

**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::	Amy Stenglein	PHONE:	X 3110
REQUISITION NUMBER	0000011432	FAX:	X8447
CONTRACT NUMBER:	E0000009863	BID NUMBER:	
ORIGINAL CONTRACT TOTAL:	\$40,000		
CONTRACT EXPENDITURES TO DATE:	\$69,920		
CURRENT CONTRACT TOTAL (including prior contract amendments for increases, if any)	\$80,000		
REQUESTED CONTRACT INCREASE AMOUNT:	\$40,000		
NEW CONTRACT TOTAL INCLUDING THIS AMENDMENT:	\$120,000		

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: 1st Option 2nd Option 3rd 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 2/2/2012 THRU 2/1/2013.

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 Reavey
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:	\$40,000	Requisition #	0000011432
Suggested EBE Vendor:			
Brief description of item or service to be purchased, purpose of the request, and requested vendor name: Current Vendor: Personal Property Consultants of WI, LLC will provide Specialized Valuation Services			
Time of Performance:	One year extension of E00000009863		
If services have already commenced, please indicate why:			
Grant funded purchase? (please check one) Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Potentially <input type="checkbox"/>			

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:
Personal Property Consultants of WI, LLC will provide specialized valuation services to include: process personal property returns filed by taxpayers with special attention to leasing companies and the more complex returns filed, provide personal property training to appraisal staff, answer questions from taxpayers and provide assistance in resolving problems, process TIDS, assist in coordinating the creation and mailing of 2012 personal property returns.

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

Approved Denied

RESUME
JOHN E. MEYER

14460 W Nine Iron Ct
New Berlin, WI 53151

Work: (414) 286-3162
Home: (262) 395-4998

Employment History

January, 2010 to present	Consultant to Milwaukee Assessor's office – Personal Property
May, 1985 to December, 2009	Supervising Assessor Assistant - City of Milwaukee
October, 1979 to May, 1985	Personal Property Appraiser III -City of Milwaukee
June, 1974 to October, 1979	Personal Property Appraiser II - City of Milwaukee
May, 1972 to June, 1974	Personal Property Appraiser I - City of Milwaukee

General Education

Marquette University
Bachelor of Science-Accounting, 1972

Certification

Certified Wisconsin Assessor II

Technical Education

International Association of Assessing Officers
Course 4 - Assessment Administration - 1996
Standards of Practice and Professional Ethics - 1997
Market Analysis - Income Approach - 1998
Restructuring Income/Expense Statements - 1999
Course 201 – Appraisal of Land – 1999
Course 101 – Fundamentals of Real Property Appraisal –
Course 102 – Income Approach to Valuation

Numerous WAAO sponsored courses

Quality Improvement Achievements

Quality Improvement Course
Facilitator Skills Training
Consensus Bargaining Facilitation Skills Training (1994)
Attended Hunter Conference (1993 - 1995)
Attended Milwaukee First In Quality workshops
Facilitated Assessor Telephone Team (1996 City of Milwaukee Innovation Award)
Facilitated City of Milwaukee Building & Fleet Steering Team (1996-1997)
Facilitated City of Milwaukee Scientific Personnel Consensus Bargaining

Team (1994 & 1996)
Facilitated City of Milwaukee Clerical Support Study Team (1995-1996)

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JOHN E. MEYER

Quality Improvement Achievements (Con'td)

Facilitated Milwaukee Metropolitan Sewage District Communications Team
(1996-1997)
Instructor for City of Milwaukee Total Quality Improvement Courses
Former Instructor for City of Milwaukee Working Colleagues Workshops
(1982-1987)
Former member Assessor's Office Public Information Team (1990 - 1994)
Member, Assessor's Office Planning Team (1993 to present)
Member, Assessor's Office Steering Team (1995 to 2001)
Co-Chairperson of Assessor's Office Steering Team (1998 to 2001)

Affiliations

Wisconsin Association of Assessing Officers - member since 1976

Positions held: Past President - September 1998 to 1999
President - September 1997 to September 1998
President-Elect - September 1996 to September 1997
Vice President - August 1995 to September 1996
Executive Board Member - August 1993 to August 1995
- August 2002 to August 2005
Chairman Nominating Committee
Chairman Program Committee
Member of Planning and Management Committee
Chairman and member of Personal Property Standards Committee
Chairman of Ad Hoc Classification Committee

League of Wisconsin Municipalities, Assessors Section

Positions held: Trustee - 1990 to 1992

Presentations

League of Municipalities

Personal Property Auditing

Valuation of Business Personal Property

Personal Property – A Statistical Overview and Auditing Tips

WAAO

Using A Customer Focused Approach In The Assessor's Office

Impact of Computer Exemptions & Current Issues from the DOR

Wisconsin Towns Association

Valuation of Business Personal Property

City of Milwaukee

Total Quality Improvement Courses

Working Colleague Workshops

Lorman Education Services

Property Tax In Wisconsin – Personal Property Assessment From The Assessor's Prospective