

# ATTACHMENT B

## **PROPOSAL FOR REVALUATION SERVICES**

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**City of Franklin, WI**

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

Submitted:  
November 29<sup>th</sup>, 2023

# Table of Contents

Firm and Contact Information .....	4
Individual Qualifications .....	4
Firm Qualifications .....	9
Work Proposal - Revaluation (2024) .....	11
Work Proposal - Maintenance (2025, 2026) .....	13
Additional Notes .....	15
References .....	16
Proposal Cost .....	Attached

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

To: Kelly Hersh  
Director of Administration  
City of Franklin

As requested, I have enclosed the following proposal in response to your request for information regarding a revaluation and ongoing maintenance for the City of Franklin.

Forward Appraisal has over thirty years of 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, mobile homes and personal property, supporting and supervising in-house staff, and other responsibilities in and of the Assessor's office.

Our mission is to provide professional, fair, and equitable assessment services. Our satisfaction comes from working with civic leaders and property owners to build their confidence in the assessment process. 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 working with the City and would be available to answer any questions at your request. Thank you for your consideration.

Sincerely,

Steven J. Shepro

## **Firm and Contact Information**

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

Name: Steven J. Shepro  
Email: [steve@forwardappraisal.com](mailto:steve@forwardappraisal.com)  
Phone: 608-206-3002

Name: Nichole J. Tesch  
Email: [nichole@forwardappraisal.com](mailto:nichole@forwardappraisal.com)  
Phone: 608-444-6216

## **Individual Qualifications**

Steven J. Shepro (Owner/ Assessor/ Commercial and Residential Appraiser)  
Certified Assessor I

Nichole J. Tesch (Commercial and Residential Appraiser)  
Certified Assessor II & III

Scott D. Alvey (Commercial and Residential Appraiser)  
Certified Assessor I

Beth Polacek (Residential Appraiser and Administrative)  
Certified Assessor I

# STEVEN SHEPRO

## QUALIFICATIONS

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Certified Assessor I by the Wisconsin Department of Revenue  
Active member of the Wisconsin Association of Assessing Officers

## EXPERIENCE

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2005 - Current                      Forward Appraisal, LLC                      Green Bay, WI  
*Owner/Assessor*

- Extensive experience valuing commercial properties
- Completion and filing of all statutorily required forms with the Wisconsin Department of Revenue
- Work cooperatively with City and County officials to resolve assessment issues from prior years
- Review and valuation of residential, commercial, agricultural, and exempt properties
- Successfully defend property values at Open Book, Board of Reviews and 70.85 hearings
- Assist Municipal staff with Open Book and Board of Review
- Set up neighborhoods and model land cost tables for revaluations
- Commercial Assistance for: City of Marshfield, City of Green Bay, City of La Crosse
- Statutory Assessor for: City of Marshfield, City of Wisconsin Rapids, City of Stevens Point

1993- 2005                      Bowmar Appraisal, Inc.                      Appleton, WI  
*Appraiser*

- Field review and valuation of residential, commercial, agricultural, and exempt properties
- Extensive work valuing commercial properties and working with commercial property owners
- Provided defense of values at Open Books and Board of Review hearings
- Completed full appraisal reports of several specialty properties
- Implemented new listing sheet, to be used for gathering commercial property data
- Developed procedure and form for collecting income and expense data

## RELATED SKILLS

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Experienced with Microsoft Excel, Access, and Word

CAMA Software programs: CLT, Market Drive, GVS and Marshall & Swift

Sketching software programs: Apex, WinSketch and RapidSketch

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STEVE@FORWARDAPPRAISAL.COM  
P.O. BOX 13434 • GREEN BAY, WI 54307 • PHONE (608) 206-3002

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# NICHOLE TESCH

## EDUCATION

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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

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Certified Assessor II and Assessor III by the Wisconsin Department of Revenue  
Active member of the Wisconsin Association of Assessing Officers (WAAO)  
Active member of the International Association of Assessing Officers (IAAO)

## EXPERIENCE

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2007 - Current                      Forward Appraisal, LLC                      Green Bay, WI  
*Commercial/Residential Appraiser and Technical Support*

- Valuation of residential, commercial, personal, and mobile home properties
- Planning and implementation of several data conversions from various CAMA systems
- Planning and implementation of several city revaluations
- Development of Microsoft Access custom queries and reports for the purposes of defending value, internal statistical analysis, and providing information to other departments.
- Organization and preparation of documents presented at Board of Review
- Preparation of materials for valuation estimates and progress reports to various City departments
- Organization and 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

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

Experience utilizing CAMA Software CLT, Market Drive, and GVS

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

NICHOLE@FORWARDAPPRAISAL.COM  
P.O. BOX 13434 • GREEN BAY, WI 54307 • PHONE (608) 444-6216

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# SCOTT ALVEY

## EDUCATION

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

## QUALIFICATIONS

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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  
Active member of International Association of Assessing Officers (IAAO)

## EXPERIENCE

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2017 - Current                      Forward Appraisal, LLC                      Green Bay, WI  
*Commercial/Residential Appraiser*  
Valuation of residential, commercial, personal and mobile home properties

- Preparation of documents presented at Board of Review
- Input and sketch commercial and residential properties using Market Drive  
Preparation of materials to assist in the presentation of progress reports to 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 Annual Assessor's Report, Municipal Assessment Report, TID Assessment Report and Exempt Computer Report

2015 - 2017                      Shopko Corporate Office                      Green Bay, WI  
*Category Assistant*

- 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
- General category management and upkeep

## RELATED SKILLS

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Proficient to 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

SCOTT@FORWARDAPPRAISAL.COM  
P.O. BOX 13434 • GREEN BAY, WI 54307 • PHONE (920) 655-1349

# BETH POLACEK

## EDUCATION

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2015 Northeast Wisconsin Technical College Green Bay, WI  
Training Certificate: OSHA 500

2021 Mid State Technical College  
Business Communications

## QUALIFICATIONS

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

## EXPERIENCE

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2021- Current Forward Appraisal, LLC Green Bay, WI  
*Appraisal Assistant*

- Inspect new and existing properties and make note of distinctive characteristics
- Stay updated on current listings, logging photographs and property details
- Photograph properties to properly document features and conditions
- Check previous property record card data against currently observed data
- Maintain current database of completed appraisals and customer information
- Inspect property, thoroughly detailing condition in writing
- Review sales comparison, production costs and other components to determine accurate property values
- Assist in researching land, property data and market values in order to complete valuation estimates

2018 - Current Wood Street Rental Center Inc. Stevens Point, WI  
*Customer Service Manager*

Developed improved filing systems for confidential client records and reports to increase operational efficiency

Established and maintained a positive work environment

- Maintained team efficiency by delegating daily activities, monitoring output and rewarding positive contributions
- Supported regulatory compliance by overseeing all audits to verify protocol adherence
- Trained and regularly mentored associates on performance-oriented strategies and customer service techniques

## RELATED SKILLS

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Strong written and verbal communication skills

Computer proficiency

BETH@FORWARDAPPRAISAL.COM  
P.O. BOX 13434 • GREEN BAY, WI 54307

## Firm Qualifications

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, 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
- Sales analysis - reviews and modeling
- Revaluations (Full Inspection or Market Interim)

### Revaluation Experience

Municipality:	City of Green Bay
Population:	107,395
Equalized Value:	\$9,863,427,300
Total Parcel Count:	33,532
Statutory Assessor:	No
Maintenance Services:	Yes, Commercial (2005-present)
Revaluation Services:	Yes, 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 Stevens Point
Population:	25,666
Equalized Value:	\$2,810,324,500
Total Parcel Count:	8,322
Statutory Assessor:	Yes
Maintenance Services:	Yes, Commercial and Residential (2013-present)
Revaluation Services:	Yes, 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 Wisconsin Rapids  
Population: 18,877  
Equalized Value: \$1,506,001,400  
Total Parcel Count: 8,002  
Statutory Assessor: Yes  
Maintenance Services: Yes, Commercial and Residential (2012-present)  
Revaluation Services: Yes, Commercial and Residential (2018, 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 Marshfield  
Population: 18,929  
Equalized Value: \$170,968,600  
Total Parcel Count: 7,515  
Statutory Assessor: Yes  
Maintenance Services: Yes, Commercial and Residential (2022-present)  
Revaluation Services: Yes, Commercial and Residential (2023)  
Evidence of Accuracy: Compliance achieved through successful revaluation, maintenance work completed with no ongoing objections by property owners or Department of Revenue.

## Work Proposal- Revaluation {2024}

Forward Appraisal will provide market interim revaluation services as described in the City's Request for Proposal under Summary of Needs (Page 6) and any services outlined in the Wisconsin Property Assessment Manual as part of a market interim revaluation.

### Detailed Scope of Services

1. Convert existing electronic assessment records into Market Drive CAMA software
2. Ensure buildings have vectorized sketches using Apex Sketch sketching software
3. Full inspection of at least 10% of parcels in the City, including sale and permit reviews typical of maintenance years
4. 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.
5. Research and review all land sales for the purpose of establishing land values
6. Establish new models in Market Drive software for valuing all land in the City. This will include commercial, residential, and other land not subject to use-value rates.
  - 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 a market value for land can be estimated
7. Test land models for accuracy
8. Research and review all improved sales for the purpose of establishing improvement values
9. Establish new models in Market Drive software for valuing all improvements. This will include commercial, residential, agricultural, and any other non-manufacturing taxable improvements.
  - a. Commercial Income and Expense surveys should be distributed, collected, and analyzed to build a thoroughly supported Income Valuation Model. Costar data will be available for use should the surveys be incomplete.
  - b. Commercial cost model will be based on Marshall & Swift, with proper and supported adjustments tailored to the local market
10. Test improvement models for accuracy
11. Adjust models based upon observations in the field and any new verifiable sales
12. Review final new values and amounts of change, paying special attention to atypical or very large percentage changes
13. Assist with the generation and mailing of notices
14. Attend Open Book, answer property owner questions, and provide any property owner follow-up.
15. Attend Board of Review and assist in the defense of new property values.
16. Complete Municipal Assessment Report and submit to Department of Revenue

## Detailed Work Implementation

### 1. Audit of Existing Data

Per the Request for Proposal, there is a considerable amount of data clean-up that will need to occur to ensure reliable information from which to model new cost tables.

- a. Initiate conversion process with Market Drive support or third-party programmer to convert all data into Market Drive CAMA software format
- b. 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
- c. Review and correct all items on the Assessment Roll Audit Report  
*This 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.*
- d. Review and correct all items on the Incomplete Records Report  
*This report identifies properties that are missing data required to generate a value using Market Drive, as well as properties that are missing electronic sketches and digital photos.*
- e. Review all neighborhood boundaries and ensure all parcels are correctly assigned
- f. Compare and correct acreage differences between the County and Market Drive
- g. Assign all land an appropriate and consistent unit of measure

### 2. Field Review

Per the Request for Proposal, Forward Appraisal will attempt a full inspection of at least 10% of all properties in the City. This will include properties with building permits and properties that sold but will also include properties most likely to need reinspection.

### 3. Analysis of Sales Data

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 and Assessment Staff each year when reviewing the validity of sales. Since Market Drive is working with converted data, auditing will be necessary to make sure the sales being used for modeling are listed properly within the program.

- a. Review of land sales from prior 5 years, or as deemed relevant
- b. Review of improved sales from prior 3 years, or as deemed relevant

### 4. Land Modeling

Existing land models will be adjusted based on valid vacant land sales and improved sales using the abstraction method where necessary. Unique lots (irregular shape, access, contamination etc.) will be identified and adjusted appropriately.

### 5. Residential Improvement Modeling

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:

- a. Analysis of new construction costs and new home sales to determine local modifier
- b. Analysis of depreciation based on sales studies
- c. Analysis of necessary market modifiers for residential components (style, interior and exterior ratings, basement egress, etc.)

### 6. Commercial Improvement Modeling

Commercial improvements will be valued using Marshall & Swift Cost Manual with modifications made to reflect local market conditions identified through the following studies:

- a. Analysis of new construction costs and sales to determine local modifier
  - b. Distribution and analysis of income surveys (with the incorporation of Costar data) for producing an income valuation approach for relevant commercial properties
  - c. Identify custom market adjustments for commercial property types based on sales data
7. Model Calibration  
All models will be tested by comparing newly computed values with recent sales data. Additional adjustments will be made if necessary.
8. Final Review  
All properties will be office-reviewed for consistency and equitability.

## **Work Proposal - Maintenance (2025, 2026)**

Forward Appraisal will provide ongoing maintenance work as described in the City's request for proposal under Summary of Needs (Pages 6-7) and any services outlined in the Wisconsin Property Assessment Manual as part of ongoing maintenance work.

### **Detailed Scope of Services**

1. Continue data cleanup as necessary of converted electronic assessment records in Market Drive CAMA software
2. Full inspection of at least 10% of parcels in the City
3. Inspect and update property records of all sold properties (with re-appraisal as needed)
4. Inspect and update property records of properties with building permits (with re-appraisal as needed)
5. Provide value estimates of proposed construction projects
6. Review final new values and amounts of change, paying special attention to atypical or very large percentage changes
7. Perform sales ratio study to determine projected level of assessment and measure uniformity of assessed values
8. Assist with the generation and mailing of notices
9. Attend Open Book, answering property owner questions, and providing any property owner follow-up
10. Attend Board of Review and assisting in the defense of new property values
11. Complete Municipal Assessment Report and submit to Department of Revenue

### **Detailed Work Implementation**

1. Audit of Existing Data  
Given the considerable amount of data clean-up that will be necessary, it's reasonable to expect a nominal amount of data cleanup that will persist through the maintenance portion of this proposed contract.

- a. Review and correct all items on the Assessment Roll Audit Report  
*This 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.*
  - b. Review and correct all items on the Incomplete Records Report  
*This report identifies properties that are missing data required to generate a value using Market Drive, as well as properties that are missing electronic sketches and digital photos.*
  - c. Review all neighborhood boundaries and ensure all parcels are correctly assigned
  - d. Compare and correct acreage differences between the County and Market Drive
  - e. Assign all land an appropriate and consistent unit of measure
2. Field Review  
Per the Request for Proposal, Forward Appraisal will attempt a full inspection of at least 10% of all properties in the City. This will include properties with building permits and properties that sold but will also include properties most likely to need reinspection.
  3. Sale Inspections  
All sales will be reviewed to determine whether they are usable market sales. All property data will be updated upon sale inspection.
  4. Permit Inspections  
All permits will be screened. For those that are determined may affect value, on-site inspections will be performed, and properties will be re-assessed as needed.
  5. Final Review  
All changed properties will be office-reviewed for consistency and equitability.

## **Additional Notes**

### **Additional Recommendations**

1. We recommend the revaluation/maintenance cycle conform with the Department of Revenue recommendation of a revaluation at least once every five years. This helps to keep records updated and overall assessment levels in compliance with DOR standards.
2. We recommended that any accepted maintenance contract have two additional one-year mutual options. This would allow for seamless maintenance work in the recommended five-year revaluation cycle.
3. We recommend that the City budget to mail postcards to all properties informing property owners of the revaluation.
4. We recommend that the City budget to mail Income and Expense surveys to all commercial properties on or around January 1, 2024.
5. We recommend that the City budget to mail letters to owners of Buildings on Leased Land (if any) and to owners of same Leased Land to inform them of recent law change (Act 12).

### **City Obligations**

The following assumptions are made regarding the City's involvement in the revaluation and ongoing maintenance work:

1. Forward Appraisal will cover the cost of Market Drive software licensing fees and Apex Sketch software licensing fees.
2. The City will keep active an online records portal (available via Market Drive at [assessordata.org](http://assessordata.org)) for property information available to the public.
3. Forward Appraisal will house all electronic assessment records on a secure private server dedicated to assessment work. (The City will own all data; Forward Appraisal will be the custodian of all data.)
4. As stated in the RFP, the City will be responsible for all necessary printing and mailing costs. Any costs associated with necessary mailings incurred by Forward Appraisal shall be reimbursed accordingly.
5. As stated in the RFP, the City will furnish adequate office space for Forward Appraisal to conduct business. This should include at least one office with a computer or computer peripherals, a phone, and access to all paper and electronic records.
6. The City will provide Forward Appraisal appraisers city email addresses for seamless community integration. Forward Appraisal will have access to City's softphone system (if available) for remote calling.
7. The City will supply Forward Appraisal any letterhead, watermark, or other official document template for seamless community integration.
8. All work progress would be monitored and overseen by the Director of Administration.

## References

The following contacts are provided as a list of references for our prior work:

Municipality: City of Green Bay  
Contact: Russ Schwandt  
Title: Assessor  
Email: [russ.schwandt@cityofgreenbay.gov](mailto:russ.schwandt@cityofgreenbay.gov)  
Phone: 920-448-3066

Municipality: City of Stevens Point  
Contact: Corey Ladick  
Title: Comptroller/ Treasurer  
Email: [cladick@stevenspoint.com](mailto:cladick@stevenspoint.com)  
Phone: 715-346-1573

Municipality: City of Wisconsin Rapids  
Contact: Tim Desorcy  
Title: Finance Director  
Email: [tdesorcy@wirapids.org](mailto:tdesorcy@wirapids.org)  
Phone: 715-421-8254

# ATTACHMENT C

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

To: Kelly Hersh  
Director of Administration  
City of Franklin

As requested, I have separated the proposal cost from the assessment work proposal. The proposal cost is as follows:

## Proposal Cost

For the performance of a revaluation and maintenance work as detailed in the City's request for proposal and Forward Appraisal's response proposal:

<b>Time and Materials Costs</b>	<b>Rate per Hour</b>
Conversion – Programmer time to convert the data	\$150
Conversion – Appraiser time to review/cleanup	\$50
Sketching – Technician time to sketch buildings	\$40
Sketching – Appraiser time to re-measure buildings	\$65

  

<b>Fixed Price</b>	<b>Bid Amount</b>
Assessment work for 2024 (January 1, 2024 – October 31, 2024)	\$550,000
Assessment work for 2025 (November 1, 2024 – June 30, 2025)	\$150,000
Assessment work for 2026 (July 1, 2025 – June 30, 2026)	\$150,000

Billings would be monthly payments beginning February 1, 2024 and would conclude July 1, 2026 with payment due within 10 days of invoice date. Payments shall be evenly distributed over the course of each cycle. Work will begin immediately upon signing a contract and would be completed with a successful Board of Review held no later than June 30, 2026.

Once again, I look forward to working with the City.

Sincerely,

Steven J. Shepro