



To: Administration & Finance Committee
Cc: Rebecca Grill, City Administrator
From: Jason Williams, Interim City Assessor
Date: 7/6/2017
Re: Contract Assessment Service Recommendation and Cost Breakdown

BACKGROUND

On January 17, 2017 a communication was presented to the Administration and Finance committee recommending that the City of West Allis adopt a “hybrid approach” in providing assessment services. The City would retain the current city assessor to serve as the statutory assessor along with one clerical support person. An assessment firm would be hired to perform a commercial revaluation and provide assessment services in coordination with in-house staff. The committee unanimously voted to accept the proposal. The Common Council placed the recommendation on file. On June 20, 2017 a communication was presented to the Administration and Finance committee summarizing the request-for-proposal process and the proposals submitted to the City for consideration.

Currently there is an Interim City Assessor, a full-time Appraiser, and a full-time Administrative Support Assistant. The current Interim City Assessor, Jason Williams, was sworn into office on March 20, 2017 and has acted as the statutory assessor for the City of West Allis. The full-time Appraiser position will be eliminated. The person holding the position that will be eliminated has been notified of the Hybrid Approach plan. The Department will work with City Administration, Human Resources and the City Attorney's office to ensure compliance with City policy, laws and regulations.

STAFF RECOMMENDATION

Tyler Technologies is recommended for selection for both the commercial revaluation and annual assessment services. Tyler Technologies presented a proposal that closely matches the needs of the City, the reference checks were positive, the project manager assigned to West Allis has the necessary experience and expertise to complete the assignment, Tyler Technologies has experience in assisting existing staff with a hybrid approach to assessment services as evidenced by their work in Oshkosh, and experience with municipalities in the Milwaukee area (Oak Creek and Franklin). Also, with a client list of 15 municipalities and an internal philosophy of controlled growth, it is felt that Tyler Technologies can successfully complete the requested services. Additionally, Tyler Technologies offices are located in West Allis.

- Tyler Technologies would be selected to assist current staff with the 2018 and 2019 annual assessment requirements, with service ending with the completion of annual duties in 2019.
- Tyler Technologies would be selected to perform the full commercial revaluation with work starting in 2017 continuing through 2018 with the revaluation in 2019.

COST BREAKDOWN

The Not-to-Exceed amount of \$430,000 includes costs for annual assessment services, a full commercial revaluation, optional increase in staffing level if needed, and a miscellaneous amount to cover any unforeseen expenses. Services would begin August 1, 2017 and end July 31, 2019. The cost breakdown is as follows:

Annual Assessment Services	
August 1, 2017 to July 31, 2018	\$98,000
August 1, 2018 to July 31, 2019	\$100,500
Commercial Revaluation	
August 1, 2017 to July 31, 2019	\$183,500
Optional Increase in Staffing Level	
August 1, 2017 to July 31, 2018	\$19,600
August 1, 2018 to July 31, 2019	\$19,600
Miscellaneous	<u>\$8,800</u>
TOTAL	<u><u>\$430,000</u></u>

Costs broken down by year:

2017 Total Contract Costs	\$79,063
2018 Total Contract Costs	\$190,792
2019 Total Contract Costs	\$112,145
Optional Increase in Staffing Hours	
August 1, 2017 to July 31, 2018	\$19,600
August 1, 2018 to July 31, 2019	\$19,600
Miscellaneous	<u>\$8,800</u>
TOTAL	<u><u>\$430,000</u></u>