

Section 9 - Real Estate Acquisition and Plat Guidelines

- I. Introduction - Professional Services firms (FIRM) and staff involved with design and construction projects often must obtain permanent and temporary easements or land acquisition to accommodate new pipelines, new or rehabilitated pump stations, storage tanks, and treatment plant expansions. This guideline outlines the steps and timing for coordinating with HRSD's Real Estate Manager during a typical project. It is important for FIRM and staff to properly account for the duration of time that a typical land acquisition process will take when preparing for bid advertisement of construction projects.

- II. Real Estate Schedule vs. Project Schedule
 - A. Exhibit A in this Section shall be used as a template for the timing and stage for submitting real estate-related matters to HRSD's Real Estate Manager.

 - B. The FIRM is to build sufficient time into the project schedules to account for standard real estate acquisition efforts, as well as additional locality/jurisdictional requirements causing additional time to be added to the acquisition schedule (e.g., rezoning, subdivisions, public hearings, conditional use permits, special use permits, etc.) prior to advertising a project for construction bids.

- III. Acquisition and Plats
 - A. Plat – Refer to the Standard Details section in this manual and Attachment A in this section for sample plats showing critical information required to meet HRSD needs.

 - B. The FIRM shall prepare all plats required for the project, to include subdivision, resubdivision, easements, permanent, temporary, and access ingress/egress in a manner to meet the needs of HRSD and to be in accordance with Virginia State Library and Archives Standards for Plats and be recordable in the appropriate jurisdiction.

 - C. The FIRM shall provide an editable list by project parcel number (e.g., 1,2,3,4) of the names, addresses (mailing and physical site), contact numbers, GPIN, Tax Map number, desired use of parcel (Fee Simple, Permanent, Temporary, Access Ingress/Egress) and size, of the current property owners for each plat utilizing the HRSD Project Acquisition Tracking log, which may be found in Attachment B.

 - D. Plat shall not exceed 8-½ inch x 14 inch without prior approval from the HRSD Real Estate Manager.

- E. FIRM shall coordinate with HRSD's Real Estate Manager as necessary to resolve any issues uncovered in the title search or other phases of the process.
 - F. For plats, the minimum permanent easement width shall be 30 feet with the centerline of the pipe at the one-third point. For pipelines in easements along the right of way, permanent easement shall provide a minimum of ten feet from centerline of pipe to the edge of easement away from the right of way. Provide temporary easement widths as required for construction purposes. Access Ingress/Egress easement widths shall be determined per project and future operation and maintenance requirements.
 - G. FIRM shall provide HRSD with an electronic copy in pdf format and three paper copies of the final plats.
 - H. An electronic copy of the plats shall be provided in AutoCAD (.DWG) format or otherwise approved format. A minimum of two sets of northing and eastings, as well as two Virginia State Plane Coordinates, shall be provided to tie the easement and/or property boundary to the Virginia State Plane grid. A reference to the horizontal datum including the realization (e.g. NAD83(1986), NAD83(HARN), NAD83(CORS96)) shall be included on the plat.
- IV. Design Engineer's Estimate – When requested, the FIRM shall produce a replacement cost estimate to be used in procuring a title insurance policy for a parcel and structure. A sample including the required information to be included, may be found in Attachment C.
- V. Justification Memorandum – When requested, the FIRM shall produce a justification memorandum to support the acquisition cost for a property or easement. The justification memorandum should consider, at a minimum, the impact of the acquisition or easement(s) on design, permitting, maintenance of traffic, construction costs, project schedule and regulatory deadlines, community and social justice, as well as the impacts to the property owner. The memorandum should include the FIRM's recommendation statement. A sample of both Design Firm and Real Estate Firm memos may be found in Attachments D and E.
- VI. Phase I, Environmental Site Assessment (ESA) – For each fee simple acquisition and when requested, easements, the FIRM shall prepare a Phase I, ESA to the current ASTM 1527 Standard. The initial Phase I, ESA should be performed during the site evaluation stage of the project. Phase I, ESAs expire 180 days from the commencement of the investigation. Therefore, the Phase I, ESA may need to be updated to ensure a valid Phase I, ESA is available at the time of acquisition. This requirement can only be waived by the Chief Engineer on the recommendation of the Real Estate Manager. A sample Phase I, ESA may be

found in Attachment F and an ESA scope and fee template may be found in Attachment G

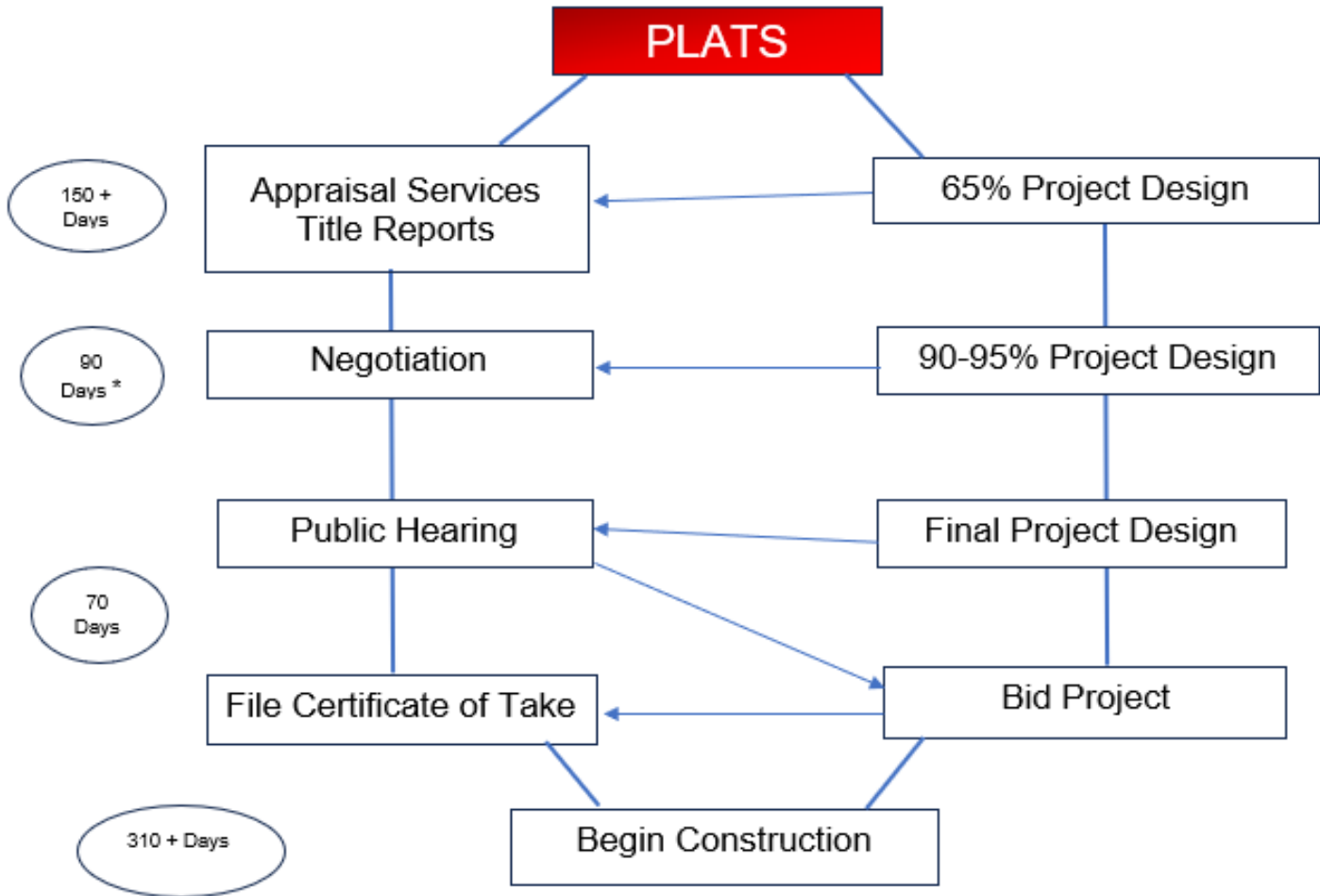
- VII. Location Map – When requested, the FIRM shall produce a Location Map for the fee simple or easement acquisition. A sample Location Map may be found in Attachment H.

- VIII. Demolition of Structures – For a typical project with an assigned HRSD Project Manager, that Project Manager will be responsible for the complete demolition process required for existing structures on the purchased properties. This effort will be done in coordination with the Real Estate Manager and using the demolition specification and demolition checklist. Any demolition activities not associated with a planned project will be managed by the Real Estate Manager. The demolition specification template and checklist may be found in in the HRSD Guidelines Manual.

- IX. Attachments:
 - A. Plat Template
 - B. Project Acquisition Tracking Log
 - C. Engineer’s Estimate Template
 - D. Sample – Justification Memo - Design Firm
 - E. Sample – Justification Memo - Real Estate Firm
 - F. ESA Scope and Fee Template
 - G. Sample – Phase 1 ESA
 - H. Sample – Location Map

Exhibit A

Real Estate Schedule vs. Project Schedule **



Notes:

* Federal, State, Local Jurisdictions, and/or Railroads may require additional time.

** This schedule does not include additional time needed for CUPs, SUPs, rezoning, subdivisions, and other approval steps that may be required by the Localities/Jurisdictions.

End of Section