
THE HIGHLAND GROUP

CITY OF WAUPUN

**REAL ESTATE APPRAISAL, RELOCATION AND ACQUISITION
SERVICES PROPOSAL**

**MAIN STREET
STATE STREET TO COUNTY PARK ROAD
PROJECT ID# 6090-06-23**

Proposal Date: December 30, 2013

CITY OF WAUPUN

REAL ESTATE APPRAISAL, RELOCATION AND ACQUISITION SERVICES PROPOSAL

MAIN STREET STATE STREET TO COUNTY PARK ROAD

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I. LETTER OF TRANSMITTAL

Thank you for considering The Highland Group (Consultant) to provide appraisal, relocation and acquisition services for the City of Waupun (Waupun) referenced project.

Our scope of services will be as follows:

- Provide a Real Estate Project Manager
- Prepare Acquisition Stage Relocation Plan
- Pre-project conferences
- Preparation of all individual parcel files
- Prepare and maintain project spread sheets
- Prepare all appropriate documents in WisDOT LPA format
- Preparation of R/W Certifications
- Project Data Book
- Preparation of nominal value offers
- Coordinate the disposition of encroachments
- Complete appraisal services
- Complete relocation services
- Recording all appropriate documents
- Coordination of all plat revisions
- Coordination with oversight of razing contracts

Compensation for all services indicated above, will be based on the acquisition of 92 parcels, 1 relocation and the property management of 1 parcel as indicated in the Cost Sheet for Project ID 6090-06-23 provided under separate cover. It is understood and agreed that this fee will be adjusted if the scope of services changes.

The not to exceed fee is the full compensation to The Highland Group for services provided. It includes The Highland Group's payroll costs, taxes, insurance, overhead, vacation, holiday, subsistence pay, profit and all other indirect charges such as copies, mileage, telephone calls, maps, plats, zoning regulations, project related office supplies and the project conference meeting.

This proposal addresses the primary objectives set forth by Waupun as well as provides the manner in which Highland's assigned project personnel will accomplish each objective. In addition, this proposal contains information pertaining to Highland's overall qualifications, staff experience and resumes and a time-line depicting the project's critical dates.

The Highland Group represents that they are qualified and able to perform the services required. Because of Highland's staff of experienced professionals, Waupun's involvement can be as much or as little as desired.

THE HIGHLAND GROUP OFFICE LOCATIONS:

110 N. Third Street
Watertown, WI 53094
920/262-2150
FAX 920/262-2152

456 W. Main St.
Waukesha, WI 53186
920/988-7667

II. REAL ESTATE PROCEDURES

All activities will be conducted out of the Watertown office with Stephen D. Simpson as our contact person.

An Acquisition Stage Relocation Plan will be prepared and approved by WisDOT and the Department of Administration prior to approval of the Relocation Order. Each Transportation Project Plat page, which contains a Relocation Order for that page, needs to be recorded in the County where the project is taking place before any offers can be made.

Appraisal Procedures

Immediately following the pre-project conference meeting, our appraiser will begin gathering data for the Project Data Book. The Project Data Book and the Nominal Payment Parcel Report (NPPR) for the nominal parcels will be prepared and submitted to Waupun for approval. Landowner interviews for the appraised parcels will be conducted by our appraiser upon issuance of an Introduction Letter to the landowner and notification that the project has been staked. **The appraisal reports will be prepared to State of Wisconsin Real Estate LPA Manual specifications.** The completed appraisals will be reviewed by our review appraiser. Any needed corrections will be made by our appraiser and the final appraisal report will be submitted to Waupun for approval.

Highland presumes that the establishment of landowner compensation shall be an ongoing process performed on a timely basis by Waupun taking a maximum of thirty (30) days to approve the Project Data Book and the Nominal Payment Parcel Report.

The appraisals will be performed to ensure that:

- Proper formats are utilized per the City of Waupun contract
- Appraisals are complete to Manual standards
- Mathematical calculations are correct
- Fair market values are established for the takings

The actual format and level of documentation of an individual appraisal depends on the complexity of the appraisal itself, however, in each instance, it will be consistent with the format stated in the Manual and comply with the Uniform Standards of Professional Appraisal Practice.

The appraiser will be available to meet with Waupun, or its attorneys to provide expert witness testimony, as required, in the event that court appearances are necessary to determine the compensation for any particular parcel.

Acquisition Procedures

The negotiator's prime concern will be to acquire the necessary rights-of-way in a professional, competent manner while adhering to the guidelines established by Waupun and the Manual and to provide these services in accordance with project deadlines. We also realize that our negotiators will be viewed as direct extensions of Waupun when in contact with the affected landowners and the general public. In this respect, professionalism and honesty in these phases of public relations will be stressed and enforced by Highland.

After field reviewing the project, we have determined that all parcels with the exception of the relocation parcel can be put on the Nominal Payment Parcel Report. Therefore, the nominal payment parcel method will be utilized for 91 parcels on this project. Upon receiving the approved Nominal Payment Parcel Report from Waupun, our negotiators will contact the owners to set up meetings to present the offers and secure executed conveyance documents. During the first meeting, the negotiator will reiterate the purpose and extent of the project and ensure that the landowner has received a copy of "The Rights of Landowners Under Wisconsin Eminent Domain Law" brochure describing the land acquisition process and the owner's rights. The negotiator will present each landowner with an offering price letter in the amount that has been established and approved as just compensation for the property.

If efforts to reach the landowner in person are not successful, or if the landowner resides out-of-state, the negotiator will contact the owner via certified mail. The initial letter will explain why the contact is being made, what improvements are involved, if any, and what land is required. In addition, an offer will be made with an explanation regarding the determination of value. Thorough instructions will be provided so that the landowner understands what actions are required of him/her for proper execution of the required documents.

In every negotiating situation, the possibility of a counteroffer exists. If a negotiated settlement higher than the Nominal offer is reached with the Nominal owner, the negotiator will have the owner sign the Nominal Payment Parcel-Waiver of Appraisal, make the appropriate adjustments to the Nominal Waiver form and have the owner initial the changes. The negotiator will also initial the changes and the report will be sent to Waupun for approval.

In the event we cannot reach an agreement with the owners or they exercise their right to an appraisal, a short format appraisal report will be prepared to State of Wisconsin Real Estate LPA Manual specifications. The appraisal will be given to the owner with a new offering price letter that supersedes and replaces all previous offers after the appraisal is approved.

Owners who receive an appraisal prepared by The Highland Group, either initially or during Nominal negotiations, will have 60 days to obtain a second appraisal at Waupun's expense. Waupun is not obligated to pay for the appraisal fee if the owner's appraisal is not turned in within 60 days from the date the offer was made. However, the appraisal will be considered in order to determine just compensation. If a second appraisal is received from the landowner, the appraisal will be submitted to Waupun together with The Highland Group's review and recommendations. The owner's appraisal invoice together with a recommendation for payment or nonpayment will be submitted to Waupun for consideration.

Closings will be performed in accordance with the Manual. If a purchase agreement has been signed, the check will be delivered in person by the negotiator, who will provide the conveyance document and closing statement for signature by the landowner. If the conveyance document has been previously signed, the check and closing statement will be mailed to the owner via Certified Mail with instructions to sign and return the original closing statement.

To assist Waupun in assessing the progress of the negotiations, **Highland shall submit a written progress report to Waupun on a monthly basis.** For purposes of delivery of the final product, Highland will prepare a file for each affected parcel containing its original documents and submit the file to Waupun's Project Manager. Prior to submitting the project files to Waupun, all of the files will be reviewed for accuracy and completeness.

Condemnation

In the event a negotiated settlement cannot be reached with an owner who has received an appraisal, Highland will consult with Waupun to determine if the offer should be increased prior to issuing a Jurisdictional Offer. Highland will prepare a Jurisdictional Offer, Lis Pendens and Award of Damages for approval by Waupun's Project Manager. Also, the appraiser, upon notification from the Highland Project Manager, will provide an updated appraisal of the affected property to establish an estimated value at the time of taking. Highland personnel will be available to assist Waupun regarding settlement, pre-trial hearings and trial preparation. The appraiser will be prepared to defend his finding of value and to testify at the condemnation proceedings regarding the appraisal determination representing current fair market value.

If the statutory 20-day waiting period for the landowner to consider the Jurisdictional Offer expires or the owner rejects the Jurisdictional Offer, the negotiator will proceed to acquire the property interests needed for the project by issuing an Award of Damages.

Relocation Procedures

Relocation procedures will be implemented in accordance with the Acquisition Stage Relocation Plan. Relocation assistance will be rendered under the guidelines of the Uniform Relocation and Real Property Acquisition Policies Act of 1970, by a professional with extensive experience in relocations performed under those guidelines. The owners will be provided with their Relocation Assistance Package at the initiation of negotiations. **We have found that presenting the relocation package along with the offering price letter and appraisal helps the displacee to understand the process better.**

Advisory services that are provided during the relocation phase include the determination of the needs and preferences of the people being displaced and explanation of the options available concerning assistance for which they may be eligible. The relocation advisory program will also provide information regarding availability and prices of replacement residences. The Relocation Specialist will utilize our Watertown office as the location to accept calls and correspondence from the displacees.

In accordance with the Uniform Act, relocation expenses for both actual and fixed costs are provided to eligible persons who are being displaced. Some of the costs covered include transportation of persons and property up to 50 miles; packing, crating, unpacking and uncrating of personal property; up to 12 months of storage of personal property (at the discretion of Waupun); insurance for replacement value of items connected with the moving and storage of personal property; losses not covered by insurance; and other moving-related expenses.

Property Management Procedures

At the Vacancy inspection for the residential relocation, **the relocation agent will ensure that no hazardous materials or personal property are left behind.** The displacees will be instructed to have garbage picked up prior to the inspection and the city owned garbage bins removed from the property and have all utilities taken out of their names. The relocation agent will ensure that all windows and doors are locked. Moving payments will not be disbursed unless all hazardous materials and personal property have been removed from the property.

After the property has been vacated, all public utilities will be contacted to transfer services to City of Waupun ownership and to start demolition requests to have the utilities removed from the building. The local sheriff will be contacted to watch the vacant buildings to prevent vandalism or theft. Mark Davis of DCC, LLC will then be contacted to test the property for asbestos and provide an estimate for removal. Once an estimate has been provided, the Raze and Removal Bid Packet will be prepared including pictures of the buildings. The bid packets will be mailed out to local demolition companies with instructions on bidding. A sealed bid opening will be conducted at the Watertown office. The contract will be awarded to the lowest bidder and mailed to the winning contractor providing them 10 days to complete and sign the contract. Once the contract has been signed, a Notice to Start will be given to the awarded contractor with a 30 day allowance to complete the project. The site will be inspected to ensure the safety of the public and to make sure work has been completed in compliance with the contract prior to backfilling the site. The site will then be inspected to ensure that it has been graded and seeded to City of Waupun standards.

III. PERSONNEL EXPERIENCE

HISTORY OF FIRM

The Highland Group is an S corporation, based in Watertown, Wisconsin. Highland is a full service consultant company to the transportation, telecommunications and utility industries. Highland provides the following services:

- Fee, Easement and Lease Acquisition
- Appraisal Preparation and Appraisal Review
- Relocation Assistance
- Property Management

Stephen D. Simpson, the owner of The Highland Group, started working in the right of way industry in 1981. While working for a major oil and gas corporation he oversaw the acquisition of easements for salt water disposal, natural gas and crude oil pipelines and various other easements associated with the oil and gas industry. In 1992 he assumed the position of Regional Manager for the Wisconsin office of Linderlake Corporation Field Services Group, a right of way acquisition firm based in Alsip, Illinois.

After three years presence in Watertown, the principals of Linderlake discontinued their operations in Wisconsin. At this point, Mr. Simpson formed a new land acquisition service company, The Highland Group, to complete the unfinished contracts. Since its inception, The Highland Group has successfully acquired in excess of 3,900 parcels for Federal, State and locally funded projects under Wis. Stats. Ch. 32.

The Highland Group is certified as a Disadvantage Business Enterprise (DBE) and is eligible to participate on

Federal and locally financed projects sponsored by Milwaukee County and Federal projects with the Wisconsin Unified Certification Program which includes Milwaukee County, Wisconsin Department of Transportation, Dane County and the City of Madison.

The Highland Group's staff consists of Steve Simpson, Negotiator/Project Manager, Real Estate Specialist Sarah Simpson and Ms. Reneé Held, the company's Document Specialist. The Highland Group's team also includes Mann & Associates, a real estate appraisal firm based in Oshkosh, WI, to prepare the appraisals required for assignments and Lockly Valuation Services, a real estate appraisal firm based in Milwaukee, WI to review the appraisals. Steve and Sarah are on the LPA Real Estate Statewide list of approved Fee Negotiation/Relocation Consultants and Steve Mann of Mann & Associates and Tony Lockly of Lockly Valuation Services are both on the approved list of appraisers.

Our team includes senior level staff with expertise in real estate acquisition for highway improvement projects. The project personnel have the necessary technical and specialized skills, as well as the competence and experience to complete projects within established parameters of time and budget. The following individuals make up The Highland Group's project team:

Project Manager/Negotiator – Mr. Stephen Simpson serves as the project liaison between the agency and Highland in the role of Project Manager, as well as in the negotiations for acquiring parcels. Steve has 31 years of experience in the Right-of-Way Industry. Since the Watertown office was established in 1992, Steve has functioned as Project Manager on title, appraisal/appraisal review, relocation assistance and acquisition projects for Fond du Lac County, the Wisconsin Department of Transportation Northeast Region, Southeast Region and Southwest Region, as well as numerous county and municipal transportation departments. Steve has experience in negotiating agreements at city, county, state and federal levels since 1981. In addition to his governmental agency work, he has performed acquisitions on a wide variety of projects for private industry, including telecommunications and major oil and gas exploration companies.

Real Estate Specialist – Ms. Sarah Simpson, who graduated from the University of Wisconsin-Milwaukee with a 3.6 GPA, will serve as the relocation agent and property management agent for the residential relocation. She will also serve as one of The Highland Group's acquisition agents. Sarah has more than four years experience as a relocation/negotiation specialist. Sarah was instrumental in the acquisition of 86 parcels for the reconstruction of STH 22 from Gillett to Oconto Falls, 119 parcels for the reconstruction of STH 144 from West Bend to the north Washington County line and 99 parcels for the reconstruction of STH 96 in Kaukauna. Sarah has negotiated the acquisition of parcels for the Wisconsin Department of Transportation, Northeast Region and Southeast Region, Waukesha County Transportation Department, the City of Kenosha, Kenosha County, Racine County, Rock County and Fond du Lac County. She has also acquired approximately 110 parcels for local and county municipal transportation departments.

Sarah will prepare the Acquisition Stage Relocation Plan and relocate the residential displacee. Sarah has recently participated in the relocation of eight residential families and nine commercial businesses. The businesses included two convenience store/gas stations, two taverns, an auto body repair shop, three retail operations and a car repair/tire sales facility. Sarah developed the Acquisition Stage Relocation Plan consisting of 18 residential relocations and 3 business relocations for the Wisconsin Department of Transportation Northeast Region's STH 15 Hortonville Bypass. Early acquisitions in this project have resulted in the successful relocation of five (5) residential families and two (2) move only relocations with three (3) remaining early acquisition residential families. Sarah also developed the raze and removal bid packages for the five residential properties, awarded the contracts to the winning bidders and oversaw the demolition of each property to ensure compliance with the contract.

Documents Specialist – Ms. Reneé Held has extensive experience in preparing appraisal reports, acquisition documents, tracking reports, updating computer files and the like. Reneé has the responsibility for the preparation of the acquisition documents for the field staff, and is experienced in the preparation of documents for local public agencies, Wisconsin Department of Transportation and private industry. Ms. Held is responsible for the maintenance of the project files and is an integral member of the project team.

Project Appraiser – Mr. Steve Mann of Mann & Associates has 28 years experience as a professional real estate appraiser and negotiator including agricultural, commercial, manufacturing, industrial, vacant land and residential properties. He has also managed various appraisal projects for the Northeast and Southeast Regions of the Wisconsin Department of Transportation. These projects included nominal appraisal acquisitions and acquisitions with full narrative appraisals of partial and whole takings. Acquisition services included working with both the property owner and design engineering firm to insure the property owners understanding of the need for the project.

Review Appraiser – Mr. Anthony Lockly of Lockly Valuation Services serves either as the lead appraiser or as the review appraiser on eminent domain projects. Anthony has over 28 years of experience in real estate valuation. Lockly Valuation Services has performed appraisals for the Wisconsin Department of Transportation (WisDOT), Wisconsin Department of Justice (WisDOJ) as well as numerous county and municipal departments of transportation and economic development.

In addition to his governmental agency work, he has performed appraisals on a wide variety of projects for private industry, including banks and telecommunications companies.

Hazardous Materials Testing – Mr. Mark Davis, the owner of Davis Consulting & Contracting (DCC) has been a Certified Asbestos Supervisor since 1999 and a Certified Asbestos Inspector since 2001. DCC is a certified asbestos inspection company with the State of Wisconsin Department of Health Services (DHS) and a registered company with the State of Wisconsin Department of Commerce – Safety & Buildings Division. DCC currently holds a master contract with the Wisconsin Department of Transportation Northeast Region, inspecting all buildings the State owns in this region prior to demolition.

STEPHEN D. SIMPSON
Project Manager/Negotiator

Project Manager

Overall supervision of various projects in compliance with the Wisconsin Real Estate Program Manual for the Wisconsin Department of Transportation; Northeast Region, Southeast Region and Southwest Region. Duties on these projects included acquisition, title research, Acquisition Stage Relocation Plan and implementation and the supervision and review of appraisal and acquisition document preparation. Responsibilities included quality assurance, staff training and administration, scheduling and budgets, as well as functioning as liaison to the general public and the Department. Addressed and resolved contractual matters and developed budgets for new projects.

Responsible for overseeing the acquisition of copper and fiber telecommunications rights-of-way for various projects for TDS Telecom - Midwest Region (Madison, WI). The projects involved title research and acquisition of parcels as well as coordination with local officials and client company engineering and administration.

Relocation Specialist

Prepared the Acquisition Stage Relocation Plan for four residential units on Good Hope Road in Menomonee Falls, one business in Pleasant Prairie, two residential units on Rawson Avenue in the City of Franklin and one residential unit on CTH "ES" in Mukwonago. Served as relocation agent for the relocation of three families in Juneau, Wisconsin, four families in Menomonee Falls and assisted in the relocation of four additional families in Menomonee Falls.

Real Estate Specialist

Duties included developing and maintaining land acquisition programs for various clients. Responsible for functioning as liaison between various governmental agencies and private industry and the general public. Coordination with outside legal counsel, as well as subcontracting entities such as surveyors and brokers when required. Total financial accountability for the projects, including subcontractor procurement, project time and materials was also required.

Real Estate Review Appraiser

Reviewed appraisals prepared for the Wisconsin Department of Transportation, Winnebago County Highway Commission, Walworth County Highway Department, Kenosha County Department of Public Works, Waukesha County Transportation Department, Dodge County, the City of West Allis, the City of New Berlin, the City of South Milwaukee, the City of Oak Creek and the Village of Menomonee Falls.

EDUCATION

- | | |
|---|---|
| <input type="checkbox"/> Bachelor of Business Administration -
University of Oklahoma | <input type="checkbox"/> Relocation Assistance - IRWA Course 501 |
| <input type="checkbox"/> Effective Speaking, Human Relations and Relocation
Courses | <input type="checkbox"/> Advanced Relocation Assistance 1-
IRWA Course 505 |
| <input type="checkbox"/> WisDOT Eminent Domain Appraisal Seminar | <input type="checkbox"/> Business Relocation-IRWA Course 502 |
| <input type="checkbox"/> Pre-Trial preparation for Relocation Agents,
Negotiators and Appraisers | <input type="checkbox"/> Bargaining Negotiations - IRWA Course 205 |
| | <input type="checkbox"/> Appraisal of Partial Acquisitions -
IRWA Course 401 |

PROFESSIONAL LICENSES

- | | |
|--|--|
| <input type="checkbox"/> Wisconsin Licensed Appraiser #932-004 | <input type="checkbox"/> Wisconsin Notary Public |
|--|--|

PROFESSIONAL MEMBERSHIPS

- International Right-of-Way Association - Badger Chp. 17

SARAH J. SIMPSON
Real Estate Specialist

EXPERIENCE

Real Estate Specialist

Negotiated the acquisition of parcels for the Wisconsin Department of Transportation, Northeast Region and Southeast Region, Waukesha County Transportation Department, the City of Kenosha, Kenosha County, Racine County, Rock County and Fond du Lac County. Possesses a working knowledge of the brochure entitled "The Rights of Landowners Under Wisconsin Eminent Domain Law", Chapter 3: Acquisition of The Real Estate Program Manual and The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970.

Relocation Specialist

Assisted in the development of Conceptual Stage Relocation Plan for the Wisconsin Department of Transportation Southwest Region for STH 32, developed the Acquisition Stage Relocation Plan for the Northeast Region for USH 14. Assisted in the relocation of twelve (12) residential families and nine (9) commercial businesses on Janesville Road in the City of Muskego for the reconstruction of CTH "L" in Waukesha County. Developed the Acquisition Stage Relocation Plan for the Wisconsin Department of Transportation Northeast Region STH 15 Bypass and successfully relocated five (5) residential families and two (2) move only relocations and currently working with three (3) remaining early acquisition residential families. Possesses a working knowledge of the brochure entitled "Wisconsin Relocation Rights: Business, Farm and Nonprofit Organizations" and the brochure entitled "Wisconsin Relocation Rights: Residential".

EMPLOYMENT

2009 – Present: The Highland Group of Wisconsin, Inc.

2008 – 2009: Spackle Gallery, LLC
Co-founder, Curator of Artwork. Spackle is a collective independent art gallery that exists as a professional venue for upcoming artists to exhibit, develop and advance innovative art of diverse media and content. Member of MIGA (Milwaukee Independent Art Gallery Association).

2006 – 2009: University Club of Milwaukee
From 2008 – 2009 employed as the Dining Room Manager. Responsible for overseeing waitstaff in the dining room as well as organizing and overseeing banquets for up to 300 people. Responsible for training staff members to serve a la carte as well as banquet service in the fine dining industry including wine service.
From 2006 – 2008 employed as a Server/Banquet Server

EDUCATION

- University of Wisconsin – Milwaukee, B.F.A. in Painting and Drawing – 3.6 GPA with High Honors Magnum Cum Laude
- Relocation Assistance-IRWA Course 501
- Business Relocation-IRWA Course 502
- Computing Replacement Housing Payments- IRWA Course 504
- Advanced Business Relocation-IRWA Course 506
- Principles of Land Acquisition-IRWA Course 100
- NHI Course 141050 – Fed Aid R/W Requirements for LPAs

PROFESSIONAL MEMBERSHIPS

- International Right of Way Association – Badger Ch. 17

PROFESSIONAL LICENSES

- Wisconsin Notary Public

RENEÉ B. HELD
Documents Specialist

EXPERIENCE

Documents Specialist

Responsible for the final preparation of Before and After appraisals in MS Word format for the Wisconsin Department of Transportation highway acquisition and wetland mitigation projects. Duties included proofreading appraisal reports for grammar and spelling and data conversion of appraiser's reports into a D.O.T. - supplied computer format. In addition, is responsible for the preparation of acquisition documents for all projects.

Preparation of easement acquisition documents for several system expansion projects for TDS Telecom and its associated local operating companies in Central Wisconsin. Duties included preparation of acquisition documents and establishing a file management system for the accurate tracking of project property documents, both for public recording and archiving purposes. In addition, as a Notary Public, witnessed and notarized document execution in the course of easement acquisition.

Documents Clerk

Prepared final title reports from Title Specialist field reports for the State Highway 67 expansion project for the Wisconsin Department of Transportation, District Three.

Prepared Right-of-Way acquisition documents for system capacity expansion projects (fiber optic) for Illinois Bell Telephone on the Wisconsin/Illinois border.

Administrative Assistant

Duties varied and included purchasing, typist, receptionist, document preparation and general clerical support of regional operations office in Watertown, Wisconsin.

Secretary

Performed office management and general and project related clerical duties for a metal building contractor.

General office and real estate related clerical duties for two Wisconsin Real Estate Brokerage firms.

EDUCATION

- Graduate - Washington County Union High School, Washington County, Wisconsin
- Word Perfect 6.1 for Windows - Moraine Park Technical College
- Microsoft Word - Moraine Park Technical College

STEVEN G. MANN
Appraiser

EXPERIENCE

Twenty eight years experience as a professional real estate appraiser and negotiator including agricultural, commercial, manufacturing, industrial, vacant land and residential properties.

Managed various appraisal projects for the Southeast Region of the Wisconsin Department of Transportation. These projects included full narrative appraisals of partial and whole takings, nominal appraisal acquisitions and acquisitions with full narrative appraisals. Acquisition services included working with both the property owner and design engineering firm to insure the property owners understanding of the need for the project.

Completed commercial appraisal and property acquisitions on State Highway 12, Main Street in Whitewater, nominal appraisals and acquisitions on Highway 83 in Hartford, full narrative total acquisition appraisals on State Highway 31 in Kenosha County, nominal appraisal and acquisitions on Milwaukee's Lake Arterial Freeway, partial acquisition appraisals on Highway 20 & I-94 in Racine County, partial acquisition appraisals on Highway Q & I-94 in Kenosha County and many small projects and individual appraisals throughout Southeast Wisconsin.

Completed full narrative appraisals for the City of Kenosha, Village of Pleasant Prairie, City of Racine, Town of Caledonia and a project with full narrative commercial appraisals at County Line Road and State Highway 41 in the Town of Germantown for the Washington County Highway Department. Completed a 33 parcel negotiation and acquisition project for the City of Oshkosh.

EDUCATION

B.A. - Business Administration -UW Oshkosh

International Right of Way Association

- Principles of Real Estate Acquisition
- The Appraisal of Partial Acquisitions - Course 401
- Valuation of Contaminated Properties - Course 407

Society of Real Estate Appraisers

- Introduction to Appraising Real Estate - Course 101
- Applied Residential Property Valuation - Course 102

Appraisal Institute

- Capitalization Theory & Techniques - Part A and B
- Advanced Writing Skills for the Residential Appraiser

Wisconsin Department of Transportation

- Local Public Agency Seminar
- WisDOT Negotiations Seminar

PROFESSIONAL LICENSES

- Wisconsin Certified Residential Appraiser License - #541
- Wisconsin Licensed Real Estate Broker

ANTHONY L. LOCKLY
Certified General Appraiser

EXPERIENCE

Real estate analyst with excellent evaluation skills and extensive public and private sector experience in property appraisal and mortgage portfolio risk assessment. Experienced in market research, property inspection, financial forensics, database management, asset valuation, and geographic mapping.

Since 2009, as the owner of Lockly Valuation Services, LLC, provides valuation, brokerage and consulting services for the purchase, development and financing of commercial, industrial and residential real estate. Specialized services include appraisals for eminent domain projects and property tax assessment appeals. Master Contract with WisDOT for eminent domain appraisals and other real estate services.

Served as the Senior Appraiser of a staff of 36 appraisers for the City of Milwaukee's Assessor's office from 1990 to 2005. Annually appraised over 500 commercial properties in Milwaukee's Central Business District, with an accumulative value of over \$1.3 billion. Property types included Class-A office towers, convention hotels, parking ramps, mixed-use retail and residential projects. Experienced in pre-trial board-of-review case preparation and defense, as well as, valuation dispute resolution.

As the Senior Valuation Consultant for American Appraisal Associate, Inc. from 2005-2006, provided valuation and consulting services for real estate acquisition, disposition, financing, income tax reporting, property tax disputes and proposed development projects. Industries of focus included hotels and casinos, recreational and entertainment facilities, shipyards and maritime services, office complexes and heavy industrial facilities.

Coordinated product development, marketing and sales for property tax management and valuation software. Conducted client presentations & training sessions to achieve and maintain a 50+% market share in Wisconsin. Managed strategic planning of service offerings and coordinated the development of potential markets, resulting in a 15% increase in properties under management and a 30% increase in aggregate property value. Appraised commercial properties throughout southeastern Wisconsin.

Managed the appraisal review processes for the commercial mortgage lending department. Supervised risk mitigation and portfolio monitoring team of 15 loan analysts to complete internal appraisals for all commercial real estate collateral and established investment-rating grades for each of the portfolio's 1,000 commercial mortgages. Developed valuation, reporting and data mapping tools that streamlined the data collection, analysis and reporting processes for loan underwriting and portfolio asset management.

EDUCATION

- Cornell University, Bachelor of Science in Economics
- University of Wisconsin – Milwaukee, Geographic Information System (GIS) Certificate Candidate
- Milwaukee Area Technical College, A.A.S. in Computer Network Administration
- Appraisal Institute, Completed all courses for the MAI designation – over 366 Credit Hours
- International Association of Assessing Officers, Completed all courses for the CAE designation
- H&R Block, Inc – Tax School, Over 185 credit hours in federal and state income tax law

PROFESSIONAL LICENSES

- Wisconsin Certified General Appraiser #375-10
- Wisconsin Real Estate Broker

CERTIFICATIONS

- Assessor II – State of Wisconsin
- Tax Specialist 3 – H&R Block

MARK R. DAVIS
Asbestos Inspector

EXPERIENCE

Owner of Davis Consulting & Contracting, LLC based in Fond du Lac since 2009. As the owner, provides services in Project Management, Project Supervision, Asbestos Inspections and consulting.

EDUCATION

- University of Wisconsin – Oshkosh, Bachelor of Science Degree – Major in Criminal Justice; Minor in Sociology with an Emphasis on Environmental Studies

CERTIFICATIONS

- Certified Asbestos Supervisor since 1999
- Certified Asbestos Inspector since 2001
- State of Wisconsin – Department of Health Services (DHS)
- Registered Company with the State of Wisconsin Department of Commerce – Safety & Buildings Division

Each project team member understands Waupun's technical and procedural requirements to assure that the work each individual produces will be exemplary. Highland will conduct staff meetings to assure that our personnel have a thorough understanding of the standards governing the project. The Highland Group has an experienced project team with more than 70 years of combined experience that is backed by a fully trained support staff.

We are well aware of the time frame allotted for the completion of this project. We are committed to successfully complete this project for Waupun on time and within budget.

We are available to begin this project immediately.

Project Management Schedule/Timeline

Completion of each step of the following time line is contingent upon timely approvals by Waupun. Any delay in approvals or staking will delay each subsequent step.

After field reviewing the project, we have estimated that damages for all parcels, with the exception of Parcel 23, will be less than \$10,000 and can therefore be put on the Nominal Payment Parcel Report. If any of these nominal parcels rejects the nominal offer or exercises their right to an appraisal, The Highland Group's appraiser will prepare an appraisal at that time.

We anticipate completion of the appraisal for parcel 23 by May 5, 2014. Once the offering price report has been approved by Waupun, the relocation specialist will submit the Replacement Housing Payment Computation to the City for approval. Both the offer and the relocation package will then be provided to the owner at the initiation of negotiations by June 13, 2014.

The owner's 60 days to obtain a second opinion will expire on August 12, 2014. This timeframe will allow ample time to negotiate for the acquisition of the parcel and allow the displacee time to find replacement housing by Fall of 2014. We project that the improvements will be razed, the hole filled and the site restored prior to Winter 2015.

NOMINAL PARCEL ACQUISITIONS

NPPR completed by...	3/7/14	Review owner's appraisal by...	10/21/14
Approved by...	3/21/14		
		Issue Jurisdictional Offers by...	11/10/14
Make all nominal offers by...	4/4/14		
		Take occupancy by...	1/1/15
Appraise nominal parcels by...	8/1/14		
Approved by...	8/8/14	All parcels acquired on or before...	4/1/15
Make all appraised nominal offers on or before...	8/15/14		
Owner's appraisal due	10/14/14		

Since the inception of The Highland Group in 1995, we have appraised and acquired in excess of 3,900 parcels for WisDOT and local public agencies under Chapter 32. These parcels were acquired in accordance with WisDOT's Real Estate Program Manual and the LPA Manual.

The following is a partial list of projects completed by The Highland Group along with associated references.

HIGHWAY ACQUISITIONS

Local Public Agencies –

Washington County Highway Department

- Project I.D. #2742-02-20, CTH "W", (7 parcels)
- Project I.D. #2711-05-00, CTH "M", (4 parcels)
- Project I.D. #2777-02-20, CTH "Y", (27 parcels)
- Project I.D. #312-65, 312-66, CTH "X", "H"/"XX", (54 parcels)
- Project I.D. #2751-06-20, CTH "Q", (57 parcels)
- Project I.D. #4868-00-20, CTH "A", (100 parcels)

Fond du Lac County

- Project I.D. #4831-04-21, CTH VV, Fond du Lac (29 parcels)

City of Kenosha

- Project I.D. #3230-07-00, 75th Street (67 parcels)
- Project I.D. #3240-08-20, Sheridan Road (24 parcels)

Kenosha County Department of Public Works

- Project I.D. #2011-0116.13, CTH "G" (26 parcels)
- Project I.D. #2011-0116, CTH "G" (25 parcels)
- Project I.D. #3728-01-20, 22nd Avenue/CTH "Y" (12 parcels)
- Project I.D. #3766-01-22, CTH "E" (110 parcels)

Village of Mt. Pleasant

- Project I.D. #TMP-008, Stuart Road, (49 parcels)
- Project I.D. #TMP-003, Pike River Restoration Project, Phase III (14 parcels)
- Project I.D. #TMP-002, Pike River Restoration Project, Phase II (10 parcels)
- Project I.D. #TMP-001, Pike River Restoration Project, Phase I (12 parcels)

City of New Berlin

- Project I.D. #K-362 & W-136, Moorland Blvd., (17 parcels)
- Project I.D. #2722-06-70, W. National Ave., (15 parcels)
- Project I.D. #2783-0-02, S. Calhoun Rd., (39 parcels)

Racine County

- Project I.D. #2704-02-73, CTH "C"/Airline Rd., (11 parcels)
- Project I.D. #2400-04-70, CTH "Y"/Meachem Rd., (43 parcels)
- Project I.D. #RC-00-08, CTH "FF", (13 parcels)

Rock County

- Project I.D. #5989-02-85 & 3662-00-01, CTH "S" (63 parcels)

Waukesha County Transportation Department

- Project I.D. #2753-06-71, CTH "VV", Menomonee Falls (40 parcels)
- Project I.D. #2753-06-70, CTH "VV", Menomonee Falls (55 parcels)
- Project I.D. #06-2380(13)(A), CTH "L", Muskego (28 parcels)
- Project I.D. #04-2779(13), CTH "Y", New Berlin (36 parcels)

Wisconsin Department of Transportation –

Northeast Region

- Project I.D. #1146-75-21, STH 15, Hortonville Bypass (10 early acquisition parcels)
- Project I.D. #9532-03-21 & 9532-03-22, STH 160, Pulaski (72 parcels)
- Project I.D. #4075-20-21, STH 146, Little Chute (135 parcels)
- Project I.D. #4075-21-21, STH 96, Kaukauna (99 parcels)
- Project I.D. #9180-18-21, STH 22, Oconto Falls (93 parcels)

Southwest Region

- Project I.D. #6707-00-24, STH 146, Columbia County (27 parcels)
- Project I.D. #1066-02-21, I94, Dane County (32 parcels)

Southeast Region

- Project I.D. #4010-05-21, STH 144, Washington County (115 parcels)

THE HIGHLAND GROUP REFERENCES

The following projects were completed by The Highland Group in the past three years.

Client Name: Fond du Lac County

Description of Actual Work Performed: **Acquisitions**
Project I.D. #15278, 14785, CTH "M"
11 acquisition parcels, 4 utility parcels
12/20/12 – 5/1/13

Contact Information: Thomas J. Janke, Highway Commissioner
920/929-3488
301 Dixie St., P.O. Box 1234
Fond du Lac, WI 54936
Tom.janke@fdlco.wi.gov



Client Name: Kenosha County

Description of Actual Work Performed: **Acquisitions**
Project I.D. #2011-0116.13, CTH "G"
23 acquisition parcels, 3 utility parcels
11/7/12 – 4/7/13

Contact Information: Gary Sipsma, Highway Division Director
262/857-1859
19600 75th St.
Bristol, WI 53104
gsipsma@co.kenosha.wi.us



Client Name: Wisconsin Department of Transportation –Northeast Region

Description of Actual Work Performed: **Acquisitions**
Project I.D. #9532-03-21/22, STH 160, 72 parcels
1/26/12 – 3/1/13
Project I.D. #4075-20-21, STH 96, 135 parcels
12/1/11 – 5/3/13

Contact Information: E. Jay Viste, Real Estate Project Manager
920/492-7715
944 Vanderperren Way,
Green Bay, WI 54324
EJay.Viste@dot.wi.gov

MANN & ASSOCIATES REFERENCES

Client Name: City of Green Bay, Department of Public Works

Contact Information: Thomas H. Giese, Right of Way Specialist
920/448-3111
100 N. Jefferson Street Room 300
Green Bay, WI 54301
TomGi@greenbaywi.gov



Client Name: City of Clintonville

Contact Information: Lisa A. Kuss, City Administrator
715/823-7600
50 Tenth Street
Clintonville, WI 54929
lkuss@clintonvillewi.org



Client Name: Town of Black Wolf

Contact Information: Rob Keller, Supervisor II
920/379-0717
380 E. Black Wolf Ave.
Oshkosh, WI 54902
rob@townofblackwolf.com

LOCKLY VALUATION SERVICES REFERENCES

Client Name: City of Oshkosh, Department of Public Works

Contact Information: David Patek
920/236-5065
215 Church Ave.
PO Box 1130
Oshkosh, WI 54903-1130
DPatek@ci.oshkosh.wi.us



Client Name: Wisconsin Department of Transportation – Northeast Region

Contact Information: Curt Van Erem, Real Estate Project Manager
920/492-5742
944 Vanderperren Way,
Green Bay, WI 54324
Curtis.vanerem@dot.wi.gov



Client Name: Wisconsin Department of Transportation – Southeast Region

Contact Information: Debra Sinkula, Real Estate Project Manager
262/548-8757
141 NW Barstow Street
Waukesha, WI 53187
debra.sinkula@dot.wi.gov

DAVIS CONSULTING & CONTRACTING REFERENCES

Client Name: TRC Environmental Corporation

Description of Actual Work Performed: Worked with TRC Corporation for Subcontract Work and Project Management on Bridges on USH 41 Corridor Project from 2010 - 2013

Contact Information: Dan Haak, Engineer
608/826-3628
708 Heartland Trail Suite 3000
Madison, WI 53717
dhaak@trcsolutions.com



Client Name: Guelig's Waste Removal & Demolition, LLC

Description of Actual Work Performed: Various asbestos abatement/removal work before demolition projects from 2009 through 2013

Contact Information: Bob Guelig, Owner
920/477-2068
N4456 Hwy. 45
Eden, WI 53019
gueligwaste@yahoo.com



Client Name: Wisconsin Department of Transportation – Northeast Region

Description of Actual Work Performed: Asbestos inspection contract for asbestos inspection services before moving or demolishing any structures owned by WisDOT, 2010 through 2013

Contact Information: Kristin Schrader, Real Estate Specialist
920/492-7704
944 Vanderperren Way
Green Bay, WI 54324-0080
kristin.schrader@dot.wi.gov

CONCLUSION

The Highland Group appreciates the opportunity to submit this appraisal and acquisition proposal. We believe Highland is well positioned with adequate staff to provide quality and responsive services to Waupun

Our past experience with similar projects eliminates the learning curve. Our experienced appraisers and real estate specialists are capable of beginning the process with minimal review, thus eliminating the common occurrence of slow project starts.

The project team consisting of The Highland Group, Mann & Associates, Lockly Valuation Services and Davis Consulting & Contracting is comprised of a seasoned team of real estate specialists and support staff that are committed to providing timely and quality service to our clients. The project management team for the Main Street project is composed of senior level staff who commands a thorough understanding of highway acquisition requirements under Wis. Stat. 32.

Once again, The Highland Group would like to express its appreciation to Waupun for the opportunity to submit this proposal for review. We are prepared to fulfill your requirements and meet your project deadlines. Understanding your need for prompt results, we are available to begin this project immediately. If you have any questions regarding this proposal or require additional information, please contact Stephen D. Simpson at 920/262-2150.

We look forward to your favorable acceptance of our proposal.

**Cost Sheet for RFP for Project ID 6090-06-23
Main Street, City of Waupun
State Street to County Park Road**

Service Provided	Method of Payment	Estimated Number	Cost	Total Estimated Cost
Project Management	Lump Sum	1	\$900	\$900
Project Data Book	Lump Sum	1	\$6,000	\$6,000
Appraisals	Each (Before/After) Nominal to Appraisal	1	\$2,000	\$2,000
		9	\$1,000	\$9,000
Appraisal Review	Each	10	\$400	\$4,000
Acquisition for Land Parcels – TLE only	Each	75	\$700	\$52,500
Acquisition for Land Parcels – Fee or Highway Easement	Each	18	\$700	\$12,600
Relocation Services	Lump Sum	1	\$1,500	\$1,500
Acquisition Stage Relocation Plan	Lump Sum	1	\$600	\$600
Asbestos/Hazardous Contaminant Assessment	Each	1	\$450	\$450
Coordination, oversight, and development of razing and abatement contract	Each	1	Included in Project Management Cost	Included in Project Management Cost
Encroachment resolution	Each	16	Included in Acquisition Cost	Included in Acquisition Cost
Total Cost Not to Exceed				\$88,950