paid by Municipality on or before January 31, 2026. Municipality Payment to County: **\$0.00 per Property Tax Bill prepared plus Actual Postage Costs based on Number of Bills mailed.**

☐ **OPTION B – MUNICIPALITY MAILS ITS OWN TAX BILLS**

Municipality shall mail its own tax bills to taxpayers at Municipality expense. County shall notify Municipality once tax bills are prepared, and Municipality shall pick up printed tax bills at the Brown County Treasurer Office.

By signing below, the parties affirm and acknowledge that they have read and understand this Agreement, that they shall be bound by the terms and conditions of this Agreement, and that they have authority to enter into this Agreement on behalf of their respective Municipality or County.

City of De Pere	County of Brown	Brown County Treasurer's Office
Name of Municipality	Name of County	Name of County Department
Troy Streckenbach	Raymond Suennen	
Name of Individual Signing on Behalf of Municipality	Name of Individual Signing on Behalf of County	Name of Individual Signing on Behalf of County Department
Brown County Executive	Brown County Treasurer	
Title of Individual Signing on Behalf of Municipality	Title of Individual Signing on Behalf of County	Title of Individual Signing on Behalf of County Department
X	X	X
Signature of Individual Signing on Behalf of Municipality	Signature of Individual Signing on Behalf of County	Signature of Individual Signing on Behalf of County Department
Date Signed	Date Signed	Date Signed
(920) 448-4001	(920) 448-6321	
Phone Number	Phone Number	Phone Number



City of De Pere, Wisconsin

I.9

Request for Finance/Personnel Committee Action

MEETING DATE: August 12, 2025
DEPARTMENT: Finance
FROM: Pamela Manley, Finance Director
SUBJECT: Cash and Investments Report.
RECOMMENDED ACTION: Review/Discussion Only

I have attached a summary of the City's Cash and Investments for your information and review as of June 30th, 2025. I have also attached last year's monthly summary of the accounts, so you can see comparable activity throughout the course of the year for all accounts. The City's investment return through June was \$638,967.25. In June, a transfer of \$37,879.72 was made from the LGIP account to the General Checking for the ARPA expenses paid to date and interest earned. Both the Associated Bank Trust and Charles Schwab Investments increased due to market appreciation. Feel free to contact me should you have any questions about this.

ATTACHMENTS:

Investment Summary-June 2025, Yearly Summary-June 2025, Yearly Summary-Dec. 2024

DE PERE CASH AND INVESTMENTS SUMMARY

June 30, 2025

CASH ACCOUNTS

CHECKING ACCOUNTS	BALANCE
CITY CHECKING	\$ 2,137,719.43
PROPERTY TAX CHECKING	\$ 1,000.00
HEALTH CHECKING	\$ 180,410.37
DENTAL CHECKING	\$ 91,711.87
TOTAL CASH	\$ 2,410,841.67

INVESTMENTS

	JAN 1 BALANCE	BALANCE	INTERST AND APPRECIATION	ANNUALIZED RATE OF RETURN
LGIP	11,214,276.91	\$ 15,280,455.03	\$ 279,751.27	4.38%
ASSOCIATED BANK TRUST	5,319,990.57	\$ 5,465,004.19	\$ 145,013.62	5.45%
CHARLES SCHWAB INVESTMENTS	6,686,473.66	\$ 6,853,862.45	\$ 167,388.79	5.01%
MONEY MARKET	3,909,023.89	\$ 13,114,213.03	\$ 46,813.57	4.45%
TOTAL INVESTMENTS	\$ 27,129,765.03	\$ 40,713,534.70	\$ 638,967.25	
TOTAL CASH AND INVESTMENTS		\$ 43,124,376.37		

NOTE: The City budgeted \$2,000,000 for general fund revenues in the 2025 Adopted Budget.

DE PERE CASH AND INVESTMENT YEARLY SUMMARY
JUNE 30, 2025

	31-Jan-2025	28-Feb-2025	31-Mar-2025	30-Apr-2025	31-May-2025	30-Jun-2025
CHECKING ACCOUNTS						
CITY CHECKING	8,755,035.10	6,920,951.59	9,302,479.39	8,078,173.90	5,309,622.47	2,137,719.43
REAL & PPT TAX CHECKING	27,032,373.51	12,616,784.81	1,000.00	1,000.00	1,000.00	1,000.00
HEALTH CHECKING	474,815.36	536,579.01	422,196.54	365,583.23	397,111.37	180,410.37
DENTAL CHECKING	87,718.73	83,340.12	85,387.36	84,083.67	87,018.03	91,711.87
TOTAL CASH	\$ 36,349,942.70	\$ 20,157,655.53	\$ 9,811,063.29	\$ 8,528,840.80	\$ 5,794,751.87	\$ 2,410,841.67
INVESTMENTS						
LGIP	11,684,103.57	11,390,123.60	12,812,453.30	13,286,611.84	15,263,762.16	15,280,455.03
ASSOCIATED BANK TRUST	5,342,673.83	5,377,179.54	5,399,549.84	5,433,406.27	5,433,495.49	5,465,004.19
CHARLES SCHWAB INVESTMENTS	6,707,443.35	6,739,321.78	6,768,723.53	6,806,423.44	6,802,158.53	6,853,862.45
MONEY MARKET	3,923,499.08	3,936,621.86	12,972,700.64	13,019,189.17	13,067,399.46	13,114,213.03
TOTAL INVESTMENTS	\$ 27,657,719.83	\$ 27,443,246.78	\$ 37,953,427.31	\$ 38,545,630.72	\$ 40,566,815.64	\$ 40,713,534.70
TOTAL CASH AND INVESTMENTS	\$ 64,007,662.53	\$ 47,600,902.31	\$ 47,764,490.60	\$ 47,074,471.52	\$ 46,361,567.51	\$ 43,124,376.37

	31-Jul-2025	31-Aug-2025	30-Sep-2025	31-Oct-2025	30-Nov-2025	31-Dec-2025
CHECKING ACCOUNTS						
CITY CHECKING	-	-	-	-	-	-
REAL & PPT TAX CHECKING	-	-	-	-	-	-
HEALTH CHECKING	-	-	-	-	-	-
DENTAL CHECKING	-	-	-	-	-	-
TOTAL CASH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
INVESTMENTS						
LGIP	-	-	-	-	-	-
ASSOCIATED BANK TRUST	-	-	-	-	-	-
CHARLES SCHWAB INVESTMENTS	-	-	-	-	-	-
MONEY MARKET	-	-	-	-	-	-
TOTAL INVESTMENTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL CASH AND INVESTMENTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

DE PERE CASH AND INVESTMENT YEARLY SUMMARY
DECEMBER 31, 2024

	31-Jan-2024	29-Feb-2024	31-Mar-2024	30-Apr-2024	31-May-2024	30-Jun-2024
CHECKING ACCOUNTS						
CITY CHECKING	8,658,164.85	6,546,435.65	4,338,133.91	3,966,560.48	1,415,991.35	2,392,194.50
REAL & PPT TAX CHECKING	15,641,771.63	6,514,236.72	1,000.00	1,000.00	1,000.00	1,000.00
HEALTH CHECKING	1,418,730.29	1,410,173.44	1,378,539.11	1,293,115.07	1,284,101.22	750,258.10
DENTAL CHECKING	86,128.58	87,106.05	86,124.74	87,017.04	89,457.87	89,789.67
TOTAL CASH	\$ 25,804,795.35	\$ 14,557,951.86	\$ 5,803,797.76	\$ 5,347,692.59	\$ 2,790,550.44	\$ 3,233,242.27
INVESTMENTS						
LGIP	17,866,153.79	17,658,776.95	18,936,797.56	19,341,730.48	20,398,737.41	20,438,939.67
ASSOCIATED BANK TRUST	5,132,918.84	5,127,445.37	5,145,143.67	5,140,481.49	5,170,236.11	5,193,827.26
CHARLES SCHWAB INVESTMENTS	6,446,202.84	6,430,877.60	6,439,451.41	6,448,746.66	6,472,755.90	6,498,760.90
MONEY MARKET	1,078,564.79	1,083,162.54	7,619,525.82	7,653,126.65	7,687,904.44	7,721,680.79
TOTAL INVESTMENTS	\$ 30,523,840.26	\$ 30,300,262.46	\$ 38,140,918.46	\$ 38,584,085.28	\$ 39,729,633.86	\$ 39,853,208.62
TOTAL CASH AND INVESTMENTS	\$ 56,328,635.61	\$ 44,858,214.32	\$ 43,944,716.22	\$ 43,931,777.87	\$ 42,520,184.30	\$ 43,086,450.89

	31-Jul-2024	31-Aug-2024	30-Sep-2024	31-Oct-2024	30-Nov-2024	31-Dec-2024
CHECKING ACCOUNTS						
CITY CHECKING	6,088,631.77	727,881.28	7,802,828.00	3,708,330.68	1,972,185.65	2,073,383.90
REAL & PPT TAX CHECKING	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	16,203,476.44
HEALTH CHECKING	1,011,765.80	956,627.05	918,795.55	857,501.63	824,097.82	701,634.09
DENTAL CHECKING	80,528.88	82,770.58	83,519.61	87,013.58	88,453.72	90,200.19
TOTAL CASH	\$ 7,181,926.45	\$ 1,768,278.91	\$ 8,806,143.16	\$ 4,653,845.89	\$ 2,885,737.19	\$ 19,068,694.62
INVESTMENTS						
LGIP	20,971,586.74	17,522,703.29	14,947,368.10	14,967,477.54	14,919,096.80	11,214,276.91
ASSOCIATED BANK TRUST	5,241,542.35	5,282,497.12	5,320,173.83	5,295,505.14	5,312,234.41	5,319,990.57
CHARLES SCHWAB INVESTMENTS	6,560,741.25	6,617,696.47	6,659,345.09	6,656,922.28	6,665,667.33	6,686,473.66
MONEY MARKET	7,756,736.36	7,791,951.07	7,824,800.74	7,857,010.73	7,887,021.96	3,909,023.89
TOTAL INVESTMENTS	\$ 40,530,606.70	\$ 37,214,847.95	\$ 34,751,687.76	\$ 34,776,915.69	\$ 34,784,020.50	\$ 27,129,765.03
TOTAL CASH AND INVESTMENTS	\$ 47,712,533.15	\$ 38,983,126.86	\$ 43,557,830.92	\$ 39,430,761.58	\$ 37,669,757.69	\$ 46,198,459.65



City of De Pere, Wisconsin

I.10

Request for Finance/Personnel Committee **Action**

MEETING DATE: August 12, 2025
DEPARTMENT: Administration
FROM: Kim Flom, City Manager
SUBJECT: 2026 Budget Status Discussion.
RECOMMENDED ACTION: Discussion

ATTACHMENTS:
None



City of De Pere, Wisconsin

I.11

Request for Finance/Personnel Committee Action

MEETING DATE: August 12, 2025
DEPARTMENT: City Clerk
FROM: Carey Danen, City Clerk
SUBJECT: Consideration of request by Haisan T. Williams, owner of Buddy's Breakfast Burgers, LLC to appear before the Finance-Personnel Committee regarding the denial of his Mobile Food Establishment application

**RECOMMENDED
ACTION:**

This is a request from Haisan Williams for a quasi-judicial hearing to appeal the denial of his application for a Mobile Food Establishment License.

ATTACHMENTS:

Mobile Food Establishment Application_Buddy's Breakfast Burgers, Denial documentation_H Williams, ScreewritingResume, 2025LogisticsResume (1), Character Reference for Haisan Williams

City of De Pere	
☒	Mobile Food Establishment Application (existing City of De Pere business that sells food-based products) Permit fee: \$300/year (July 1 – June 30)
☐	Mobile Food Establishment Application Permit fee: \$500/year (July 1 – June 30)
PLUS Non-refundable Processing Fee: \$20.00	
Total Fee: \$ <u>320.00</u>	

R# 202106

Part A – APPLICATION INSTRUCTIONS	
Answer all questions completely, and attach an additional sheet of paper if you cannot answer a question within the space provided. File this completed application, along with the following items, at the office of the City Clerk, 335 S. Broadway, De Pere WI 54115.	
- Required fee - Copy of Health Department license	- Insurance documents *see pg 2 for requirements - Copy of current vehicle registration

Part B – TO BE COMPLETED BY APPLICANT	
1.	Business Name: <u>Buddy's Breakfast Burgers & Burritos</u>
2.	Permanent Address: <u>310 N. Wisconsin, De Pere WI 54115</u>
3.	Person In Charge of Sale: First <u>TAMMY KONTZEE WILLIAMS</u> Middle <u>A</u> Last <u>KONTZEE-WILLIAMS</u> <u>HARRIS</u> <u>T.</u> <u>WILLIAMS</u>
4.	Phone Number: <u>920530 5093</u>
5.	Driver's License or ID Number: _____ State of Issuance: _____ <u>(HARRIS)</u> <u>(TAMMY) WI</u>
6.	Date of Birth: <u>TAMMY 01-27-1974</u> <u>HARRIS 10-31-1970</u>
7.	Vehicle(s) to be Used: Make/Model _____ Plate #: _____ VIN: <u>4A91Z142955305071</u> <u>ARK-LA-TEX Restaurant Equipment</u> <u>AS19713</u>
8.	WI Seller's Permit #: <u>456-1032078796-02</u>
9.	Have you been convicted of any felony, misdemeanor, or ordinance violation (other than minor traffic violations) in the last five years? If YES, include date(s) and disposition(s): <u>NO</u>
10.	Description of food/merchandise to be sold: <u>BREAKFAST CUISINE, Burgers, Burritos, Bowls.</u>

11.	Selling times and locations: VARIED local SITES, Primarily 1259 Velp, GREEN BAY, WI 54305
12.	List all employees or persons engaged in this activity (Full name, address, and date of birth): HAISAN T. WILLIAMS 503 FULTON ST De Pere, WI 54115 10-31-1970 TAMMY KONTZEN WILLIAMS 503 FULTON ST. De Pere, WI 54115 01-27-74

Part C – TO BE COMPLETED AT THE CITY CLERK'S OFFICE

READ CAREFULLY BEFORE SIGNING. The undersigned, being duly sworn, states that each of the above questions has been truthfully answered to the best of my knowledge. I understand that any activity engaged in is limited to the time, date, location and inventory representations made on this application and by the provisions of Chapter 106 De Pere Municipal Code. I hereby designate the City Clerk for the City of De Pere as my agent for the purposes of accepting service in any civil action arising out of or in conjunction with the use of this license.

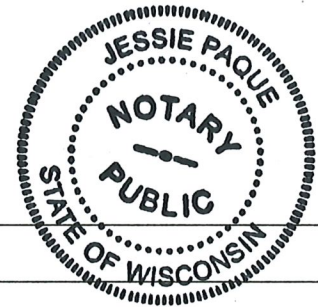
Applicant Signature: _____

Date: 6/19/25

Clerk/Notary Public: _____

Subscribed and sworn to before me this 6th day of June, 2025.

My Commission expires: 7/15/28



Part D – FOR CITY USE ONLY

Police Department recommendation is based upon information received from police organizations willing to submit criminal history background information for license checks.

- ☐ No information received upon which to recommend denial of license
- ☐ Denial (reasons): _____

Police Chief Signature: _____

Clerk Signature: _____

Sanitarian Signature: _____

Date: _____

Insurance requirements:

- \$1 million general liability per occurrence
- \$1 million products liability
- City of De Pere to be named as an additional insured and provided a copy of the additional insured endorsement
- Written notice by insurance company of policy cancellation, non-renewal, or material change by first class mail



Public Health
Prevent. Promote. Protect.

De Pere Health Department

**DE PERE HEALTH DEPARTMENT
POST IN A CONSPICUOUS LOCATION**

License, Permit or Registration

The licensee has complied with the Wisconsin statutes and is authorized to engage in this activity

ACTIVITY	EXPIRATION DATE	I.D. NUMBER
Retail Food - Serving Meals, Mobile Base - Prepackaged	30-Jun-2026	TGRH-DH4H74
LICENSEE MAILING ADDRESS	NOT TRANSFERABLE	BUSINESS / ESTABLISHMENT ADDRESS
BUDDY'S BREAKFAST BURGERS, LLC		BUDDY'S BREAKFAST BURGERS & BURRITOS 310 N WISCONSIN AVE DE PERE WI 54115

All Permits expire on June 30th; it is the responsibility of the licensee to make sure all applicable fees are received by the department before July 1st or a late payment fee will be assessed.

If you do not receive a renewal form prior to June 30th from your licensing authority, you should send in your payment for renewing your permit to the following address:

DE PERE HEALTH DEPARTMENT
335 S BROADWAY
DE PERE, WI 54115
(920)339-4054

* Include the name of your facility and the ID number.



Public Health
Prevent. Promote. Protect.

De Pere Health Department

**DE PERE HEALTH DEPARTMENT
POST IN A CONSPICUOUS LOCATION**

License, Permit or Registration

The licensee has complied with the Wisconsin statutes and is authorized to engage in this activity

ACTIVITY Retail Food - Serving Meals, Mobile - Moderate	EXPIRATION DATE 30-Jun-2026	I.D. NUMBER TGRH-DH4JWR
LICENSEE MAILING ADDRESS BUDDY'S BREAKFAST BURGERS, LLC	NOT TRANSFERABLE	BUSINESS / ESTABLISHMENT ADDRESS BUDDY'S BREAKFAST BURGERS & BURRITOS 310 N WISCONSIN AVE DE PERE WI 54115

All Permits expire on June 30th; it is the responsibility of the licensee to make sure all applicable fees are received by the department before July 1st or a late payment fee will be assessed.

If you do not receive a renewal form prior to June 30th from your licensing authority, you should send in your payment for renewing your permit to the following address:

DE PERE HEALTH DEPARTMENT
335 S BROADWAY
DE PERE, WI 54115
(920)339-4054

* Include the name of your facility and the ID number.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
05/29/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER NS Insurance 2149 Velp Ave Suite 100 Green Bay, WI 54303	CONTACT NAME: Nate Stymiest PHONE (A/C, No, Ext): 920-264-9791 E-MAIL ADDRESS: nate@getnsinsurance.com FAX (A/C, No):																					
INSURED Buddy's Breakfast Burgers and Burritos 503 Fulton St De Pere, WI 54115-2616	<table border="1"><thead><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr></thead><tbody><tr><td>INSURER A:</td><td>Erie Insurance Company</td><td>26263</td></tr><tr><td>INSURER B:</td><td></td><td></td></tr><tr><td>INSURER C:</td><td></td><td></td></tr><tr><td>INSURER D:</td><td></td><td></td></tr><tr><td>INSURER E:</td><td></td><td></td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></tbody></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Erie Insurance Company	26263	INSURER B:			INSURER C:			INSURER D:			INSURER E:			INSURER F:		
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COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL LIABILITY ☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PROJECT ☐ LOC	Y	Q61-0552876	05/05/2025	05/05/2026	EACH OCCURRENCE	\$ 1,000,000
	DAMAGE TO RENTED PREMISES (Ea occurrence)					\$ 1,000,000	
	MED EXP (Any one person)					\$ 5,000	
	PERSONAL & ADV INJURY					\$ 1,000,000	
	GENERAL AGGREGATE					\$ 2,000,000	
	PRODUCTS - COMP/OP AGG					\$ 2,000,000	
A	AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ ALL OWNED AUTOS ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ☐ NON-OWNED AUTOS		Q80-0021572	05/05/2025	05/05/2026	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
	BODILY INJURY (Per person)					\$	
	BODILY INJURY (Per accident)					\$	
	PROPERTY DAMAGE (Per accident)					\$	
						\$	
						\$	
A	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$		Q29-0570558	05/05/2025	05/05/2026	EACH OCCURRENCE	\$ 1,000,000
	AGGREGATE					\$ 1,000,000	
						\$	
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N ☐ N/A					WC STATUTORY LIMITS	OTH-ER
	E.L. EACH ACCIDENT					\$	
	E.L. DISEASE - EA EMPLOYEE					\$	
	E.L. DISEASE - POLICY LIMIT					\$	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Certificate holder is listed as additional insured

CERTIFICATE HOLDER**CANCELLATION**City of De Pere
335 South Broadway
De Pere, WI 54115

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Nathan Stymiest



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Certificate of Vehicle Registration

Plate Number AS19713	Registration TRL TRL	Chassis TRLR	Gross Weight 4500	Period A	Product Number 60445251545	Registration Number 25154FS0030
Vehicle Identification Number 4A9121429SS305071			Year 2025	Make ATRE	Color BLUE	Fleet No.
				Expiration Date 12/31/2025	Amount Received \$ 473.40	

C OF R MUST BE IN VEHICLE AT ALL TIMES

PLATE(S) STAY WITH VEHICLE WHEN SOLD

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H&TKW VENTURES LLC

503 FULTON ST

DE PERE, WI 54115-2616

THIS IS NOT A BILLThis Registration Certificate is not a
Title. Not Valid for Transfer of
Ownership.Contact the Division of
Motor Vehicles at:
wisconsin.dmv.gov
608-264-7447



City of De Pere, Wisconsin

I.13

Request for Finance/Personnel Committee Action

MEETING DATE: August 12, 2025
DEPARTMENT: City Attorney
FROM: Joanne Bungert, City Attorney
SUBJECT: Consideration and Possible Action on the Findings of Fact and Conclusions of Law to approve the appeal of Chad Zeske, agent for Holy Smokes, as to the denial of his Cigarette, Tobacco and Electronic Vaping Device Retail License Application.
RECOMMENDED ACTION: Motion to Approve.

This item is submitted for review and approval of the Findings of Fact and Conclusions of Law, resulting from the quasi-judicial hearing before this Committee on July 8, 2025.

ATTACHMENTS:

Holy Smokes - FOFCL-08.12.2025v2

Findings of Fact and Conclusions of Law

This matter came before the City of De Pere Finance/Personnel Committee, and the matter was scheduled for a quasi-judicial hearing on July 8, 2025. This appeal was brought by Chad Zeske, as the agent for Holy Smokes located in De Pere, Wisconsin. The purpose of the hearing was to determine whether the denial of Mr. Zeske's application for a Cigarette, Tobacco, and Electronic Vaping Device Retail License should be affirmed, reversed or modified.

Findings of Fact

1. This matter was heard by the City of De Pere Finance/Personnel Committee on July 8, 2025.
2. At issue is whether the appellant's conviction history is substantially related to the licensed activity which would preclude the appellant from obtaining a license under Wis. Stat. § 134.65(1m), and whether the evidence of rehabilitation and fitness for the licensed activity as presented by the appellant is sufficient.
3. A hearing was held by the parties, which included testimony and evidence presented by City of De Pere Staff and the appellant, Chad Zeske, who did appear.
4. The record for this hearing consists of the following documents:
 - a. Holy Smokes Cigarette Tobacco and Vaping (CTV) License Application
 - b. Holy Smokes- Chad Zeske CTV agent form
 - c. Holy Smokes- Chad Zeske CTV Individual Questionnaire form
 - d. Holy Smokes-Chad Zeske CTV License Application Denial Letter
 - e. Holy Smokes -Chad Zeske Request for Appeal
5. Section 110-4 of the De Pere Municipal Code and Wis Stat § 134.65 and 111.335(3), (4)(c) and (4)(d) are relevant to this appeal.
6. Wis Stat § 134.65 in relevant part states that a city clerk may not issue a cigarette tobacco vaping license unless the applicant meets all the requirements which includes, subject to Wis. Stat. 11.321, 111.322 and 111.335, the applicant has not habitually been a law offender or been convicted of a felony unless pardoned.
7. Wis. Stat § 111.335(3), (4)(c) and (4)(d) provide in relevant part that when a conviction record is considered as a bar to licensing, and the individual provides competent evidence of sufficient rehabilitation and fitness to perform the licensed activity, the licensing agency may not refuse to license the individual or bar the individual from licensing based on that conviction.

Conclusions of Law

8. This appeal is properly before the Finance/Personnel Committee in accordance with Section 106-2(g) of the De Pere Municipal Code. A hearing on this matter was timely conducted in accordance with that Section.

9. The applicant was convicted in 2020 on a felony charge for the distribution of synthetic drugs in the State of New York.

10. After considering the facts and testimony presented, the Finance/Personnel Committee has found that the appellant has provided competent evidence of rehabilitation and fitness to perform the licensed activity, the sufficiency of which will be accepted upon providing proof of successful completion of probation for the felony conviction at issue.

11. The Finance/Personnel Committee therefore concludes, pursuant to Wis. Stat § 11.335(4)(c), that it may not refuse to license the applicant based on that felony conviction.

Determination

12. For the foregoing reasons, the Finance/Personnel Committee hereby approves the appeal and grants a Cigarette, Tobacco, and Electronic Vaping Device Retail License to Chad Zeske as agent for Holy Smokes, contingent upon the appellant providing evidence documenting his successful completion of probation and parole for the 2020 felony drug conviction.

Approved by the Finance/Personnel Committee on August 12, 2025.

Mayor James G. Boyd, Committee Chair

Date

Attest:

City Clerk Carey E. Danen