



CONTRACT FOR
MAINTENANCE OF ASSESSMENT RECORDS
2022 - 2024

PROPOSED AGREEMENT: by and between Grota Appraisals LLC, hereinafter called the "Assessor", and the Village of Thiensville, Ozaukee County, Wisconsin, hereinafter called the "Village".

The Assessor and the Village for the compensation stated herein, agree as follows:

ARTICLE I

SCOPE OF WORK: the Assessor, having familiarized himself with the local conditions affecting the cost of the work to be done, and the Standard Specifications for the Annual Maintenance of Real and Personal Property Records in the State of Wisconsin pursuant to Chapter 70, Wisconsin State Statutes, hereby agrees to perform everything required to be performed and to complete in a professional manner everything required to be completed to comply with State Statutes regarding the assessment of Real and Personal Property on behalf of the Village and in accordance with the General Agreements as stated in Article Three of this contract.

ARTICLE II

COMPENSATION: the Village shall pay to the Assessor for the performance of the contract the following compensation of \$19,800 (Nineteen Thousand Eight Hundred Dollars), such amount to paid as follows: (\$6,600 annually)

2022 - 2024

\$1,650 January 1, July 1, April 1, October 1

ARTICLE III

GENERAL AGREEMENTS:

- 1) The contract would begin January 1, 2022 and end December 31, 2024.
- 2) All normal duties and functions of the Assessor as described and set forth in Volume I of the Wisconsin State Assessors Manual, including required meetings, will be performed in a timely manner, and in accordance with the Chapter 70 Laws of the State and all other laws of the state.
- 3) The above fee includes any and all normal assessment duties during its duration, including: No additional charges for quantity of permits or new plats, Board of Review and further appeals to circuit court.
- 4) All services requested over and above the normal yearly assessment functions will be charged extra at a mutually agreed upon rate
- 5) The Assessor will provide his own equipment, work space, storage and security of records, while in his possession.
- 6) The Assessor will carry a Commercial General Liability Policy, including Valuable Papers Coverage Extension. The Assessor shall provide a Certificate of Insurance to the Village naming it as an additional insured. The Assessor further agrees to indemnify the Village for any and all suits, claims or actions associated with alleged intentional acts or omissions on the Assessors, such intentional acts or omissions taking place between January 1, 2022 and December 31, 2024.
- 7) The Assessor is to be considered an Independent Contractor hired to fill an Appointed Statutory Position, and is not subject to withholding tax, insurance programs or benefits. As Such, the Assessor is not an Authority.
- 8) Every year at Board of Review meeting or as needed Assessor will inform Village Board on matters concerning but not limited to:
 - a) Compliance with State Statutes on assessment practices.
 - b) Property assessments in relation to current sales of property.
- 9) Work closely with Village Clerk and Building Inspector on matters concerning both offices.
- 10) The Village will comply with the open records law. The Assessor will advise the Village in writing of all open record requests it receives within 3 days of receipt.

11) Open Records Law Compliance; Assessor's Duties; Indemnification: Both parties understand that the Village is bound by the Wisconsin Open Records Law, and, as such, all of the terms of this contract are subject to and conditioned upon the provisions of secs. 19.21, et seq., Wis. Stats. The Assessor acknowledges that it is obligated to cooperate with and assist the Village in retaining and promptly producing records that are subject to the Wisconsin Open Records Law, and that a delay or failure to comply shall constitute a material breach of this contract. Further, the Assessor shall make available for inspection and copying all records, as defined in sec. 19.32(2), Wis. Stats., in its possession created, produced, collected or otherwise related to this contract to the same extent as if the records were maintained by the Village. The Assessor expressly acknowledges and agrees that its obligations concerning public records and compliance under this contract should not be limited by copyright, license, privacy and/or confidentiality, except as expressly authorized under the Open Records Law. The Assessor shall defend, indemnify and hold the Village harmless from any claims, demands, actions, causes of action, liabilities and damages (including, but not limited to, attorney's fees and costs) caused in whole or in part or arising from any acts, errors, omissions, delays or refusals by the Assessor, its agents and employees in the retention and/or production of records under the Open Records Law and the provisions of this contract. Except as otherwise authorized, those records shall be maintained for a period of seven (7) years after receipt of final payment under this contract.

12) Assessor further agrees that it will purchase a license of the Market Drive Municipal Viewer Edition, and the Market Drive Public Data Distribution Tool for the Village from Assessment Technologies of WI, LLC. The material used as input for the Municipal Viewer Edition, and the Market Drive Public Data Distribution Tool and the material produced as a product of the Market Drive Public Data Distribution Tool will be provided to the Village. Assessor will maintain the yearly upgrade and maintenance costs of the Market Drive software for the Village for the duration of this contract.

SUBMITTED TO THE VILLAGE OF THIENSVILLE THIS 9TH DAY OF
SEPTEMBER, 2021



Michael L. Grota, Authorized Member
Grota Appraisals, LLC

ACCEPTANCE BY VILLAGE:

The above proposal, terms and general agreements are hereby accepted, this

_____ day of _____, 2021

BY GOVERNING BODY OF THE VILLAGE OF THIENSVILLE

President

Administrator



PROPOSAL FOR THE REVALUATION
OF ALL REAL AND PERSONAL PROPERTY
FOR THE VILLAGE OF THIENSVILLE
2023

VILLAGE BOARD MEMBERS:

- 1) This proposal includes:
 - a. Detailed sales analysis of all sold properties in the Village of Thiensville.
 - b. Checking existing property record card information against data already in computer program to insure accuracy.
 - c. Update computer program with the newest functions and features available.
 - d. After completion of the Board of Review, update the viewer edition of the assessment database for use at Village Hall.

- 2) The total price for the complete Market Update of the Village of Thiensville is \$22,680 (Twenty Two Thousand Six Hundred Eighty Dollars)

- 3) Project will follow this format:
 - a. Review current property record card information as this information will be used to calculate the new assessed values. (no interior or exterior inspection of properties will take place, revaluation will be performed in our office using the current known information, checking of internet sites for property data for sold properties and reviewing recent sales for the basis of the new assessed values)
 - b. Perform an analysis of current sales to help in the re-building of the valuation model to be used in the Village of Thiensville with the aid of a computer mass appraisal software program. Check the delininations of the existing neighborhoods and groups of neighborhoods (i.e. lakes, rivers, location on water, subdivisions, locations for scattered properties throughout the Village, lot sizes).
 - c. Finish the calibration of the new valuation model.
 - d. Generate new values in line with the current market based on the recent sales in the Village.

- e. Individually review each property with the recent sales for a correct valuation.
 - f. After all properties are reviewed, send each property owner a new notice of assessment. A letter of explanation will be sent with the new notice (approximately July 2020)
 - g. Provide the Village Clerk with copies of the sales reports and preliminary assessment rolls for both real and personal property. Assessment rolls will be at Village Hall for property owners and others interested in reviewing the new assessed values prior the "Open Book" meeting.
 - h. Conduct Open Book hearings at Village Hall to afford property owners a chance to compare properties, ask questions of an appraiser and present differing opinions of value.
 - i. Attend the Board of Review.
- 4) All normal annual assessment duties of the Assessor will be performed early so the revaluation can be completed without delay.

As outlined in in the Revaluation Options document, a Market Update Revaluation for the Village would normally cost \$21.50 per improved parcel times the 1,288 improved parcels equals \$27,692 ($\$21.50 \times 1,288 = \$27,692$). Due some duplication of work with the annual assessment functions, and in consideration of our long-standing relationship with the Village of Thiensville I have given a credit of \$5,012 from the fee normally charged for the proposed service.

If this proposal is accepted, please sign the enclosed contract with acceptance, terms and payment schedule using this proposal as an addendum.

Respectfully Submitted,



Michael L. Grota
Grota Appraisals



CONTRACT FOR
MARKET UPDATE IN THE VILLAGE OF THIENSVILLE
OZAUKEE COUNTY, WISCONSIN
2023

THIS AGREEMENT: By and between Grota Appraisals LLC, hereinafter called the "Assessor", and the Village of Thiensville, Ozaukee County, Wisconsin, hereinafter called the " Village ".

ARTICLE I

SCOPE OF WORK: The Assessor, having familiarized himself with the local conditions affecting the cost of the work to be done, and the Standard Specifications for the Revaluation of all Real and Personal Property in the State of Wisconsin pursuant to Chapter 70, Wisconsin State Statutes, hereby agrees to perform everything required to be performed, and to complete in a professional manner, all the work required to be completed, to revalue all Real and Personal Property within the Village in accordance with all the applicable Wisconsin State Statutes and the General Agreements as stated in Article three of this contract.

ARTICLE II

COMPENSATION: The Village shall pay to the Assessor for the performance of the contract, the sum of \$22,680 (Twenty Two Thousand Six Hundred Eighty Dollars) for revaluation work, payments shall be made as follows:

Total amount of \$22,680 due quarterly in an amount of \$1,890
January, April, July, October for the years 2022, 2023, 2024

ARTICLE III

GENERAL AGREEMENTS: In addition to the normal contract language that states I will perform everything required to be performed, and to complete everything to be completed in a timely and professional manner, to comply with State Statutes on Revaluations, and Volume I of the Wisconsin State Assessors Manual on Procedures.

Submitted to the Village of Thiensville this 9TH day of SEPTEMBER, 2021



Michael L. Grota
Grota Appraisals

ACCEPTANCE BY VILLAGE:

The above contract, terms and general agreements are hereby accepted this _____ day of _____, 2021, by Governing Body of the Village of Thiensville

ATTEST:

President

Administrator

Clerk