



## HAMNER, JEWELL & ASSOCIATES

### Government Real Estate Services

a division of Beacon Integrated Professional Resources, Inc.

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March 7, 2012

*By email to: [jilasin@SantaBarbaraCA.gov](mailto:jilasin@SantaBarbaraCA.gov)*

John L. Ilasin  
Project Engineer  
City of Santa Barbara  
Public Works Dept.  
630 Garden Street  
Santa Barbara, CA 93102

Subject: City of Santa Barbara – Mason Street Bridge Replacement Project  
Proposal for Acquisition and Relocation Assistance Services

Dear John:

This is to respond to your request for a proposal to provide acquisition and relocation assistance services in conjunction with the City's Mason Street Bridge Replacement Project, as follows:

- Partial acquisition and business relocation: 16 W. Mason Street (APN 033-075-006)
- Full Acquisition and business relocation: 15 W. Mason Street (APN 033-102-003)
- Full Acquisition and residential relocation: 20 W. Mason Street (APN 033-074-005)
- Partial Acquisition: 135 Kimberly Avenue (APN 033-074-019)

It is our understanding that the property at 15 W. Mason has one business tenant, Horny Toad Activewear, a manufacturer and distributor of wholesale clothing. The Project will require the removal of the building currently occupied by Horny Toad Activewear. It is further our understanding that the property at 16 W. Mason appears to house the laundry facility for the hotel across Mason Street; clearance of this site and relocation of this facility will be needed. For the property at 20 W. Mason Street, we understand that we are to assume that the full acquisition of this property as well as the relocation of the tenant/occupant will be required for the Project. Further, we understand that the partial acquisition at 135 Kimberly Avenue does not involve removal of any structures or tenant displacements. Thus, we are looking at three displacements that will require relocation assistance services: one residential and two businesses. If there are more residences or businesses that require relocation, then additional budget may be necessary.

From the information you have provided to me, it is my understanding that this project will involve federal funding and therefore the property acquisition and relocation assistance process must be completed in accordance with the provisions of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended. I assume that you will require our preparation of a relocation plan in conformance with Uniform Act provisions, so this proposal also includes and covers the preparation of a relocation plan.

We would be pleased to assist the City with these efforts. Hamner, Jewell & Associates has a long history of providing property acquisition and relocation assistance services to local public agencies.

Our property acquisition and relocation assistance experience is extensive and we have provided such assistance to most of the municipalities within the tri-counties area, including relocating multiple businesses in Santa Barbara over the years, dating back to the relocation of 32 downtown businesses to make way for the Paseo Nuevo Mall. We are familiar with the requirements of the California Government Code as well as with the relocation assistance requirements of the federal Uniform Act and City ordinances.

To aid us in completing the property acquisitions, you will provide us with project plans, right of way maps, and legal descriptions, area calculations and plats for any partial acquisitions. Our proposed budget includes preliminary title reports for four parcels. Once we have these items, we can obtain an appraisal in accordance with Government Code, Uniform Act, and eminent domain requirements, and prepare offer packages based upon the appraisal for presentation to each involved property owner. Our offer packages will include an offer letter, Appraisal Summary Statement, proposed Acquisition Agreement and Deed. These documents would be presented to you for City review and pre-approval prior to presenting offers to property owners. Concurrently, we will need to seek Caltrans review and approval of the appraisals, prior to proceeding with making the purchase offers. This proposal is conditioned on our being able to obtain appraisal reviews from Caltrans at no costs. After offer presentation, we would pursue agreements with each owner to finalize the property purchases. For any purchase efforts that do not culminate in mutually acceptable amicable agreements, we would coordinate with you and, if appropriate, with the City Attorney's office in conjunction with any required Necessity Hearing scheduling. For those on which we are able to reach final agreements, we would process all documents for necessary approvals and coordinate escrows, title insurance, lien clearances and closings. It is always our goal to reach mutually acceptable amicable agreements on the City's behalf.

For the relocations required, we will contact and interview site occupants to discuss the project and their relocation needs and preferences. We will conduct market research to identify comparable replacement properties for the occupants' consideration, and calculate a projection of the amount of relocation assistance benefits that the occupants might be eligible to receive. We will prepare a Relocation Plan in advance of making the property purchase offers and triggering relocation eligibility. For the business displacements, we would also have an appraisal made of the tenant-owned business fixtures and equipment. This appraisal would be used as the basis for an offer to purchase the fixtures and equipment for each business in accordance with State laws that mandate compensation for "Improvements Pertaining to the Realty."

We will provide the occupants with legally required notices regarding the status of the City's pending purchase of the properties and the occupants' rights for relocation assistance. We would work with the occupants by providing referrals for alternative sites for consideration. We would further assist the occupants by obtaining moving bids and providing information as to the extent of the financial assistance that would be available to aid with the cost of physically moving and successfully relocating the occupants/businesses from their current locations to a replacement location. Once a replacement site is selected, we would aid the occupants in planning and completing their move and calculate the amount of benefits that the tenant would be eligible to receive based upon the site selected, the relocation guidelines that apply, and the fixtures and equipment appraisals. We would complete appropriate relocation assistance claim forms for the occupants' signatures and submit such to you for processing and payment. Throughout our efforts we would communicate closely with you, providing written monthly status reports for transmittal with our monthly invoices.

For our services, we would bill monthly in accordance with our Time and Materials Fee Schedule, attached. We bill only for time and materials actually expended in the City's behalf and work closely with you in order to assure that our efforts are in line with the City's goals and interests. Any time

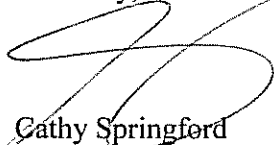
you work with people rather than a specific controllable task, it is always difficult to calculate in advance the exact amount of time it may take to complete our efforts. Our efforts are dependent upon the receptiveness and cooperation of the occupants, their willingness to actively look for and select an alternative replacement site, the availability of replacement sites, and the promptness in the City's processes, occupancy approvals for the replacement site(s), and timeline for the project. However, for your budgetary purposes, we would suggest that you allocate a budget of \$71,500 for this process. This budget will cover up to 385 hours of HJA staff time, \$1,000 of reimbursable expenses (mileage, postage, etc.), four acquisition appraisals, preliminary title reports on all four parcels, two fixtures and equipment appraisals of the improvements pertaining to the realty and an inventory of major movable equipment for Horny Toad Activewear and the laundry. The fixtures and equipment appraisal reports will include an estimate of the replacement cost new, fair market value in place, and liquidation value and will be prepared in conformance with Civil Code requirements. The City must conduct any required appraisal review of these documents per federal guidelines. Any required supplemental valuations of movable items will be done at additional cost. The fixtures and equipment appraiser's hourly rates are \$130 to \$175 depending upon the appraiser assigned and the functions performed. A complete valuation of all movable items would cost an additional \$3,300 approximately. If the residence at 20 W. Mason is a vacation rental, there is a potential need for another fixtures and equipment appraisal. This budget assumes that such an appraisal will not be needed for the 20 W. Mason residence.

Please note that our proposal does not include a goodwill appraisal. Our approach to relocation assistance is to provide proactive assistance aimed at helping the business successfully relocate with the relocation assistance available to them and the monies available per the fixtures and equipment appraisal. In almost all cases, we have successfully relocated businesses without a claim of loss of business goodwill. Thus, we recommend proceeding with the business relocation efforts without an up front expenditure for a goodwill appraisal. However, if there is tenant resistance to the move, and claims of business impacts that could cause loss of goodwill and/or related litigation, a goodwill appraisal may subsequently be required.

Attached are our 2012 Time and Materials Fee Schedule, some information on our firm, and our scope of acquisition and relocation services. I hope that this provides you with the information you need at this juncture. If you have any questions about this proposal or will need any further information in order to retain us to provide these services and assist you with this work, please feel free to give us a call at (805) 773-1459.

Again, thank you for calling on us to seek our assistance with this project. We look forward to the opportunity to work with you!

Sincerely,



Cathy Springford  
Senior Associate/Project Manager

Attachments: 2012 Project Based Time and Materials Fee Schedule  
Hamner, Jewell & Associates Firm Qualification Page  
Staff Qualifications for Cathy Springford and Lillian Jewell  
Scope of Acquisition and Relocation Services

**HAMNER, JEWELL & ASSOCIATES**  
*a division of BEACON INTEGRATED PROFESSIONAL RESOURCES, INC.*

**2012**

(Same rate for 4 consecutive years – 2009, 2010, 2011, and again for 2012)

**TIME AND MATERIALS FEE SCHEDULE**  
(Project Based)

Managing Senior Associate	\$175 an hour
Legal Support *	\$175 an hour*
Senior Associate II	\$160 an hour
Senior Associate I	\$130 an hour
Associates II	\$110 an hour
Associates I	\$ 95 an hour
Assistants	\$ 75 an hour

These rates are inclusive of secretarial support and general office expenses, overhead, and profit. Reimbursable costs that may be passed through to the client as additional expenses include travel expenses (based upon the standard IRS mileage reimbursement rate, or actual expenses for travel outside of the tri-county area of Ventura, Santa Barbara, and San Luis Obispo), special handling fees such as certified, express mail, and delivery charges, photography and third party photocopy expenses, certain project/client-specific telephone expenses, and other charges made by third parties in connection with performing the scope of services. Such third party expenses may include, but are not limited to, such costs as moving bid fees, title and escrow company charges, and appraisal fees. Fees charged by insurance companies for issuing insurance certificates for client per contract requirements will also be billed through to client for reimbursement.

All third party expenses will be billed to the client at cost plus 10%, with appropriate invoices or other appropriate documentation provided for reference. Mileage and travel costs will be passed through without mark-up.

Statements for work shall be rendered monthly. Payments are due within 30 days. Payments not received within said period will accrue interest at a rate of 10% per annum.

At all times, by pre-directive, our clients may structure and direct our efforts and general time expenditures so as to maintain control of the course and cost of our services.

If Hamner, Jewell & Associates ("HJA") is called upon or compelled to provide support for litigation or other proceedings, or respond to subpoenas in any way whatsoever related to the work HJA has completed on client's behalf, client shall pay HJA for required time in accordance with the hourly rates and fees specified in this Fee Schedule, except, however, any time for court testimony and depositions shall be paid at a rate of \$250/hour for HJA Senior Associates, \$200/hour for HJA Associates, and \$135/hour for HJA Assistants. HJA shall additionally be reimbursed for all out-of-pocket and overhead expenses in connection with such proceedings. This provision shall survive the term of the contract.

Rates may be adjusted annually, with thirty days advance written notice.

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\* At the request of several of our clients, this billing rate category has been added specifically in relation to the qualifications and services of Robert McDowell and Cathy Springford who, as licensed attorneys, can provide cost effective support and coordination with client legal counselors. Hamner, Jewell & Associates does not, however, provide legal representation or counsel; we work closely with the legal counsel of our clients to cost effectively assist in resolving any legal matters associated with services we provide.

**HAMNER, JEWELL & ASSOCIATES**  
*FIRM QUALIFICATIONS*

**HAMNER, JEWELL & ASSOCIATES** is a specialized real estate consulting firm that provides right of way and governmental real estate acquisition and relocation services. For over thirty years, Hamner, Jewell and Associates has provided these services to public agencies throughout Ventura, Santa Barbara, and San Luis Obispo Counties, and to select clients in Los Angeles and San Diego Counties. Now with two offices, one in Ventura and one in Pismo Beach, we are even better able to service agencies along the Central Coast and Central Valley corridors.

**Clients** Our extensive client list includes municipalities, counties, school districts, special districts, redevelopment agencies, nonprofit housing organizations, private developers, public utilities, and engineering firms.

**Services** Our primary specialization is acquiring real property rights, including easements and other partial interests, and providing mandated relocation assistance to property occupants on behalf of entities with the authority to acquire property by eminent domain. Our services are designed with the specific intent of successfully acquiring property by agreement, minimizing the instances in which eminent domain action would otherwise be required, but preserving the acquiring agency's right to initiate such action should it become a viable necessity.

We have acquired temporary and permanent easements or fee interests for roadways, sewer lines, waterlines, well sites, tank sites, utilities, greenbelts, and construction areas. We have also acquired access rights, air rights, slope easements, drainage easements, and properties for redevelopment projects and capital improvement projects such as parks, public parking lots, and sewer expansion projects.

We have relocated residences and businesses that have ranged from office, retail, and industrial, including restaurants and bars, to automotive businesses, and even a tattoo parlor.

Additionally, our services include acquisition and relocation planning, including drafting acquisition and relocation guidelines, relocation plans, and replacement housing plans. We also provide preliminary relocation surveys and cost estimates, market surveys, resource analysis, title analysis, representation in lease negotiations, interim property management, utility relocation coordination, construction noticing, dispute resolution, and other general real property consulting services.

**Federal Funding: Uniform Act Compliance** **HAMNER, JEWELL & ASSOCIATES** is experienced and knowledgeable with all federal funding requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act ("Uniform Act") and we have an excellent working relationship with our local federal oversight representatives from Caltrans and HUD. To facilitate federally funded public works projects, we work extensively with Caltrans District representatives and can facilitate projects in compliance with Caltrans and federal funding requirements. In addition to FHWA/Caltrans-funded projects, we have also handled property acquisition funded by other federal agencies, such as acquiring transportation center sites utilizing Federal Transit Administration (FTA) funding, and aviation easements utilizing Federal Aviation Administration (FAA) funding. We also have experience in federal stimulus-funded projects and are familiar with the extra tracking and reporting requirements associated with such projects.

**Professional Accolades** **HAMNER, JEWELL & ASSOCIATES** has been repeatedly recognized as "Employer of the Year" by California Central Coast Chapter 47 of the International Right of Way Association in recognition of outstanding professionalism, support, and active involvement in the right of way acquisition field, and Managing Senior Associate Lillian Jewell was named Chapter 47's Professional of the Year in 1993 and again in 2000. Additionally, HJA Associates David Jewell and Cathy Springford have also been honored with Professional of the Year acknowledgements, David in 2003 and Cathy in 2010.

*Offices in: Pismo Beach (805) 773-1459 and Ventura (805) 658-8844*  
*www.hamner-jewell.com*

HAMNER, JEWELL & ASSOCIATES  
*STAFF QUALIFICATIONS*

**Lillian D. Jewell**  
**Managing Senior Associate / Corporate Real Estate Broker**

Commencing in 1986, Lillian Jewell has been a Right of Way Consultant and Governmental Real Estate Specialist with initial emphasis in property acquisition. Ms. Jewell has functioned in a primary role in residential, commercial, and agricultural land negotiations and acquisitions for the Cities or Redevelopment Agencies of Ventura, Thousand Oaks, Port Hueneme, Oxnard, Fillmore, Santa Barbara, Lompoc, and San Luis Obispo, the Calleguas Municipal Water District, Goleta Water District, Central Coast Water Authority, the Conejo Recreation and Park District, and others. Assignments have included fee purchases of vacant and improved properties and easement acquisition for pipelines and street widening involving slope easements, work areas and complex coordination with existing commercial tenant uses. Ms. Jewell has also been instrumental in the drafting of relocation guidelines, plans, and cost estimates and has provided relocation assistance to numerous residential and commercial occupants. Ms. Jewell is familiar with Federal and State guidelines for governmental acquisition and relocation, as well as local real estate practices.

From 1984-1986, Ms. Jewell was a licensed real estate agent and member of the Ventura Board of Realtors, actively involved in all aspects of real estate transactions.

From 1983-1984, she served as an Account Representative for Fidelity National Title Insurance Company, Ventura County, responsible for all contact with real estate, lending and escrow agents. There she gained knowledge of the internal workings of the title insurance industry, along with increased familiarity with public information systems.

From 1979-1983, Ms. Jewell was a licensed real estate agent with extensive involvement in all aspects of residential real estate in the San Gabriel Valley. In addition to handling marketing, sales, escrows, qualifying, and financing, responsibilities included supervision of tradesmen on broker-owned rehabilitation projects.

Lillian Jewell graduated from the University of California, Santa Barbara with a Bachelor of Arts Degree in Psychology. Post graduate studies include courses in Real Estate Law, Business Law, Real Estate Appraisal, Income Taxation, Real Estate Practice, Real Estate Finance, Syndication Basics, Real Estate Economics, and numerous specialized professional courses, including International Right of Way Association Courses 101-Principles of Real Estate Acquisition, 403-Easement Valuation, 501-Relocation Assistance, 802-Legal Aspects of Easements, 901-Interpreting Engineering Drawings, and 214-Skills of Expert Testimony, among others. Additionally, she completed a Comprehensive Rehabilitation Services workshop entitled "All the Right Moves—Tenant Assistance and Relocation in HUD Programs." She completed The Negotiation and Dispute Resolution Course offered by the Ventura Center for Dispute Settlement, and has also attended a two day eminent domain conference presented by CLE International, a State Bar of California approved continuing education provider.

Ms. Jewell is a candidate for registration as a Senior Member of the International Right of Way Association (SR/WA), a licensed Real Estate Broker, Notary Public, and twice past President and International Director of Chapter 47 of the International Right of Way Association, which named her Professional of the Year in 1993 and again in 2000.

HAMNER, JEWELL & ASSOCIATES  
*STAFF QUALIFICATIONS*

**Cathy A. Springford**  
**Senior Associate II**

In 2006, Ms. Springford joined Hamner, Jewell & Associates as a Right of Way Associate, joining the firm's Nacimiento Water Project team and bringing with her an extensive background and experience in real estate and related issues. Ms. Springford quickly took on important and complex assignments involving right of way agreements between various public agencies including the Federal Army Corps of Engineers, the State Department of Water Resources, the County of San Luis Obispo and the County of Monterey, as well as right of way acquisitions from private property owners. She additionally has completed right of way acquisitions for roadway projects for the County of San Luis Obispo and the Cities of Santa Barbara and Thousand Oaks, creek improvement and bridge projects for the Cities of Goleta and Santa Barbara, and sewer projects for the Cities of San Luis Obispo and Grover Beach. She has also been working with the Cachuma Operations and Maintenance Board (COMB) on various water projects. Ms. Springford brings her honed problem solving, mediation, and negotiation skills to our staff and clients, as well as her extensive knowledge of public agency real estate law and guidelines.

From 1978 through 2004, Ms. Springford was a trial lawyer in the areas of real estate, business and debt collection. She represented title companies, financial institutions, buyers, sellers, homeowners, and developers in all aspects of real property rights. She practiced as a sole practitioner for five years, before which she was with Lillick & Charles, a major San Francisco firm. Ms. Springford ended her legal career as a name partner in Robinson, Lyon & Springford, LLP, in Auburn, California.

Ms. Springford is a trained mediator and served for many years as a volunteer arbitrator and judge pro tem for numerous Courts, as a mediator for Placer Dispute Resolution Service and for private parties. Since 2004, Ms. Springford has also been a licensed real estate agent, with an initial emphasis on residential real properties. She earned a Seniors Real Estate Specialist designation in 2006. Ms. Springford has also been an investor of residential rental property for twenty years. She manages her own portfolio of rental property and earned certification as a California Certified Residential Manager (not currently active).

Ms. Springford graduated from Scripps College with a Bachelor of Arts degree in International Relations. She received a Juris Doctorate in law in 1978 from the University of San Francisco School of Law. She has completed many courses offered by the IRWA, Caltrans, FHWA, and HUD, and is an IRWA approved instructor for Course 802 entitled Legal Aspects of Easements. She has served on numerous boards and was president of the Grover Beach Chamber of Commerce, the Auburn Area Chamber of Commerce, the Placer County Bar Association, Placer Dispute Resolution Service (a mediation service), and Women Lawyers of Placer County. Ms. Springford is a candidate for registration as a Senior Member of the International Right of Way Association (SR/WA), is currently serving as President of Chapter 47 of the International Right of Way Association, and was recently honored as the recipient of the Chapter's 2009-2010 Professional of the Year Award.

# HAMNER, JEWELL & ASSOCIATES

## SCOPE OF ACQUISITION SERVICES

### PROJECT PLANNING PHASE

- Review preliminary project plans.
- Jointly establish acquisition policies and procedures.
- Actively participate in field checks with engineers and appraisers.
- Initiate preliminary owner contacts to obtain information that may assist in design plan completion and appraisal preparation.
- Prepare proposed acquisition documents for staff review and pre-approval.
- Communicate and coordinate with staff, legal counsel, appraisers and engineers to minimize potential property acquisition complications and costs.

### PRE-OFFER PHASE

- Obtain and review preliminary title reports.
- Obtain and review appraisals.
- Review final project plans to assure thorough understanding prior to contacting property owners.
- Set up individual parcel files.
- Prepare offer letters to property owners.
- Prepare Summary Statements reflecting relevant appraisal data, in conformance with state law.
- For partial acquisitions, prepare an information package including plans, diagrams, etc., indicating the specific area to be acquired, and addressing any effects of the acquisition on the remainder parcel.
- Set appointments for offer presentations.

### NEGOTIATION PHASE

- Personally deliver each offer, if at all possible, and explain project details, the written offer, the Summary Statement, and governmental acquisition procedures to the property owner.
- Respond to the owners' requests for supplemental information.
- Gather and review information submitted by the property owners, and transmit to staff, appraiser, engineer, or legal counsel, if appropriate.
- Coordinate interim vacancy payments with owners whose tenants are relocated prior to Agency possession of the property.
- Prepare periodic status reports and maintain open communication with staff at all times.
- Respond to all concerns in a prompt, impartial manner while attempting to obtain agreement.

#### Negotiated Agreement

- Prepare purchase and transfer documents, including escrow instructions and supplemental paperwork, if required.
- Meet with owners to obtain signatures.
- Notarize documents.
- Open an escrow, if appropriate, and supply copies of all documents, title report, and supplemental information to escrow officer.
- Forward original documents to staff for submission to Council/Board for approval.
- Coordinate with owners, staff, escrow officer, title officer, recorder's office, beneficiaries, and others, handling all items necessary to successful closing.
- Transmit funds and closing documents to appropriate parties.
- Review and forward Policy of Title Insurance to staff, if such is obtained per agreement provisions.

#### Condemnation

- Coordinate with legal counsel in preparing the necessary suit information in advance of filing.
- Prepare and mail Notices of Intent, if requested. (Actual notices usually are mailed by legal counsel.)
- Attend public meetings.
- Continue settlement negotiations.
- Maintain open communication with legal counsel.
- Attend settlement conferences and/or mediation sessions, if requested.
- Act as Expert Witness, if called upon.

### FOLLOW-UP

- Process Caltrans Right of Way Certification, if required and included in Scope of Work.
- Maintain records in compliance with law.
- Submit original files to Agency, if requested.
- Review acquisition statistics upon project completion, providing an analysis of project acquisition costs, if requested.
- Provide construction coordination and consultation to insure compliance with all agreements and requirements.



**HAMNER, JEWELL & ASSOCIATES**  
**SCOPE OF RELOCATION SERVICES**

**PROJECT PLANNING PHASE**

- Determine relocation rules depending upon funding sources and adopted guidelines (Federal, State, Caltrans, CDBG, HOME, Barney Frank, *et cetera*).
- Update or prepare a relocation program for Agency adoption.
- Conduct preliminary relocation surveys, needs analysis and market surveys.
- Prepare a relocation plan for the proposed project area.
- If required, prepare a replacement housing plan.
- Provide preliminary relocation cost estimates, if requested.

**PRE-OFFER PHASE**

- Develop appropriate forms and notices for project use and obtain staff pre-approval.
- Give occupants preliminary information about project and the relocation process.
- Verify existing rents and utility costs.
- Update survey of real estate markets and compile a referral list. Determine availability of public housing when appropriate.
- Set up individual files for each occupant.
- Prepare a notice of eligibility and informational statement and receipt for each occupant.
- Arrange for a fixtures and equipment appraisal, if appropriate.

**RELOCATION PHASE**

- Deliver notice of eligibility and informational statement as soon as possible after initiation of negotiations to acquire. Get receipts of delivery and explain the relocation process. Discuss relocation plans and update needs in a sensitive, open, and informative manner.

**Residential**

- Provide referrals to decent, safe and sanitary comparable housing.
- Determine the maximum replacement housing payment for each occupant.
- Assist occupants in securing replacement sites.
- Inspect new dwellings to determine decent, safe and sanitary status.
- Verify new rent rates. Calculate benefits in accordance with adopted guidelines.
- Obtain bids for moving and related costs.
- Complete claim forms and attach necessary documentation.
- Submit claims for payment.
- Disburse benefits to relocatees.
- Deliver 90-day notices to vacate.
- After Agency has acquired property, prepare and obtain rental agreements for remaining tenants.
- Deliver 30-day notices to vacate.
- Obtain keys when site is vacant.
- Inspect condition of premises; inventory items abandoned.
- Coordinate securing premises, if requested.

**Non-Residential**

- Provide referrals to alternate comparable locations.
- Inspect new location to determine comparability.
- Inventory improvements pertaining to realty, determine ownership and appropriate payments.
- Determine which improvements will be acquired and which will be relocated.
- Prepare Bills of Sale for acquired improvements.
- Check with Secretary of State for equipment liens.
- Obtain moving and related bids for physical changes and other eligible re-establishment expenses.
- Determine eligible actual moving costs/eligibility for "in-lieu" payment; gather necessary documentation for claims.
- Inspect new rental/lease agreements.
- Prepare claims.
- Process claims for payment.
- Disburse payments to relocatees.
- Coordinate with client and with legal counsel on any loss of goodwill claims.

**FOLLOW-UP**

- Maintain records in compliance with law.
- Submit original files to Agency, if requested.
- Review relocation statistics upon project completion, providing an analysis of relocation costs, if requested.
- Act as expert witness, if called upon in conjunction with any displacement litigation.