

**REQUEST FOR CONTRACT AMENDMENT FORM  
CITY OF MILWAUKEE - DOA – PROCUREMENT SERVICES SECTION**

This form must be submitted with any requisition for a contract amendment, whether it is for a commodity contract, service contract, vendor commodity contract or vendor service contract.

DEPARTMENT NAME:	ASSESSOR	DATE:	11/9/11
CONTACT PERSON::	David Fortney	PHONE:	X 3107
REQUISITION NUMBER	0000011433	FAX:	X8447
CONTRACT NUMBER:	E0000007220	BID NUMBER:	
ORIGINAL CONTRACT TOTAL:	\$50,000		
CONTRACT EXPENDITURES TO DATE:	\$238,180		
CURRENT CONTRACT TOTAL (including prior contract amendments for increases, if any)	\$250,000		
REQUESTED CONTRACT INCREASE AMOUNT:	\$50,000		
NEW CONTRACT TOTAL INCLUDING THIS AMENDMENT:	\$300,000		

**REQUEST FOR CONTRACT INCREASE AND REASON** (Check all applicable box(es))

The estimated dollar amount was based on prior history.

There has been an increase in emergency purchases.

This was a new contract and there was no prior history to accurately forecast the estimated usage.

There has been a significant increase in the cost of the product.

Additional funds are needed to cover the extension period as indicated in the Justification section below.

**REQUEST FOR CONTRACT EXTENSION AND REASON** (Check all applicable box(es))

Extension needed to allow time for a new bid and contract.  
Indicate Length of Extension Required:  
Indicate the date the new requisition was submitted for new bid/contract:

Additional funds are needed to cover this extension period.

Exercise Option to Extend the contract:  1<sup>st</sup> Option  2<sup>nd</sup> Option  3<sup>rd</sup> Option

Other (please explain in "Justification" section)

**JUSTIFICATION FOR AMENDMENT IS REQUIRED:** Current Contract gives the option to renew for one year period which we are requesting to do so from 2/10/2012 THRU 2/11/2013.

Justification should include:

- 1) SPECIFIC reasons for the request
- 2) Reason for increase
- 3) Reason for extension (i.e., why vendor could not complete work within the specified time of performance, etc.)
- 4) Reason this contract should not be competitively bid at this time

Per City Charter, Section 16.05, amendment of certain Single and Sole Source contracts to an amount equal to or greater than \$50,000 may require approval by the Finance & Personnel Committee to be processed. Please see Section 16.05-3.b of the City Charter or contact Procurement Services at extension 3501 for details.

Increases exceeding a certain percentage of the original estimated dollar amount of a contract are subject to analysis and may be required to be re-bid.

Mary Reavery  
Department Head Signature

11/9/11  
Date

**CITY OF MILWAUKEE – DOA – PROCUREMENT SERVICES SECTION  
REQUEST FOR EXCEPTION TO BIDDING / EBE PARTICIPATION ANALYSIS FORM**

**PART A: General Information**

Requester Name:	Mary Reavey	Requester Title:	Assessment Commissioner
City Agency Name:	Assessor's Office	Date:	11/9/2011
Contact Person Phone:	Amy Stenglein	E-mail:	AmyStenglein@milwaukee.gov
Commodity/Service Dollar Value:	\$50,000	Requisition #	0000011433
Suggested EBE Vendor: _____			
Brief description of item or service to be purchased, purpose of the request, and requested vendor name: <b>Current Vendor: Valuation Solutions, LLC</b> will provide the following: Specialized assessment related to Data analysis; internal and State mandated reports; website design and maintenance; Network, data server(s) and Microcomputer maintenance/administration services; TIF/TID related analysis and reporting; documentation of the Above and all other critical systems and procedures.			
Time of Performance: One year extension of E00000007220			
If services have already commenced, please indicate why:			
Grant funded purchase? (please check one)      Yes _____ No <input checked="" type="checkbox"/> Potentially _____			

**PART B: Emerging Business Enterprise (EBE) Program Analysis**

This section of the form is to be completed by the User Department. Please contact the EBE Office at 286-8749 (Gabe DeVougas) or 286-8781 (Rayna Andrews) to obtain the necessary information. If a change in EBE subcontractor is being requested, please attach a new Form A and/or letter requesting the change.

EBE Percentage Requirements: \_\_\_\_\_ %

If 0%, please explain: \_\_\_\_\_

EBE Vendor Name(s): \_\_\_\_\_

Is there an EBE certified in this area?      Yes       No

**PART C: Reason for Requesting an Exception to the Bidding Process**

- A Request for Proposal (RFP) is requested (please explain in the "Additional Information" section on Page 2)
  - Professional, artistic, scientific or creative services.
  - Impossible or impracticable to develop bidding specifications.
  - Experimental purpose
- Experimental purpose – single or sole source requested. (please explain in the "Additional Information" section on Page 2)
- Sole Source:**
  - No comparable competitive product or service available – there is only one supplier.
  - Patented product only available from the manufacturer.
  - Proprietary software.
  - Public utility service which has a monopoly.
  - Component or replacement part(s) available from only one source.
  - Other (please explain in the "Additional Information" section)

**Single Source:**

- Only local authorized / licensed distributor.
- Compatibility is the overriding consideration and the item is available from only one source.
- Used item that is immediately available, is not usually available, and is subject to prior sale.
- Product is needed for trial or testing.
- Additional needs discovered in the midst of a project – e.g., change orders.
- No other supplier can meet the required delivery date.
- No other supplier can make on-call repairs at a particular location.
- Vendor has specific insight from previous knowledge of service or commodity.
- Vendor has been specified by terms of grant (federal or state) or by City Resolution.
- Other (please explain in the "Additional Information" section)

**Additional Information:**

**For single/sole source requests, please explain why the bidding process cannot be used:**  
Valuation Solutions, LLC. provides technical and analytic support of real and personal property systems and hardware used for Assessment and tax purposes.

**How was the previous contract procured, and what was its dollar value?**

Please provide a list of the vendor(s) contacted for pricing:

Vendor Name	Vendor Contact Person	Phone / E-mail

**FAIR TRADE NOTE:** If this contract relates to the purchase of food or beverages, the contractor is urged to make Fair Trade products available in accordance with Common Council Resolution 070280 declaring the City of Milwaukee a Fair Trade City effective July 18, 2007.

**PART D: Required Signatures**

<u>Mary Reaney</u> Department Head	<u>27 Jan 2012</u> Date
_____ EBE Business Analyst	_____ Date
_____ Purchasing Agent	_____ Date

Approved     Denied

## City of Milwaukee DOA- Procurement Services Section IT Procurement Request Questionnaire

**Purpose:** The information provided on this form will ensure efficient spending and procurement for IT-related projects and purchases.

**Instructions:** This form is divided into three sections; "General Information," "Services and Software," and "Hardware." Answer all questions that apply. When completed, please provide a copy to the Procurement Services Section with your requisition. You may be contacted if follow-up is required.

If purchase of IT services, software, and/or hardware are project-related, you will also need to complete an IT Project Charter. You may enter Project Charter information at [www.milwaukee.gov/itprofile](http://www.milwaukee.gov/itprofile). If you need a login or assistance please complete an ITMD online request at [www.milwaukee.gov/itmdhelpdesk](http://www.milwaukee.gov/itmdhelpdesk)

<b>Requisition Number:</b>	10669		
<b>Project Name (if applicable):</b>			
<b>Department Contact Person:</b>	David Fortney	3115	
<b>Vendor Name (if known):</b>	Valuation Systems		
<b>Request Date:</b>			
<b>Priority (1-5) 1=High, 5=Low</b>	1		

<b>General Information</b>				
Information Requested	Yes	No	Not Applicable	Comments
Is this purchase related to a project (defined as a temporary activity with a starting date, specific goals, defined responsibilities, a budget, planning, and a fixed end date)?	<input type="checkbox"/>	X	<input type="checkbox"/>	
If this is a project, did your department complete a "Project Charter" form?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Has a detailed scope of services been developed and shared with the CIO?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Does the scope include regularly scheduled written status reports?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Will the vendor/contractor supply his/her own equipment?	<input type="checkbox"/>	X	<input type="checkbox"/>	

General Information				
Information Requested	Yes	No	Not Applicable	Comments
Will the vendor/contractor need to use any City equipment or services such as e-mail, phones, etc.? (describe in Comments field)	X	<input type="checkbox"/>	<input type="checkbox"/>	Desktop computer, MS Office Suite, other

Services and Software				
Information Requested	Yes	No	Not Applicable	Comments
Is this a fixed-cost proposal?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Is this project billed at an hourly rate?	X	<input type="checkbox"/>	<input type="checkbox"/>	
Is there any provision for overtime rates? (Include provision or % in "Comments" field)	<input type="checkbox"/>	X	<input type="checkbox"/>	
If payments are based on an hourly rate, is there a "not-to-exceed" funding amount?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Does billable overtime require City staff manager approval?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Are there any incentives in the contract for meeting benchmarks/milestones?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Is there any cost recovery in the contract if benchmarks/milestones are not met?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Does the project include the purchase of software?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Is this the complete software purchase for this project? (If additional purchase required please describe in "Comments" area.)	<input type="checkbox"/>	<input type="checkbox"/>	X	
Is this custom-programmed software?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Is this off-the-shelf software?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Does the project involve extensive modification of pre-written software?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Does this include software maintenance? (Indicate terms in the comment field.)	<input type="checkbox"/>	<input type="checkbox"/>	X	

Services and Software				
Information Requested	Yes	No	Not Applicable	Comments
Will work be done by an existing vendor or a vendor used by another department (if known include terms and dept name in the comments field)	X	<input type="checkbox"/>	<input type="checkbox"/>	
Is this software for a limited/select group of users (i.e. Limited users)?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Does this software purchase allow for use by the entire City? (ie Enterprise License)	<input type="checkbox"/>	<input type="checkbox"/>	X	
For custom-programmed software, will the City have ownership of the developed software? (If the vendor will retain rights, please note this in the "Comments" area.)	<input type="checkbox"/>	<input type="checkbox"/>	X	
Are documentation requirements included for systems development and/or custom-programmed software?	<input type="checkbox"/>	<input type="checkbox"/>	X	

Hardware				
Information Requested	Yes	No	Not Required	Comments
Will the hardware serve a "new" purpose within your department (i.e., not replace existing hardware?)	<input type="checkbox"/>	<input type="checkbox"/>	X	
Does the hardware replace existing hardware within your department?	<input type="checkbox"/>	<input type="checkbox"/>	X	
If this is replacement hardware, do you have a plan for disposing of or reusing the old hardware? (If yes, please detail in the "Comments" field.)	<input type="checkbox"/>	<input type="checkbox"/>	X	
Is this the complete hardware purchase for this project? (If not, please provide additional details in the comments field)	<input type="checkbox"/>	<input type="checkbox"/>	X	
Is a maintenance agreement included in the cost?	<input type="checkbox"/>	<input type="checkbox"/>	X	
If maintenance is included what is the length of time (Indicate # of years in Comment field)	<input type="checkbox"/>	<input type="checkbox"/>	X	

# Valuation Solutions LLC - Darryl Malquist

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W264N2045 Deer Haven Ct, Pewaukee, WI 53072 - 262 696-4563 (H) - - txdm2@aol.com

## Profile

Network Manager with 10 years extensive experience with Microsoft and Sybase database implementation, network security and management. 15+ years Microsoft desktop applications installation, training and support.

Cama (Computer Aided Mass Assessment) valuation systems to include regression based computer modeling and SQL reporting.

Additional qualifications - See attached job description.

## Professional Experience

City of Milwaukee Assessor's Office <b>Network Manager</b> Milwaukee, WI	January 2004 to December 2007
City of Milwaukee Assessor's Office <b>Systems and Administration Supervisor</b> Milwaukee, WI	January 1991 to December 2003
City of Milwaukee Assessor's Office <b>Commercial Real Estate Appraiser</b> Milwaukee, WI	January 1985 to December 1990
City of Milwaukee Assessor's Office <b>Residential Real Estate Appraiser</b> Milwaukee, WI	January 1977 to December 1984

## Education

<b>University of Wisconsin</b> Economics <b>BA</b> Milwaukee, WI, USA	1977
<b>UW- Graduate School - 2 years</b> Mathematical Economics and Statistics Milwaukee, WI, USA Left for full time employment with the City of Milwaukee.	

# JOB DESCRIPTION

FOR DER USE ONLY	
Vacancy No. _____	
City Service Commission: _____	Finance Committee: _____
Fire & Police Commission: _____	Common Council: _____

**Instructions:** Complete all sections except No. 11. Refer to the "Guidelines for Preparing Job Descriptions" for instructions on completing specific items.

1. <b>Date Prepared/ Revised:</b> 5/1/2006	2. <b>Present Incumbent:</b> Darryl D. Malquist	<b>Is incumbent underfilling position?</b> YES <input type="checkbox"/> NO <input type="checkbox"/>	
3. <b>Date Filled:</b>	4. <b>Previous Incumbent:</b>	If YES, indicate underfill title in box 10.	
5. <b>Department:</b> Assessor		<b>Bureau:</b>	<b>Unit:</b>
		<b>Division:</b> Administration	<b>Section:</b>
6. <b>Work Location:</b> City Hall Rm 507		<b>Telephone:</b> 286-3107	<b>Work Schedule:</b>
		<b>Email:</b> dmalqu@milwaukee.gov	Hours: 7-4:45 / Days: M-F
7. <b>Represented by a Union?</b> NO	8. <b>Bargaining Unit:</b> Management, General City If in District Council 48, chose a Local: Local 1238		9. <b>FLSA Status:</b> EXEMPT
10.	<b>Official Title:</b> Network Supervisor	<b>Pay Range</b>	<b>Job Code</b>
		8	4932
	<b>Underfill Title (if applicable):</b>		EEO Code
	<b>Requested Title (if applicable):</b> Network Manager	10	5140
<b>Recommended Title (DER Use Only):</b>		<b>Approved by:</b> _____	
		<b>Date:</b> _____	

**11. BASIC FUNCTION OF POSITION:**

(See attachment)

**12. DESCRIPTION OF JOB** (Check if description applies to **Official Title**  or **Underfill Title** ):

**A. ESSENTIAL FUNCTIONS/Duties and Responsibilities:** (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
20	• Network/Lan management
20	• Database development/management
20	• Report design and management
15	• Internet and intranet design and management
10	• Department financial management
5	• Sales database management
5	• Systems development/management
5	• Supervision
	•
	•

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
	•
	•
	•
	•
	•



PERIPHERAL DUTY	
% of Time	
	•
	•
	•
	•
	•

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

David Fortney-Systems Analyst Project Leader Mgr.

**D. SUPERVISION RECEIVED:** (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

General objectives are directed by the Assessment Commissioner, Chief Assessor and the Systems Analyst Project Leader. Employee is allowed to develop specific work methods independently and assume a high level of responsibility and judgement for carrying out of the overall objectives, methods and conclusions.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = \_\_\_\_.

**Direct Supervision:** List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign duties b. Outline methods c. Direct work in progress d. Check or inspect completed work		e. Sign or approve work f. Make hiring recommendations g. Prepare performance appraisals h. Take disciplinary action or effectively recommend such	
Number Supervised	Job Title	Extent of Supervision Exercised (Select those that apply from list above, a - h)	
1	Office Assistant III	a,c,d,e,f	

**F. MINIMUM QUALIFICATIONS REQUIRED:** (Indicate the MINIMUM qualifications required to enter the job.)

i. Education and Experience:

(See attachment )

ii. Knowledge, Skills and Abilities:

(See attachment)

iii. Certifications, Licenses, Registrations:

Certification of Assessor II or higher by Wisconsin Department of Revenue.

### **Basic Function of Position**

This is a key position. On a highly independent level the incumbent using specialized skills and experience in assessment theory and administration, database analysis, statistical and reporting tools develops and presents analyses, reports and recommendations to senior management using both the Assessor's warehoused data and other external sources, as well as formulates new ideas and procedures to improve department productivity, efficiency and leverage the departments information and assessment technologies. Actively participates in projects relating to all areas of department. Communicates openly with management team regarding issues, researching results and making recommendations on findings.

### **Duties and Responsibilities**

#### **DATABASE MANAGEMENT**

Imports or exports, assembles, compiles, organizes data into relational databases and spreadsheets from various sources including converting existing Sybase data sources for analysis and reporting purposes on a regular and ad-hoc basis using Sybase and Microsoft SQL query tools.

Serves as backup to the Systems Analyst Project Leader Mgr in all aspects of day-to-day support, disaster/recovery support, maintenance of the Assessor's Office data warehouse and other related tasks.

Provides technical assistance and serves as a resource for ODBC connections to existing InfoMaker reports and will train others to perform simple extractions of data and analysis.

Automate existing procedures through the design and development of relational databases.

#### **REPORT MANAGEMENT**

Research and develop reports including but not limited to state Department of Revenues reports whose accuracy directly affects the City's shared revenues and tax burden of local and State taxes.

Manage data requests from all levels of City management and external customers to clarify report requests and determine report specifications in a timely manner with attention to accuracy

- Designs, develops, tests and produces standard and/or ad hoc reports as requested for special projects.
- Modifies and/or enhances existing reports, as needed.
- Documents all information related to each report generated.
- Provides technical assistance and serves as a resource for modifying existing and developing new reports.
- Archives prepared reports.
- Coordinates the design, data requirements and production of assessment notices, mailers and questionnaires.

Manage data requests from all levels of City management and external customers in a timely manner with attention to accuracy to include development of databases, SQL queries, and spreadsheets to provide requested reporting and data analysis sources including GIS data extraction.

#### **WEB MANAGEMENT & DEVELOPMENT**

Maintains, improves and develops existing and new departmental Intranet and Internet WEB site content to include the development, import and updating of real estate sales files and annual departmental reports.

#### **SALES MANAGEMENT**

Manages the analysis and processing 8,000 to 10,000 sales annually,. These sales are the basis of the annual revaluation of 150,000 real estate parcels. The accuracy and timely processing has a direct impact on shared revenues and the City's proportionate burden of inter-jurisdictional taxes.

With full authority liaisons with representatives of the Wisconsin Department of Revenue to resolve issues of data accuracy, interpretation and application of the above.

## **NETWORK/LAN MANAGEMENT**

Directly manages 3 departmental Windows 2000/2003 servers and directs management of departmental Novell server(s) thru ITMD.

Responsible for short and long term network operational planning and resource management.

Initiates, manages, monitors and controls network projects and expenditures.

## **SYSTEMS DEVELOPMENT/MANAGEMENT**

Directly participate and assist in the development of departmental valuation and administrative systems and identify opportunities for process improvements.

Participate directly in all aspects of day-to-day support, disaster/recovery support, and other related tasks. The incumbent will work closely with end-users to assist in areas ranging from establishing local and lan ODBC connections to Sybase Anywhere databases, general knowledge of databases and reporting tools, to specific support in developing queries and reports to match department and user requirements.

Liaises with database software vendors and external technical support on issues such as software upgrades, problems and potential solutions.

## **FINANCIAL MANAGEMENT**

Prepare, manage and monitor departmental budgets and capital improvement projects, additions and modifications related to computer network infrastructure. Approves and monitors expenditures and take necessary actions to promote adherence to the budget.

## **ADMIN/SUPERVISION**

Coordinates and assigns higher level clerical personnel (Clerk of the Board of Review, Account Assistant III and above)

## **QUALIFICATIONS**

### **EDUCATION**

Minimum Bachelor's degree in business, real estate, mathematics, economics, or related degree. Course study in computer science, information systems, GIS and statistics is highly desirable.

Certification of Assessor II by the Wisconsin Department of Revenue.

### **EXPERIENCE, SKILLS and KNOWLEDGE**

Minimum 5 years experience in assessment administration, computer assisted mass appraisal (CAMA), real estate appraisal, assessment practices and assessment related statistical techniques.

4 years experience using mathematical and statistical processes for computer assisted mass appraisal (CAMA) of real and personal property market values.

1 – 2 years progressive experience with relational data base management system (RDMS) databases such as Sybase Anywhere, MS SQL Server, or Microsoft Access to include data development, data extraction, transformation, SQL queries, data exporting and database editing tools.

1-2 years experience desired in designing, implementing and maintaining statistical reports from the databases using report generation tools Sybase InfoMaker, Crystal Reports, Dbase and MS Access.

2 years experience with operating systems such as MS Windows XP, 2000 Server, and 2003 Sever - MSCE or equivalent certifications or experience.

Demonstrated proficiency in MS Office Products and statistical applications.

1 years experience designing, creating, maintaining and updating Web pages using Front Page and CMS software.

1 years experience developing departmental budgets and monitoring expenditures using PeopleSoft FMIS, Nvision reports and customized FMIS queries.

**PERSONAL QUALITIES**

- Ability to work independently with minimum of supervision
- Strong quantitative, problem solving and analytic skills
- Understands the big picture and how individual work contributes to the overall objective
- Manages time efficiently
- Remains accurate and positive under pressure
- Meets deadlines and carries out assignments efficiently
- Takes ownership of tasks
- Communicates status, logic and results of analysis clearly and concisely
- Ability to work under pressure and meet deadlines
- Provides reliable quality control of his or her work
- Ability to solve a variety of complex problems in the absence of technical guidance or precedents utilizing detail oriented analytical skills
- Assumes responsibility for the accuracy and quality of work performed. Takes ownership of all assigned projects