Items described and included in this "LPA toolbox" serve as a summary and overview. This is a condensed version of procedures and samples of required documents when acquiring real estate for construction projects with state and/or federal money used anywhere in the project. It is important to remember that other forms and documentation are required. Municipalities must contact their Local Program Real Estate Project Manager (LPREPM) before beginning the acquisition process. LPAs must work with a WisDOT LPREPM on projects with state/federal funds.

Sample Forms are available upon request. Official forms and letter templates are in READS (Real Estate Automated Data System). Contact your LPREPM for access.

For State and/or Federal Funds in Real Estate

WISDOT approvals needed BEFORE acquisition begins:
☐ Environmental Document and Design Study Report (DSR) approved.
□ Acquisition Stage Relocation Plan, if any relocations; submit to LPREPM and WisDOT Statewide Relocation
Coordinator for review and approval.
□ Qualified individual from Municipality completes Project Cost Estimate and submits to LPREPM.
☐ Right of Way Plat and Relocation Order approved and filed/recorded or Construction Plan complete if right of way costs,
including utilities, are under \$1000; approved by LPA.
□ Real estate funding authorized by LPREPM.
□ Acquisition Capabilities Statement submitted to LPREPM for approval.
☐ Consultant contracts approved by LPREPM. Contracts must use WisDOT standard language and forms
Negotiations cannot begin until funding has been authorized and Relocation Order has been approved!
Begin acquisition process:
□ Order title searches.
□ Conduct Startup Meeting.
☐ Create Sales Study; WisDOT approves.
□ Determine which parcels will be appraised and which will attempt to use waiver valuations (non-complex, under
\$25,000 in damages).
☐ Send letters to all property owners on plat w/brochure 'Rights of Landowners Under Wisconsin Eminent Domain Law'
informing them of upcoming project and staking to be done on their property.
☐ Create Nominal Payment Parcel Report (NPPR) to report waiver offering prices based on Sales Study; submit to
LPREPM for approval.
☐ Complete and review appraisals; submit appraisal with Offering Price Report & Submittal for WisDOT approval.
☐ Create parcel file with all required documentation for negotiations; file must also have all correspondence.
☐ Meet with property owner; explain their rights, discuss impacts to their property; present offer; listen and respond to
owner questions and concerns.
□ Documents requiring owner's signatures:
☐ Conveyance w/legal description,
□ Nominal Payment Parcel - Waiver of Appraisal (If Applicable),
☐ Statement to Construction Engineer,
□ Closing Statement,
☐ Form IRS W-9 (if proceeds are \$600+).
☐ Get Partial Releases of Mortgage
□ Negotiation Diary: During the process, document (tell the story) all conversations/correspondence about the parcel;
note owner concerns, questions, etc.; Note when owner was paid and when conveyance was recorded; negotiator
must sign first entry, initial all others, sign and date when negotiations are completed. (See sample in packet)
☐ Cut check and deliver/mail to property owner; owner MUST be paid BEFORE conveyance can be recorded!
☐ Record conveyance. Temporary Limited Easements (TLE) and Temporary Right of Entry Easements should be
recorded.
□ Complete Certification of Local Public Agency (LPA) Right of Way Acquisition; upload it with supporting documentation
to READS; inform LPREPM when acquisition is complete.
☐ If requesting reimbursement, follow the process in the LP Real Estate Manual and work with LPREPM

For Local Funds Only Used for Real Estate Acquisition

 □ Environmental Document and Design Study Report (DSR) approved. □ Acquisition Stage Relocation Plan, if any relocations; submit to LPREPM and WisDOT Statewide Relocation Coordinator for review and approval. □ Qualified individual from Municipality completes Project Cost Estimate. □ Right of Way Plat and Relocation Order approved and filed/recorded or Construction Plan complete if right of way costs including utilities, are under \$1000; approved by LPA. □ Acquisition Capabilities Statement submitted to LPREPM for approval. □ Consultant contracts approved by LPA. Contracts must use WisDOT standard language and forms ■ Negotiations cannot begin until funding has been authorized and Relocation Order has been approved! ■ Begin acquisition process: □ Order title searches. □ Conduct Startup Meeting. □ Create Sales Study. Approved by LPA □ Determine which parcels will be appraised and which will attempt to use waiver valuations (non-complex, under \$25,000 in damages). □ Send letters to all property owners on plat w/brochure 'Rights of Landowners Under Wisconsin Eminent Domain Law' informing them of upcoming project and staking to be done on their property. □ Create Nominal Payment Parcel Report (NPPR) to report waiver offering prices based on Sales Study; LPA approves. □ Complete appraisals, conduct appraisal review, create appraisal review report and approve. □ Create parcel file with all required documentation for negotiations; file must also have all correspondence. □ Meet with property owner; explain their rights, discuss impacts to their property; present offer; listen and respond to owner questions and concerns. □ Documents requiring owner's signatures: □ Conveyance w/legal description, □ Nominal Payment Parcel - Waiver of Appraisal (If Applicable),
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☐ Closing Statement,
☐ Form IRS W-9 (if proceeds are \$600+).
☐ Get Partial Releases of Mortgage or complete project and parcel risk assessment (LP Real Estate Manual 1.13.1)
□ Negotiation Diary: During the process, document (tell the story) all conversations/correspondence about the parcel; note owner concerns, questions, etc.; Note when owner was paid and when conveyance was recorded; negotiator must sign first entry, initial all others, sign and date when negotiations are completed. (See sample in packet)
☐ Cut check and deliver/mail to property owner; owner MUST be paid BEFORE conveyance can be recorded!
☐ Record conveyance. Temporary Limited Easements and Temporary Right of Entry Easements should be recorded.
☐ Complete Certification of Local Public Agency (LPA) Right of Way Acquisition; upload it with supporting documentation
to READS; inform LPREPM when acquisition is complete.

IMPORTANT REMINDERS & NOTES

- Work with LPREPM on required documentation for your files and WisDOT files.
- All files are subject to review by WisDOT and/or Federal Highways Administration. Intent is to verify LPAs followed all applicable code, statute, policies and procedures and maintained appropriate documentation.
- This is a very condensed version of the acquisition process. It is a basic "LPA toolbox" only. You must reference the Real Estate Program Manual (REPM) and the LP Real Estate Manual for right of way procedures. Contact your LPREPM with any questions. The manuals are available on WisDOT's website.
- Official forms and letter templates are in READS (Real Estate Automated Data System)
- READS must be used in its full capacity.

Attachments: LPREPM contacts, sample PSE schedule, sample startup meeting agenda, diary sample, Waiver of Appraisal offering package checklist, Appraisal offering package checklist, LPA PROJECT file checklist; LPA Waiver of Appraisal parcel file checklist, LPA Appraisal parcel file checklist

WisDOT Local Program Real Estate Contacts

North Central (NC)	Jay Viste	(920) 360-1672	EJay.Viste@dot.wi.gov
Southwest (SW)	Angie Kneip	(608) 245-2623	angela.kneip@dot.wi.gov
Northwest (NW)	Angie Kneip	(608) 245-2623	angela.kneip@dot.wi.gov
Southeast (SE)	MeriKate Bock	(262) 548-8781	merikatherine.bock@dot.wi.gov
Northeast (NE)	Jay Viste	(920) 360-1672	EJay.Viste@dot.wi.gov
Statewide	Abby Ringel	(920) 883-8324	Abigail.Ringel@dot.wi.gov

Task	Scheduled Da		Actual	Additional Days	Comments
Pool Estate Project Start Pote		26 months before			
Real Estate Project Start Date Conceptual Stage Reocation Plan	10/1/2022 10/1/2022	FORE		0	
Real Estate/Utility Coordination	10/1/2022			0	
Encumbrance Cost Estimate/PCA		30 days before prelim			
Completed	10/8/2022			0	
Dell'editore Blates Levitte III. BE		21 days before scoping			
Preliminary Plat submitted to RE Appraisal & Acquisition Scoping		completion 21 days before contract		0	
Completed	11/28/2022			0	
- Compressed		56 days before contract		-	
Contracts started	12/19/2022			0	
		7 days before DSR			
Setup Project in READS	1/30/2023	Approval 14 days before plat		0	
DSR Approved	2/6/2023	recording		0	
Consultant (acq, relo, appraisal)	2/0/2020			-	
Contracts Completed / Internal		21 days before start up			
staff assigned	2/13/2023			0	
Plat Recorded		14 days before start up		•	
Plat Recorded	2/20/2023	42 days before sales		0	
Start Up Meeting		study submitted		0	
		40 days before Sales		-	
Sales Study Submitted for review		study Approval		0	
Apprinition Office Delivery Di		90 days after plat			
Acquisition Stage Relocation Plan	5/21/2023	recorded 21 days before NPPR		0	
Staking	5/20/2023			0	
J. G.	3/20/2023	14 days before NPPR			
Sales Study Approved		submitted		0	
		21 days before NPPR			
NPPR submitted for review	6/10/2023			0	
NPPR Approved		21 days before nominal offers out		0	
Nominal offers out		30 days before flipping		0	
		45 days before appraisal			
Flip remaining nominals		submission		0	
		60 days before apraisal		_	
Appraisal submitted for review Contract Amendment	10/5/2023	approvai		0	enter additional days as paeded
Contract Amendment		14 days before offer			enter additional days as needed
Appraisal approved	12/4/2023	-		0	
Offer/relocation packet to owner		90 days before JO date		0	
Owner's appraisal due (if		60 days after appraisal			
applicable) Finalize agreed negotiations	2/16/2024			0	
Finalize agreed negotiations		14 days before JO date 45 days before Target		0	
Last date to JO	3/17/2024	-		0	
		21 days before paying			
Order Checks	3/23/2024			0	
JO expiration date		20 days after JO		0	
Owner Paid Signed Conveyance Recorded		7 days before recording7 days after Owner paid		0	
Signed Conveyance Recorded	4/20/2024	14 days after JO		0	
Award recorded	4/20/2024	•		0	
		must be vacated before			
Relocations vacated	6/4/2024	razing contract awarded		0	
Razing (begin contract docs,		hagin 6 mantha hafara			
contact BPD, Advertise, bid opening, Contract award, Demo)	6/4/2024	begin 6 months before		0	
Target Acquisition Date/Utility date		7 mths before PS&E		0	
Documents submitted for Review				-	
(LPA)	11/3/2024	28 days before PS&E		0	
		relocation assistance			
		and advisory services			
		are on going through the acquisition process and			
Relocation Assistance & Advisory		until up to 2 years after			
Services		vacate date.			
PS&E	12/1/2024		12/1/2024	0	
Ad Let date					
Let uate		ĺ			

days 780 #months 26.0

REAL ESTATE START-UP ACQUISITION MEETING AGENDA Project ID ____-_Project name Limits

LPA Sponsor and County

Date **Meeting Location**

Call in		access code .		
Virtual access -				

Introductions: List individuals invited and additional members of project team here, include company/agency, title/role, phone number & email address
Funding: Example: State funding in Real Estate
The Project and Parcel Details:
Reason for the project:
Trail Project? Yes / No The process and documentation are different since the agency does NOT have condemnation authority. Get the process and documents from the LPREPM.
Total Number of Real Estate Parcels:
Number of Utility Release of Rights: Who is obtaining Utility Release of Rights? Utility coordinator must provide RE with names and contact information for utility companies. Identify specific utilities that will be acquired via the real estate process.
Relocation Parcels
Number of Appraisals:
Type of Appraisals:
Number of Waivers: (starting out)
Sensitive/Priority Parcels:
Railroad Parcels:
Billboards:
State/County/Municipality owned Parcels:
Encroachment Report prepared by on on
And approved by on
encroachments to be removed prior to construction
encroachments are allowed and each encroachment will be issued a Revocable Occupancy Permit.

Hazmat concerns:

Schedule and Approvals:
Project PS&E date:
Project Letting date:
Environment Document Approved:
DSR (Design Study Report) Approved:
Final R/W Plat Approved:
Acquisition Capability Statement Approved:
Plat will be recorded: Filed:
Real Estate Clear date: 28 days before PS&E
Offers to be mailed by:
Appraisals completed by:
Responsibilities:
Title Work and Updates to be provided by:
Introduction Letters and Brochures to be sent to property owners byon
R/W Staking to be completed by: no later than
Utility Release of Rights to be secured by:
Establishing Parcel Values:
1) Cost Estimate will be prepared by:
2) Sales Study will be prepared by:
Reviewed by and Approved by
3) TLE time frame will be from the date of the appraisal to the end of construction.
Construction will Start and End
4) Appraisals will be prepared by:
Reviewed byunder \$10,000over \$10,000.
Appraisal Reviewer to prepare and sign the OPR (Offering Price Report). Additional
OPRs will be approved by:
5) Nominal Payment Parcel Report will be prepared by:
NPPR will be reviewed by: and recommend approval to
6) Administrative Revisions will be reviewed by, approved by
and then

Process for Negotiations / Documents required for Certification of R/W (1)

WisDOT RE Forms to be used in READS
Partial Release of Mortgage are required on all parcels with Fee Acquisition
Minimum Offer will be:
Negotiation Diaries are to be signed. /s/ with a typed name is acceptable.
Statement to Construction Engineer should be signed by the property owner, negotiator and LPA. Note "None" if no commitments were made.
Local Certification of LPA R/W, Form LPA 3028 to be prepared by
signed and dated by
Supporting documents are to be in READS. (See LPREPM)
Other Issues:
Relocation:
Fixtures:
Remnant Parcels
Certified Survey Maps / Plats of Survey

Waiver of Appraisal offering package checklist

Copies of all waivers of appraisal made on parcel
Copies of project's R/W plat showing owner's affected property, highlighted
Initiations of negotiations letter
Legal description
Map showing all property affected by project
Names of at least ten or more neighboring property owners to whom offers
will be made
Conveyance Document
Statement to the Construction Engineer
W-9, if applicable
Brochure
Authorization for Partial Release
Self-addressed stamped envelope
Business card/contact information
Plan Sheets
Aerial Overlay
Copies of quit claim deeds if there are other parties of interest

Owner Name	
Project ID	
Parcel #	
Date offer	
given	
Method given	☐ hand delivered ☐ certified mail

Official Forms are housed in READS

Appraisal offering package checklist

Appraisal Guidelines and Agreement (RE1003)
Copies of completed appraisal(s) made on parcel. *Does not include draft
appraisal(s)
Copies of project's R/W plat showing owner's affected property, highlighted
Initiations of negotiations letter
Legal description
Map showing all property affected by project
Names of at least ten or more neighboring property owners to whom offers
will be made
Proposed Agreement for Purchase and Sale of Real Estate
Conveyance Document
Statement to the Construction Engineer
W-9, if applicable
Brochure
Authorization for Partial Release or Satisfaction of Mortgage
Self-addressed stamped envelope
Business card/contact information
Plan sheet
Aerial overlay
Copies of quit claim deeds if other parties of interest
•

Owner Name		
Project ID		
Parcel #		
Date offer		
given		
Method given	☐ hand delivered	☐ certified mail

Official Forms are housed in READS

City of Green Bay

Owner (name; address; pl Al Packer & Sue Packer ,		een Bay, WI	
Initiation of negotiations date 04/10/2020	Brochure sent date 01/01/2020	60th day to receive owner's appraisal 07/08/2020	1099 amount \$ 30,000
Offering price	Date approved	Alternate Offer (A, B)	Date approved
\$ 25,000	03/30/2020	\$ (A) \$ (B)	(A) (B)
		Administrative settlement \$ 30,000	Date approved 08/10/2020

On 04/10/2020, I, the negotiator, sent/gave the subject property owner a copy of the right of way plat, our appraisal(s), and other required documents.

Under "REMARKS" below, the Real Estate agent should indicate persons present, attitude of owner, owner's appraisers, owner's attorney, owner's asking price, information regarding buildings, improvements, extended occupancy, fixture apportionment, date to vacate buildings and any pertinent data regarding items such as drainage, driveways, fencing, title lines, wells, dry wells, etc. Remarks are not to be necessarily limited to the foregoing. Use as much space as needed to fully explain details.

ATE & AGENT	REMARKS
11/01/2019	
	I received a copy of the title search dated January 11, 2009 from the engineer. According
Abigail E Ringel	to the title, the property is owned by Al & Sue Packer and there are no mortgages listed.
01/01/2020	Sent introduction letter Al & Sue Packer at the address listed on the tax bill. The letter
AR	included a copy of the brochure entitled "The Rights of Landowners Under Wisconsin
	Eminent Domain Law", right of way plat, and list of all the owners on the project.
01/03/2020	I called the phone number listed for the Packers and spoke with Al Packer. I introduced
AR	myself. I explained I was calling to inform them of an upcoming roadway project
	impacting their property. Mr. Packer was aware of the upcoming project. He asked if his
	maple tree would be cut down. I verified which tree we were discussing. As I had already
	spoken with the project engineers, I was able to tell Mr. Packer that the tree was not
	within the acquisition area. He said he was relieved. I let Mr. Packer know I had sent a
	packet of information to him. I told him if he had any questions, he could call me. I verified
	his phone number and address. I explained that an appraiser would be contacting him to
	complete and appraisal to determine the damages to his property. I said that was still in
	progress, but once it was done, I would again contact him. He asked about how long that
	would be. I indicated the appraiser would be contacting him within the next few weeks
	and the appraisal process could take several months due to workloads and the review
	process. He said he would keep my number and call me if he or Sue had any questions.
3/15/2020	Received the appraisal from the consultant. I forwarded it to the LOCAL PUBLIC
AR	AGENCY REVIEW APPRAISER for review and approval.
3/30/2020	Received the approved offering price report in the amount of \$25,000.
AR	
3/31/2020	I called the Packers. I spoke with Sue. I explained I had the completed appraisal and
AR	offering documents to present to them. I asked if she would like to set up a time to meet
	to go over them and discuss. She said she would check with Al and get back to me.
4/1/2020	Sue Packer called me back. She asked if we could meet on 4/10/2020 at 8:00 am. I said
AR	that would work for me and asked if she would be comfortable meeting at their property.
	She said that would be fine. I confirmed the date and gave her my cell phone number
	should anything come up.
4/10/2020	I met Mr. and Mrs. Packer at their property. I presented them with the offering price letter
AR	in the amount of \$25,000, along with the appraisal, the Appraisal Guidelines and

	Agreement, a highlighted copy of the right of way plat showing the Packer's property, the legal description, a map showing all property affected by project, a list of all of the owner's names along the project to whom offers will be made, a Proposed Agreement for Purchase and Sale of Real Estate, a W-9, draft copy of the warranty deed, Statement to the Construction Engineer, Owner's rights brochure, and my business card. We walked the stakes and discussed the impacts to the property. I explained that the offering price was based on the appraisal report and that they have the right to obtain their own appraisal. The city will reimburse the cost of the appraisal if received within 60 days. The owners indicated the offer was a bit low and said they didn't think the amount for landscaping was enough. I said that I would need additional justification for any increase in value. They asked if they could do that by obtaining their own appraisal. I said that was correct. We discussed that I would need to have the appraisal back by 6/9/2020 for it to be eligible for reimbursement. They thanked me for explaining the offer and said they were going to obtain an appraisal. I thanked them for their time and told them they could continue to contact me with any questions.
6/8/2020 AR	Received owner's appraisal prepared by John Goodmen. The estimated value is \$35,000. The appraisal fee was \$3,500.
6/11/2020 AR	Requested payment for the reimbursement of the owner's appraisal.
6/25/2020 AR	Called to discuss the appraisals with the Packers. Left a voicemail requesting they call me back to discuss.
6/30/2020 AR	Al called me to discuss both appraisals. The main difference between the appraisals is that Mr. Goodmen estimates landscaping damages higher due to the quality and specific landscaping plan. Mr. Goodmen's appraisal also had a higher per acre value for the land. We discussed the tow appraisals and the differences and similarities. We came to an agreement that an additional \$5,000 would be reasonable. I told Al this increase is subject to common council approval. I asked if I could email him a purchase agreement for \$30,000 for his and Sue's signature. He agreed. I emailed the purchase agreement. I received a reply email with a signed a purchase agreement for \$30,000.
7/11/2020 AR	Common Council approved the increase. I called the Packers to set up a meeting for closing. We will close on 7/28/2020 at 9:00
7/18/2020 AR	am at their residence. I requested a payment request for \$30,061.10 (taxes prorated). Received check
7/28/2020 AR	Met with Al and Sue to close. They signed the Warranty Deed (I notarized it), closing statement, W-9, and statement to construction engineer. I gave them the check for \$30,061.10 and the check for the second appraisal reimbursement. They had no questions.
8/3/2020 AR	The original signed deed was sent to the Register of Deeds to be recorded
8/10/2020 AR	Received the recorded deed back from the Register of Deeds.
Abigail Ringel	

CHECKLIST FOR PROJECT DOCUMENTATION - DOCUMENTS TO BE RETAINED BY LOCAL

The project file shall, in the order listed below, include (where applicable) copies of the following

Date			
	Right of Way Plat		
	Public Involvement notes/attendance record		
	Project Scoping Spreadsheet		
	Project Cost Allocation		
	Start Up Meeting Notes		
	Encroachment Report		
	Consultant Contracts		
	Project Team Assignments		
	Relocation Plan, if applicable		
	DSR Approval Letter		
	Sales Study (approved)		
	Nominal Payment Parcel Report (approved)		
	State Municipal Agreement, if applicable		
	Memorandum of Understanding		
	Project Level Diaries		
	Project Level Correspondence		
	Estimates		
	Invoices (Raze & Remove, Special Studies such as circuity of travel, etc.)		
	Proposals		
	Right of Way Certification		

All above listed documents should be uploaded into READS project log. However, the official documentation should remain with the LPA per its record keeping practices.

PARCEL FILE CHECKLIST

*W-9s, partial release requests, bank information or personal financial information must NOT be in READS, but retained in Regional paper file location

Nominal	Appraisal	
		Title Search & all updates
		Staking Photos
		Design Overlays
		Ownership Information Record
		Copy of Introduction (Brochure) Letter
		Signed Nominal Waiver of Appraisal or Donation Waiver of Appraisal
		Appraisal
		Appraisal Review
		Offering Price Report (Approved)
		Initiation of Negotiation Letter
		Checklist of Required Items Provided to Owner
		Alternate Offers
		Owner's Appraisal
		Owner's Appraisal Invoice
		Executed Purchase Agreement
		Admin Revision for all increased offers
		Property Improvement/Remnant Report (copy to Property Management)
		Closing Statement
		Tax proration (all fee acquisitions)
		Executed Conveyance
		*Partial Release or Satisfaction of Mortgage
		Executed Quit Claim Deeds for Other parties of Interest
		*IRS 1099 screen in READS completed
		Signed JO (if condemned)
		Recorded Lis Pendens (if condemned)
		Recorded Award of Damages (if condemned)
		Negotiation Diary (check that info is in there)
		Statement to Construction Engineer (also saved to regional BOX folder)
		Payment Details
		Transfer Return
		Simplfile Receipts
		Recorded Conveyance
		6-month or 2-year conveyance letter
		*W-9 Request
		All READS screens filled in
		All Correspondence
		All certified receipts (identify what they are for)
		All Other Records per Record Retention Policy

All above listed documents should be uploaded into READS parcel log. However, the official documentation should remain with the LPA per its record keeping practices.