



Finance Committee Agenda

June 7, 2016
5:30 p.m.

FINANCE COMMITTEE AGENDA

1. Call to order
2. Approval of the Minutes of the Finance Committee Meeting held May 17, 2016 - [Finance Minutes 05-17-2016](#)
3. Discussion and Action Items:
 - Request for additional funding for the College Labor Program - [college labor program funding 6-1-2016](#)
 - Proposed Sidewalk Replacement Project Funding
 - SWOT Analysis - [SWOT Analysis Example](#)
 - RFP – Assessing Services - [RFP - Assessor](#)
4. Correspondence:
5. Unfinished Business:
6. Adjourn

7. PUBLIC NOTICE

Upon reasonable notice, a good faith effort will be made to accommodate the needs of individuals to participate in public hearings, which have qualifying disability under the Americans with Disabilities Act. Requests should be made as far in advance as possible, preferably a minimum of 4 hours. For additional information or to request this service, contact the St. Francis City Clerk at 481-2300. The meeting room is wheelchair accessible from the east and west entrances.

NOTE: There is a potential that a quorum of the Common Council may be present.

**MINUTES OF THE FINANCE COMMITTEE MEETING HELD
MAY 17, 2016**

Present: Alderpersons Schandel, McSweeney and Tutaj

Also Present: City Clerk/Treasurer Uecker, City Engineer Dejewski, Chief Dietrich, Chief Lockwood, Alderman Brickner, Alderman Wattawa, Alderman Klug, Mayor St. Marie-Carls and interested citizens

The meeting was called to order at 6:18 p.m.

Moved by Alderman Tutaj, seconded by Alderman McSweeney to nominate Alderman McSweeney as chair. Motion carried with Alderwoman Schandel opposed.

Moved by Alderwoman Schandel, seconded by Alderman Tutaj to place on file the minutes of the Finance Committee meeting held March 1, 2016. Motion carried.

Moved by Alderman Tutaj, seconded by Alderwoman Schandel to place on file the March 2016 Bank Reconciliation, Investment Report and General Fund Financial Report. Motion carried.

SWOT Analysis:

Mayor St. Marie-Carls brought this forward to the Committee for discussion. She had presented this to the Common Council several years ago at a development session. She felt this would give the City a baseline as to where we are at and where we are going in the future. Alderwoman Schandel asked how it would work. The Mayor stated that the Department Heads would list three items in each SWOT area and then return them to the Finance Committee. After further discussion, it was decided that the Finance Committee would come up with a template for the Department Heads to use and then ask for input.

Assessor Proposals:

Mayor St. Marie-Carls requested this item for the agenda. She stated that the current contract expires at the end of 2016 and that the Committee should start the process to go out for RFP's for Assessor Services. The Committee can review the RFP that was included in the packet and make changes/deletions/additions with the idea that the RFP's would go out after Board of Review in July.

Moved by Alderwoman Schandel, seconded by Alderman Tutaj to adjourn. Motion carried.

Time: 6:30 p.m.



City of St. Francis

Melinda K. Dejewski, PE, City Engineer/Director of Public Works

June 1, 2016

City of St. Francis
Finance Committee

Subject: College Labor Program Funding

Dear Finance Committee Members:

As you are aware, the college labor program funding was reduced in 2016 to the point where the DPW could hire only 4 employees for 5 hours/day. This is a big impact on the program. Since the time the budget was approved and the program started, I had a full time employee who had to take some time off without pay. This is a net savings to the department of \$4950 in salary. In addition, the overtime was down significantly in January-March of 2016 due to the mild winter. Historically, the City spends between \$15,000 and \$20,000 in that time period. This year, we have spent \$3700. I therefore believe that I have funds available to be able to employ the college laborers full-time until August 5. The funding needed and available is as follows:

Funding Needed to have College Laborers work Full-time through August 5, 2016

College Laborers work dates = May 9 – August 5 (note that not all started on May 9)

Total days = 54 days x 4 laborers + 17 days from May 9 to May 19 = 233 days

233 days @ 5hrs/day = 1165 hrs. @ \$11.50/hr. = \$13,398

233 days @ 8hrs/day = 1864 hrs. @ \$11.50/hr. = \$21,436

Amount needed for full-time = \$ 8,040

Funding Available from Unpaid Leave

Value of unpaid leave = \$4950

Amount still needed to fund college laborers full-time = \$3090 (say \$3100)

Funding Available from Overtime Budget

Value of overtime budget as of April 30 = approx.. \$30,000

Less amount needed to fund college laborers full-time = \$3100

Amount left in overtime budget for April-December = \$26,900

I believe that the \$26,900 will be enough to get through the balance of the year. There are a two parades, plowing in November and December which historically has been around \$5000, and there will be some unanticipated overtime. Even though the prediction is for a colder and wetter winter, I do not believe that the funding will be short by utilizing \$3100 from the overtime budget to fund the college labor program full time until August 5; however, the winter is an unknown until it happens. It will be to the benefit of the City to fund the program full-time so that permanent staff can perform skilled jobs. Attached is the accounts where the funding will come from and go to.

Please let me know if you have any questions.

Sincerely,

Melinda K. Dejewski, P.E.
City Engineer/Director of Public Works

Account	Description	Budget	Amount to Transfer	
			From	To
5420-108	Highway Department Salaries Part-time	\$ 25,900		\$8040.00
5420-101	Highway Department Salaries Regular	\$405,000	\$4950.00	
5420-102	Highway Department Salaries Overtime	\$ 35,000	\$3100.00	



COMMUNITY TOOL BOX

Section 14. SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats

(<http://ctb.ku.edu>)

- **WHAT IS A SWOT ANALYSIS AND WHY SHOULD YOU USE ONE?**
- **WHEN DO YOU USE SWOT?**
- **WHAT ARE THE ELEMENTS OF A SWOT ANALYSIS?**
- **HOW DO YOU CREATE A SWOT ANALYSIS?**
- **HOW DO YOU USE YOUR SWOT ANALYSIS?**



Change is an inevitable part of community organizing. If you know how to take stock of the strengths, weaknesses, opportunities, and threats, you are more likely to plan and act effectively.

SWOT provides a tool to explore both internal and external factors that may influence your work.

WHAT IS A SWOT ANALYSIS AND WHY SHOULD YOU USE ONE?

SWOT stands for: **S**trength, **W**eakness, **O**pportunity, **T**hreat. A SWOT analysis guides you to identify your organization's strengths and weaknesses (S-W), as well as broader opportunities and threats (O-T). Developing a fuller awareness of the situation helps with both strategic planning and decision-making.

The SWOT method was originally developed for business and industry, but it is equally useful in the work of community health and development, education, and even for personal growth.

SWOT is not the only assessment technique you can use. Compare it with other assessment tools in the Community Tool Box (<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>) to determine if this is the right approach for your situation. The strengths of this method are its simplicity and application to a variety of levels of operation.

WHEN DO YOU USE SWOT?

A SWOT analysis can offer helpful perspectives at any stage of an effort. You might use it to:

- Explore possibilities for new efforts or solutions to problems.
- Make decisions about the best path for your initiative. Identifying your opportunities for success in context of threats to success can clarify directions and choices.
- Determine where change is possible. If you are at a juncture or turning point, an inventory of your strengths and weaknesses can reveal priorities as well as possibilities.
- Adjust and refine plans mid-course. A new opportunity might open wider avenues, while a new threat could close a path that once existed.

SWOT also offers a simple way of communicating about your initiative or program and an excellent way to organize information you've gathered from studies or surveys.

WHAT ARE THE ELEMENTS OF A SWOT ANALYSIS?

A SWOT analysis focuses on Strengths, Weaknesses, Opportunities, and Threats.

Remember that the purpose of performing a SWOT is to reveal positive forces that work together and potential problems that need to be recognized and possibly addressed.

We will discuss the process of creating the analysis below, but first here are a few sample layouts for your SWOT analysis.

Ask participants to answer these simple questions: what are the strengths and weaknesses of your group, community, or effort, and what are the opportunities and threats facing it?

Internal		External	
Strengths	Weaknesses	Opportunities	Threats

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If a looser structure helps you brainstorm, you can group positives and negatives to think broadly about your organization and its external environment.

Positives	Negatives
<ul style="list-style-type: none"> • Strengths • Assets • Resources • Opportunities • Prospects 	<ul style="list-style-type: none"> • Weaknesses • Limitations • Restrictions • Threats • Challenges

Below is a third option for structuring your SWOT analysis, which may be appropriate for a larger initiative that requires detailed planning. This "TOWS Matrix" is adapted from Fred David's *Strategic Management* text.

	STRENGTHS	WEAKNESSES
	<ol style="list-style-type: none"> 1. 2. 3. 4. 	<ol style="list-style-type: none"> 1. 2. 3. 4.
OPPORTUNITIES <ol style="list-style-type: none"> 1. 2. 3. 4. 	Opportunity-Strength (OS) Strategies Use the strengths to take advantage of opportunities <ol style="list-style-type: none"> 1. 2. 	Opportunity-Weakness (OW) Strategies Overcome weaknesses by taking advantage of opportunities <ol style="list-style-type: none"> 1. 2.

THREATS	Threat-Strength (TS) Strategies	Threat-Weakness (TW) Strategies
1.	Use strengths to avoid threats	Minimize weaknesses and avoid threats
2.	1.	
3.	2.	1.
4.		2.

David gives an example for Campbell Soup Company that stresses financial goals, but it also illustrates how you can pair the items within a SWOT grid to develop strategies. (This version of the chart is abbreviated.)

	STRENGTHS	WEAKNESSES
	<ul style="list-style-type: none"> • Current profit ratio increased • Employee morale high • Market share has increased 	<ul style="list-style-type: none"> • Legal suits not resolved • Plant capacity has fallen • Lack of strategic management system
OPPORTUNITIES	Opportunity-Strength (OS) Strategies	Opportunity-Weakness (OW) Strategies
<ul style="list-style-type: none"> • Western European unification • Rising health consciousness in selecting foods • Demand for soups increasing annually 	<ul style="list-style-type: none"> • Acquire food company in Europe (S1, S3, O1) • Develop new healthy soups (S2, O2) 	<ul style="list-style-type: none"> • Develop new Pepperidge Farm products (W1, O2, O3)
THREATS	Threat-Strength (TS) Strategies	Threat-Weakness (TW) Strategies
<ul style="list-style-type: none"> • Low value of dollar • Tin cans are not biodegradable 	<ul style="list-style-type: none"> • Develop new biodegradable soup containers (S1, T2) 	<ul style="list-style-type: none"> • Close unprofitable European operations (W3, T1)

This example also illustrates how threats can become opportunities (and vice versa). The limitation of tin cans (which aren't biodegradable) creates an opportunity for leadership in developing biodegradable containers. There are several formats you can use to do a SWOT analysis, including a basic SWOT form (<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/swot-analysis/tools>) that you can use to prompt analysis, but whatever format you use, don't be surprised if your strengths and weaknesses don't precisely match up to your opportunities and threats. You might need to refine, or you might need to simply look at the facts longer, or from a different angle. Your chart, list or table will certainly reveal patterns.

LISTING YOUR INTERNAL FACTORS: STRENGTHS AND WEAKNESSES (S, W)

Internal factors include your resources and experiences. General areas to consider:

- Human resources - staff, volunteers, board members, target population
- Physical resources - your location, building, equipment
- Financial - grants, funding agencies, other sources of income
- Activities and processes - programs you run, systems you employ
- Past experiences - building blocks for learning and success, your reputation in the community

Don't be too modest when listing your strengths. If you're having difficulty naming them, start by simply listing your characteristics (e.g., we're small, we're connected to the neighborhood). Some of these will probably be strengths.

Although the strengths and weakness of your organization are your internal qualities, don't overlook the perspective of people outside your group. Identify strengths and weaknesses from both your own point of view and that of others, including those you serve or deal with. Do others see problems--or assets--that you don't?

How do you get information about how outsiders perceive your strengths and weaknesses? You may know already if you've listened to those you serve. If not, this might be the time to gather that type of information. See related sections for ideas on conducting focus groups

(<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main>), **user surveys**

(<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-surveys/main>), and **listening sessions**

(<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-public-forums/main>) .

LISTING EXTERNAL FACTORS: OPPORTUNITIES AND THREATS (O, T)

Cast a wide net for the external part of the assessment. No organization, group, program, or neighborhood is immune to outside events and forces. Consider your connectedness, for better and worse, as you compile this part of your SWOT list.

Forces and facts that your group does not control include:

- Future trends in your field or the culture

- The economy - local, national, or international
- Funding sources - foundations, donors, legislatures
- Demographics - changes in the age, race, gender, culture of those you serve or in your area
- The physical environment (Is your building in a growing part of town? Is the bus company cutting routes?)
- Legislation (Do new federal requirements make your job harder...or easier?)
- Local, national or international events

HOW DO YOU CREATE A SWOT ANALYSIS?

WHO DEVELOPS THE SWOT?

The most common users of a SWOT analysis are team members and project managers who are responsible for decision-making and strategic planning.

But don't overlook anyone in the creation stage!

An individual or small group can develop a SWOT analysis, but it will be more effective if you take advantage of many stakeholders. Each person or group offers a different perspective on the strengths and weaknesses of your program and has different experiences of both.

Likewise, one staff member, or volunteer or stakeholder may have information about an opportunity or threat that is essential to understanding your position and determining your future.

WHEN AND WHERE DO YOU DEVELOP A SWOT ANALYSIS?

A SWOT analysis is often created during a retreat or planning session that allows several hours for brainstorming and analysis. The best results come when the process is collaborative and inclusive.

When creating the analysis, people are asked to pool their individual and shared knowledge and experience. The more relaxed, friendly and constructive the setting, the more truthful, comprehensive, insightful, and useful your analysis will be.

HOW DO YOU DEVELOP A SWOT ANALYSIS?

Steps for conducting a SWOT analysis:

- Designate a leader or group facilitator who has good listening and group process skills, and who can keep things moving and on track.
- Designate a recorder to back up the leader if your group is large. Use newsprint on a flip chart or a large board to record the analysis and discussion points. You can record later in a more polished fashion to share with stakeholders and to update.

- Introduce the SWOT method and its purpose in your organization. This can be as simple as asking, "Where are we, where can we go?" If you have time, you could run through a quick example based on a shared experience or well-known public issue.
- Depending on the nature of your group and the time available, let all participants introduce themselves. Then divide your stakeholders into smaller groups. If your retreat or meeting draws several groups of stakeholders together, make sure you mix the small groups to get a range of perspectives, and give them a chance to introduce themselves.
 - The size of these depends on the size of your entire group – breakout groups can range from three to ten. If the size gets much larger, some members may not participate.
- Have each group designate a recorder, and provide each with newsprint or dry -erase board. Direct them to create a SWOT analysis in the format you choose—a chart, columns, a matrix, or even a page for each quality.
 - Give the groups 20-30 minutes to brainstorm and fill out their own strengths, weakness, opportunities and threats chart for your program, initiative or effort. Encourage them not to rule out any ideas at this stage, or the next.
 - Remind groups that the way to have a good idea is to have lots of ideas. Refinement can come later. In this way, the SWOT analysis also supports valuable discussion within your group or organization as you honestly assess.
 - It helps to generate lots of comments about your organization and your program, and even to put them in multiple categories if that provokes thought.
 - Once a list has been generated, it helps to refine it to the best 10 or fewer points so that the analysis can be truly helpful.
- Reconvene the group at the agreed-upon time to share results. Gather information from the groups, recording on the flip-chart or board. Collect and organize the differing groups' ideas and perceptions.
 - Proceed in S-W-O-T order, recording strengths first, weaknesses second, etc.
 - Or you can begin by calling for the top priorities in each category -the strongest strength, most dangerous weakness, biggest opportunity, worst threat--and continue to work across each category.
 - Ask one group at a time to report ("Group A, what do you see as strengths?") You can vary which group begins the report so a certain group isn't always left "bringing up the end" and repeating points made by others. ("Group B, let's start with you for weaknesses.")
 - Or, you can open the floor to all groups ("What strengths have you noted?") for each category until all have contributed what they think is needed.
- Discuss and record the results. Depending on your time frame and purpose:
 - Come to some consensus about the most important items in each category

- Relate the analysis to your vision, mission, and goals
- Translate the analysis to action plans and strategies
- If appropriate, prepare a written summary of the SWOT analysis to share with participants for continued use in planning and implementation.

More ideas on conducting successful meetings can be found in Community Tool Box resources on conducting public forums and listening sessions (<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-public-forums/main>), conducting focus groups (<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main>), and organizing a retreat (<http://ctb.ku.edu/en/table-of-contents/structure/training-and-technical-assistance/retreats/main>).

HOW DO YOU USE YOUR SWOT ANALYSIS?

Better understanding the factors affecting your initiative put you in a better position for action. This understanding helps as you:

- Identify the issues or problems you intend to change
- Set or reaffirm goals
- Create an action plan

As you consider your analysis, be open to the possibilities that exist within a weakness or threat. Likewise, recognize that an opportunity can become a threat if everyone else sees the opportunity and plans to take advantage of it as well, thereby increasing your competition.

Finally, during your assessment and planning, you might keep an image in mind to help you make the most of a SWOT analysis: *Look for a "stretch," not just a "fit."* As Radha Balamuralikrishna and John C. Dugger of Iowa State University point out, SWOT usually reflects your current position or situation. Therefore one drawback is that it might not encourage openness to new possibilities. You can use SWOT to justify a course that has already been decided upon, but if your goal is to grow or improve, you will want to keep this in mind.

IN SUMMARY

A realistic recognition of the weaknesses and threats that exist for your effort is the first step to countering them with a robust set of strategies that build upon strengths and opportunities. A SWOT analysis identifies your strengths, weaknesses, opportunities and threats to assist you in making strategic plans and decisions.

Contributor

Val Renault

Online Resources

The Essential Guide to SWOT Analysis (http://ctb.ku.eduhttp://aea365.org/blog/jackson-hille-on-the-essential-guide-to-swot-analysis/?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+aea365+%2BAEA365%29) from Jackson Hille, content associate for FormSwift, a SF-based startup that helps organizations, entrepreneurs, and businesses go paperless.

Quality Guide: SWOT Analysis (<http://ctb.ku.eduhttp://erc.msh.org/quality/tttools/tswot.cfm>) is a helpful guide from Management Sciences for Health and United Nations Children's Fund.

Mind Tools: SWOT Analysis (http://ctb.ku.eduhttp://www.mindtools.com/pages/article/newTMC_05.htm) provides a quick overview of SWOT

Print Resources

David, F. (1993). *Strategic Management*, 4th Ed. New York, NY: Macmillan Publishing Company.

Jones, B. (1990). *Neighborhood Planning: A Guide for Citizens and Planners*. Chicago and Washington, DC: Planners Press, American Planning Association.

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Proposal Request for City Assessment Services

The City of St. Francis is entertaining proposals from qualified individuals or firms to provide assessment services for the City of St. Francis, Wisconsin (hereafter, referred to as "City"). We are providing the following information to assist you with your quotation proposal:

Background Information

The City is located in Milwaukee County with an estimated 2009 population of 8,959. The 2010 Equalized Value (including manufacturing) for the City is \$649,557,500. The City's last city-wide reassessment was in 2009. A reassessment shall be conducted every three to five years or as designated by the Wisconsin Department of Revenue.

Specific Services Required

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the City in accordance with applicable Wisconsin State Statutes.
2. Assessor will review and assess all properties that were under partial construction as of January 1 of the previous year.
3. Assessor will review and assess new construction as of January 1 of the current year.
4. Assessor will mail out state approved blotters to all holders of personal property in the City, audit the returned forms and place the new values in the assessment roll.
5. Assessor will account for all buildings destroyed or demolished.
6. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
7. Assessor will process parcel splits and new plats.
8. Assessor will correct legal descriptions as needed.
9. Assessor will take digital photographs of new construction, also on the review process if needed.
10. Assessor will file building permits or copies of such in property record files.
11. Assessor will maintain property owner lists, with current name and address changes.
12. Assessor will post assessments to real estate transfer returns and record sale information to property record cards.
13. Assessor will be responsible for maintaining recent plat and subdivision maps and aerial photographs on file and updated accordingly.
14. Assessor will annually update all property owner record cards with new legal description labels.

15. Assessor will mail Notices of Increased Assessment, form PR-301A.
16. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes.
17. Assessor will be responsible for insuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of July each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of review meeting.
19. Assessor will conduct office hours at the St. Francis City Hall on each Wednesday of the month from 8:00 AM to 4:30 p.m. Alternate hours may be considered by the City.
20. Assessor will also provide a local or toll-free phone number for City officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
21. Assessor shall coordinate with city volunteers and employees to prepare a computerized data base of property assessment records, including digital photographs of each property.
22. Assessor will supply to the City a complete set of computer property assessment records (including digital photographs of each property). Assessor will also perform all other duties incidental to the normal duties of Assessor.

General Quotation Requirements

1. Proposals shall include no more than twenty (20) pages, 8½ inches by 11 inches.
2. All quotations must identify the firm name, address and specific assessment services experience in Wisconsin. The proposals shall also include: the names, educational background and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed; experience with conducting a reevaluation process; identify experience with assessment evaluation of potential tax-exempt properties and any specific assessment experience with evaluation of medical facilities; demonstrate accuracy of assessment work; and provide examples of going above and beyond the "call of duty", with respect to serving the community and its property owners.
3. The proposal shall include the total annual compensation rate to provide the assessment services described in the above Specific Services Required and in accordance with the laws of the State of Wisconsin. The City will pay the annual compensation rate in equal monthly installments. Additionally, the proposal shall include costs to complete a city-wide re-evaluation.
4. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.

5. The proposals shall identify five references from municipal clients for which the bidder has provided assessment and/or revaluation services within the past three (3) years. References must include the name, title, address and phone number of the contact person.
6. The proposals shall also identify any and all contractual requirements that the bidder currently has.
7. Identify the date when the firm would be available to begin providing assessment services to the City.
8. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the department of Revenue, and shall maintain certification throughout the duration of this assignment.
9. Bidders are advised to carefully inspect the community, the entire records and facilities of the City of St. Francis and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for consideration set forth in this bid.
10. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
11. The successful bidder will have three to five years experience in municipal government assessing, including re-evaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
12. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the solicitation and is the most advantageous to the City of St. Francis, considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received.
13. If a proposal is accepted, the Assessor shall provide a certificate naming the City as additionally insured for the purposes of general and professional liability protection. Said certificate shall be in a form acceptable to the City Attorney.

Other Information

The Assessor will be selected and hired by the City Council. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected. The original copy of the Assessment Services Proposal must be received at the address listed below by no later than 4:00 PM on November 28, 2010.

Proposals shall be submitted to:

City of St. Francis
Attn: City Clerk/Treasurer Anne Uecker
3400 East Howard Avenue
St. Francis, WI 53235
Phone: (414) 481-2300
Fax: (414) 481-6483

Evaluation Criteria

The following evaluation criteria will be used to review the Assessment Services Proposals that are received and which meet the general quotation requirements:

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size, particularly with lake properties.
2. Past experience with providing assessment re-evaluation services.
3. Demonstration of a high level of accuracy in assessment work for municipal clients.
4. Cost of assessment services.
5. Evidence of positive customer interaction.

Thank you for your interest in this project!

ASSESSOR RFP LIST

Schultz Appraisal Agency, LLC
PO BOX 1077
Oconomowoc, WI 53066

Magnan Assessment Services
PO BOX 98
Eagle, WI 53119

Grota Appraisals
N88 W16573 Main Street
Menomonee Falls, WI 53051

J A Zore & Associates
6562 Riverdale Ln
Greendale WI 53129-2855

Accurate Appraisal, LLC
PO BOX 415
Menasha, WI 54952

National Appraisal Corporation
3359 S. 13th Street
Milwaukee, WI 53215

Peters Assessment Service
4344 W. Heidel Road 121 N
Mequon, WI 53092

Associated Appraisal Consultants Inc.
Bernie Laird, CEO
1314 W College Ave
Appleton, WI 54912

Tyler Technologies, Inc.,
CLT Division
3199 Klepinger Road
Dayton, OH 45406

Value Solutions
Perry Nell
PO Box 527
Brookfield, WI 53008