



2.14 PROJECT MANAGEMENT CONFERENCE

A project management conference shall be held on all projects. If the region believes, however, that a project management conference is not needed, they must make the recommendation to the Bureau of Technical Services-Real Estate (BTS-RE) review appraiser. The BTS-RE review appraiser must concur with this recommendation. The purpose of the project management conference is for the region and BTS-RE to jointly develop a plan for the appraisal and review of the parcels in the project. The major elements of this plan are a time schedule, assignment of appraisers and reviewer(s), the completion of the Appraisal Problem Analysis (APA) (RE1004), and the identification of the scope of the work required. Decisions need to be made at this time regarding if the appraisals needed, will be complex or non-complex, or whether the BTS-RE reviewer or the region will handle the review. BTS-RE and regional review on the same project should be coordinated in order to operate efficiently and maintain consistency. A time schedule must be developed. This will identify the following:

1. When appraisers will start work.
2. When sales study will be complete.
3. Order in which appraisals will be done.
4. Dates when critical appraisals need to be complete.
5. Date of final approval of offering prices.

The assignment of appraisers will include such considerations as the use of region staff or fee appraisers and the possible need and types of specialty reports. These reports may involve fixtures, perc tests, contractor/s estimates, timber cruises, etc. The type and complexity of the appraisal problem should be matched against the experience and qualifications for the appraiser on a parcel-by-parcel basis. Preliminary decisions will be noted on a parcel-by-parcel basis under the scope of work regarding such things as the possible waiver of appraisal, appraisal format, identification of appraisal problems, approaches to be used, and the identification of any possible uneconomic remnants.

Attendance at the project management conference shall depend upon the size and complexity of the project. At a minimum, the region real estate supervisor or the lead acquisition staff person responsible for the project together with the region review appraiser, and the BTS-RE review appraiser should be in attendance. Others in attendance may include the potential appraisers, relocation agent(s), LPA representatives, etc. Plats and plans should be available. It may also be necessary to make a field inspection of the project as part of the conference.

Depending upon circumstances and the size and complexity of the project, it may be desirable to break the meeting into several conferences with the matters of timing and assignment appraisers basically decided at the first conference and some of the details regarding scope of the work left for a second conference where the assigned appraisers can be involved in the process. This second conference should ordinarily not be held until the appraisers have completed their sales work and made a few calls on property owners so that some idea of the problems and land values will be known and so that decisions on nominal value parcels can be made.

2.14.1 Project Management Conference Agenda

Project management conferences should include discussion of the following:

1. Appraisal assignment:
 - a. Can one appraiser handle entire project? How will work be divided? Who will appraise?
 - b. If relocation is involved – establish need for on-site meeting between relocation specialist and appraiser to discuss personal property/fixture issues.
 - c. Which appraisals should be completed first?
 - d. Which approaches will be required?
 - e. Will any special reports be required (i.e., fixtures, timber cruise, perk tests, septic system replacement, cost estimate, etc.)?
 - f. Will second appraisals be required on any parcel?
2. Are there any potential legal problems or legal opinions required?
3. Are there any railroad appraisals?
4. Are there any uneconomic remnants?
5. Are there sensitive parcels?
6. Date of relocation order?
7. How will public relations be handled?
8. Review appraiser assignment, central office or region?
9. What are appraisal completion dates?
10. What is letting date?
11. What is sales study completion date?
12. When will plans and cross-sections be available?
13. Who will be regional contact for appraisers (if non-region appraiser)?
14. Who will handle negotiations?
15. Will appraiser be furnished with title search and information gathered at P.R. call?
16. Will project be staked? When?

As part of the project scoping process, an Appraisal Problem Analysis (APA) (RE1004) must be filled out for every parcel where there is a partial taking. See Section 2.13.3 of this manual for details. WisDOT will fill one out at a project scoping meeting then will give one to each bidder on each parcel before they bid on the project. The analysis on the form is intended to point out to all bidders the potential areas of concern in a partial taking acquisition. One will not be provided in total takings. Items checked or not checked do not necessarily indicate the existence or absence of the item, only that a perception of its potential or lack thereof was observed by the client (WisDOT). Any discrepancies between this analysis and the appraiser's judgment of the appraisal problem must be communicated to WisDOT.