

**TOWN OF NEW GLARUS**  
**SPECIAL TOWN BOARD MEETING**  
OCTOBER 30, 2023, 5:00 PM  
**AGENDA**

NOTICE IS HEREBY GIVEN that Town of New Glarus Board, County of Green, will conduct a meeting for the transaction of business as is by law required permitted at such meeting as follows:

LOCATION: 26 5<sup>th</sup> Avenue, Town Hall Community Room or virtually

VIRTUALLY: <https://us06web.zoom.us/j/85010450619?pwd=rjkbN3w3A2CgJy1vRmhS61jc2fQyik.1>

Meeting ID: 850 1045 0619

Passcode: 310680

Phone: 312 626 6799

Any specific subject on the agenda for consideration by the Board may be acted upon by the Board.

1. Call to Order
2. Confirm Proof of Posting
3. Approve Minutes of the October 11, 2023 Regular Town Board Meeting
4. Public Comments
5. Review and Possibly Approve Resolution 231030 to Adopt a Substitute for a Treasurer's Bond for 2023 pay 2024 Taxes Apportioned for Green County
6. Review and Approve Refund of Collected Impact Fees that Were not Spent or Committed Within Eight Years of Collection
7. Consider and Possibly Approve the Transfer of Impact Fees into General Fund for Community Park Improvements
8. Review Proposals for 2024-2026 Maintenance Assessment Contract and Possibly Select One for Award
9. Review and Possibly Approve Checks, Deposits, Transfers, and ACH Payments
10. Consider Recommendation from Town Plan Commission to Approve Amendment 1 to the Impact Fee Agreement
11. Review 2024 Draft Budget
12. Adjourn

Posted 10/24/2023

Revised/reposted 10/26/2023

New Glarus Town Hall

New Glarus Maintenance Building

New Glarus Post Office

<https://townofnewglarus.com/>

Chris Narveson, Chair

John Wright, Clerk-Treasurer

Pursuant to applicable law, notice is hereby given that a quorum or a majority of the Town of New Glarus Planning Commission Members may attend this meeting. Information presented at this meeting may help form the rationale behind future actions that may be taken by the Town of New Glarus Board. Persons requiring additional services to participate in a public meeting may contact the Town Clerk for assistance at 527-2390.

**REGULAR TOWN BOARD MEETING  
WEDNESDAY, OCTOBER 11, 2023  
MINUTES**

**Town Board Attending:** Chris Narveson (Chair), Jim Hoesly, Matt Streiff, and Robert Elkins

**Board Members Absent:** Troy Pauli

**Also Attending:** John Ott: board member of the New Glarus Fire District; Harry Pulliam: Chair of the Town of New Glarus Park Commission; and John Wright: Town of New Glarus Clerk-Treasurer

1. **Call to Order** – Chair Narveson called the meeting to order at 6:00 PM.
2. **Confirm Proof of Posting** – Clerk-Treasurer Wright attested to the proper proof of posting.
3. **Approve Regular Town Board Meeting Minutes from September 13, 2023** – A motion to approve the September 13, 2023 meeting minutes, as presented, was made by Supervisor Streiff; seconded by Supervisor Hoesly. Motion carried 4-0.
4. **Public Comments** – None.
5. **2024 New Glarus Fire District**
  - a) Review of budget by Fire District Board member John Ott – Mr. Ott presented the proposed 2024 budget to those in attendance. He noted that the approximate increase of 28% was mainly due to utility cost increases, the cost of a financial audit, and replacements of communication equipment. The audit of 2024 will be conducted in 2025 to fulfill a 2021 agreement with member municipalities of the Fire District to conduct a financial audit within five years.
  - b) Discussion and possible action to approve – There was brief discussion of compensation of volunteers and the tax reporting obligations for some of them. A 2002 pumper apparatus is proposed to be replaced in 2027 at an estimated cost of \$1,000,000. There is a two-year period between placing an order and receiving the equipment. The Town of New Glarus currently represents 38.2007% of the 2024 budget.  
A motion to approve the proposed 2024 budget, as presented, was made by Supervisor Hoesly; seconded by Supervisor Elkins. Motion carried 4-0. Without objection, the Town Board members present supported the replacement of the pumper apparatus in 2027.
6. **Set Date of Special Town Meeting with Approval of the Levy by the Electorate** – The Town Chair and Clerk-Treasurer are scheduled to meet with Tara Bast of Johnson Block to continue the review of the draft 2024 budget. If there is no need to review it further, the meeting date of the Special Town Meeting, with a regular Town Board meeting to follow, was proposed for Wednesday, November 8, 2023 at 6:00 PM.  
A motion to schedule the Special Town Meeting of the Electorate on November 8, 2023 at 6:00 PM, in order to present the 2024 budget and proposed 2023 levy for taxes paid in 2024 unless there is need for further review, was made by Supervisor Hoesly; seconded by Supervisor Streiff. Motion carried 4-0.
7. **Review and Approve Refund of Collected Impact Fees that were not Spent or Committed Within Eight Years of Collection** – Clerk-Treasurer Wright presented his calculations of interest owed to eight who paid impact fees and were reimbursed the principal of unused fees in 2021. He then presented the principal and interest owed for fees not spent within eight years of collection for an additional nine who paid impact fees. Wright noted that the Wis. Stat. §66.0617 was amended in 2017, effective April 5, 2018, which changed the terms for reimbursement.  
Without objection, Wright can issue the 17 refunds totaling \$11,831.13.
8. **Consider and Possibly Approve the Transfer of Impact Fees into General Fund for**
  - a) Highway transportation facility – Wright presented Resolution 231011-1 to authorize the transfer of \$48,241.29 from the Highway and Transportation Facility fund line from the Town impact fee account (principal and interest) to the general fund to pay for capital costs related to site preparation, engineering, plans, etc. for a new public works facility on the STH 39 property purchased by the Town in December of 2022.  
A motion to approve Resolution 231011-1 to transfer \$48,241.29 from the impact fees account to the general fund to pay for capital costs related to a new public works facility and campus was made by Supervisor Streiff; seconded by Supervisor Hoesly. Motion carried 4-0.

- b) Town trails – Wright presented Resolution 231011-2 to authorize the transfer of \$27,709.52 from the Trails (option #2) fund line of the Town impact fee account (principal and interest) to the general fund to pay for capital costs related to the trail to be constructed between the new Town Park and Durst Road as a partial match to the \$45,000 trail grant approved by the Wisconsin Department of Natural Resources.

A motion to approve Resolution 231011-2 to transfer \$27,709.52 from the impact fees account to the general fund to pay for capital costs related to a new trail along STH 39 between the Town Park and Durst Road was made by Supervisor Streiff; seconded by Supervisor Elkins. Motion carried 4-0.

- c) Purchase of public land for Town Hall/Town Park – Wright presented Resolution 231011-3 to authorize the transfer of \$8,625.70 from the Community Park Land Acquisition fund line of the impact fees account to the general fund to pay for capital costs associated with the purchase of 97.4772 acres of land for the Town Park and possible site for a future Town Hall.

A motion to approve Resolution 231011-3 to transfer \$8,625.70 from the impact fees account to the general fund to pay for capital costs associated with the purchase of land on STH 39 for a Town Park and possible location for a future Town Hall was made by Supervisor Elkins; seconded by Supervisor Hoesly. Motion carried 4-0.

9. **Update on 2023 Road Maintenance** – Chair Narveson reported that Dura Patch has been applied to Disch Road and Old Madison Road. Marty Road will likely receive the same treatment in 2024. There followed a brief discussion of the need for ditching along Marty Road, brush removal, and possible tree removals. The most recent bill to be approved for paving does not include costs for Ashley Lane or Kempfer Lane. Loose gravel will need to be swept on Dahlk Road prior to snow plowing.

10. **Consider Recommendation from Town of New Glarus Park Commission to Approve a Limit on Hunting and Trapping at Town Park on State Highway 39 to be by Permit Only and to Permit Matt Stelter to Hunt within the Park this Season** – Park Commission Chair, Harry Pulliam, provided a brief history of the involvement of Matt Stelter with maintaining trails and planting perennials in cooperation with the Hayes and then Pertzborn/Kratz families who previously owned the property. If the Town had received the Knowles-Nelson Stewardship Grant for the purchase of land for passive recreation, then hunting and trapping would have been required. The members of the Park Commission are requesting that Matt Stelter be allowed to bow hunt on the property. The Town Board members did not support future hunting or trapping on this site, so will not pursue a permitting process as a consequence.

A motion to allow Matt Stelter to bow hunt exclusively on the Town Park property until December 31, 2023 was made by Supervisor Elkins; seconded by Supervisor Hoesly. Motion carried 4-0.

11. **Update on Request for Proposals for 2024-2026 Maintenance Assessment Contract** – Clerk-Treasurer Wright contacted five vendors to solicit proposals on September 5, 2023 and has received four responses and three proposals. Wright presented the original proposal from Associated Appraisal Services for \$15,000 a year for maintenance assessment services for three years and a second proposal received from Accurate Appraisal, LLC for \$12,000 a year for maintenance assessment services for three years or \$24,000 a year for five years of service, four of which are maintenance and one of which is an interim market update. A proposal was received earlier today from Equity Appraisal, LLC, but the file is corrupted and cannot be opened or shared with the Board. Catalis (formerly Grota Appraisal) responded that Green County is outside of their service area, so they will not be submitting a proposal. There was no response from Affiliated Property Valuation Services.

Without objection, this item will be added to the next Town Board agenda for consideration when the third proposal is received and can be shared.

12. **Review Health Insurance Options, with Possible Action** – Clerk-Treasurer Wright presented the 2024 rates for health insurance, with and without dental coverage, as offered through the Wisconsin Department of Employee Trust Funds. Employees Ronald Roesslein and John Wright currently are enrolled in Quartz UW Health for family. The monthly premium is \$2,103.40, of which the Town pays 88%. The 2024 rate for the same provider and coverage is \$2,218.76 a month. If the employees were to enroll with any of the plans available in Green County, the 88% Town monthly obligation would be \$2,240.02 as compared to 88% of the Quartz UW rate of \$1,952.51.

A motion to approve the Town paying 88% of the premium for family health insurance as offered by Quartz UW Health, with dental, in 2024, was made by Supervisor Hoesly; seconded by Supervisor Elkins. Motion carried 4-0.

**13. Patrolman Report** – Chair Narveson reported that mowing has continued. Narveson noted that the new park will need to be mowed. He wondered whether the Town Board should consider the purchase of a tractor and mower. At the STH 39 land acquired by the Town for a park and public works facility, the Patrolperson dug a test hole and it was 5’ to bedrock. Elliott Jacob Buol has harvested the property and has agreed to a reduced lease cost in 2024 in exchange for planting winter wheat to be harvested in mid-July of 2024. This will reduce the emergence of invasive plants.

**14. Clerk-Treasurer Report**

- a) Approval and payment of bills – Motion to approve checks 21260 through 21302, excluding voided checks 21258 and 21259, deposits, and ACH transactions, including the loan payment of \$24,122.78 by check 21257, was made by Supervisor Streiff; seconded by Supervisor Hoesly. Motion carried 4-0.
- b) 2024 budget preparations – As noted in item 6 above, Bast, Narveson, and Wright will continue to refine the 2024 draft budget on Friday, October 13, 2023. Wright states that he hopes to work with Bast to craft a budget amendment to capture the transfer of impact fees, application of those fees to cover paid capital expenses, and possibly apply expenses related to the sale of the 11.5 acres and buildings at the W6599 STH 39 property to the income from the sale of that property.

**16. Chairperson Report**

- a) Bulk waste pickup in Town, October 23, 2023 – Some neighborhoods may have collection the following day if trucks are full on Monday, October 23, 2023.
- b) Discussion with possible action about reclassifying some Town roads as Class B roads – Chair Narveson reported that new funds will be available through the Agricultural Roads Improvement Program (ARIP). The funds are for weight-restricted, Class B roads, that are used by farmers. The cost share is 90/10. Many area roads were discussed as possible candidates.

A motion to approve the posting of Legler Valley Road was made by Supervisor Streiff; seconded by Supervisor Hoesly. Motion carried 4-0.

Narveson provided a brief report regarding meeting with a representative from Cleary Building Corporation about possible designs for a future public works building. A discussion followed about changes to the preliminary size and design that was presented.

**17. Parks Commission**

- a) September 20, 2023 minutes – The draft minutes were available for Board review.
- b) Town e-Cycling event on Saturday, October 14, 2023 – Park Commission Chair Harry Pulliam stated that the event will run between 9:00 AM and noon. He provided a brief description of the upcoming workshop on invasive species. In addition to how to identify these invasives, there will be discussion about how best to remove/manage them. This will be held on October 28, 2023 at the new Town park site on STH 39. Participants should gather at the Town Hall, 26 5<sup>th</sup> Avenue, to then commute to the location where parking is limited. The work session and workshop will run between 10:00 AM and approximately 2:00 PM. Matt Wallrath, the Wisconsin First Detector Network Coordinator at UW Madison, and Jasmine Wyant, Invasive Species Coordinator for the Upper Sugar River Watershed Association will be the presenters. An invitation to area officials for the Walk the Park event on November 4, 2023 has yet to be sent. Pulliam reported on efforts by Shahnaz Shahidain to coordinate a community orchard project at the Town Park through Green County Leaders. An organizational meeting will be held on Monday, October 16, 2023 among the five volunteers and Pulliam. Pulliam advocated for more staff support of the Park Commission. Chair Narveson responded that a Deputy Clerk-Treasurer would be able to assist the Commission, once hired.

**18. Plan Commission** – September 21, 2023 minutes – The draft minutes were available for Board review.

**14. Adjourn** – Motion to adjourn made by Supervisor Hoesly; second by Supervisor Streiff. Meeting adjourned at 7:52 PM.

Approved:

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Prepared by John Wright, Clerk-Treasurer

TOWN OF NEW GLARUS  
GREEN COUNTY  
WISCONSIN

**RESOLUTION 23/10/30  
TREASURER'S BOND, SUBSTITUTE  
FOR**

**WHEREAS**, in accordance with chapter 70.67 (2) of the Wisconsin Statutes, authorizing the Town governing body to obligate said municipality for all taxes of any kind required by law to be paid by such treasurer to the county in lieu of a bond, and

**THEREFORE**, the Town Board, of the Town of New Glarus does obligate itself to pay to the Green County Treasurer the amount of taxes apportioned to it for the 2023 tax roll (\$1,208,832.24), should the treasurer fail to do so, then

**BE IT HEREBY**, resolved by the Town Board of the Town of New Glarus that Resolution No. 23/10/30 be adopted.

Approved:

Town Board of New Glarus  
This 30<sup>th</sup> day of October, 2023

\_\_\_\_\_  
Chris Narveson

\_\_\_\_\_  
John Wright – Clerk-Treasurer

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Matt Streiff

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Troy Pauli

\_\_\_\_\_  
Jim Hoesly

\_\_\_\_\_  
Bob Elkins

To be filed the 30<sup>th</sup> day of October, 2023 with the Green County Treasurer

# Impact Fee Collections

Parks & Playgrounds												
Tax ID	Ref	Address	Date Paid	Public Library	Community Park Land Acquisition	Community Park Improvements	Trails (Option #2)	Pool House (Jt Project w/Village)	Highways and Transp. Facility	Total Paid	Date Refunded/Spent	Expenditure Deadline
				0.33	0.05	0.13	0.15	0.08	0.25		REFUNDED	
23-024-110.1100	ARN	W6060 Durst Road	5/14/2008	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	7/1/2008	
23-024-258.1000	LARSON	N7468 Cty Rd N	7/8/2008	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	7/8/2015
23-024-190.0311	CAREY	2500 State Hwy 69	10/1/2008	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	10/1/2015
23-024-210.0030	SCHNEIDER	N7772 County Hwy N	11/6/2008	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	11/6/2015
23-024-139.2100	PALENSKE	N8153 Zentner Road	4/21/2009	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	4/21/2016
23-024-165.0000	KUBLY	1801 2nd Street	9/10/2009	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	9/10/2016
23-024-258.0500	HOESLY	N7490 County Hwy N	3/3/2010	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	3/3/2017
23-024-129.3300	MORRISON	N8609 Marty Road	7/12/2010	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	7/12/2017
23-024-129.3300	NILLES	W6832 Farmers Grove Rd	10/28/2010	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562	9/8/2021	10/28/2017
23-024-123.2000	WINKELHAKE	W6097 State Road 39	10/6/2011	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		10/6/2019
23-024-145.0000	HUTCHISON	N8147 ZENTNER ROAD	8/7/2012	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		8/7/2020
23-024-071.0340	ZELLMER	W5373 Sandrock Road	4/19/2013	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		4/19/2021
23-024-009.0200	NOMMENSEN	W5276 Windmill Ridge Road	6/27/2013	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		6/27/2021
23-024-071.0200	ALT	W5376 Windmill Ridge Road	7/18/2013	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		7/18/2021
23-024-086.0100	SCHINDLER	W5065 Cty W	8/6/2013	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		8/6/2021
23-024-192.0200	BLANK	W5715 Cty H	12/6/2013	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		12/6/2021
23-024-071.0370	SWEET	W5443 Sandrock Road	3/19/2014	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		3/27/2022
23-024-151.2320	KLEEMAN	W6262 Legler Valley Road	8/18/2014	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		8/18/2022
23-024-184.0200	TIMMERMAN	W4910 EDELWEISS	11/11/2014	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		11/11/2022
23-024-189.2000	NOWORATZKY	N7817 VALLEY VIEW	11/24/2014	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		11/24/2022
	includes interest?	<b>Disbursement for Land Pur</b>	<b>4/10/2015</b>		-\$3,169	-\$9,066				-\$12,236	4/10/2015	
23-024-136.2000	FINK	N8495 ZENTNER ROAD	5/1/2015	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		5/1/2023
23-024-189.2707	RUCHTI	N7887 VALLEY VIEW	6/11/2015	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		6/11/2023
23-024-073.0320	MOSER	W5324 HIGHLAND DRIVE	7/2/2015	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		7/2/2023
23-024-0192.6000	Moldenhauer	W6710 LEGLER VALLEY ROAD	10/22/2015	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		10/22/2023
23-024-0223.2000	EINER/PETERSON	W6548 CTY H	11/5/2015	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		11/5/2023
23-024-0140.0210	SCHNEIDER	N8410 Marty Road	4/14/2016	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		4/14/2024
23-024-0009.0100	STAMPFLI	LOT 35 Windmill Ridge	4/27/2016	\$1,181	\$165	\$472	\$547	\$297	\$900	\$3,562		4/27/2024

Payer	Pool	Hwy	Refund base	2008 inter	2009 inter	2010 inter	2011 inter	2012 inte	2013 inte	2014 inte	2015 inte	2016 inte	2017 intere	2018 inte	2019 inter	2020 inter	2021 inte	2022 inter	2023 inte	Total	Refund on 9.08.2021	Owed
LARSON	\$ 297.00	\$ 900.00	\$1,197	\$ 4.74	\$ 15.02	\$ 11.56	\$ 3.07	\$ 2.46	\$ 1.23	\$ 1.85	\$ 1.86	\$ 1.49	\$ 6.20	\$ 9.35	\$ 12.56	\$ 3.17	\$ 2.58	\$ -	\$ -	\$1,274.14	\$ 1,197.00	\$77.14
CAREY	\$ 297.00	\$ 900.00	\$1,197	\$ 2.00	\$ 14.99	\$ 11.53	\$ 3.06	\$ 2.46	\$ 1.23	\$ 1.85	\$ 1.85	\$ 1.48	\$ 6.19	\$ 9.33	\$ 12.53	\$ 3.16	\$ 2.58	\$ -	\$ -	\$1,271.23	\$ 1,197.00	\$74.23
SCHNEIDER	\$ 297.00	\$ 900.00	\$1,197	\$ 0.80	\$ 14.97	\$ 11.52	\$ 3.06	\$ 2.45	\$ 1.23	\$ 1.85	\$ 1.85	\$ 1.48	\$ 6.18	\$ 9.32	\$ 12.52	\$ 3.16	\$ 2.57	\$ -	\$ -	\$1,269.97	\$ 1,197.00	\$72.97
PALENSKE	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ 9.04	\$ 11.46	\$ 3.04	\$ 2.44	\$ 1.22	\$ 1.84	\$ 1.84	\$ 1.47	\$ 6.15	\$ 9.27	\$ 12.45	\$ 3.14	\$ 2.56	\$ -	\$ -	\$1,262.92	\$ 1,197.00	\$65.92
KUBLY	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ 2.91	\$ 11.40	\$ 3.03	\$ 2.43	\$ 1.22	\$ 1.83	\$ 1.83	\$ 1.47	\$ 6.12	\$ 9.22	\$ 12.38	\$ 3.13	\$ 2.55	\$ -	\$ -	\$1,256.49	\$ 1,197.00	\$59.49
HOESLY	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ 8.43	\$ 3.01	\$ 2.42	\$ 1.21	\$ 1.82	\$ 1.82	\$ 1.46	\$ 6.09	\$ 9.17	\$ 12.32	\$ 3.11	\$ 2.53	\$ -	\$ -	\$1,250.40	\$ 1,197.00	\$53.40
MORRISON	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ 4.36	\$ 3.00	\$ 2.41	\$ 1.21	\$ 1.81	\$ 1.81	\$ 1.45	\$ 6.07	\$ 9.14	\$ 12.28	\$ 3.10	\$ 2.52	\$ -	\$ -	\$1,246.17	\$ 1,197.00	\$49.17
NILLES	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ 4.17	\$ 3.00	\$ 2.41	\$ 1.21	\$ 1.81	\$ 1.81	\$ 1.45	\$ 6.06	\$ 9.14	\$ 12.28	\$ 3.10	\$ 2.53	\$ -	\$ -	\$1,245.98	\$ 1,197.00	\$48.98
WINKELHAKE	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ 0.50	\$ 2.40	\$ 1.20	\$ 1.80	\$ 1.80	\$ 1.45	\$ 6.03	\$ 9.09	\$ 12.21	\$ 3.08	\$ 3.09	\$ 12.40	\$ 10.43	\$1,262.49		\$501.31
HUTCHISON	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ 0.80	\$ 1.20	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.02	\$ 9.08	\$ 12.19	\$ 3.08	\$ 3.09	\$ 12.37	\$ 10.42	\$1,260.28		
ZELLMER	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.73	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.01	\$ 9.07	\$ 12.18	\$ 3.08	\$ 3.08	\$ 12.36	\$ 10.40	\$1,258.95		
NOMMENSEN	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.50	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.01	\$ 9.06	\$ 12.18	\$ 3.07	\$ 3.08	\$ 12.36	\$ 10.40	\$1,258.71		
ALT	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.44	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.01	\$ 9.06	\$ 12.18	\$ 3.07	\$ 3.08	\$ 12.36	\$ 10.40	\$1,258.64		
SCHINDLER	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.38	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.01	\$ 9.06	\$ 12.17	\$ 3.07	\$ 3.08	\$ 12.36	\$ 10.40	\$1,258.58		
BLANK	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.08	\$ 1.80	\$ 1.80	\$ 1.44	\$ 6.01	\$ 9.06	\$ 12.17	\$ 3.07	\$ 3.08	\$ 12.36	\$ 10.40	\$1,258.27		
SWEET	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1.26	\$ 1.80	\$ 1.44	\$ 6.00	\$ 9.05	\$ 12.15	\$ 3.07	\$ 3.08	\$ 12.34	\$ 10.38	\$1,257.56		
KLEEMAN	\$ 297.00	\$ 900.00	\$1,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.05	\$ 1.80	\$ 1.44	\$ 6.00	\$ 9.05	\$ 12.15	\$ 3.07	\$ 3.08	\$ 12.34	\$ 10.38	\$1,256.35		
	\$ 2,673.00	\$ 8,100.00	\$ 10,773.00				\$ 0.50	\$ 3.19	\$ 4.52	\$ 13.89	\$16.19	\$ 12.97	\$ 54.12	\$ 81.58	\$ 109.59	\$ 27.67	\$ 27.74	\$ 111.24	\$ 93.63	\$ 11,329.82		
	Pool	Park Impr.																				
TIMMERMAN	\$ 297.00	\$ -	\$ 297.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.06	\$ 0.45	\$ 0.36	\$ 1.49	\$ 2.25	\$ 3.02	\$ 0.76	\$ 0.76	\$ 3.06	\$ 2.90	\$ 312.11		
NOWORATZKY	\$ 297.00	\$ -	\$ 297.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.04	\$ 0.45	\$ 0.36	\$ 1.49	\$ 2.25	\$ 3.02	\$ 0.76	\$ 0.76	\$ 3.06	\$ 2.90	\$ 312.09		
FINK	\$ 297.00	\$ 472.00	\$ 769.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.67	\$ 0.92	\$ 3.85	\$ 5.81	\$ 7.80	\$ 1.97	\$ 1.98	\$ 7.92	\$ 7.51	\$ 807.44		
RUCHTI	\$ 297.00	\$ 472.00	\$ 769.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.54	\$ 0.92	\$ 3.85	\$ 5.81	\$ 7.80	\$ 1.97	\$ 1.97	\$ 7.92	\$ 7.51	\$ 807.30		
MOSER	\$ 297.00	\$ 472.00	\$ 769.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.47	\$ 0.92	\$ 3.85	\$ 5.81	\$ 7.80	\$ 1.97	\$ 1.97	\$ 7.92	\$ 7.51	\$ 807.23		
MOLDENHAUER	\$ 297.00	\$ -	\$ 297.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.08	\$ 0.36	\$ 1.49	\$ 2.24	\$ 3.01	\$ 0.76	\$ 0.76	\$ 3.05	\$ 2.57	\$ 311.32		
EINER/PETERSON	\$ 297.00	\$ -	\$ 297.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.05	\$ 0.36	\$ 1.49	\$ 2.24	\$ 3.01	\$ 0.76	\$ 0.76	\$ 3.06	\$ 2.57	\$ 311.30		
																				\$ 3,668.78		

\$376.92 interest owed those paid principal on September 8, 2021 for Highway and Transportati  
\$124.39 interest owed those paid principal on September 8, 2021 for Pool House project

\$8,518.66 principal and interest owed those refunded October 11, 2023 for Highway Transporation facility  
\$2,811.16 principal and interest owed those refunded October 11, 2023 for Pool House project

\$1,485.88 principal and interest owed those refunded November 8, 2023 for Park Improvements  
\$2,182.90 principal and interest owed those refunded November 8, 2023 for Pool House project

**RESOLUTION 231030**  
**RESOLUTION REGARDING IMPACT FEES USE**

The Town Board of the Town of New Glarus, Green County, Wisconsin do resolve as follows:

**WHEREAS** the Town of New Glarus Board do have the authority as granted under Wis. Stats. §66.0617 to establish and maintain an Impact Fee account; and

**WHEREAS** the Town of New Glarus reserved a portion of the Impact Fees for community park improvements within the Town of New Glarus; and

**WHEREAS** the Town of New Glarus was gifted 4.290 acres of undeveloped land by Duane and Carolyn Sue Pope as defined as Lot 49 of Certified Survey Map 2211 in 1997, and

**WHEREAS** the Town of New Glarus Park Commission members, with Board authorization, worked with Adam Ingwell of Ec3 to remove invasive plant species to promote the return of the native prairie and preserve the oak savannah remnant beginning in 2009; and

**WHEREAS** the Town Park Commission did approve the site be named Blue Bird Ridge Conservancy at their September 17, 2009 meeting; and

**WHEREAS** the Town Park Commission approved the purchase of Department of Transportation Pollinator Seed Mix to further restore the Blue Bird Ridge Conservancy;

**NOW, THEREFORE, BE IT RESOLVED** that the New Glarus Town Board, in legal session assembled, that \$991.24 of the current balance from the Impact Fees account earmarked for community park improvements be transferred to offset costs incurred to purchase pollinator seed mix to further restore Blue Bird Ridge Conservancy.

Approved and signed by the New Glarus Town Board on the 30<sup>th</sup> day of October, 2023.

By: \_\_\_\_\_ Attested by: \_\_\_\_\_  
Chris Narveson, Town Chair John Wright, Clerk-Treasurer

\_\_\_\_\_  
Matt Streiff, Town 1<sup>st</sup> Supervisor

\_\_\_\_\_  
Troy Pauli, Town 2<sup>nd</sup> Supervisor

\_\_\_\_\_  
Jim Hoesly, Town 3<sup>rd</sup> Supervisor

\_\_\_\_\_  
Robert Elkins, Town 4<sup>th</sup> Supervisor



# **CONTRACT FOR MAINTENANCE ASSESSMENT SERVICES**

Prepared for the  
**Town of New Glarus**  
Green County

By



**Appleton Office  
W6237 Neubert Rd. | P.O. Box 291  
Greenville, WI 54942-0291  
Phone (920) 749-1995/Fax (920) 731-4158**

Lake Geneva Office  
Walworth County  
Lake Geneva, WI 53147

Ironwood, Michigan Office  
Ironwood, MI 49938

Hurley Office  
Iron County  
Hurley, WI 54534

## CONTRACT FOR MAINTENANCE ASSESSMENT SERVICES

This Contract is by and between the **Town of New Glarus, Green County, State of Wisconsin**, a body corporate and politic (hereafter referred to as "Municipality") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter referred to as "Assessor").

*IN CONSIDERATION of the mutual promises contained herein, the parties hereto do agree as follows:*

**I. SCOPE OF SERVICES.** All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the *Wisconsin Property Assessment Manual* and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this Contract. This Contract is being provided under the assumption all property records are in digital format. Digital property records include digital photographs, sketches and property record data compliant with the Wisconsin Department of Revenue mandates. In the event the property assessment records are not digital, there shall be additional costs charged to the Municipality for collection and or conversion.

**A. INSPECTIONS.** The following inspection cycle is to be completed by the Assessor annually:

- 1) New construction, annexed properties, and properties with a change in exemption status shall be physically inspected, and the property record card prepared or updated as needed.
- 2) Properties affected by building removal, fire, significant remodeling (those requiring a building permit), or other major condition changes shall be physically inspected.
- 3) Improved properties under construction over the term of the contract years shall be re-inspected.
- 4) All sales properties, legal description changes, and zoning changes shall be reviewed and inspected if deemed necessary to ensure an accurate and fair assessment.
- 5) Requests for review by property owners, made after the close of the municipal Board of Review, and prior to signing the affidavit for the next assessment roll, shall be physically inspected during the current assessment cycle.
- 6) A classification review shall be conducted annually to determine eligibility for agricultural use value assessment and the assessment of agricultural forestland and undeveloped land.

**B. PARCEL IDENTIFICATION.** The legal description and size of each land parcel shall be contained in the existing property records. The drawings and measurements of each primary improvement shall be contained in the existing property records. For all new records, the Assessor shall provide digital drawings and digital photographs of each primary improvement. In the event of a discrepancy found in existing records, the Assessor shall investigate and correct the record.

**C. PREPARATION OF RECORDS.** Appropriate records shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and agricultural improvements. All information relating to the improvements shall be obtained and shown as provided on the respective forms. The Assessor shall supply to the Municipality a complete set of property records in a computer readable format compatible with the Municipality's computer system and update records within fourteen (14) days of final adjournment of the Board of Review. Records shall be updated prior to open book and again to reflect any changes made at Board of Review.

**D. APPROACH TO VALUE.** Assessor shall assess all taxable real estate according to market value, as established by professionally acceptable appraisal practices, except where otherwise provided

by law. Assessor shall consider the sales comparison approach, the cost approach and the income approach in the valuation of all property.

- 1) **Sales Comparison Approach.** Assessor will collect, compile and analyze all available sales data for the Municipality in order to become familiar with the prevailing market conditions and activity. A detailed analysis of sales data will be prepared, including pictures of recent residential and agricultural sales. Vacant land sales will also be compiled and analyzed. In valuing property by the sales comparison approach, subject properties will be appraised through a detailed comparison to similar properties that have recently sold, making careful consideration of similarities and differences between the subject and comparable sale properties.
- 2) **Cost Approach.** The cost approach to value will be considered for all taxable improved property. Replacement costs for residential and agricultural improvements will be calculated per Volume II of the *Wisconsin Property Assessment Manual* or similar cost manual. Replacement costs for commercial improvements will be calculated using Marshall & Swift valuation service or similar cost manual. All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence will be accurately documented and deducted from current replacement costs.
- 3) **Income Approach.** Consideration of the income approach to value will be made when the income or potential income generated by the real estate is deemed likely to affect the property's resale value. Data to be analyzed will include economic rents, typical vacancy rates and typical operation expense ratios. In the valuation of property by the income approach, adequate records will be prepared, showing a reconstruction of income and expenses, as well as all calculations used to arrive at market value, including formulas and capitalization rates as appropriate to the type of property being appraised.

E. **ASSESSMENT NOTICES.** A notice of changed assessment as prescribed under §70.365, Wis. Stats., shall be mailed for each applicable taxable parcel or property whose assessed value has changed from the previous year. The notice form used shall be that prescribed and or approved for use by the Department of Revenue and include the time and place of when the open book conference(s) and board of review meeting(s) will be held. Assessor shall be responsible for the preparation and timely mailing of all assessment notices by First Class Mail.

F. **OPEN BOOK.** Upon completion of the Assessor's review of assessments and prior to completion of the assessment roll, the Assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values. The Assessor shall take the phone calls to schedule appointments for the open book conference as needed. The Assessor shall be present at the open book conference for a time sufficient to meet with the property owners or their agents and shall be present at least two (2) hours or as needed. Assessor shall provide necessary staff to handle projected attendance.

G. **COMPLETION OF ASSESSMENT ROLL AND REPORTS.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the Wisconsin Property Assessment Manual. The Assessor shall provide final assessment figures for each property to the Municipality, and the roll shall be totaled to exact balance. Assessor shall arrange and provide the Personal Property and Real Estate Assessment Roll for viewing by the public as prescribed in Chapter 5 of the Wisconsin Property Assessment Manual, as amended each year, and adhere to any county or Municipality business requirements as prescribed under §70.09(3)(c), Wis. Stats. Assessor shall prepare and submit all reports required of the Assessor by the Wisconsin Department of Revenue.

H. **BOARD OF REVIEW.** Assessor shall attend all hearings of the Municipal Board of Review to explain and defend the assessed value and be prepared to testify under oath regarding the values determined. In the event of appeal to the Wisconsin Department of Revenue or Circuit Court, Assessor shall be available upon request of Municipality to furnish testimony in defense of the values determined for up to eight employee hours per parcel. Testimony in excess of eight employee hours will require an

addendum to this Contract. If deemed necessary by both parties, any outside counsel services requested by the Assessor shall be provided and paid for by the Municipality as agreed upon by both parties.

I. **PERSONAL PROPERTY ASSESSMENTS.** The Assessor shall prepare and distribute annual personal property statements to all businesses. Each year the Assessor will review statements and follow up with un-filed or incorrect statements. The Assessor shall determine the appropriate assessment. The Assessor shall exercise particular care so that personal property as a class on the assessment roll bears the same relation to statutory value as real property as a class.

J. **MONTHLY MUNICIPAL PERMIT FEE.** Manufactured and Mobile home statement of monthly municipal permit fee calculations shall be completed. Assessor shall maintain an electronic copy of the property record data for each account as contained on the PA-117 form, Manufactured & Mobile Home Valuation Worksheet or similarly approved form as prescribed in Chapter 5 of the Wisconsin Property Assessment Manual, as amended each year.

K. **OPEN RECORD REQUESTS.** The Assessor shall timely respond to all open record requests received by the Assessor. In so doing, the Assessor shall comply with the confidentiality provisions of the Wisconsin Statutes, including §70.35(3), Wis. Stats., regarding the personal property return, §70.47(7)(af), Wis. Stats., regarding income and expense information provided to the Assessor and board of review; and §77.265, Wis. Stats., regarding the real estate transfer return.

L. **AVAILABILITY.** The Assessor shall maintain telephone service to receive calls from the Municipality or property owners five days a week from 8:00 a.m. to 4:30 p.m. excluding holidays and Assessor time off. Internet and voicemail communication are available twenty-four hours per day. The Assessor shall timely respond to all telephone inquiries within four business days or sooner. The Assessor shall copy the municipal clerk on those issues that have been raised to the clerk or board and subsequently passed on to the Assessor. Assessor shall be available to attend Town meetings at the request of the Municipality for up to two (2) hours annually not including annual assessment required meetings. Any additional meetings the Assessor shall be asked to attend beyond two (2) hours shall be compensated at the customary rates charged by the Assessor. The Municipality and the Assessor shall discuss the cost prior to attendance.

M. **MUNICIPALITY RECORDS.** The Municipality shall allow access and make available to the Assessor municipal records such as, but not limited to, previous assessment rolls and property assessment records, sewer, and water layouts, permits, tax records, records of special assessments, plats, condominium documents, maps, and any other pertinent documents currently in the possession of the Municipality at no cost. If such records necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County Surveyor, Register of Deeds, or other sources at the Municipality's expense.

N. **MAPS.** Municipality shall provide at no cost to Assessor any plat maps, zoning maps, cadastral maps, GIS related maps, or any other maps currently in the possession of the Municipality. If such maps necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County surveyor, Register of Deeds, or other sources at the Municipality's expense.

O. **MAILING SERVICES.** The Municipality shall be responsible for the cost of all postage and mailing services. This cost includes, but is not limited to, personal property forms, notices of changed assessment, written requests to view property, questionnaires, and mailing of documents such as maps and assessment rolls. If Municipality requires Assessor to send any letters by certified mail, Municipality shall be responsible for the postage and mailing services costs of all certified mail.

## II. GENERAL REQUIREMENTS

A. **OATH OF OFFICE.** As Assessor is a corporation, the person designated as responsible for the assessment shall take and subscribe to an oath or affirmation supporting the Constitution of the United States and to the State of Wisconsin and to faithfully perform the duties of Assessor. The oath shall conform to §19.01, Wis. Stats., and be filed with the Municipal Clerk prior to commencing duties.

Assessor shall assume the appointed office of Town Assessor as per §60.307 and §70.05(1), Wis. Stats., for the duration of this Contract and shall perform all statutory duties appertaining to such office. The Assessor shall be considered a public officer and afforded the protection from civil liability under §895.46(1), Wis. Stats., for carrying out duties while acting within the scope of the Assessor's employment as an officer of the Municipality. As such, and except for those claims and liabilities based upon alleged intentional or negligent acts of Assessor, Municipality shall hold harmless Assessor from all claims and liabilities relating to the assessment or taxation of property, including but not limited to claims made under §74.35, and §74.37, Wis. Stats., and any circuit court claims, unless otherwise specified in this Contract.

**B. QUALIFICATIONS AND CONDUCT OF PERSONNEL.** The Assessor shall provide at its own expense any personnel necessary and shall comply with the following:

- 1) All personnel providing services shall be currently certified in compliance with §70.05 and §73.09, Wis. Stats., and the administrative rules prescribed by the Wisconsin Department of Revenue.
- 2) Assessor's field representatives shall carry photo identification cards.
- 3) All employees, agents, or representatives of the Assessor shall conduct themselves in a safe, sober, and courteous manner while performing services within the Municipality.
- 4) The Assessor shall review any complaint relative to the conduct of the Assessor's employees and take appropriate corrective action. If the Municipality deems the performance of any of Assessor's employees unsatisfactory, the Assessor shall, for good cause, remove such employees from work upon written request by Municipality, such request stating reasons for removal.

**C. INSURANCE.** The Assessor agrees as follows:

- 1) The Assessor shall obtain and maintain during the term of this Contract full coverage insurance to protect and hold harmless the Municipality which insurance is to include:

(a) Workers Compensation State of Wisconsin requirements

(b) General Liability

General Aggregate	\$ 2,000,000
Products/Completed Operations	\$ 1,000,000
Each Occurrence	\$ 1,000,000
Personal & Advertising	\$ 1,000,000
Fire Damage	\$ 100,000
Medical Expense	\$ 10,000

(c) Comprehensive Auto Liability

Combined Single Limit	\$ 1,000,000
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- 2) The Assessor shall provide the Municipality with certificates for all required insurance, with the Municipality as a named insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall timely pay all insurance premiums.

- 3) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the Assessor within the Municipality shall be assumed by that Assessor.

D. **OWNERSHIP OF RECORD.** All records prepared or maintained in connection with assessments in the Municipality shall at all times be and remain the sole property of the Municipality, including (a) all records prepared in connection with assessments in the Municipality including, but not limited to property records, personal property forms, maps, and any other schedules or forms, (b) all records and materials obtained from the municipality and not previously returned to include maps, and Assessor's records, and (c) materials specifically obtained and/or used for performance of assessment work for the Municipality, to include aerial photos, maps, depth factor tables, copies of leases, correspondence with property owners, sales data, copies of real estate transfer returns, and operating statements of income property, and (d) if the record system is computerized, at a minimum, provide that the software be able to create an exportable text file of data (e) if the Municipality requires a conversion of the electronic assessment records to a neutral file format, such as but not limited to a text file format or a tab delimited format, the Municipality shall pay the actual cost of such conversion.

### III. TERM AND TERMINATION

A. **TERM.** The term of this Contract is for the **2024, 2025, and 2026** assessment year(s). The Assessor shall have completed all work under this Contract on or before the fourth Monday in April or 45 days thereafter, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this Contract and by mutual consent.

B. **TERMINATION.** Either party may terminate this Contract only with cause, cause being defined as default of the other party of terms of this Contract upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to the Municipality all records and materials in Assessor's possession used or created during this Contract. During the 60-day wind down period, both Assessor and the Municipality shall act in good faith with each other and cooperate in the orderly transfer of records. If termination occurs during the course of ongoing assessment work, the Assessor shall be paid for work completed as of the date of termination on a percentage basis in light of all work to be performed during the year of termination.

C. **ENTIRE CONTRACT.** This Contract contains the complete and entire Contract between the parties and may not be altered or amended except in writing, executed, making specific references to this Contract, by a duly authorized officer of the Assessor and by a duly authorized official of the Municipality.

D. **AUTOMATIC RENEWAL.** This Contract will automatically renew for successive annual assessment years upon the expiration of the original term unless either party, on or before July 1 of the preceding year, notifies the other party by certified mail of their desire to non-renew.

### IV. COMPENSATION


- A. The Municipality shall pay the Assessor **Fifteen Thousand Dollars (\$15,000.00)** for each of the 2024, 2025, and 2026 assessment year(s) for maintenance assessment services.
- B. The compensation due to the Assessor shall be paid in monthly or quarterly installments throughout the 2024, 2025, and 2026 assessment year(s).
- C. **Renewal Adjustments:** An increase of not more than five percent (5.0%) may be applied on an annual basis for each year of automatic renewal after 2026.
- D. Additional compensation that may be due to the Assessor as a result of services that are beyond the scope of this Contract will be invoiced in the month subsequent to the month in which the services were provided.

E. **Optional Website Posting:** The Municipality shall have the option to post assessment data on our website for an additional cost of a penny and an eighth per parcel per month ( $$.018 * 1,036 = \$18.65$ ) payable to a third-party vendor (pass-through expense only). This monthly charge is subject to change annually based on our third-party vendor-imposed fees and any parcel count changes.

\*\*\* Please initial yes or no to post data to the website. \*\*\*

Yes \_\_\_ No \_\_\_

V. **SIGNATURES**



---

Mark Brown  
President  
Associated Appraisal Consultants, Inc.

07/26/2023  
Date

---

Authorized Signature  
Town of New Glarus

---

Date



# ASSESSMENT SERVICES PROPOSAL

PREPARED FOR:

*Town of New Glarus*





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Accurate agrees to all scope of work expressed in the RFP sent by the Village of Reedsville. There is no charge for the cost of this proposal submission. Accurate is an independent assessment firm and will never outsource our assessing services to an outside contractor. We are fully insured have provided a sample insurance in the Appendix of this proposal.

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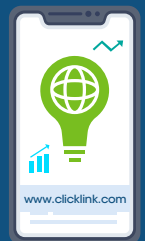
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### This proposal is built to be INTERACTIVE!

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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 appreciate the opportunity to serve the Town of New Glarus!

For over 23 years, Accurate Appraisal has continuously improved the assessment experience through **innovation, education, and technology**. We understand that New Glarus is a unique community, therefore we will provide you solutions tailored to fit your specific needs.



We firmly believe that every property owner comes first. They should be part of the assessment process and not just an end result. We work hard to make sure **everyone is treated fairly and equitably**.

## TRANSPARENCY

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

## OUR CORE VALUES:



### 1. 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.



### 4. 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.



### 2. 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.



### 5. 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.



### 3. 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.



## Our Mission:

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

# ASSESSMENT TEAM

Your assessment team has access to over **195 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 Amanda as your main point of contact throughout the contract.

**Amanda Meade**  
*Customer Experience Manager*

**Upon Selection**  
*Statutory Assessor*

**Jamie Busha**  
*Quality Manager*

**Amy Baji**  
*Personal Property Coordinator*

**Terri Muskevitsch**  
*Customer Service Manager*

**Chris Plamann**  
*Marketing and PR*

**30 EMPLOYEES**

27 ASSESSOR I & II

3 ASSESSOR III



**Bill Gaber** is the overall operations manager. He is an assessor II and III with over 12 years of assessing experience. Bill mentors all of our assessors by reviewing the WPAM and sharing knowledge sessions with our entire assessment staff. This ensures we are following DOR guidelines. Bill communicates with leaders from the DOR to build a strong relationship so when it comes time for a market update we are all on the same page.

**Amanda Meade** is your customer experience manager. You will have access to her for tracking the workload, pulling reports, regular bi-weekly meetings and any training you may need. She manages our customer service staff and ensures your community is treated fairly and respectfully.

**Upon Selection** You may pick your statutory assessor. Your assessor will be overseeing the field work and verifying the roll. They will manage the open book process before board of review. They will sign the roll & defend cases at board. Your assessor will be an assessor II certified assessor.

**Jamie Busha** is your quality manager. She leads a team of 3 that reviews all changes made during the assessment process before notices are sent. She is an assessor II with 10 years of experience.

**Amy Baji** has over 13 years of assessing experience. She will verify personal property accounts and post the assessment rolls online. Her #1 goal is to minimize dooimages. She is an assessor II.

**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.

**Chris Plamann** will be involved in building an intentional community education plan. He will post education on facebook weekly, build mailings and social media content to educate property owners.



PROUD PARTNERS WITH:



Wisconsin Association of Assessing Officers

# EXPERIENCE MANAGER

I WILL HELP YOU SELECT YOUR STATUTORY ASSESSOR

## AMANDA MEADE

### Customer Experience Manager

amandam@accurateassessor.com 920.460.4688



### ABOUT ME

I am an optimistic and outgoing person that loves to try new things. I love to travel! Around the US, the world and especially within Wisconsin! I am highly organized and dedicated with great problem-solving skills. I love to work with a great team and develop new ideas. In my free time I love to spend time with my big family. I am so excited about working with many different people toward common goals.

"If you can be anything in the world, be kind"

### EXPERIENCE

- Previous Assessment Experience
- Management of Over 100 Municipalities
- Oversee Regular Workload Meetings
- Education of Board Members and Clerks on the Assessment Process
- Understanding of the WPAM
- Build Relationships with Administrators and Mayors
- GIS mapping
- Experience with Prolorem - CAMA System

### WORK HISTORY

Executive Director  
Non Profit - 7 years

Executive Director  
Preschool - 10 years

### STRENGTHS/SKILLS

Problem Solver	Organized
Professional	Communication
Building Relationships	Empathetic
Personable	Consistent

### TRAINING



NATIONAL OSHA  
FOUNDATION



"The only way to do great work is to love what you do."

# 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

**Your statutory assessor - 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

# ASSESSMENT TIMELINE

Before January of each year we will send you 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 standard outline of what happens throughout the assessment timeline.

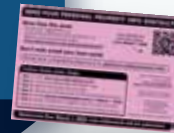
## JANUARY

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.



Personal Property post cards are mailed with digital submission options available.



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.

## FEB-MAR

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. Personal Property is collected. Every personal property blotter is saved digitally.

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



## APRIL-MAY

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

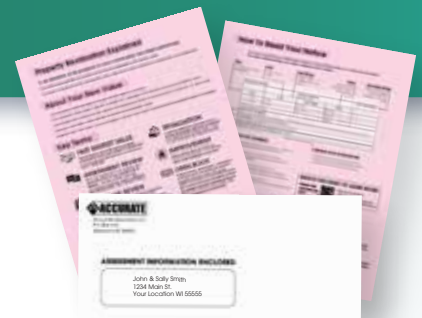
Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



## JUNE-JULY

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.



## AUGUST

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

Your account manager will meet with your team throughout the year to go over accountability and workload. **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	20	21	22	23	24	25	26	27	28	29	30	31
TASK	ASSIGNED TO	PROGRESS	START	END	TOTAL DAYS LEFT	M	T	W	T	F	S	E	M	T	W	T	F	S	E	M	T	W	T	F	S	E	M	T	W	T	F	S	E	M	T	W	T	F	S	E				
<b>Education / Publication</b>																																												
Prep and share Education Plan	Chris	100%	8/1/23	8/30/23	30	-15																																						
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																																						
<b>Data Transfer &amp; Analysis</b>																																												
Data Transfer		1%	1/1/24	1/15/24	15	15																																						
Code Table Data Reviews & Return		1%	1/1/24	3/30/24	70	70																																						
<b>Fieldwork (Permits &amp; New Construction)</b>																																												
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)		100%	9/8/23	9/29/23	22	11																																						
Ag Checks (Kenosha 2nd letter, data update)		100%	10/1/23	11/15/23	46	46																																						

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 Milwaukee 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.

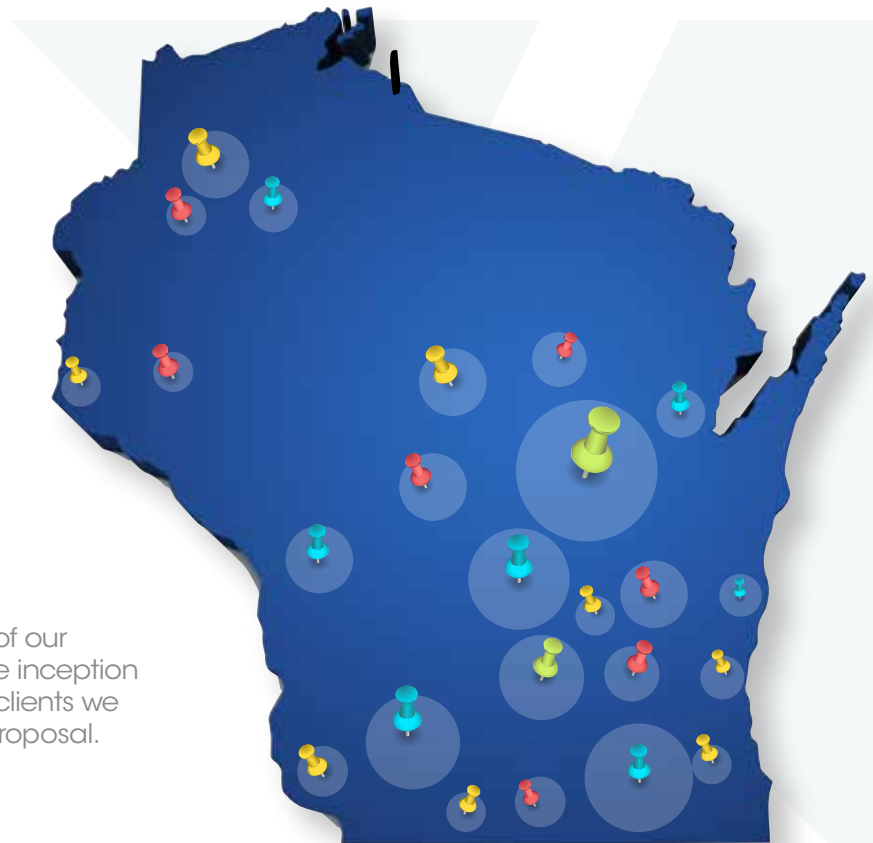
# WHO WE SERVE

**ALL - PROPERTY OWNERS**  
**ALL - EMPLOYEES**  
**105 - MUNICIPALITIES**  
**22 - COUNTIES**

We serve a variety of municipalities across the state. From small towns to large cities, we focus on one thing. **Putting property owners first.**

A phrase we often hear is, **"You're not a typical assessor,"** and we are proud of that. We strive to be inclusive and understanding with everyone we serve. Our passion to embrace growth and innovation stems from low assessment standards.

We value **transparency** in everything we do. We work with board and council members, commercial property owners, homeowners, real estate agents, and the list goes on and on. The common theme is that no matter who you are, at Accurate we will work late and go the extra mile to serve property owners. Don't think of us as a contract assessor, think of us as **a trusted advisor here to serve you and your community.**



Our client retention rate is 99%. Many of our customers have been with us since the inception of our company. A list of all municipal clients we serve is on the following page of this proposal.



# MUNICIPAL CLIENT LIST

MUNICIPALITY	TYPE	POPULATION	EQ VALUE	PARCELS	SERVICE
Kenosha	City	99,986	9,129,723,600	29,901	BLEND
Franklin	City	35,451	3,608,867,300	11,971	FULL VALUE
Manitowoc	City	32,936	1,392,199,900	12,374	BLEND
De Pere	City	24,893	1,618,168,000	7,664	FULL VALUE
Grand Chute	Town	23,831	3,325,751,400	7,154	MAINTENANCE
Watertown	City	22,926	1,203,821,500	7,351	BLEND
Fox Crossing	Village	18,892	1,198,650,600	6,246	FULL VALUE
Onalaska	City	18,712	1,405,385,500	5,895	BLEND
Cudahy	City	18,200	904,066,900	5,877	FULL VALUE
Oconomowoc	City	16,847	1,898,997,800	6,160	FULL VALUE
Beaver Dam	City	16,476	740,557,500	5,545	FULL VALUE
River Falls	City	15,800	934,801,400	1,450	BLEND
Whitefish Bay	Village	14,747	2,913,528,800	4,814	BLEND
Whitewater	City	14,517	433,367,500	2,607	FULL VALUE
Shorewood	Village	13,338	1,418,231,600	3,848	BLEND
Stoughton	City	13,134	937,153,400	4,427	FULL VALUE
Glendale	City	12,779	1,065,226,500	5,030	BLEND
Baraboo	City	12,556	664,887,100	4,116	MAINTENANCE
Platteville	City	12,537	411,313,800	2,831	BLEND
Brown Deer	Village	11,964	674,445,400	4,264	BLEND
Greenville	Town	11,874	1,218,445,000	4,445	FULL VALUE
Harrison	Village	11,532	1,128,775,500	4,307	BLEND
Two Rivers	City	11,271	666,263,700	4,729	BLEND
Burlington	City	10,668	670,648,100	3,435	FULL VALUE
Monroe	City	10,661	559,462,700	4,055	BLEND
Oregon	Village	10,390	1,121,101,700	3,634	FULL VALUE
Portage	City	10,365	408,028,900	3,181	FULL VALUE
Elkhorn	City	9,853	556,333,700	3,163	FULL VALUE
Sparta	City	9,522	400,746,900	3,157	FULL VALUE
New Richmond	City	8,966	700,313,500	3,483	FULL VALUE
Altoona	City	8,929	510,581,300	2,666	BLEND
McFarland	Village	8,449	916,289,300	3,072	FULL VALUE
Delavan	Town	8,385	1,027,819,100	3,609	BLEND
Monona	City	8,179	985,590,300	2,944	FULL VALUE
Windsor	Village	7,795	901,574,900	2,836	BLEND
Sheboygan Falls	Town	7,435	154,644,400	772	BLEND
Mount Horeb	Village	7,421	676,653,100	2,484	BLEND
Vernon	Village	7,227	1,054,853,500	2,947	BLEND
Buchanan	Town	7,082	584,171,400	2,407	FULL VALUE
Beloit	Town	7,038	462,018,800	3,288	BLEND
Edgerton	City	5,552	364,170,300	2,140	FULL VALUE
Rothschild	Village	5,325	333,417,900	2,132	BLEND
Saukville	Village	4,419	300,885,500	1,449	BLEND
Prairie du Sac	Village	4,378	363,372,900	1,581	BLEND
Bayside	Village	4,377	595,016,700	1,622	FULL VALUE
Prescott	City	4,229	312,132,400	1,471	BLEND
Geneva	Town	4,099	912,896,900	3,755	BLEND
Mosinee	City	4,063	212,596,800	1,726	BLEND
Sugar Creek	Town	3,973	382,156,500	1,953	BLEND
Chilton	City	3,828	177,642,000	1,493	BLEND
Lancaster	City	3,760	192,492,400	1,591	BLEND

MUNICIPALITY	TYPE	POPULATION	EQ VALUE	PARCELS	SERVICE
Combined Locks	Village	3,588	314,834,700	1,369	BLEND
Seymour	City	3,443	74,979,700	1,252	MAINTENANCE
Lyons	Town	3,440	388,811,700	1,782	BLEND
Menominee	Town	3,422	346,963,000	1,525	BLEND
Pleasant Springs	Town	3,387	481,121,500	1,435	FULL VALUE
Boscobel	City	3,231	103,974,100	1,176	BLEND
Fulton	Town	3,158	413,981,200	2,216	FULL VALUE
Wescott	Town	3,135	386,545,700	2,554	BLEND
Brillion	City	3,127	151,267,700	1,127	BLEND
Dale	Town	2,842	252,326,200	1,151	BLEND
Walworth	Town	2,842	195,945,900	685	BLEND
Walworth	Village	2,824	164,495,100	955	BLEND
Union	Town	2,776	178,423,300	732	MAINTENANCE
Fox Lake	Town	2,709	203,679,900	938	BLEND
Dayton	Town	2,703	384,094,600	1,723	MAINTENANCE
Deerfield	Town	2,524	173,654,500	650	BLEND
Pacific	Town	2,518	390,961,700	1,332	BLEND
Poynette	Village	2,494	170,308,900	880	BLEND
Caledonia	Town	2,491	180,754,800	974	BLEND
Dekorra	Town	2,350	351,865,400	1,448	BLEND
Deerfield	Village	2,319	228,122,300	981	BLEND
Jefferson	City	2,231	400,186,600	2,747	FULL VALUE
Spring Prairie	Town	2,197	261,805,500	894	BLEND
New Glarus	Village	2,172	168,495,500	808	MAINTENANCE
Albion	Town	2,103	188,271,100	1,058	BLEND
Jamesstown	Town	2,077	174,781,600	1,023	BLEND
Pardeeville	Village	2,067	126,196,300	849	BLEND
Blooming Grove	Town	1,911	137,158,700	683	BLEND
Richmond	Town	1,835	228,604,700	1,039	BLEND
Randolph	Town	1,767	38,841,400	331	BLEND
Fontana	Village	1,713	1,303,832,100	2,712	BLEND
Darien	Town	1,588	126,297,100	565	MAINTENANCE
Springdale	Town	1,530	311,257,100	855	BLEND
Cambridge	Village	1,518	137,183,600	665	BLEND
Cleveland	Village	1,477	95,219,800	587	BLEND
Brooklyn	Village	1,466	115,985,800	495	BLEND
Eldorado	Town	1,443	99,975,300	618	BLEND
West Baraboo	Village	1,428	60,537,900	464	BLEND
Hazel Green	Village	1,200	60,805,000	398	MAINTENANCE
Berry	Town	1,188	176,335,000	544	MAINTENANCE
Green Valley	Town	1,072	54,147,900	501	MAINTENANCE
Oregon	Town	1,053	432,821,500	1,258	BLEND
Marathon	Town	1,048	76,147,200	489	BLEND
Blue Mounds	Village	971	71,354,300	297	BLEND
Footville	Village	810	38,412,500	338	BLEND
Primrose	Town	774	67,890,400	341	BLEND
Cambria	Village	753	29,585,400	326	BLEND
Perry	Town	737	59,221,900	353	BLEND
Sullivan	Village	669	37,904,600	232	BLEND
Upham	Town	647	169,759,000	942	BLEND
Rose	Town	595	59,950,200	488	BLEND
Courtland	Town	510	20,890,400	241	BLEND
Coloma	Village	456	17,531,000	252	BLEND
Friesland	Village	356	13,642,600	160	MAINTENANCE

## BLEND

Years of maintenance with an interim market updated at least one year of the contract.

## MAINTENANCE

Review of permits, new construction, splits, etc.

## FULL VALUE

Annual Interim Market Updates performed every year.

225,842 - IMPROVEMENTS



# OUR HISTORY

Accurate was **founded 23 years ago** on **complete Transparency and Communication.**

For many years it was common practice for assessment firms 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 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 195 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  
Still growing - added more employees  
Purchased the building we rented

## 2005 - 2010

75 municipalities  
Online scheduling available  
Moved to new location on Midway Rd.  
Growing - added new employees

## 2015 - PRESENT

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

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 - 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

## ALL INCLUSIVE SERVICES

- ✓ **FREE** Web Data Access
- ✓ **CUSTOM** Community Education
- ✓ **LIVE** Customer Service
- ✓ **CLOUD** Based Assessment Software

- Access to a dedicated assessor certified Account Manager
- Online appointment scheduler
- Telephone and Virtual Open Book appointments
- Customized videos and educational materials
- Active live chat function available on our website
- Dedicated quality management
- Virtual walk-through options
- Maintenance inspections



# POSITIVE INTERACTION

We take pride in our **interaction and communication** with municipal officials, property owners, and state employees. **Our commitment to transparency and education** ensures we create a positive interaction with those we serve. Below are some examples:

**W Wendy Helgeson**  
1 review  
★★★★★ 8 months ago  
I enjoy working with the staff at Accurate Appraisal. They are quick to respond and extremely easy to work with!  
👍 2

**S Susan Tweedy**  
1 review  
★★★★★ a month ago  
I requested Accurate Appraisal to please reassess our property value after a jump of almost 48% since the last appraisal. Jill Luebke, an appraiser at the company, worked on my case. With my own research and analysis in hand, she demonstrated a clear understanding of my concerns and the math that went into her own re-assessment. She was thoughtful and polite but even more importantly, a highly capable and methodical worker who walked me through each data input and factor weighting. I still wish it were lower (as this appraisal is an input into our eventual tax assessment), but the framework she employed was reasonable and equitable. In conjunction with her knowledge and professionalism, Jill couldn't have been a better person to work with on this dispute. She's a real gem!

**T Tina Moore**  
6 reviews · 1 photo  
★★★★★ a month ago  
Accurate Appraisal re-assessed my house with a market adjustment. I spoke with Alanna who explained in great depth the process of re-assessing homes and provided me with valuable information to understand their process and state statutes regarding home values.

**J Jennifer O'Handley**  
3 reviews  
★★★★★ a year ago  
I had received a notice of changed assessment on my recently purchased home. It was a lot higher than I was anticipating and I wrote an email, inquiring what the basis for increase was.  
  
After receiving a reply, I scheduled a time to speak to the assessor because their information was demonstrably incorrect. I had a phone conversation with Miranda yesterday, explained the situation and I was blown away by her understanding and reasonableness.  
  
After she sent me the amended amount today, I sent this email back and it's how I truly feel encapsulated my experience:

**M Michael Busterud**  
4 reviews · 1 photo  
★★★★★ 2 years ago  
Reply

**Accurate Appraisal**  
1428 Midway Rd, Menasha, WI  
★★★★★

We understand not all of our reviews are 5 star. We promise to continue to make the assessment experience the best for every property owner we serve.

**Accurate builds relationships with your community!** For example our Personal Property department created an instructional video on our website showing 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."

Primrose Resident - Duane Wagner



# EDUCATION PLAN

**Our education plan puts your community first.** We utilize your channels of communication to educate your community. Together we will create a **two-way channel of communication** through social media, council meetings, newsletters, post card mailings, custom videos, and much more!

Most assessors do not prepare early for property owners and municipal officials. The first time owners find out about a market update is typically **30 days** before the board of review.

**A one-way channel of communication is not transparent** and leaves property owners scrambling to figure out what is going on. Often times this creates a rift between property owners, the municipality and the assessor.

## 6 STEPS TO EDUCATION:

### 1. WEEKLY SOCIAL MEDIA



Every week we share content on social media for you to share with your community. We mix this with a schedule of postings over the coming year to let property owners know what to expect and the status of the current market. Involving the community ensures we have two-way communication through the assessment process.

### 2. COUNCIL MEETINGS



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

### 3. NEWSLETTER/MAILING

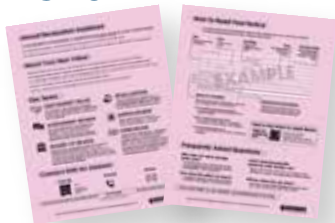
We have custom newsletter content that explains assessments, what to expect, and the schedule of social media postings to keep your community engaged. We will help you enhance the connection you have with your property owners.

### 4. WEBSITE



Updating your website with a custom video helps explain what an interim market updated is and what to expect. We will build links to property record info and educational FAQ's for the market update. 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 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

Our Open Book process is very flexible and allows property owners to contact us by online appointment, phone, email with plenty of time before board of review. Roll Books are posted online and we help prepare clerks for any cases before the Board of Review.



# SOCIAL MEDIA

We post content twice a week. Through **Social Media** we build a positive and informative **two-way communication** with your community. We encourage you to review other assessment firm's social media so you can see the content and judge for yourself.

We instantly connect with thousands of property owners to **quell the stigma of taxes and assessed values**. When you don't involve your community they feel left out and discouraged about the assessment process. **Our transparency ensures property owners are engaged** so they don't feel like they're just another un-informed taxpayer.

## 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 in the same condition as mine, 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 (same average)	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](http://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.

**MILL RATE = TOTAL TAXES NEEDED / TOTAL ASSESSED VALUE**

If 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.

Taxes are set annually by these 4 entities:

- Municipality
- School District
- County
- Technical College

2021

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

35% COMMUNITY-WIDE INCREASE MARKET-WIDE AVERAGE

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 206 IN 2021 | 202 IN 2022

Presented by: Accurate

## 2023 ASSESSMENT TIMELINE

January 1, 2023: Close

February: Property

March: Rate Calculation

Summer 2023: Sales as of 2022

Mill Rate Determination

November: New Values

Not Ready for Market Reassessment

Done: Equalized Value Report

Not Ready for New Year Values

Permit & Building Inspection Checks

March: Review of Sales Price

April: Rate

Board of Review

June 2024: Field Checks

2023 No-Site Market By Municipality

## DID YOU KNOW?

The State of WI is a Market Value State. Assessors are obligated 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](http://accurateassessor.com)

CHECK US OUT ONLINE!



[www.facebook.com/accurateappraisalllc](https://www.facebook.com/accurateappraisalllc)



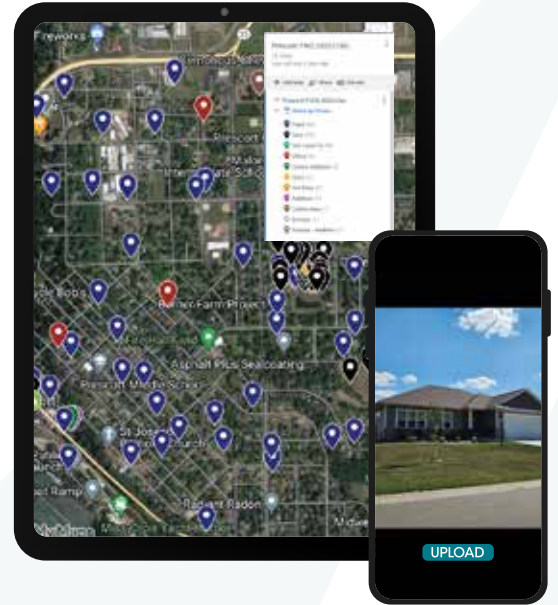
[www.linkedin.com/company/accurate-appraisal-llc](https://www.linkedin.com/company/accurate-appraisal-llc)



# SOFTWARE

The CAMA system we use is completely **CLOUD BASED.**

There are no costs for the software and no cost to convert your current data. Property information will be available on your website **FREE** to you and your community **24/7**. Each parcel shows detailed **images and information** and offers a digital option for sales questionnaires and personal property. Reports of any kind can be generated for your needs.



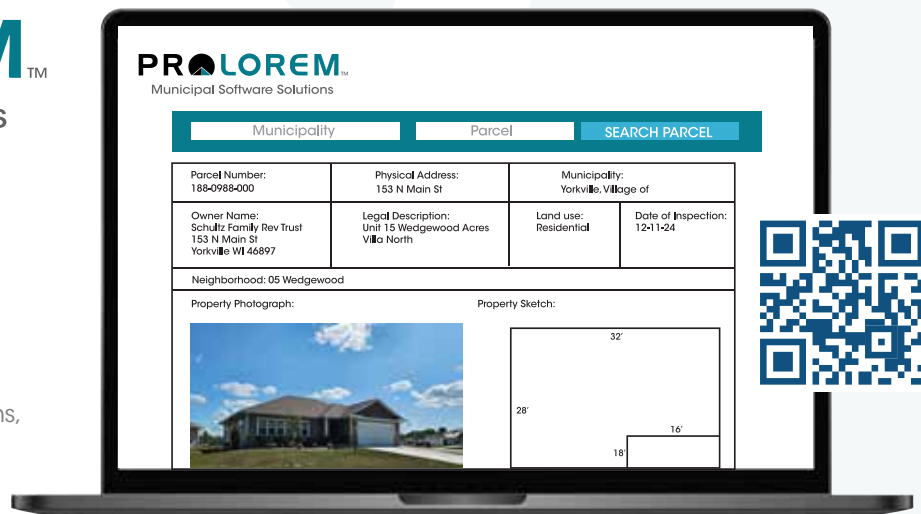
Our assessors are trained to **value and update properties on premise**, eliminating errors from re-entering data. When we take a new picture of a house or add a permit, that data is live instantly. **PROLOREM** is the only software that updates online property record information **in real-time**.

Your employees and property owners will be able to access the assessment data from any computer or mobile device. **PROLOREM** integrates multiple platforms such as: GIS, Apex Sketching Tool, iWorQ, etc. We will never charge you for access or any cost to convert your data. It's your data, not ours. You will never be charged to update or license our software.

**PROLOREM**<sup>TM</sup>  
Municipal Software Solutions

**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.



# SERVICE OPTIONS

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

## 3 YEAR MAINTENANCE

3 Maintenance Years

	2024	2025	2026	Total
Assessment Services	Maintenance	Maintenance	Maintenance	Maintenance
Annual Cost	\$12,000	\$12,000	\$12,000	\$36,000

January 1, 2024 through December 31, 2026

## 5 YEAR BLEND

4 Maintenance Years, 1 Market Update

	2024	2025	2026	2027	2028	Total
Assessment Services	Maintenance	Maintenance	Maintenance	Market Update	Maintenance	Blend
Annual Cost	\$24,000	\$24,000	\$24,000	\$24,000	\$24,000	\$120,000

January 1, 2024 through December 31, 2026

**RECOMMENDED**

## ADD-ON INSPECTION COST

Annual Total

Exterior Only	\$24,000	\$4,800
Interior/Exterior	\$48,000	\$9,600

**Exterior Inspections:** We recommend an exterior inspection be performed for this contract. We will inspect the exterior of all buildings. Re-measure and take new images of all improvements as well as review the data on file is current. The last inspections took place in 2007. We recommend the inspections be completed 1/5 of all properties each year, to be spread throughout the next 5 years.

**Interior Inspections:** This option would include an interior inspection of properties as well as exterior inspection process. This option is the most expensive and with new statutes that allow property owners to deny entry would not garner much new data. If you choose this option we would recommend spreading out the inspections over the contract.

The service option recommended would be the **5 year blend** with exterior inspections. The contract would be an **ANNUAL TOTAL: \$27,600** Including the Permit Portal option.

### 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.

### Interim 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.

## PROLOREM PERMIT PORTAL DISCOUNT

### Apply for a Permit

Other users can also apply for a permit through the online permit portal.



Currently your permit submissions aren't fully digital. Property owners go to your website and download paper pdf forms, fill them out by hand and mail or email them to you.

Select our assessment services and the annual pricing will be **reduced by \$1,200** and we will set you up with an online **Prolorem Permit Portal!**\*

\*Permit charges will apply

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



# REFERENCES



## DE PERE

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](http://www.deperewi.gov)  
[cdanen@mail.de-pere.org](mailto:cdanen@mail.de-pere.org)  
(920) 339-4072 ext 1355



## HARRISON

Working with Accurate makes my job as Clerk-Treasurer a lot easier. The Village of Harrison has a range of rural, urban, and lake front property and is one of the fastest growing communities in Wisconsin. Averaging over 300 building and remodeling permits and 100 parcel changes annually, I am very thankful to have an Accurate assessor to work with. Accurate's assessors are very knowledgeable and make me confident we are following all the State guidelines and filing reports correctly. I appreciate having a dedicated assessor and team assigned to our municipality. They are available and always willing to answer questions, both from Village staff and our residents. Our assessor and the Village staff have built a great professional relationship. He knows our community, he knows our history, he knows our weaknesses and strengths, he knows our future goals, and he knows how to be fair, equitable, and accurate.

**Vicki Tessen**  
CLERK/TREASURER

[www.harrison-wi.org](http://www.harrison-wi.org)  
[clerk@harrison-wi.org](mailto:clerk@harrison-wi.org)  
(920) 989-1062 ext 5



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](http://www.fccommunity.com)  
[JSturgell@foxcrossingwi.gov](mailto:JSturgell@foxcrossingwi.gov)  
(920) 720-7101



## 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](http://www.townofgreenville.com)  
[whelgeson@greenvillewi.gov](mailto:whelgeson@greenvillewi.gov)  
(920) 757-5151 ext 1100

**Project/Service:** Annual Market Updates  
**Statutory Assessor:** Kyle Kabe





# SUMMARY

Thank you for taking the time to look over our proposal. Our philosophy of **TRANSPARENCY** as well as our core values help guide our company and ensures that we are treating municipal officials and property owners fairly & equitably.

Our cloud based assessment CAMA is the most advanced in the industry. All of your data is saved digitally online so you and your community can find property information quickly and easily. **The best part is, it's FREE to both you and your property owners.** You will also receive a reduction in price is available if you use Prolorem's Online Permit Portal.

You will have access to **one main point of contact in your account coordinator.** They will be available to your municipal employees for questions, to help provide assessment information, and be available whenever you need them.

We provide a comprehensive customer service solution. Our **three LIVE assessor certified customer service representatives** answer questions quickly and, if needed, make adjustments on the spot over-the-phone.

Our website offers a 24/7 online appointment calendar. We will track every interaction with your community throughout the assessment process and share this information at the board of review every year.

We will help you with a progressive **education plan** to build positive interactions with your employees and community. No other assessment firm provides weekly educational content such as social media posts, educational videos, newsletter content and much more!

Our **Core Values** express who we are as a company. **We Are Family** - doesn't just mean our employees are family. **We embrace you and your community as our family as well.** We believe in sharing the assessment process with everyone. Trust is important to us! **Transparency** between the property owners, the Town of New Glarus and the assessor is paramount in building a successful assessment program.



# INSURANCE

# APPENDIX A

This sample insurance copy is for reference. A copy of this insurance will be automatically emailed to you annually to save in your files. If you would like additions or changes to the insurance we can make those any time at no additional cost to you.



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
9/19/2023

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 have ADDITIONAL INSURED provisions or 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).

<b>PRODUCER</b> Fox Cities Insurance A Division of Ansay & Associates 4351 W College Ave Suite 310 Appleton WI 54914		<b>CONTACT NAME:</b> Theresa Vorpahl <b>PHONE (A/C, No, Ext):</b> 920-739-0424 <b>FAX (A/C, No):</b> 920-560-7079 <b>E-MAIL ADDRESS:</b> Theresa.Vorpahl@ansay.com	
<b>INSURED</b> Accurate Appraisal, LLC & Municipal Assessment Software Sol PO Box 415 Menasha WI 54952		<b>INSURER(S) AFFORDING COVERAGE</b> <b>NAIC #</b> INSURER A: West Bend Mutual Insurance Company      15350 INSURER B: Houston Specialty Insurance Company      12936 INSURER C: INSURER D: INSURER E: INSURER F:	

**COVERAGES**      **CERTIFICATE NUMBER:** 1287743460      **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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			1421930	2/22/2023	2/22/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COM/PROP AGG \$ 6,000,000 \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			1421930	2/22/2023	2/22/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			1421930	2/22/2023	2/22/2024	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
A	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	1421932	2/22/2023	2/22/2024	<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 100,000 E.L. DISEASE - EA EMPLOYEE \$ 100,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional Liability			MEO-HS-0003754-00	10/3/2022	10/3/2023	Limit 2,000,000

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

<b>CERTIFICATE HOLDER</b>  Village of Reedsville	<b>CANCELLATION</b>  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 <i>Theresa Vorpahl</i>

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**TOWN OF NEW GLARUS  
2024-2026 MAINTENANCE ASSESSMENT  
CONTRACT**

This Contract is made this 1<sup>st</sup> day of January 2024, by and between Equity Appraisal, LLC (hereinafter "Appraisers") and the Township of New Glarus, Wisconsin, (hereinafter "Township").

**RECITALS**

1. The Appraisers are certified by the State of Wisconsin to perform the assessment of real and personal property for tax purposes.
2. Township needs such an assessor and wishes to retain Appraisers on the terms and conditions set forth in this Contract.
3. Appraisers agree to perform the services for the Township under the terms and conditions set forth in this Contract.

In consideration of the mutual promises set forth herein, it is agreed by and between the Township and Appraisers as follows:

**SECTION ONE  
RESPONSIBILITIES OF APPRAISERS**

Appraisers agree to provide the following services and incur the following responsibilities:

1. Measure new structures and note all land improvements on site, make a detailed sketch of all structures and land improvements on field cards, view and take picture and note detailed interior and exterior information on field cards, and calculate values of the structures and land improvements.
2. Review all work completed with the use of building permits. This shall include on-site inspection in the case of every permit and the update of field cards to show current property description.
3. Enter new plats on the assessment roll. This shall include the preparation of a new field card for each lot on the plat. The preparation shall include inserting the name, address, and value calculations.
4. Make parcel splits as they occur. This shall include the application of new land description to the field cards and updating the land sketches and land calculations.
5. Record all building permits on field cards.

6. Place all values in the assessment roll and ensure that all value change notices are sent to property owners.
7. Attend Open Book and Board of Review in order to complete the work of the Township.
8. Incur all vehicle expenses, without reimbursement from the Township.

## **SECTION TWO OBLIGATIONS OF THE TOWNSHIP**

Township agrees to provide the following:

1. In consideration of the Appraisers performance hereunder, The Township of New Glarus shall pay the Appraisers the sum of **Eleven Thousand - Eight Hundred and NO/100 Dollars (\$11,800.00) Annually**. Payments shall be made quarterly.
2. Pay all the miscellaneous expenses incurred, unless as specified herein, such as postage for mailing notices and entry requests.

## **SECTION THREE RELATIONSHIP OF PARTIES**

The parties intend that an independent contractor-employer relationship will be created by this contract. Appraisers are not to be considered an agent or employee of the Township for any purpose, and Appraiser's employees, if any, are not entitled to any benefits that the Township provides the Township's employees.

## **SECTION FOUR LIABILITY**

The work to be performed under this contract will be performed entirely at the Appraisers risk, and Appraisers assume all responsibility for damages resulting from the inspection of properties in the Township; provided, however, the Township will indemnify Appraiser from any claims or liabilities incurred because of the establishment of any appraised value of the properties.

**SECTION FIVE  
DURATION**

This contract shall commence on January 1<sup>st</sup>, 2024 and shall terminate on the December 31<sup>st</sup>, 2026.

**SECTION SIX**

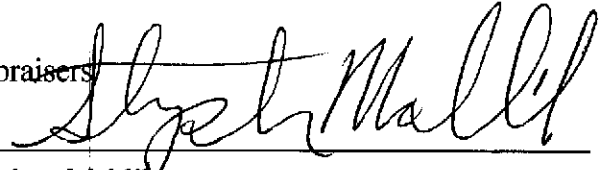
**MISCELLANEOUS**

1. All technical terms used in this contract shall have the meaning as specified in the Wisconsin Property Assessment Manual or as generally used in the Assessment Profession.
2. This contract shall not be modified without the written consent of both parties.
3. This contract shall be construed under the laws of the State of Wisconsin.
4. If a court of competent jurisdiction deems any provision or part of this contract invalid, the remaining portion and provisions thereof shall not be affected thereby.

IN WITNESS THEREOF, the parties have executed this Agreement as of this \_\_\_\_ day of \_\_\_\_\_, 2023.

Equity Appraisal, LLC

Appraisers



Stephen Mahlik

Township of New Glarus

\_\_\_\_\_  
Town Chairperson

\_\_\_\_\_  
Town Clerk

**Equity Appraisal LLC  
7818 Big Sky Dr #206  
Madison WI 53719  
(608) 826-0009**



**Town of New Glarus**  
**Transaction Detail by Account**  
 October 12-30, 2023

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE	DEBIT
10000 DDA 2306 - 2 - 1								
10/14/2023	Payment	1529	Rebecca Hauser	Paid by Amanda Hannes	13000 Accounts Receivable (A/R)	517.79	517.79	\$517.79
10/30/2023	Bill Payment (Check)	21303	Associated Appraisal Consultants		21000 Accounts Payable (A/P)	-625.00	-107.21	
10/30/2023	Bill Payment (Check)	21304	Computer Know How		21000 Accounts Payable (A/P)	-2,000.00	-2,107.21	
10/30/2023	Bill Payment (Check)	21305	Connie Davalt and Randy Ruchti		21000 Accounts Payable (A/P)	-807.30	-2,914.51	
10/30/2023	Bill Payment (Check)	21306	Eric and Jessie Fink		21000 Accounts Payable (A/P)	-807.44	-3,721.95	
10/30/2023	Bill Payment (Check)	21307	Green County Highway Department		21000 Accounts Payable (A/P)	-12,776.60	-16,498.55	
10/30/2023	Bill Payment (Check)	21308	Green County Treasurer		21000 Accounts Payable (A/P)	-21.94	-16,520.49	
10/30/2023	Bill Payment (Check)	21309	Helen Beck		21000 Accounts Payable (A/P)	-100.00	-16,620.49	
10/30/2023	Bill Payment (Check)	21310	Kasieta Legal Group		21000 Accounts Payable (A/P)	-300.00	-16,920.49	
10/30/2023	Bill Payment (Check)	21311	Kurt and Amy Timmerman		21000 Accounts Payable (A/P)	-312.11	-17,232.60	
10/30/2023	Bill Payment (Check)	21312	Larry and Laura Moldenhauer		21000 Accounts Payable (A/P)	-311.32	-17,543.92	
10/30/2023	Bill Payment (Check)	21313	Mark and Janice Noworatzky		21000 Accounts Payable (A/P)	-312.09	-17,856.01	
10/30/2023	Bill Payment (Check)	21314	Paul and Veronica Moser		21000 Accounts Payable (A/P)	-807.23	-18,663.24	
10/30/2023	Bill Payment (Check)	21315	Robert Einer and Andrew Peterson		21000 Accounts Payable (A/P)	-311.30	-18,974.54	
10/30/2023	Bill Payment (Check)	21316	Total Inspection Services, LLC		21000 Accounts Payable (A/P)	-1,258.75	-20,233.29	
10/30/2023	Bill Payment (Check)	21317	Transcendent Technologies		21000 Accounts Payable (A/P)	-212.00	-20,445.29	
10/30/2023	Bill Payment (Check)	21318	Vierbicher		21000 Accounts Payable (A/P)	-221.00	-20,666.29	
10/12/2023	Transfer			TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	Repurchase Agreement 1623	-98,000.00	-	-
							118,666.29	
10/16/2023	Expense		Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	51400 General Administrative:51400-03 Software Maintenance Agreements	-59.00	-	-
							118,725.29	
10/17/2023	Deposit		Ekum Title LLC		Undeposited Funds	25.00	-	\$25.00
							118,700.29	
10/20/2023	Expense		Alliant Energy	Alliant - WPL PAYMENT 3936450000	53420 Street Lighting	-9.84	-	-
							118,710.13	
10/20/2023	Expense		Alliant Energy	Alliant - WPL PAYMENT 2725610000	53420 Street Lighting	-19.45	-	-
							118,729.58	
10/23/2023	Expense		Wi Department of Employee Trust Funds	Group Insurance ETFPay WS2GPCXXXXX0213	Uncategorized Expense	-4,206.80	-	-
							122,936.38	
<b>Total for 10000 DDA 2306 - 2 - 1</b>						<b>\$ -</b>		<b>\$542.79</b>
						<b>122,936.38</b>		

# Town of New Glarus

## Transaction List by Date

October 12-30, 2023

DATE	TRANSACTION TYPE	NUM	POSTING	NAME	MEMO/DESCRIPTION	ACCOUNT	SPLIT	AMOUNT
10/14/2023	Payment	1529	Yes	Rebecca Hauser	Paid by Amanda Hannes	10000 DDA 2306 - 2 - 1	13000 Accounts Receivable (A/R)	517.79
10/30/2023	Bill Payment (Check)	21303	Yes	Associated Appraisal Consultants		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-625.00
10/30/2023	Bill Payment (Check)	21304	Yes	Computer Know How		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-2,000.00
10/30/2023	Bill Payment (Check)	21305	Yes	Connie Davalt and Randy Ruchti		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-807.30
10/30/2023	Bill Payment (Check)	21306	Yes	Eric and Jessie Fink		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-807.44
10/30/2023	Bill Payment (Check)	21307	Yes	Green County Highway Department		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-
10/30/2023	Bill Payment (Check)	21308	Yes	Green County Treasurer		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	12,776.60
10/30/2023	Bill Payment (Check)	21309	Yes	Helen Beck		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-21.94
10/30/2023	Bill Payment (Check)	21310	Yes	Kasieta Legal Group		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-100.00
10/30/2023	Bill Payment (Check)	21311	Yes	Kurt and Amy Timmerman		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-300.00
10/30/2023	Bill Payment (Check)	21312	Yes	Larry and Laura Moldenhauer		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-312.11
10/30/2023	Bill Payment (Check)	21313	Yes	Mark and Janice Noworatzky		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-311.32
10/30/2023	Bill Payment (Check)	21314	Yes	Paul and Veronica Moser		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-312.09
10/30/2023	Bill Payment (Check)	21315	Yes	Robert Einer and Andrew Peterson		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-807.23
10/30/2023	Bill Payment (Check)	21316	Yes	Total Inspection Services, LLC		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-311.30
10/30/2023	Bill Payment (Check)	21317	Yes	Transcendent Technologies		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-1,258.75
10/30/2023	Bill Payment (Check)	21318	Yes	Vierbicher		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-212.00
10/12/2023	Transfer		Yes		TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	10000 DDA 2306 - 2 - 1	Repurchase Agreement 1623	-
10/16/2023	Expense		Yes	Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	10000 DDA 2306 - 2 - 1	51400 General Administrative:51400-03 Software Maintenance Agreements	98,000.00
10/17/2023	Deposit		Yes	Ekum Title LLC		10000 DDA 2306 - 2 - 1	Undeposited Funds	-59.00
10/20/2023	Expense		Yes	Alliant Energy	Alliant - WPL PAYMENT 3936450000	10000 DDA 2306 - 2 - 1	53420 Street Lighting	25.00
10/20/2023	Expense		Yes	Alliant Energy	Alliant - WPL PAYMENT 2725610000	10000 DDA 2306 - 2 - 1	53420 Street Lighting	-9.84
10/23/2023	Expense		Yes	Wi Department of Employee Trust Funds	Group Insurance ETFPay WS2GPCXXXXX0213	10000 DDA 2306 - 2 - 1	Uncategorized Expense	-19.45
								-4,206.80



October 13, 2023

Mr. Chris Narveson, Town Board Chair  
Town of New Glarus  
PO Box 448  
New Glarus, WI 53574

Re: Agreement Amendment No. 1  
Impact Fee Needs Assessment, Town of New Glarus, Green County, WI

Dear Chris:

We propose to amend our current Agreement, (dated July 21, 2021) for engineering consulting services for the Impact Fee Needs Assessment to include the additional services requested. The following services shall be provided:

**I. SCOPE OF ADDITIONAL SERVICES:**

- a. **Facilities Needs Assessment:** Consultant shall complete the document to reflect the updated information brought forward by:
  - i. The Barrientos September 12, 2022 Spaces Needs Assessment, and
  - ii. The December 2022 purchase of land, a portion of which is intended to host a Town park, and
  - iii. The Comprehensive Outdoor Recreation Plan updated for 2022-2027, which contains trails whose lengths and associated costs will be used to inform an appropriately calculated and charged impact fee, and
  - iv. The funds for the CTH NN Trail project being reallocated to an estimated 0.6 mile trail facility along Hwy 39 from Durst Road to the Town's new park
- b. **Impact Fee Ordinance (Town of New Glarus Code Chapter 80):** Consultant shall update Chapter 80 to reflect changes to Wis. Stat. §66.0617.
- c. **Service Area Map:** Consultant shall prepare an updated Town of New Glarus Map which portrays the (municipal) extents in which these impact fees may be levied to provision capital improvements. A note on the map will specify that the library serves patrons beyond the borders of the Town.

**II. SCHEDULE:**

A. The schedule to complete the activities noted above are as follows:

Activity	Date
1. Parks Commission Mtg reviewing materials .....	November 15, 2023
2. Plan Commission Mtg reviewing materials.....	November 16, 2023
3. Town Board Mtg reviewing materials.....	December 13, 2023
4. Public Hearing / Town Board Mtg for Adoption.....	January 10, 2024



**III. FEE STATUS:**

The fixed fees to provide the scope of services described herein is as follows:

A.	Original Agreement .....	\$7,200
B.	Agreement Amendment No. 1 .....	<u>\$1,500</u>
	<b>Current Total Agreement Amount:</b> .....	<b>\$8,700</b>

All other terms and conditions of the original Agreement remain in effect.

If the Agreement amendment is acceptable, please sign below and return one executed copy to our Madison office.

Sincerely,



Matthew G. Miller, CNU-A  
Project Leader



Andrew R. Kurtz  
Planning and Community Development Manager

Town of New Glarus

Authorization to Proceed: \_\_\_\_\_

Date: \_\_\_\_\_

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