**SPECIAL PROVISIONS REAL ESTATE – RELOCATION SERVICES**

Wisconsin Department of Transportation

Revised 11/29/2021

SCOPE OF SERVICES

A. Relocation Services

(1) Relocation Activities:

All CONSULTANT relocation services will be according to Wisconsin Statutes, Wisconsin Administrative Codes, and the Wisconsin Department of Transportation Real Estate Program Manual ([REPM](https://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm.aspx)).

Any CONSULTANT staff providing services under relocation must be approved by the DEPARTMENT. The DEPARTMENT must approve any subsequent changes or additions to that staff.

CONSULTANT STAFF/SUB-CONSULTANT LIST:

|  |  |
| --- | --- |
| **FUNCTION or TASK** | **NAME** |
| Relocation |  |
| Administrative Support |  |

DEPARTMENT shall furnish CONSULTANT with parcel numbers, right of way plat sheets, legal descriptions and names and addresses of owners of record (unless identified elsewhere in this contract), sufficient to identify property and define relocation assignments for the pertinent parcels.

DEPARTMENT may meet with CONSULTANT prior to the agent meeting with the owners or tenants to review any material or processes pertinent to relocation process.

DEPARTMENT shall make available all pertinent relocation forms.

CONSULTANT shall meet with owners/tenants at times and in the manner prescribed by the DEPARTMENT in the REPM.

CONSULTANT will maintain accurate, complete and appropriate records and recordkeeping via according to state of Wisconsin and federal rules and laws, and DEPARTMENT policy, using READS as the primary records storage mechanism.

CONSULTANT will ensure proper coordination, communication and documentation is implemented and maintained between CONSULTANT, DEPARTMENT Real Estate staff and other DEPARTMENT personnel such as Railroads, Utilities, Design, Construction and Consultant Services.

CONSULTANT must adhere to the processes, procedures and all appropriate policy provisions as per the DEPARTMENT Real Estate Program Manual (REPM) or otherwise as directed and prescribed. CONSULTANT must stay alert to DEPARTMENT developing and changing policy as well as industry trends, professional standards, changes to state and federal rules and laws, and must adapt and adhere to all as appropriate.

 (2) General Relocation Services

 CONSULTANT agrees to provide relocation services as follows:

* Communicate and coordinate on all relocation matters with the Bureau of Technical Services (BTS) Statewide Relocation Program Coordinator;
* Conceptual Stage Relocation Plan (collect information, prepare plan, facilitate its approval);
* Attend project Public Information Meetings (PIMs);
* Acquisition Stage Relocation Plan (prepare file, prepare introduction letter, prepare interview letter and materials, interview displacee(s), search for comparable sites, complete diary entries in READS, complete the plan and facilitate its approval);
* Prepare files and READS setup;
* Coordinate and attend the appraisal inspection;
* Secure at least two estimates for all moves;
* Secure estimates for specialized moves;
* Prepare benefits package to be presented to displacee;
* Attend the initiation of negotiations to explain relocation benefits;
* Search for additional comparable properties throughout the relocation process;
* Attend any additional meetings as needed to discuss relocation issues on the project;
* Coordinate with acquisition agent regarding property included in purchase agreement, ensuring that the relocation package and offer to purchase are delivered together, and that the terms of the final negotiated acquisition are understood by the relocation agent;
* Revise relocation benefits package based upon final settlement and explain to displacee;
* If needed, draft lease agreement and facilitate its execution between DEPARTMENT and displacee;
* Assist in coordinating and attend closing for replacement site;
* Conduct moving inspection to ensure subject property is properly vacated;
* Distribute payments to displacees;
* Complete READS diaries and case report so the file may be closed.

 (3) Residential Relocation Services (when applicable)

* Compile residential low-income documentation (when pertinent);
* Search for and visit replacement housing payment (RHP) comparables, and input comparables into READS;
* Calculate and submit RHP computation for DEPARTMENT approval;
* Assist displacee with RHP, moving, and incidental expense claims as needed and facilitate their review by BTS. Edit claims as requested.
* Inspect the replacement property to ensure it is decent, safe and sanitary (DSS) in accordance with the law.
* Observe move from subject property to replacement property.

 (4) Business Relocation Services (when applicable)

* Facilitate fixture, furniture and equipment (FF&E) appraisal (develop agent move inventory list, verify FF&E list, review the FF&E appraisal);
* Reconcile business inventory list for items being purchased by the DEPARTMENT;
* Search for and visit business replacement payment (BRP) comparables, and input comparables into READS;
* Develop estimates for reasonable project costs (RPC);
* Calculate and submit BRP computation for DEPARTMENT approval;
* Observe business move;
* Assist displacee with BRP, moving, and all other expense claims as needed and facilitate their review by BTS. Edit claims as requested.

(5) Absentee Owner Relocation Services (when applicable)

* Calculate rent loss, facilitate its approval with BTS;
* Assist displacee with all expense claims as needed and facilitate their review by BTS. Edit claims as requested.