VILLAGE OF MENOMONEE FALLS
NOTICE OF PUBLIC MEETING

www.menomonee-falls.org

GENERAL GOVERNMENT COMMITTEE
Menomonee Falls Village Hall, Room 2245
W156N8480 Pilgrim Road, Menomonee Falls, WI
Monday, October 20, 2025 6:15 pm

Note: Committee Chairpersons are asked to enter the date in which each item is to go before the Village Board (V.B.) when applicable.

1. Consideration of an Agreement for assessing services between Catalis Tax & CAMA Inc. and the Village of Menomonee Falls.

V.B. Action 10/20/2025 V.B. Report _____ Hold in Committee ☐

2. Adjournment

THIS AGENDA IS SUBJECT TO REVISION

Members of other Village committees, boards, commissions and authorities may attend and participate at this meeting, but will not take official action unless the notice so provides.

No qualified individual with a disability shall, by reason of that disability, be excluded from participation in or be denied benefits of the services, programs, or activities of the Village of Menomonee Falls, or be subject to discrimination by the Village. If you are disabled and require special accommodation, please advise the Village Clerk's Office at (262) 532-4200 no later than 5 days before the scheduled meeting or activity.

General Government Committee **1.**

Meeting Date: 10/20/2025
Topic: Assessing contract for the years 2026-2029
From: Amy Dishinger, Village Clerk
Department: Clerk Services
Date of Committee Action (if required): 10/20/2025
Date of Village Board Action (if required): 10/20/2025

Information

Subject:
Consideration of an Agreement for assessing services between Catalis Tax & CAMA Inc. and the Village of Menomonee Falls.

Background Information:
Catalis is a Menomonee Falls based assessing firm, whom works with numerous communities in Wisconsin of a similar size, number of parcels per class and geographical similarities to that of Menomonee Falls. Formerly Grota Appraisals now Catalis has been in business since 1998 here in the Falls. The Village of Menomonee Falls is required by the state to have a level 3 Assessor due to the amount of commercial properties. Catalis is able to meet this need by having several Assessors 3 on staff.

The agreement sets forth Annual Maintenance of Assessment Records yearly, 2026–2029, with Statistical Market Update Revaluations in 2027 and 2029.

Key Issues for Consideration:
- Flat rate pricing from 2026 - 2029.
- Multiple Assessor 3s on staff
- Local Menomonee Falls Company
- New assessment value online look up for residents and businesses
- Availability all week during Catalis's normal business hours

Action By Committee or Village Board:
Consideration of an Agreement for assessing services between Catalis Tax & CAMA Inc. and the Village of Menomonee Falls.

Attachments

Assessing Service Contract 2025-2029
Exhibit A - SOW
Exhibit B - Revaluation SOW

Catalis
3025 Windward Plaza, Suite 200
Alpharetta, GA 30005

No.: 006Ph00000XwYskIAF
Order Form Date: 9/10/2025

ASSESSMENT SERVICES ORDER FORM

CUSTOMER INFORMATION

Customer:	Menomonee Falls, WI (Village)	Phone:	(262) 532-4205
Primary Contact:	Amy Dishinger adishinger@menomonee-falls.org	Address:	W156N8480 Pilgrim Road Menomonee Falls, WI 53051
System Administrator:	Same as Above		
Billing Contact:	Same as Above	ACH:	☐
Billing Email:		PO Required:	☐ PO No.: [PO No.]
Billing Phone:	(262) 532-4205	Tax Exempt:	☒

Catalis Representative: Jeff Leone, jeff.leone@catalisgov.com , (781) 476-2035

AGREEMENT TERM

Start Date: 12/1/2025
End Date 12/31/2029

BILLING SUMMARY

1. Due in, 2025 ($40,000.00) on December 1, 2025 (Data Conversion Fee).
   Due in 2026 ($198,950.00), $16,579.16 due monthly (Annual Maintenance of Assessment Records)
   Due in 2027 ($198,950.00), $16,579.16 due monthly (Annual Maintenance of Assessment Records & 2027 Statistical Market Update Revaluation)
   Due in 2028 ($198,950.00), $16,579.16 due monthly (Annual Maintenance of Assessment Records)
   Due in 2029 ($198,950.00), $16,579.16 due monthly (Annual Maintenance of Assessment Records & 2029 Statistical Market Update Revaluation)
2. Invoices shall be due and payable within thirty (30) calendar days following invoice by Catalis.

PRICING

Pricing below is valid through 1/1/2026. Pricing is subject to change for a contract entered into after this date.

Assessment Fees

	Fees
2025 Data Conversion Fee	$40,000.00
2026 Annual Maintenance of Assessment Records	$198,950.00
2027 Annual Maintenance of Assessment Records & 2027 Statistical Market Update Revaluation	$198,950.00
2028 Annual Maintenance of Assessment Records	$198,950.00
2029 Annual Maintenance of Assessment Records & 2029 Statistical Market Update Revaluation	$198,950.00
Total Fees:	**$835,800.00**

SCOPE OF WORK

CONTRACT FOR DATA CONVERSION 2025 – 2026 MAINTENANCE OF ASSESSMENT RECORDS 2026 – 2029 & 2027 & 2029 ANNUAL STATISTICAL MARKET UPDATE REVALUATIONS PROPOSED AGREEMENT: by and between Catalis Tax & CAMA, Inc, hereinafter called the "Assessor", and the Village of Menomonee Falls, Waukesha County, Wisconsin, hereinafter called the "Village". The Assessor and the Village for the compensation stated herein, agree as follows:

ARTICLE I

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

ARTICLE II

COMPENSATION: The Village shall pay to the Assessor for the performance of the contract the following compensation of $40,000 (2025 Data Conversion) & $795,800 (2026-2029 Annual Maintenance of Assessment Records, 2027 & 2029 Annual Statistical Market Update Revaluation).

2025 ($40,000)

$40,000 due December 1 (Data conversion fee)

2026 – 2029 ($795,800)

$16,579.16 due monthly (2026-2029 Annual Maintenance of Assessment Records, and 2027 & 2029 Statistical Market Update Revaluation)

ARTICLE III

GENERAL AGREEMENTS:

1) The contract would begin November 1, 2025 and ends December 31, 2029.

2) The Assessor will report and keep accountable to the Village Clerk, and work closely with the Village Clerk, Finance department, Building Inspectors and Village Attorney on matters of concern.

3) The Assessor will perform all normal duties and functions of the Assessor as described and set forth in Volume I of the Wisconsin State Assessors Manual, including required meetings, will be performed in a timely manner, and in accordance with the Chapter 70 Laws of the State and all other laws of the state. These duties but not limited to, as set forth in Exhibit A and B.

4) The above fee includes all normal assessment duties during its duration, including: No additional charges for quantity of permits or new plats, Board of Review and further appeals to circuit court.

5) All services requested over and above the normal yearly assessment functions will be charged extra at a mutually agreed upon rate. These services will be invoiced in the month subsequent to the month in which the services were provided.

6) The Assessor will provide his own equipment, workspace, storage and security of records, while in his possession.

7) The Assessor will carry a Commercial General Liability Policy. The Assessor shall provide a Certificate of Insurance to the Village naming it as an additional insured. The Assessor further agrees to indemnify the Village for all suits, claims or actions associated with alleged intentional acts or omissions on the Assessors, such intentional acts or omissions taking place between January 1, 2026 and December 31, 2029,

8) The Assessor is to be considered an Independent Contractor hired to fill an Appointed Statutory Position, and is not subject to withholding tax, insurance programs or benefits. As Such, the Assessor is not an Authority.

9) Every year at Board of Review meeting or as needed Assessor will inform Village on matters concerning but not limited to:
    a) Compliance with State Statutes on assessment practices.
    b) Property assessments in relation to current sales of property.

10) The Village will comply with the open records law. The Assessor will advise the Village Clerk in writing of all open record requests it receives within 3 days of receipt.

11) The Assessor will perform a Statistical Market Update Revaluation for the 2027 & 2029 assessment years. Catalis will perform all services set forth in Exhibit A in every year of this contract. The services set forth in Exhibit B shall be performed in years 2027 and 2029.

12) All data collected is the property of the Village. Data used by the Assessor in the services contemplated herein shall remain property of the Village and no use or copying shall be made thereof beyond that listed in this Agreement without written permission by the Village.

13) The Assessor will maintain an online look up for property information provided on Assessordata.org website.

14) Catalis to complete the SOA on behalf of the Village and or any other DOR forms applicable such as the AAR, MAR and any TAR reports.

    a) Submit timely valuation estimates and MAR reports to the DOR & Village before the 2nd Monday in June deadline. A copy will be sent to the Village Clerk and Finance Director when filed.

    b) Data such as open book changes, corrections and omitted lists will be submitted to the Village Clerk a minimum of a week prior to the BOR 2-hour meeting, late Open Book changes will be submitted to the Village Clerk within 24 hours of change.

15) Work to be completed by June 1st with exception of Open Book and BOR review dates. Can be extended for 30 days if both parties agree upon it.

16) Nate Carlson to be designated “Project Manager” for the Village of Menomonee Falls. The Village will be notified in writing of any change to their project manager within 10 days.

17) The Village will provide vendor with a full copy of the current CAMA data from previous vendor before November 1st, 2025.

TERMS AND CONDITIONS

1. Independent Contractor. The Contractor acknowledges and agrees that they are an independent contractor and not an employee, partner, or agent of the Customer. The Contractor shall not be entitled to Customer benefits, including, but not limited to, health benefits, paid leave, or participation in the Customer's retirement or equity programs.
2. Taxes. The Contractor is responsible for the payment of their own federal, state, and local taxes, including income tax, self-employment tax, and any other applicable taxes. The Customer will not withhold taxes from the Contractor's compensation.
3. Confidential Information. The Contractor shall not disclose or use any confidential information of the Customer, including but not limited to proprietary business information, trade secrets, customer data, marketing strategies, and other non-public information obtained during the engagement, for any purpose other than fulfilling their obligations under this Agreement.
4. Ownership & Intellectual Property. Any work product, including intellectual property, created by the Contractor during the engagement shall be considered "work made for hire" and shall be the exclusive property of the Village. The Contractor hereby assigns all rights to such work product to the Village.
5. Term and Termination
    - 5.1. Effective Date: The effective date of this Agreement shall be the date upon which the Agreement is signed and executed by the Contractor and Customer.
    - 5.2. Duration. Agreement will continue until the end of the Agreement Term noted on the Order Form.
    - 5.3. Termination: Either party may terminate this Agreement with written notice if the other party breaches any material provision of this Agreement after a sixty (60) day cure period. Termination does not relieve either party from their obligations accrued prior to termination.
6. Indemnification. The Contractor shall indemnify, defend, and hold the Customer, its officers, directors, and employees harmless from any and all claims, liabilities, damages, costs, and expenses, including reasonable attorney's fees, arising out of the Contractor's work under this Agreement or any breach of the Agreement by the Contractor.
7. Insurance. The Contractor will maintain a Liability Insurance policy. Contractor will specify the minimum amount of such insurance and provide written proof of coverage upon the City's written request
8. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the state of Wisconsin.
9. Entire Agreement. This Agreement constitutes the entire agreement between the parties and supersedes all prior or contemporaneous agreements, understandings, and representations.
10. Miscellaneous
    - 10.1. Amendment. This Agreement may only be amended in writing and signed by both parties.
    - 10.2. Notices. All notices, requests, demands, or other communications under this Agreement shall be in writing.
    - 10.3. Assignment. The Contractor may not assign or transfer this Agreement or any rights or obligations hereunder without the prior written consent of the Customer.

Catalis
3025 Windward Plaza, Suite 200
Alpharetta, GA 30005

No.: 006Ph00000XwYskIAF
Order Form Date: 9/10/2025

ACCEPTANCE

By signing below, signatories represent that they are validly authorized to enter into this Order Form and accept their terms and conditions. The Order Form is dated effective and shall be considered binding upon execution ("Effective Date") by and between both parties.

MENOMONEE FALLS, WI (VILLAGE)

By:_____

Name:_____

Title:_____

Date:_____

By:_____

Name:_____

Title:_____

Date:_____

CATALIS TAX & CAMA, INC:

By:_____

Name: Steven Ashbacher

Title: Executive Vice President

Date:_____

EXHIBIT A

SCOPE OF WORK

Assessment Services

Catalis will agree to perform the following revaluation services, and the following maintenance services as required on an annual basis, in conformance with the property assessment manual, as specified in applicable Wisconsin State Statutes. Scope of work includes, but is not limited to:

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

13. Assessor will annually update all property owner record cards with new legal description labels.
14. Assessor will mail Notices of Increased Assessment.
15. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statues.
16. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of July each year.
17. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of review meeting.
19. Assessor will provide assessment and/or clerical office hours, as requested by residents and/or the Village Manager, Village Clerk or Village Attorney.
20. Assessor will provide a local or toll-free telephone number and email for Village officials and residents to contact assessor during regular business hours, Monday through Friday. The assessor shall return calls or emails before the end of the next business day of receipt.
20. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the assessment computer shall be updated within fourteen (14) days of the final adjournment of the Board of Review.
21. Assessor will provide access to property assessment records on the Internet for public and staff access. The assessment records are public records, which are subject to the provisions of the Wisconsin public records law. Assessor will maintain the assessment records in a format accessible by the public and will promptly and without delay comply with proper open records requests under the Wisconsin Public Records Law.
22. Assessor will maintain an Assessors Level 3 certification with the Department of Revenue.
23. Assessor will keep updated all property record data and review assessments for the following

    - Annexation

- New construction and remodeling
- Formerly exempt now assessed parcels
- Buildings destroyed, significantly damaged or removed
- Change to higher land use
- Change in property class
- Properties approved for miscellaneous building permits
- Valuations of mobile homes
- Properties requesting exempt status.

24. Prepare and maintain the assessment roll and balance to the Waukesha County Tax Listers Database.
25. Assessor shall work closely with other Village departments, including Clerk Services, Planning, Zoning, Economic Development and Building Inspections, to provide the highest quality service to residents.
26. Assessor will also perform all other duties incidental to the normal duties of an Assessor.

EXHIBIT B

SCOPE OF WORK

Assessment Services

The Assessor, having familiarized themselves with the local conditions affecting the cost of work to be done, and the Standard Specifications for the Revaluation of all Real the State of Wisconsin pursuant to Wisconsin State Statutes, will perform everything required to be performed, and to complete in a professional manner, all the work required to be completed, to revalue all Real and Personal Property within the Village in accordance with all the applicable Wisconsin State Statutes.

1. The Assessor will complete all revaluation work in a timely and professional manner in compliance with Wisconsin State Statutes and the Wisconsin Property Assessment Manual.
2. The Assessor will complete a market update in line with current sales for all properties in the Village.
3. The Assessor will reconcile existing property record card data with data maintained in the Assessor's mass appraisal software program.
4. The Assessor will review all recent property sales, perform an outside inspection to verify property attributes, and take digital color photographs of all current sales.
5. The Assessor will perform sales analysis to determine value trends and help to build a valuation model specifically for the Village.
6. The Assessor will apply new valuation model to existing property record information to arrive at a new assessed value for all property in the Village.
7. The Assessor will individually review each property to ensure a fair and equitable assessment.
8. The Assessor will mail new notices of assessment along with a letter explanation to all property owners.
9. Prior to the Open Book hearing period, a time for public inspection of the proposed roll will be allowed. The Open Book period should be scheduled to comply with appropriate Statutes and ensure notice to affected properties.
10. The Assessor will hold enough “Open Book” meetings with taxpayers allowing enough time for those taxpayers wishing to ask questions or provide evidence supporting a different value.

11. The Board of Review for the revaluation period will be scheduled at the mutual convenience of the Assessor, Board of Review, and the Village Clerk.
12. The Assessor will attend “Board of Review” to provide testimony supporting the assessment.
13. The Assessor will defend assessed values should a taxpayer challenge their assessment after the board of review at no additional cost to the Village.