

# ACQUISITION CHECKLIST

DGS RESD XXX (Rev 8/2018)

For use for submittal of Acquisition Review Packages to:  
 Department of General Services  
 Real Estate Services Division  
 Real Property Services Section/Acquisitions

PROJECT:		AGENCY	AGENCY PARCEL NO
PROPERTY ADDRESS	COUNTY	APN NO.	DGS PARCEL NO.
GRANTOR (EXACT as shown on vesting deed or contract)			

## ACQUISITION TRANSACTION PACKAGE SUBMITTAL

<input type="checkbox"/> <b>CRUISE Request</b>	Each Acquisition Review request will require the completion of a Global CRUISE Request. A link to the Global CRUISE System can be found on the RESD website or direct link below. A copy of the completed request should be included with each Acquisition Review submittal. <a href="#">Global CRUISE</a>
<input type="checkbox"/> <b>DF 14 D</b>	Request for Approval to Proceed or Encumber Funds ("Original"). Check the appropriate REQUESTED ACTION. Remember to submit a new DF14D for each phase being submitted to the PWB (i.e., site, acquisition) <a href="#">SAM 6845</a>
<input type="checkbox"/> <b>Cost Funding and Schedule Summary</b>	Enclose a <b>separate</b> "Capital Outlay Cost, Funding and Schedule Summary" sheet <b>for each PWB approval</b> being requested (i.e. site selection, acquisition, one-step approvals such as No-Cost acquisitions). The most current copy of the Cost Funding and Schedule Summary will be submitted to the Department of Finance with the Consent/Action Item. <a href="#">SAM 6845</a>
<input type="checkbox"/> <b>Legislation and Funding Sources</b>	Provide copy of legislation authorizing the acquisition and funding (budget act). ID bond monies; grant monies (even if previously granted); federal monies (to note: could trigger NEPA, federal RAP regulations, federal Uniform Appraisal ("yellow book") standards, etc.)
<input type="checkbox"/> <b>Project Name</b>	After the project is named, be consistent in referencing the name of the project throughout all documents in the submittal.
<input type="checkbox"/> <b>Preliminary Report</b>	Preliminary Report (Prelim) must be current and dated within the last six months. Verify the accuracy of the Prelim as to vesting of the Grantor and Legal Description (compare against the vesting deed). The Prelim should also provide the type of title insurance being purchased.
<input type="checkbox"/> <b>Exception Copies</b>	Include copies of all pertinent title exceptions appearing on the Prelim. Include any copies of recordation cited in the legal description and/or embedded in the body of other exception document(s).
<input type="checkbox"/> <b>Vesting Document</b>	Provide a copy of the Vesting Document (compare document to Prelim – both documents should agree)
<input type="checkbox"/> <b>CEQA</b>	<ul style="list-style-type: none"> <li>▶ Request CEQA clearance and determination.</li> <li>▶ The litigation period for the "Project" must have expired prior to the PWB meeting.</li> <li>▶ Disclosure is required on any contamination found on the property. Provide a complete explanation of liability issues regarding the contamination and indicate how the contamination will be mitigated or addressed.</li> </ul>

<input type="checkbox"/> <b>Phase I/II Report</b>	Provide a copy of the Phase I Environmental Report and if applicable, a copy of the Phase II Report. Note any environmental/hazardous material issues on both the PWB Consent Item/Staff Analysis and the Acquisition Summary. If applicable, describe how any potential problems or concerns will be addressed or remediated.
<input type="checkbox"/> <b>Condition of Property Statement (COP)</b>	<ul style="list-style-type: none"> <li>▶ The Condition of Property Statement (COP) will be prepared by the Department of General Services – Environmental Service Section (DGS/ESS).</li> <li>▶ A site visit of the property will be made by DGS/ESS staff for this purpose. Provide an executed copy of the Temporary Entry Permit. Provide if available, a copy of any Environmental reports completed on the property (ie: Phase I Environmental Site Assessment Report, etc.)</li> <li>▶ The site visit date appearing on the COP should not be more than 12 months old.</li> </ul>
<input type="checkbox"/> <b>Seismic Safety Assessment</b>	If improvements exist, include a copy of the Seismic Evaluation prepared by a licensed structural engineer. A seismic safety assessment must be in accordance with the method and criteria developed by the DGS - Real Estate Services Division. The seismic safety rating as defined in the Risk Acceptability Table of the State Building Seismic Program must comply with an acceptable seismic safety rating.
<input type="checkbox"/> <b>Water Rights</b>	Consider if water rights, including, ground, riparian, appurtenant, etc. and surface right of entry have been reserved or severed from title. If so, discuss impact on property and project.
<input type="checkbox"/> <b>Mineral Rights</b>	Consider if mineral rights, including surface right of entry have been reserved or severed from title. If so, discuss impact on property and project.
<input type="checkbox"/> <b>Legal Description</b>	Review legal description and recorded documents referenced within the description. Cross reference between preliminary title report and vesting deed. If a new legal description is required, the written description must be prepared by a licensed engineer/surveyor and be accompanied by a map exhibit, both stamped and signed.
<input type="checkbox"/> <b>Location/Plot Map</b>	Provide a map of the property and delineate all encumbrances and access routes to the property. If the property is near, adjacent, or contiguous to other State properties, delineate the location of the State property in relation to the property. Also note on the location map any easements that impact the State's use of the property.
<input type="checkbox"/> <b>APN Map</b>	Provide a current copy of the Assessor's Parcel Map.
<input type="checkbox"/> <b>Appraisal/DGS Appraisal Review</b>	Provide a current copy of the Appraisal Report and/or DGS Appraisal Review. All Appraisal Reports must be prepared by a certified general real estate appraiser. The appraisal shall consider encumbrances, mineral interests, timber, access restrictions, implied dedication, etc. All outside appraisal reports must be reviewed and approved by the DGS Appraisal Review Unit.
<input type="checkbox"/> <b>Property Acquisition Agreement (PAA)</b>	Provide a hard and electronic copy of the PAA. Include copies of all exhibits attached to the document. Identify any unique terms or removal of any terms, conditions or restrictions contained in the document. Note any special clauses or terms in your Acquisition Summary. Agreement documents shall not be executed by the State or its authorized representative until acquisition approval has been granted by the PWB.
<input type="checkbox"/> <b>Other Contracts/Agreements</b>	Submit copies of all relevant documents, (i.e., Lease Agreement, Option Agreement, Use Restriction Agreement, Memorandum of Understanding, Contract, Easement, etc.) connected with the acquisition of the property. Include any supporting documentation relevant to the document(s) submitted. <b>Provide a brief summary of the key facts of each document</b> (i.e., special terms, reversionary clauses, lack of indemnification language, etc.) <b>in the Site Selection/Property Acquisition Summary.</b>

<input type="checkbox"/> <b>Relocation Assistance Program (RAP)</b>	<p>If applicable, a relocation study must be completed and a determination made of the adequacy of funds available for relocation costs. If the acquisition of the property is subject to RAP, contact DGS for further instructions.</p>
<input type="checkbox"/> <b>Williamson Act</b>	<p>If the property is encumbered by the California Land Conservation Act of 1965 (Government Code 51291 - Williamson Act). The Department of Conservation will need to be notified after the PWB Site Selection approval is granted that the State is considering the acquisition of the property.</p>
<input type="checkbox"/> <b>Aviation Restrictions</b>	<p>If the proposed site of any State building or other enclosure is within two miles of an airport runway, or proposed airport master plan the Department of Transportation (DOT) must be notified in writing of the proposed acquisition pursuant to the Public Utilities Code Section 21655-21660. The DOT will investigate the proposed site and provide a written report containing its findings and recommendations within 30-days after receipt of the notice. Submit a copy of the DOT's findings with your Acquisition Submittal.</p>
<input type="checkbox"/> <b>Deed</b>	<p>Prepare a Deed (Grant, Gift, Easement, Quitclaim, etc.) for execution by the Owner. The signatory on the Deed should include the names and titles of all parties signing this document. For legal entities such as corporations, partnerships, limited partnerships, joint ventures, trusts, etc. provide a copy of the appropriate document that includes the names and titles of persons authorized to sign this transaction on behalf of the legal entity (ie: Corporate Resolutions, Partnership Agreements, Trust Agreement including the amendments, etc.).</p>
<input type="checkbox"/> <b>Certificate of Acceptance</b>	<p>Prepare a Certificate of Acceptance as an attachment to the Deed. This document is required on all properties accepted on behalf of the State of California. This document shall not be executed until acquisition approval has been granted by the PWB.</p>
<input type="checkbox"/> <b>Site Selection/ Property ACQUISITION SUMMARY (LAS - 40 &amp; 41)</b>	<p>Complete and submit both a hard and electronic copy of the LAS40/41 – “Site Selection/Property Acquisition Summary Sheet and enter all pertinent information in the spaces provided. Complete a summary of the acquisition. This form must be prepared by the responsible Agency Real Estate Analyst/Officer, Land Agent or equivalent staff member. The form should detail all pertinent facts about the acquisition (ie: Location, funding, appraisal facts, listing of title exceptions to include a brief explanation of exceptions deleted, accepted or cured, special terms such as reversionary clauses, etc.) After all necessary edits have been made; submit the final version signed by the authorized signer.</p>
<input type="checkbox"/> <b>PWB Consent/Action Staff Analysis Item (Site or Acquisition)</b>	<p>Submit hard and electronic copy of the DRAFT PWB Site Selection or Acquisition Consent/Action Staff Analysis Item. Reference the appropriate legislative funding source and summarize why the property being selected meets the requirements of the legislation or your agency. Once assigned to a DGS Real Estate Officer you will be expected to send an electronic copy of the item.</p>
<input type="checkbox"/> <b>PWB Consent/ Action Summary Bullets</b>	<p>Include all necessary “Summary” bullets on your PWB Consent/Action Staff Analysis Item:</p> <ul style="list-style-type: none"> <li>▶ Standard selection/acquisition bullets.</li> <li>▶ The Agency’s budgetary and support bullet(s)</li> <li>▶ Describe other pertinent information/data such as specials terms, reversionary requirements, use restrictions, memorandums of understandings, environmental or hazardous waste concerns, etc.</li> </ul>
<input type="checkbox"/> <b>PWB Resolution</b>	<p>All acquisitions presented to the PWB for approval require the completion of a Resolution that includes a copy of the Legal Description as Exhibit “A”. Prepare and submit a hard and electronic copy of the PWB Resolution.</p> <p><b>NOTE:</b> The Resolution should always correspond to the Acquisition Consent/Action item presented to the PWB.</p>

<input type="checkbox"/> <b>Gift of Real Property</b>	<p>If the property being acquired as a "gift of property" A donation by the property owner, <i>without any restrictions</i>) or by means of a "no-cost acquisition," complete a <i>Gift Deed Summary</i>, RESD-212. Contact DGS' Acquisition Unit to request the RESD-212 Form.</p> <p><u>Note:</u> Following PWB Acquisition approval of the gift of property, acceptance of the property by the State will require the approval of the Director of the Department of Finance (DOF). DGS will prepare a Gift memo that will include the completed <i>Gift Deed Summary</i>, <i>Certificate of Acceptance</i> and other pertinent documentation necessary for the review and signatory of the DOF Director.  <a href="#">SAM 8634</a></p>	
<input type="checkbox"/> <b>Escrow Instructions</b>	<p>Prepare Escrow Instructions for the title company and:</p> <ul style="list-style-type: none"> <li>▶ List all documents being sent for recordation</li> <li>▶ Identify the type of title policy and amount being purchased</li> <li>▶ List any additional endorsements being requested in addition to the standard title insurance coverage (ALTA/CLTA). <b>Submit copies of any special endorsements being requested to DGS for review</b></li> <li>▶ If a Proforma title policy is requested, indicate in the Escrow instructions</li> <li>▶ Indicate how payment will be made</li> <li>▶ Identify where and to whom the title policy and recorded docs should be returned to</li> <li>▶ Notate any special instructions</li> <li>▶ List the exceptions being accepted</li> </ul> <p><b>NOTE:</b> The State of California is not subject to recordation charges pursuant to Section 27383 of the Government Code. Furthermore, no documentary transfer fee will be paid in accordance with the provisions of Section 11922 of the Government Code.</p>	
<input type="checkbox"/> <b>Title Insurance</b>	<p>Submit Policy of Title Insurance to DGS after the close of escrow. A copy of the title policy will be forward to Archives. Prior to forwarding the insurance policy to DGS ensure that all exceptions have been removed and that the policy is correct as to (1) legal vesting; (2) legal description and (3) amount of coverage specified in your Escrow Instructions.</p>	
<b>COMPLETED BY:</b>	<b>REVIEWED BY:</b>	<b>DATE:</b>