



FORT ORD REUSE AUTHORITY

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FORA/Jurisdiction Property Transfer Transaction Worksheet Cover Sheet

The following outline provides a concise reference to guide Jurisdiction and FORA Staff processing and completing of the mandatory FORA/Jurisdiction Implementation Agreement, Property Sales/Lease Transaction Worksheet. The intent of the Transaction Worksheet is to support Jurisdiction land transactions and ensure information needed by the Jurisdiction and FORA is compiled in a single location so property transfers and consistency determinations can proceed efficiently and completely. Please fill in the attached PDF form and submit electronically to FORA. If you have any questions please contact the FORA office.

STEP 1: BASIC INFORMATION (*Jurisdiction*)

- Complete Transaction Worksheet *Basic Information* about proposed land-sale/lease

STEP 2: (*Jurisdiction and FORA*)

- A) **CONTACT INFORMATION:** (*Jurisdiction*) Identify Points of Contact to work with during the transaction
- B) **TRANSACTION# & SCHEDULING:** (*Jurisdiction and FORA*) Assign a Transaction Number and Identify potential timeframe for requesting the FORA Consistency Determination
- C) **FORA TRACKING#:** Assign FORA Tracking Number (*FORA*)

STEP 3: (*Jurisdiction and FORA*)

- A) **PROPERTY VALUATION/APPRaisal:** Identify/design the Property Valuation Instructions/Specifics and concur. Include Demolition Valuation when appropriate.
- B) **TRANSACTION DESCRIPTION:** Provide written description of transaction for use in transaction review by FORA/Jurisdiction staff and leadership

STEP 4: ESTIMATED COST OF SALE/LEASE: (*Jurisdiction*)

- Provide Property Valuation/Appraisal and Estimated Transaction Costs

STEP 5: FORA TRANSACTION REVIEW: (*FORA*)

- Review and concur on *Property Valuation* and *Estimated Transaction Costs*

STEP 6: FINAL TRANSACTION COSTS: (*Jurisdictions - on completion of Sale/Lease transaction*)

- Provide FORA with *Final Transaction Costs* and arrange FORA payment

STEP 7: TRANSACTION COMPLETE: (*FORA and Jurisdiction*)

- Verify Transaction Worksheet is complete and ready for Project Consistency Determination

STEP 2B: TRANSACTION #	_____
STEP 2C: FORA TRACKING #	_____

STEP 1: BASIC INFORMATION

Jurisdiction: _____	Transaction Name: _____
Property Size (acres): _____	Army Corps of Eng Parcel: _____
Property Location: _____	Monterey County APN: _____

Estimated Lease/Transfer/Sale Date: _____	Proposed Property Uses: _____
Interim Use (select one): Yes No	_____
Interim Use Description: _____	_____

STEP 2A: CONTACT INFORMATION

Jurisdiction: _____	Sellor/Lessor: _____
Primary Contact Name: _____	Primary Contact Name: _____
Phone Number: _____	Phone Number: _____
Email: _____	Email: _____
Address: _____	Address: _____

Buyer/Lesse: _____	Escrow/Title Company: _____
Primary Contact Name: _____	Primary Contact Name: _____
Phone Number: _____	Phone Number: _____
Email: _____	Email: _____
Address: _____	Address: _____

Valuation Company: _____	FORA: _____
Primary Contact Name: _____	Primary Contact Name: _____
Phone Number: _____	Phone Number: _____
Email: _____	Email: _____
Address: _____	Address: _____

STEP 2B: SCHEDULING / REVIEW & PAYMENT TYPES

Target FORA Consistency		Transfer Type: (select one)
Determination Date: _____		Lease
Transaction Worksheet Completion Record:		Sale
Initial Draft: _____		Other: _____
Start Date: _____		Required FORA Payments:
Completion Date: _____		Lease Revenues: _____
Entitlement Review? Yes No		Land Sale Proceeds: _____
Plan/Zoning Amend? Yes No		Developer (CFD) Fees: _____

STEP 3A: PROPERTY VALUATION/APPRaisal

Valuation Instructions/Specifics: _____

attach additional sheets as needed

FORA Reviewer: _____ Jurisdiction Reviewer: _____
 FORA Approval Date: _____ Jurisdiction Approval Date: _____

Demolition	Yes	<input type="checkbox"/>	Cost: \$ _____	No	<input type="checkbox"/>
Demolition Company:	_____		FORA Reviewed:	_____	
Estimator Name:	_____		FORA Reviewer:	_____	
Phone:	_____		FORA Accepted Date:	_____	
Email:	_____		Comments:	_____	
Address:	_____		_____		
_____			_____		

STEP 3B: TRANSACTION DESCRIPTION (terms, swaps, variations, timelines, etc)

attach additional sheets as needed

STEP 4: ESTIMATED COST OF SALE/LEASE*

Value:		Date of Valuation:	
<i>Item</i>	<i>Cost</i>	<i>Item</i>	<i>Cost</i>
Recording Fees		Brokers Fees	
Administrative		Off-Site Improvements	
Title Report		Taxes	
Subdivision Map and Survey		Leasing Expenses	
Site Improvements		Other Expenses (<i>Attach Supplemental as needed</i>)	
Title Insurance			

FORA cannot process a Consistency Determination until final costs are noted in the **Step 6 table.*

Expanded FORA Transaction Worksheet

STEP 5: FORA TRANSACTION REVIEW

Date Transaction Worksheet Received: _____

Accounting Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

Finance Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

Planning Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

Property/Facilities Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

Engineering Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

Legal Review:

Reviewer: _____
 Review Date: _____
 Comments Attached? yes no

STEP 6: FINAL TRANSACTION COSTS

<i>Item</i>	<i>Cost</i>	<i>Date</i>	<i>Item</i>	<i>Cost</i>	<i>Date</i>
Recording Fees			Brokers Fees		
Administrative Costs			Off-Site Improvements		
Title Report Costs			Taxes		
Subdivision Map and Survey			Leasing Expenses		
Site Improvements			Other Expenses (<i>Attach Supplemental Information</i>)		
Title Insurance					

STEP 7: TRANSACTION WORKSHEET COMPLETE

TW Approved
 Revisions Requested?

Approval Date

Fort Ord Reuse Authority

Jurisdiction