**Template for Requesting Valuation Services for Land Exchanges**

File Code: 5430 Date:

Route To: 5410

Subject: Request for Valuation Services for Land Exchange

To: Regional Appraiser

I would like to request  valuation consultation for use in feasibility analysis or  valuation services for final decision making regarding potential Exchange Agreement execution in compliance with Forest Service Manual 5410.3, paragraph 2. This case will hereafter be referred to under file designation 5430 and identified by the following official case name:       Land Exchange.

Descriptions of the estates proposed to be exchanged have been identified: The intended use of appraisals and corresponding technical reviews (or Appraisal Waiver or Statement of Approximately Equal Value, if appropriate) is to provide the authorized officer with a defensible basis for decision making regarding the proposed exchange.

The  *(e.g. non-Federal property owner, non-profit organization, Forest, etc.)* will pay for the cost of the appraisals. If appropriated funds or funds collected by the agency are used, the job code is       and the override code is      .

NON-FEDERAL PROPERTY OWNER’S NAME(S), ADDRESS(ES), AND TELEPHONE NUMBER(S) *(include third-party facilitator information if present)*:

ENCLOSED DOCUMENTS CHECKLIST: *The following documents must either be enclosed or a link to their location on the “O” drive provided (preferred). If a document is not applicable in this case, state why*.

Feasibility Analysis Report: *When requesting a valuation consultation, include a draft copy of the Feasibility Analysis Report, if it is available. If it is not yet available for a valuation consultation request, then please simply state that. When requesting actual appraisals, include a signed copy of the Feasibility Analysis Report, including all the exhibits.*

Water Rights Analysis Report: *If water rights are to be acquired or disposed of, include a Water Rights Analysis Report. Include all documents pertaining to any water rights being deeded.*

Preliminary Title Commitment for non-Federal property, with a copy of all applicable encumbrance documents as listed on Schedule B of the Commitment. *The Preliminary Title Commitment should be no older than 6 months prior to the date of the appraisal request letter. Include plans to mitigate the encumbrances that may hinder conveyance*. *The title company should include copies of documents that describe any reservations of minerals, easements, and any other reservation for the estate appraised.*

A copy of the deed vesting title to the current non-Federal owner(s) and, if applicable, information on current listings, options, etc.

Land Description Verification Forms, Non-Federal Land, FS-5400-40 and Federal Land, FS-5400-41.  *If a request for valuation consultation, Land Description Verification forms are not required if preliminary land status for Federal lands are provided.*

Federal Land Status Report Summary for the Federal lands: *Include copies of encumbrances. Encumbrances include but are not limited to special use permits, easements, mining claims, withdrawals, grazing obligations, occupancy trespass, FERC permits, or licenses requiring a “waiver*.”

Agreement to Initiate (ATI): *When requesting a valuation consultation, include a draft copy of the ATI, if it is available. If it is not yet available for a valuation consultation request, then please simply state that. When requesting actual appraisals, include a signed copy of the ATI and all the exhibits.*

Colored Forest map(s) showing the property to be appraised, the surrounding landownership pattern (Federal versus private), and the nearest community. *Include a legend with each map. The legend shall contain the forest name; case name; and township, range, and section(s); north arrow; scale; name or initials of preparer; and date prepared. Do not include acreage on the map*.

Original secondary base series maps (1 to 24,000 Quad maps or topographic maps), outlining the property to be appraised. *Include a legend with each map containing all of the information as mentioned above including the Quad name*.

Certificate of Inspection and Possession, Form FS-5400-28: *List all of the physical evidence of actual use and occupancy on the non-Federal land.*

Reports and/or letters of clearance concerning any resource that has significant presence on the property to be appraised: *Include all specialist reports such as Wetland(s) and Floodplain(s) Report, Water Rights Report, Minerals Report, Biological Evaluation, T&E, Heritage Report, and any other resource reports available*. *While not required with a request for valuation consultation, narratively explain that appropriate specialist verified any anticipated concerns or reservations. In absence of complete mineral reports, a statement of the mineral rights for each ownership and the exact mineral estate proposed to be conveyed is required, and a date when the mineral report is expected. All specialist reports shall be provided prior to the completion and official review and approval of appraisal reports.*

Improvements located on the property to be appraised. *List buildings, sewer systems, utilities, and so forth. Describe their disposition if the proposed transaction occurs. Note any trespasses. Include recent photos of the improvements along with the dimensions, age, and condition of each structure.*

Case background and controversies expected: *Include a brief history of case negotiations including third-party involvement. Inform the appraiser if there are any controversies to be aware of. Will the appraiser have any trouble accessing the land? Could there be trouble while inspecting the property or doing research? Note any public and political opinions regarding the case*.

All Appropriate Inquiry (AAI) Process: *Is not required for valuation consultation phase. However, if anything is known to be a concern, narratively explain following these italics.* *For actual appraisals being requested, provide documentation or consult with Appraiser.*

Permission to appraise: *Include a copy of the authorization, signed by the non-Federal property owner, for the appraiser and accompanying agency personnel to enter upon and appraise the property, if such authorization is not already included in the ATI.*

Property Information: *Include directions on how to get to the property, as well as, the physical condition of the access, such as type of road, trail, or no improved access. Describe the legal access from a public road*.

I understand that the Regional Appraiser will make assignment based on the requirements in FSM 5410.42c, 5410.6, and 5411. This assignment, when completed by a Forest Service staff appraiser, falls within the scope of that appraiser’s official duties as a Federal employee. I request that this valuation service be completed no later than:      . Should you need additional information, please contact       *(name and title)* at       *(phone number)*.

(Name)

Forest Supervisor

Enclosures