

1 **364-032024**

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3 **ORDINANCE: 364-032024 To Establish an Appraisal Policy in the Acquisition, Disposition and Asset**
4 **Management of Winnebago County Owned Real Property**

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6 **TO THE WINNEBAGO COUNTY BOARD OF SUPERVISORS:**

7
8 **WHEREAS**, Winnebago County has a periodic need to acquire real property as well as dispose of and/or
9 manage its existing portfolio of real property; and

10
11 **WHEREAS**, real property acquisitions, dispositions and portfolio management requests are initiated by
12 Winnebago County Departments in accordance with needs; and

13
14 **WHEREAS**, in real property buying, selling and portfolio asset management, market valuations or other
15 valuation services can maximize investment return on and of Winnebago County Taxpayer Funds; and

16
17 **WHEREAS**, Winnebago County may have the occasional need for appraisals complying with Uniform
18 Standards of Professional Appraisal Practice, as promulgated by the Appraisal Standards Board of the
19 Appraisal Foundation (hereinafter "USPAP"); .

20
21 **NOW, THEREFORE, DOES ORDAIN AS FOLLOWS:**

22 That section 3.14 of the Winnebago County General Code is established that requires the engagement
23 of valuation services as part of Winnebago County real property acquisitions, dispositions, and portfolio
24 asset management actions. The Facilities and Property Management Committee shall make a
25 recommendation regarding the need for and type of valuation services required or lack thereof by waiver.
26 The type of valuation services required and/or discretionary waiver of valuation services shall be
27 administered solely by the County Executive. (See attached Exhibit A).
28

Respectfully submitted by:
SUPERVISOR THOMAS SWAN, DISTRICT 14
FACILITIES & PROPERTY MANAGEMENT
COMMITTEE
Committee Vote: 4-0

29
Fiscal Note:

Vote Required for Passage: **Majority of Members Present**

30 _____

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32 Approved by the Winnebago County Executive on _____.

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34 _____
35 Jonathan D. Doemel
36 Winnebago County Executive
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County Board Report



DATE: March 19, 2024
FROM: Mike Elder, Director of Facilities
AGENDA ITEM: 364-032024 To Establish an Appraisal Policy in the Acquisition, Disposition and Asset Management of Winnebago County Owned Real Property

General Description:

Winnebago County has periodic needs to acquire and dispose of real estate properties. A need exists for a consistent policy and practice to accomplish this.

Action Requested:

Motion to approve a policy and subsequent ordinance

Procedural Steps:

Committee of Jurisdiction: Facilities and Property Mgmt Meeting date: 3/1/2024
Action taken: __Approval of policy and ordinance Vote: 5/0

County Board

Meeting date:3/19/2024

Background:

Winnebago County has a periodic need to acquire and dispose of real property to conduct necessary County functions. Departments initiate the need for acquiring buildings or property to provide for the space needed for operations. Usually this is done by building on currently owned County property. Occasionally the County does not have sufficient open property, the location is not suitable for the functions or the need is temporary and rental is a better option.

The acquisition of the properties whether purchased or rented requires market valuation or other valuation services. This is to ensure the maximized investment return on and of taxpayer funds invested in the public interest. Appraisals need to comply with Uniform Standards of Professional Appraisal Practice (USPAP) as promulgated by the Appraisal Standards Board of the Appraisal Foundation.

In order to consistently apply this practice across the breath of Winnebago County departments and operations, a policy needs to be established by the Winnebago County Board of Supervisors. This policy would require the engagement of professional valuation services whenever real property is acquired, disposed of and in the management of the real estate portfolio of the County. The type of valuation services required and/or discretionary waiver of valuation services shall be administered by the

County Executive.

The professionals hired for valuation services shall have at a minimum an active Wisconsin State License applicable to the service. For valuation services under the scope of appraisal practice, the professionals shall hold active Wisconsin State Residential or General Appraisal Certification appropriate to the specific appraisal assignment. For all complex valuation assignments, the use of Wisconsin State Licensed and Certified holders of professional designations is required.

Policy Discussion:

The County Board is the body that approves and enacts the necessary ordinances that regulate County business and operations. The County Executive is the office that enforces the County ordinances.

Committee Discussion and Recommendation:

The Committee discussed the merits of the policy. A question was raised about the appraisal of properties taken for taxes. An exception was decided to be included for properties taken for taxes. The Committee approved the policy and subsequent draft ordinance, 4/0.

Supervisor Swan has asked an amendment be placed in the packet.

Attachments:

1. Appraisal - Exhibit A
2. Proposed Substitute Amendment Ordinance - Sup. Tom Swan

Exhibit A

3.14 Appraisal Policy in the acquisition, disposition, and asset management of Winnebago County owned Real Property

1. The engagement of valuation services as part of Winnebago County real property acquisitions, dispositions, and portfolio asset management actions is required.
2. Professionals hired for valuation services ~~outside of appraisal practice~~ shall have at a minimum active Wisconsin State Licensure applicable to the assignment.
3. Professionals hired for valuation services under the scope of appraisal practice **while performing an appraisal or appraisal review** shall hold active Wisconsin State Residential or General Appraisal Certification appropriate to the specific appraisal assignment.
4. Professionals hired for complex valuation services assignments shall **be licensed and or certified as defined in paragraphs (2) and (3) above and professionally designated.**
5. The Facilities and Property Management Committee shall make a recommendation regarding the need for **and type of** valuation services **required** or lack thereof by waiver. The type of valuation services required and/or discretionary waiver of valuation services shall be administered solely by the County Executive under Wis. Stat. §59.17 (2)(a).
6. Tax deeded sales will be exempt from Winnebago County's Appraisal Policy.

1 -032024

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3 **Ordinance: To establish an appraisal policy in the acquisition, disposition and asset**
4 **management of Winnebago County owned real property**

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TO THE WINNEBAGO COUNTY BOARD OF SUPERVISORS:

8 **WHEREAS**, Winnebago County has a periodic need to acquire real property as well as dispose of and/or
9 manage its existing portfolio of real property; and

10 **WHEREAS**, real property acquisitions, dispositions and portfolio management requests are initiated by
11 Winnebago County Departments in accordance with needs; and

12 **WHEREAS**, in real property buying, selling and portfolio asset management, market valuations or other
13 valuation services can maximize investment return on and of Winnebago County Taxpayer Funds; and

14 **WHEREAS**, Winnebago County may have the occasional need for appraisals complying with Uniform
15 Standards of Professional Appraisal Practice, as promulgated by the Appraisal Standards Board of the Appraisal
16 Foundation (hereinafter "USPAP"); and

17 **NOW, THEREFORE, THE WINNEBAGO COUNTY BOARD OF SUPERVISORS DOES ORDAIN AS**
18 **FOLLOWS:**

19 3.14 Appraisal Policy in the acquisition, disposition, and asset management of Winnebago County owned
20 Real Property

21 1. The engagement of valuation services as part of Winnebago County real property acquisitions,
22 dispositions, and portfolio asset management actions is required.

23 2. Professionals hired for valuation services ~~outside of appraisal practice~~ shall have at a minimum
24 active Wisconsin State Licensure applicable to the assignment.

25 3. Professionals hired for valuation services under the scope of appraisal practice ~~while performing an~~
26 ~~appraisal or appraisal review~~ shall hold active Wisconsin State Residential or General Appraisal Certification
27 appropriate to the specific appraisal assignment.

28 4. Professionals hired for complex valuation services assignments shall ~~be licensed and or certified as~~
29 ~~defined in paragraphs (2) and (3) above and professionally designated.~~

30 5. The Facilities and Property Management Committee shall make a recommendation regarding the
31 need for ~~and type of~~ valuation services ~~required~~ or lack thereof by waiver. The type of valuation services required
32 and/or discretionary waiver of valuation services shall be administered solely by the County Executive under Wis.
33 Stat. §59.17 (2)(a).s

34 6. Tax dedeed sales will be exempt from Winnebago County's Appraisal Policy.

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36 Respectfully submitted by:

37 **THOMAS SWAN, DISTRICT 14**

38

39 Respectfully submitted by:

40 **FACILITIES & PROPERTY MANAGEMENT COMMITTEE**

41

42 Committee Vote: **4-0**

43 Vote Required for Passage: **Majority of Members Present**

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45 Approved by the Winnebago County Executive this ____ day of _____, 2024.

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Jonathan D. Doemel
Winnebago County Executive

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