**DRINKING WATER SOURCE PROTECTION GRANT PROGRAM**

**Appraisal Contracting Worksheet**

*Oregon Watershed Enhancement Board*

# Instructions

OWEB strongly encourages DWSP applicants to use this worksheet to determine the nature and extent of an appraisal assignment by describing the property and its relevant characteristics and explaining the property rights to be appraised. The boxes below will expand to fit the amount of text entered.

# Administrative Information

**Appraisal Project Name and Street Address, or other Unique ID**

## Time Frame

Indicate the date by which you would like to receive the finished appraisal report from the appraiser. Because of other work commitments, appraisers typically need 60 to 90 days to complete a report. Keep in mind that if a timber cruise is required, the appraisal could take up to an additional month. Finally, allow 2 months for OWEB’s review of the appraisal.

a. Appraisal report requested by (date):

b. Number of Copies Requested. Hard Copies:       Digital Copies:

## Purpose of the Appraisal

## OWEB Applicant Information

*(Cells will expand as you type.)*

Organization:

Contacts(s):

Phone:

Address:

City, State, Zip:

E-mail Address:

## Property Owner Information

*(Cells will expand as you type.)*

Name(s):

Phone:

Address:

City, State, Zip:

E-mail address:

## Property Owner’s Agent’s Information

Include if property owner is having an agent or manager represent them with the appraiser.
*(Cells will expand as you type.)*

Name:

Firm:

Phone:

Address:

City, State, Zip:

E-mail address:

Will others be present for the property inspection?

[ ]  Yes [ ]  No If yes, include names, organizations, and contact information.

## Property Rights to be Appraised

Be specific about the property interest(s) to be acquired. OWEB provides grants for the purchase of estates in fee simple absolute, conservation easements, covenants, equitable servitudes, and other similar agreements (collectively referred to as “Protective Instruments”).

**Total Acreage to be Appraised:**

**Number of Parcels to be Appraised:**

Does the property owner also own other tracts of land in the vicinity? [ ]  Yes [ ]  No

If so, are any of them contiguous to the subject property? [ ]  Yes [ ]  No

## Property Location

Provide county and miles from major landmark or city

## Assessor’s Account No(s) and Map(s) and Tax Lot(s)

# Property Overview

Provide a description of the property’s size, shape, zoning, water availability (rivers, creeks, springs, and wells), utilities, agricultural land designations and historical yields, wetland designations, adjoining property ownership, etc., as appropriate.

## Past and Current Use of the Property

## Property Sales and Listing History

a. Is the property currently listed for sale or has it been listed for sale during the last 5 years? [ ]  Yes [ ]  No

b. Has the property sold in the last 10 years? [ ]  Yes [ ]  No

If the owner or owner’s representative answered yes to either of the above questions, provide the name and contact information for a party who is familiar with the listing(s), transaction(s) or both, such as the current owner, past owner or seller, a broker, etc. For sales, also provide the following transaction details: name of seller, name of buyer, date of sale, sale price, and terms of sale. If the property has sold more than once in the last 10 years, include all instances.

Has the property been appraised in the last 5 years? [ ]  Yes [ ]  No

If yes, for whom and for what purpose? Obtain a copy of the appraisal.

## Title

Are there any outstanding rights, reservations, easements, or exceptions to title that will be accepted as "subject to" the title? [ ]  Yes [ ]  No

If so, describe each in enough detail that an appraiser can assess if it might impact value. Include items in the property’s title report and other items not recorded but found on land, expected to run with the land or both. If a conservation easement is proposed, attach a draft copy of the conservation easement with a statement that it resembles the final in form and content. **OWEB highly recommends that you seek OWEB review of the draft Protective Instrument, via the grant application process, *before* the Protective Instrument is appraised.** This will ensure that the draft Protective Instrument is consistent with the purpose of an OWEB grant before resources are expended for the appraisal.

## Access

a. Does the property have recorded legal access? [ ]  Yes [ ]  No

b. Does the property have physical road access? [ ]  Yes [ ]  No

Provide details about the property’s existing access in relation to the nearest publicly maintained road.

## Timber

Does the property include merchantable timber of contributory value? [ ]  Yes [ ]  No

If yes, attach a current, complete timber inventory including a qualitative analysis. If the timber inventory uses sampling to determine timber value, then the inventory’s sampling error for merchantable net Scribner board foot volume must be 10% or less at the 68% confidence interval. If you have questions about soliciting for timber valuation services or designing timber inventories, please contact OWEB staff.

## Minerals

a. Is the mineral estate part of the fee estate? [ ]  Yes [ ]  No

b. Are there known valuable minerals? [ ]  Yes [ ]  No

If you answered yes to either of the above questions, briefly explain, and provide supporting documentation below. Keep in mind that OWEB may decide not to provide acquisition grant funds for a property with a split mineral estate because of the risk posed to the property’s conservation values. See OWEB’s title guidance document for more information.

## Water Rights

a. Does the property have any water rights? [ ]  Yes [ ]  No

If yes, describe the source, indicate when they were last used, and attach any pertinent documents and reports.

b. Are the water rights going to be totally or partially deeded to the OWEB applicant; or, are the water rights going to be retained by the owner or deeded to an unrelated party as part of the transaction?

## Permanent Plantings

Does the property have any permanent plantings such as orchards, vineyards, or pulp trees? [ ]  Yes [ ]  No

If so, state the type of plantings and their age, and the number of acres planted.

## Improvements

Does the property have any improvements (buildings or other structures)? [ ]  Yes [ ]  No

If there are improvements, list them below and explain whether they will be acquired with the property. If improvements will be razed or removed before closing, list them below and provide an explanation.

# Information to Provide to the Appraiser Along with this Worksheet as Available

## 1) OWEB Appraisal Guidelines and Supplemental Standards

Include a copy of the **CURRENT** guidelines and standards, available on the [DWSP webpage](https://www.oregon.gov/oweb/grants/Pages/DWSP.aspx) of the OWEB website as an appendix to the DWSP Program Manual. Ensure that the appraiser contacts OWEB’s review appraiser before beginning work and receives the review appraiser’s pre-approval of any extraordinary assumptions or hypothetical conditions.

## 2) Maps and Aerial Photos

Attach maps and aerial photos, including a location map that shows the property’s location in relation to the larger area, a plat map of the property itself, and an aerial photo of the property. If the property is less than the total acreage the seller owns in the neighboring area, include a map that shows both the property that will be acquired and the rest of the acreage owned by the seller. Include any other maps, photos, or exhibits you think will be helpful to the appraiser. As relevant, provide information regarding plans for post-closing access to the property that will be acquired and the remainder land owned by the seller, including a map depicting the location of the planned access and a description of the access.

## 3) Preliminary Title Report

Include a copy of the current preliminary title report. Be sure it has an up-to-date, accurate legal description.

## 4) Copies of Property Listings

Include a copy of any current “For Sale” listings of the property or any listing occurring within the last 3 years.

## 5) Any Recent Appraisals of the Property

Include a copy of any subject property appraisals made during the last 5 years.

## 6) Any timber inventories or appraisals made on the property

Include copies of any timber survey, inventory, professional cruise, or appraisal made on the property.

## 7) Any other pertinent reports such as planning, geology/minerals, flood hazard, or water.

Provide copies.

## 8) Protective Instrument

Provide the appraiser with a copy of the Protective Instrument. Caution: If a draft Protective Instrument is used by the appraiser, the final Protective Instrument must contain substantially the same restrictions as contained in the draft. Otherwise, the appraisal may have to be revised to be consistent with the changes in the Protective Instrument restrictions. This could delay the acquisition.