**SPECIAL PROVISIONS REAL ESTATE – APPRAISAL**

Wisconsin Department of Transportation

Revised 9/6/2023

SCOPE OF SERVICES

A. Appraisal services

1. Appraisal activities:

CONSULTANT will complete assigned appraisal(s) and submit a draft for review to the Wisconsin Department of Transportation (DEPARTMENT) on or before dates set forth in this scope of services and Work Order. Any extension to time or deadlines must be expressly granted in writing by DEPARTMENT through formal amendment.

DEPARTMENT shall furnish the CONSULTANT with the appraisal scoping checklist, right-of-way plats, legal descriptions, title work and construction plan data (when available) sufficient to identify the property and define the appraisal assignment. CONSULTANT shall assume responsibility for the completeness, accuracy and applicability of appraisal-type information, sales or other data obtained by the CONSULTANT from any source and used in the appraisal report.

*NOTE: Any and all costs of obtaining information (such as estimates for cost to cure, etc.) desired or required for completing a professional appraisal must be included in the appraisal bid exhibit.*

CONSULTANT is required to use DEPARTMENT’s Real Estate Automated Data System (READS) to manage and complete work as part of this scope of services and Work Order Agreement. CONSULTANT will use READS to submit reports. Approval for READS access is required prior to submitting appraisal reports to DEPARTMENT. Once approved for READS access, CONSULTANT will log into READS and follow procedures for submitting reports via READS. CONSULTANT shall label each report whether it is a Draft, Revision or Final. All versions of each report must be submitted through READS; reports will remain indefinitely.

CONSULTANT agrees to provide the appraisal report in accordance with the requirements of state and federal law and policy as described by the DEPARTMENT in [Chapter 2 of the Real Estate Program Manual (REPM)](https://wisconsindot.gov/dtsdManuals/re/repmchap2/chapter2.pdf).

CONSULTANT agrees to perform quality control checks prior to submitting first appraisal reports to DEPARTMENT, including checking for and correcting spelling, grammar, and mathematical errors. CONSULTANT shall submit appraisal reports of a quality that they reasonably believe could be approved by the DEPARTMENT.

CONSULTANT agrees to address/respond to all written requests for revisions or clarifications made by a DEPARTMENT review appraiser within ten (10) business days. Upon notice of acceptance of the report from a DEPARTMENT review appraiser, CONSULTANT will forward one (1) hard copy of the accepted final report to the regional office within five (5) business days. CONSULTANT must also ensure final accepted version is uploaded into READS and is clearly marked as “Final.”

CONSULTANT agrees to prepare appraisal reports using font sizes no smaller than 10 point with maps scaled for optimal readability.

CONSULTANT shall reduce color depth and/or resolution on all photos prior to inserting into appraisal and prior to creating PDF for submittal to DEPARTMENT (256 colors and 200 dots per inch [dpi)] is generally acceptable). No appraisal or Sales Study should exceed 0.40 MB per page.

The CONSULTANT appraiser who signs the certification must inspect the property being appraised and make every reasonable effort to meet with the owner(s). If CONSULTANT is not successful in contacting the owner, the CONSULTANT shall attempt to contact the owner with a letter sent by certified mail inviting the owner to accompany the appraiser at a time that is convenient to the owner. CONSULTANT shall not simply state that the CONSULTANT will be at the site at a specific date and time. A copy of the letter shall be included in the report addenda. A copy of the letter shall be included in the report addenda.

If a relocation is anticipated on the property resulting in a displaced person designation, CONSULTANT must contact the assigned relocation specialist to coordinate a walk-through meeting. The CONSULTANT must invite the relocation specialist to their appraisal inspection for all relocations.

By executing and agreeing to this Work Order, CONSULTANT acknowledges and agrees that DEPARTMENT approval of an appraisal under this Work Order and having an appraisal master contract with the DEPARTMENT does not constitute the DEPARTMENT’s endorsement of any appraisal opinion or methodology produced in any context or in any other appraisal report or in any subsequent context or appraisal report. All appraisal reports or methodologies under contract with the DEPARTMENT are reviewed independently through an appraisal review process.

The parties also agree to all materials as referenced and attached as part of the ‘Bid Tabulation’ documents to be annexed and made a part of this Work Order as appropriate.

1. Appraisal formats:

Explanation of DEPARTMENT appraisal formats is provided in the REPM [Chapter 2](https://wisconsindot.gov/dtsdManuals/re/repmchap2/chapter2.pdf) and/or [Chapter 6](https://wisconsindot.gov/dtsdManuals/re/repmchap6/chapter6.pdf). Examples of all current approved and acceptable forms and appraisal format types are viewable on the DEPARTMENT’s [REPM](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm.aspx)/[Forms](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm-forms.aspx) website. Determination of appraisal format should be made using the information provided by the DEPARTMENT in the appraisal scope of work checklist, which is attached and made a part of this Work Order.

1. Sales Study:

An acceptable Sales Study will adhere to the requirements described in [REPM Chapter 2](https://wisconsindot.gov/dtsdManuals/re/repmchap2/chapter2.pdf) and use the template provided by the DEPARTMENT on the REPM/[Forms](https://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm-forms.aspx) website. All Sales Study reports must be submitted through READS.

1. Review appraisal:

A review appraiser will conduct a review of the appraisal using the Appraisal Review Form (RE2128 - READS template) via READS as a guide to determine if the appraisal is acceptable. The Appraisal Review - Surplus Parcel (RE1009 - READS template) will be used where applicable.

1. Standards, conduct and rule:

Any CONSULTANT serving as a fee appraiser must recognize and uphold standards, conduct and rules specific to a professional licensed/certified appraiser and the appraisal profession. Per Uniform Standards of Professional Appraisal Practice (USPAP), Standards Rule 1-1 (c): *“In developing a real property appraisal, an appraiser must... not render appraisal services in a careless or negligent manner, such as by making a series of errors that, although individually might not significantly affect the results of an appraisal, in the aggregate affects the credibility of those results.”* Standards, conduct and rules shall be, first, in accordance with USPAP. Second, all CONSULTANTS are required to understand and uphold state and federal rules and laws of standards of practice and conduct governing the appraisal profession and DEPARTMENT policies. CONSULTANTS are required to have knowledge of DEPARTMENT policy and procedural documents, manuals and guides, such as the Facilities Development Manual (FDM) and the REPM.

CONSULTANT shall ensure that staff providing significant appraisal services or assistance in completing appraisal assignments are competent to perform the assignment(s). Per the USPAP Competency Rule, “[c]ompetency requires: 1. the ability to properly identify the problem to be addressed; 2. the knowledge and experience to complete the assignment competently; and 3. recognition of, and compliance with, laws and regulations that apply to the appraiser or to the assignment.” CONSULTANT is expected to provide valuation services competently and in a manner that is independent, impartial, and objective.

CONSULTANT shall not allow for the certification of an appraisal report by anyone who is not competent to perform the appraisal assignment.

1. Quality control:

CONSULTANT is expected to provide work product that has received internal quality control prior to submittal to the DEPARTMENT. CONSULTANT work product must be edited and quality-controlled for grammar, spelling, mathematical, and any other errors.

1. Non-payment for difference of professional opinion:

DEPARTMENT may not exercise a right to retain any portion of a CONSULTANT fee for matters involving only differences of professional opinion.

1. Coordination activities and business fixture appraisals, as needed:

CONSULTANT must coordinate with DEPARTMENT staff regarding inclusion of fixtures as real property in the appraisal to avoid duplication and confusion. A separate fixture appraisal report may be required for a business relocation for certain properties. CONSULTANTS must attend the on-site inspection meeting with a fixture appraiser, the acquisition agent and relocation agent.

1. Miscellaneous, general project management, and Division of Transportation System Development, Bureau of Technical Services-Real Estate (DTSD/BTS-RE) required activities:

Processes, policy and procedures: All provisions and language included in the Standard Provisions is hereby referenced and made a part of this Work Order Agreement. DEPARTMENT agrees to keep CONSULTANT informed of changing department processes, procedures and policies. The REPM is located on the [WisDOT](http://wisconsindot.gov/Pages/home.aspx) website, under [Doing business/Structure and roadway resources](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/default.aspx), [Real Estate](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/default.aspx). CONSULTANT must stay alert to industry trends, professional standards, state and federal rules and laws, and must adopt changes and adhere as appropriate.

READS: CONSULTANT must be able to access and use READS to create, maintain and complete all required project information, processes and processing activities associated with each scope of services under this Work Order. CONSULTANT shall enter and maintain READS information in a timely, complete and accurate manner.

Real Estate forms: For any required forms not available in READS, the [REPM](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm.aspx)/[Forms](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/re/repm-forms.aspx) website will have a fill-ready 'paper only' version available for immediate use. Any exception to using approved current standard DEPARTMENT forms requires prior and special permission by the assigned BTS-RE review appraiser on an individual, as needed basis.

Consultant staff: All staff and/or sub-consultants who will be assigned to perform any part of the work on this project must be clearly identified and named as a part of this Work Order Agreement. Only staff and/or sub-consultants named and approved for their credentials as described in your original Notice of Interest (NOI) solicitation materials should be included on any Work Order Agreement.

Staff changes: BTS-RE must review and approve any new staff who CONSULTANT intends to include as a part of any new Work Order Agreement. If an individual(s) was not originally named or included as part of the NOI solicitation materials, the individual must complete the appropriate and related Capability Statement form(s) from the following areas: Acquisition/ Negotiation [[RE1040](http://wisconsindot.gov/dtsdManuals/re/repmforms/RE1040-acq-neg-capability.docx)]; Appraisal [[RE1041](http://wisconsindot.gov/dtsdManuals/re/repmforms/RE1041-apprais-capability.docx)]; and, Relocation [[RE1042](http://wisconsindot.gov/dtsdManuals/re/repmforms/RE1042-relo-capability.docx)]. Each individual(s) seeking first time approval must complete the appropriate Capability Statement form(s) and receive a separate written approval from BTS-RE prior to beginning any work on a WisDOT/Real Estate project.

1. Invoicing:

CONSULTANT must submit all invoices with appropriate supporting documentation electronically through [CARS](http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/contracts/cars.aspx). To request CARS access, CONSULTANT should complete [DT1522 - CARS Request for Access](http://wisconsindot.gov/Documents/formdocs/dt1522.doc), then email it to [WisDOTCARS@dot.wi.gov](mailto:WisDOTCARS@dot.wi.gov). Only consultant security administrators need to complete the CARS Request for Access. Consultant staff does not need to complete this form, but will need a [Wisconsin User ID (WAMS ID)](https://on.wisconsin.gov/WAMS/SelfRegController) to access CARS.