



ORANGE COUNTY ROADWAY AGREEMENT COMMITTEE INSTRUCTIONS TO APPLICANTS ON THE ROAD AGREEMENT PROCESS

The following are instructions needed to process a Road Agreement through the Roadway Agreement Committee (RAC). In order to be scheduled at a RAC Meeting you will need to provide the following information:

- Pre-Meeting with County Staff to review application materials/ discuss project parameters (*Optional*)
- One-Page Application Form (attached) with a Project Location Map of your project
- SEE LIST OF REVISED REQUIREMENTS FOR EVIDENCE OF TITLE (PAGE 2)**
- Owner of Property must be entity signing the agreement or a Joinder and Consent is needed
- Appraisal of subject property by one of the County approved MAI Appraisal firms (list attached)
- Executed Agent Authorization, Project Expenditure Report and Relationship aka Disclosure Forms
 - Please make sure that your notary information is executed correctly to include:
 - Venue is properly identified
 - Date of Signature and Date of Notarization must be the same
 - Manner in which Signature was identified (personally known or provided ID) complete

Please Note: All signatures are verified with Sunbiz. If the entity is not registered with Florida and/or signature inconsistencies will require additional documentation reflecting signator authorization.

- Draft Agreement-please use the attached Boiler-plate template Agreement for format guidelines
- Exhibits you will need to attach to the Boiler-Plate Agreement:
 - **Exhibit A** Project Location Map (property must be clearly identified)
 - **Exhibit B** Legal Description and Sketch of Description of entire property before conveyance
 - **Exhibit C** Legal Description and Sketch of Description of the Property to be conveyed

[PLEASE NOTE: YOU MUST BLACKLINE AGAINST THE BOILERPLATE AGREEMENT!]

IMPORTANT: Your initial submittal is sent electronically to the RAC coordinators. Please include clean and blackline versions of the draft agreement in Microsoft Word in your email.

Everything listed above is submitted to the attention of the Transportation Planning Division. This office will be your main point of contact throughout the entire process from scheduling the Pre-Meeting, to your first appearance at RAC, to getting the agreement finalized, to BCC agenda scheduling for approval, and working with you through the conveyance process and closing with Real Estate Management.

Please review the attached information to select an appraiser from the list. Have the selected appraiser conduct the appraisal and have the applicant’s surveyor start working on preparing the exhibit(s). (NOTE: both the appraisal and survey work are lengthy so plan accordingly.) Afterwards have your attorney/representative prepare a draft agreement based on the template provided by the County. Real Estate Management shall review the appraisal and title work prior to the RAC meeting. In addition, the County Surveyor and Public Works Engineering will need to review the exhibits prior to the RAC meeting.

The Roadway Agreement Committee meets every two weeks on Wednesdays (refer to RAC Schedule). Please keep us updated with your progress and let us know at least 3-4 weeks before you think you will be ready to appear at a RAC meeting. You may schedule your Pre-Meeting with County Staff to review what is expected and the timeframes for Committee review as you prepare your other documents. However, you must complete the disclosure forms prior to the pre-meeting and provide all materials as listed above prior to your first RAC appearance. If you have any questions, please contact us to discuss further. Transportation Planning looks forward to working with you on this project!

Tammilea Chami, Orange County Transportation Planning
4200 South John Young Parkway
Orlando, Florida 32839-9205
Telephone: (407) 836-8016
Email: tammilea.chami@ocfl.net

Nannette Chiesa, Orange County Transportation Planning
4200 South John Young Parkway
Orlando, Florida 32839-9205
Telephone: (407) 836-8071
Email: nannette.chiesa@ocfl.net



ORANGE COUNTY ROADWAY AGREEMENT COMMITTEE INSTRUCTIONS TO APPLICANTS ON THE ROAD AGREEMENT PROCESS

REVISED REQUIREMENTS FOR EVIDENCE OF TITLE per Real Estate Management (3/2021):

****PLEASE BE AWARE IF YOU NEED TO ORDER TITLE WORK IT CAN TAKE 2 TO 4 WEEKS****

The Applicant must provide verification of the following at the time an application is made to RAC:

1. Verification that the entity named in the Agreement owns the real property that is legally described in the Agreement. Verification of ownership can be a copy of the recorded document of conveyance; and
2. Determine that the entity that is a party to the Agreement is in good standing in the state of its formation (including all layers of the entity). Verification of entity information can be a copy of the most recent annual report, print out from the state agency's website or a current certificate of good standing; and
3. Establish that the person(s) executing the Agreement are authorized by law to execute said instruments on behalf of the entity. Verification can be in the form of corporate documents for the entity, affidavit of the representing attorney or officer, or corporate resolution.
4. If any layer of the signing entity is also a legal or commercial entity, the above information in paragraphs 2 and 3 will be required for each layer.
5. All documents provided as verification of the above, need to be current as of the date the agreement is submitted to the Roadway Agreement Committee.

Evidence of Title needs to be a copy of a current title work (**should be within 60 days of application date**). Acceptable forms of title work would typically be a title commitment, owner's title insurance policy, title opinion, title search report, or ownership and encumbrance report that dates back to the earliest public record. Essentially, the title work needs to reflect current ownership and all encumbrances that affect the subject property.

**Orange County, Florida
2024 Roadway Agreement Committee (RAC)
Meeting Dates and Material Submittal Guidelines**

| <u>*PROPORTIONATE SHARE DEADLINE DATES</u> | <u>**ROAD AGREEMENTS DEADLINE DATES</u> | <u>2024 RAC MEETING DATES</u> |
|--|---|---|
| Initial Submittal for PSA Pre-Review Before RAC Agenda (Required on Thursdays by 12 noon) | Initial Submittal for Road Agreements Before RAC Agenda (Required on Mondays by 12 noon) | RAC Meetings held Wednesdays 9:00a.m. to 12:00p.m. |
| Thursday, Dec. 7, 2023 | Monday, Dec. 18, 2023 | January 3 |
| Thursday, Dec. 21, 2023 | Monday, January 8 | January 17 |
| Thursday, January 11 | Monday, January 29 | February 7 |
| Thursday, January 25 | Monday, February 12 | February 21 |
| Thursday, February 8 | Monday, February 26 | March 6 |
| Thursday, February 22 | Monday, March 11 | March 20 |
| Thursday, March 7 | Monday, March 25 | April 3 |
| Thursday, March 21 | Monday, April 8 | April 17 |
| Thursday, April 4 | Monday, April 22 | May 1 |
| Thursday, April 18 | Monday, May 6 | May 15 |
| Thursday, May 2 | Tuesday, May 28 | June 5 |
| Thursday, May 23 | Monday, June 10 | June 19 |
| Thursday, June 6 | Monday, June 24 | July 3 |
| Thursday, June 20 | Monday, July 8 | July 17 |
| Thursday, July 11 | Monday, July 29 | August 7 |
| Thursday, July 25 | Monday, August 12 | August 21 |
| Thursday, August 8 | Monday, August 26 | September 4 |
| Thursday, August 22 | Monday, September 9 | September 18 |
| Thursday, September 5 | Monday, September 23 | October 2 |
| Thursday, September 19 | Monday, October 7 | October 16 |
| Thursday, October 3 | Monday, October 21 | October 30 |
| Thursday, October 17 | Monday, November 4 | November 13 |
| NO MEETING | NO MEETING | NOV 27 MEETING CANCELLED |
| Thursday, November 14 | Monday, December 2 | December 11 |
| NO MEETING | NO MEETING | DEC 25 MEETING CANCELLED |

*RAC submittals for Proportionate Share Agreement (PSA) are required by the deadline date shown in the first column.

**3-Sets of Executed Proportionate Share Agreements are required by the date and time shown in the middle column.

Please Be Aware: Any meeting may be cancelled or rescheduled at any time at the discretion of the Committee. Special meetings may also be called at the discretion of the Committee.

For additional information please contact:

**Tammi Chami, Planner III
Orange County Transportation Planning
4200 South John Young Parkway
Orlando, Florida 32839-9205
Telephone: (407) 836-8016
Email: tammilea.chami@ocfl.net**

**Nannette Chiesa, Development Coordinator
Orange County Transportation Planning
4200 South John Young Parkway
Orlando, Florida 32839-9205
Telephone: (407) 836-8071
Email: nannette.chiesa@ocfl.net**

Note: When RAC application materials are submitted, every effort will be made to keep in accordance with the established meeting deadline schedule. However, as an individual meeting agenda becomes full, staff may defer (or reschedule) otherwise timely project applications to the next available meeting agenda.



ROADWAY AGREEMENT COMMITTEE (RAC) APPLICATION TRANSPORTATION PLANNING DIVISION (ROAD AGREEMENTS)

Application Date: _____

APPLICANT AND OWNER INFORMATION

Applicant: _____
Address: _____
City: _____ State: _____ Zip: _____
Work Phone: _____ Cell Phone: _____ Email: _____

Owner: _____
Address: _____
City: _____ State: _____ Zip: _____
Work Phone: _____ Cell Phone: _____ Email: _____

**If not, Owner will need to complete joinder form as part of agreement*

PROPERTY INFORMATION

Project Name: _____
Property Address: _____
Parcel ID Number(s): _____
Major Road Impacted by Project: _____
BCC District: _____ Impact Fee Zone: _____

| | <u>Yes</u> | <u>No</u> | <u>If yes, please specify.</u> |
|---|--------------------------|--------------------------|--------------------------------|
| Directed to RAC by DRC | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Directed to RAC another way | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| ROW to be dedicated by Agreement | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Design and Construction of roadway by Agreement | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Currently on CIP/Long Range Plan | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Impact Fee Eligible Roadway | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Estimated width of ROW to be dedicated | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Total acreage of ROW to be dedicated | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Wetland impacts in Row to be dedicated | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Mitigation required/Conservation easement | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Is the applicant requesting RIF Credits | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Is the applicant requesting Vested Rights | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Has an appraisal been performed in last 12 months | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| If so, what is the appraisal value? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Are APF Credits or APF Roads involved | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

*****Submit a Title Commitment or Owner's Policy showing current ownership and exceptions*****

*****Attach Project Location Map showing property and surrounding area*****

For additional information please contact:

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Orange County Transportation Planning
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Orlando, Florida 32839-9205
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**RELATIONSHIP DISCLOSURE FORM FOR USE WITH DEVELOPMENT RELATED ITEMS,
EXCEPT THOSE WHERE THE COUNTY IS THE PRINCIPAL OR PRIMARY APPLICANT**

This relationship disclosure form must be submitted to the Orange County department or division processing your application at the time of filing. In the event any information provided on this form should change, the Owner, Contract Purchaser, or Authorized Agent(s) must file an amended form on or before the date the item is considered by the appropriate board or body.

PART I

INFORMATION ON OWNER OF RECORD PER ORANGE COUNTY TAX ROLLS

Name: _____

Business Address (Street/P.O. Box, City and Zip Code): _____

Business Phone () _____

Facsimile () _____

INFORMATION ON CONTRACT PURCHASER, IF APPLICABLE

Name: _____

Business Address (Street/P.O. Box, City and Zip Code): _____

Business Phone () _____

Facsimile () _____

INFORMATION ON AUTHORIZED AGENT, IF APPLICABLE

(Agent Authorization Form also required to be attached)

Name: _____

Business Address (Street/P.O. Box, City and Zip Code): _____

Business Phone () _____

Facsimile () _____



PART II

IS THE OWNER, CONTRACT PURCHASER, OR AUTHORIZED AGENT A RELATIVE OF THE MAYOR OR ANY MEMBER OF THE BCC?

YES NO

IS THE MAYOR OR ANY MEMBER OF THE BCC AN EMPLOYEE OF THE OWNER, CONTRACT PURCHASER, OR AUTHORIZED AGENT?

YES NO

IS ANY PERSON WITH A DIRECT BENEFICIAL INTEREST IN THE OUTCOME OF THIS MATTER A BUSINESS ACCOCIATE OF THE MAYOR OR ANY MEMBER OF THE BCC?

(When responding to this question please consider all consultants, attorneys, contractors/subcontractors and any other persons who may have been retained by the Owner, Contract Purchaser, or Authorized Agent to assist with obtaining approval of this item.)

YES NO

If you responded “YES” to any of the above questions, please state with whom and explain the relationship: _____

(Use additional sheets of paper if necessary)



PART III

ORIGINAL SIGNATURE AND NOTARIZATION REQUIRED

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to any meeting at which the above-referenced project is scheduled to be heard. In accordance with s. 837.06, Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s. 775.082 or s. 775.083, Florida Statutes.

Signature of Property Owner Contract Purchaser
or Authorized Agent (Check One)

Date

Print Name and Title of Person completing this form: _____

**STATE OF FLORIDA
COUNTY OF ORANGE**

The foregoing instrument was acknowledged ___ in person before me or ___ by online notarization by _____, as _____ of _____, a _____, who is known by me to be the person described herein and who executed the foregoing, this ___ day of _____, 20___. S/he is personally known to me or has produced _____ as identification.

WITNESS my hand and official seal in the County and State last aforesaid this ___ day of _____, 20__.

NOTARY PUBLIC
Print Name: _____
My Commission Expires: _____

Staff signature and date of receipt of form
Staff reviews as to form and does not attest to the accuracy or veracity of the information provided herein.



ORANGE COUNTY SPECIFIC PROJECT EXPENDITURE REPORT

This lobbying expenditure form shall be completed in full and filed with all application submittals. This form shall remain cumulative and shall be filed with the department processing your application. Forms signed by a principal’s authorized agent shall include an executed Agent Authorization Form.

This is the initial Form: _____

This is a Subsequent Form: _____

PART I *(Please complete all of the following)*

Name and Address of Principle (legal name of entity or owner per Orange County tax rolls):

Name and Address of Principal’s Authorized Agent, if applicable: _____

List the name and address of all lobbyists, consultants, contractors, subcontractors, individuals or business entities who will assist with obtaining approval for this project. (Additional forms may be used as necessary).

1. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

2. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

3. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

4. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

5. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

6. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

7. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No

8. Name and address of individual or business entity: _____

Are they registered Lobbyist? Yes No



PART II

EXPENDITURES

For this report, "expenditure" means money or anything of value given by the principal and/or his/her lobbyist for the purpose of lobbying, as defined in section 2-351, Orange County Code. This may include public relations expenditures including, but not limited to, petitions, fliers, purchase of media time, cost of print and distribution of publications. However, the term "expenditure" **does not** include:

- ❖ Contributions or expenditures reported pursuant to chapter 106, Florida Statutes;
- ❖ Federal election law, campaign-related personal services provided without compensation by individuals volunteering their time;
- ❖ Any other contribution or expenditure made by or to a political party;
- ❖ Any other contribution or expenditure made by an organization that is exempt from taxation under 26 U.S.C. s. 527 or s. 501(c)(4), in accordance with s.112.3215, Florida Statutes; and/or
- ❖ Professional fees paid to registered lobbyists associated with the project or item.

The following is a complete list of all lobbying expenditures and activities (including those of lobbyists, contractors, consultants, etc.) incurred by the principal or his/her authorized agent and expended in connection with the above- referenced project or issue. **You need not include de minimus costs (under \$50) for producing or reproducing graphics, aerial photographs, photocopies, surveys, studies or other documents related to this project.**

| Date of Expenditures | Name of Party Incurring Expenditure | Description of Activity | Amount Paid |
|-----------------------------------|-------------------------------------|-------------------------|-------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| TOTAL EXPENDED THIS REPORT | | | \$ |

Orange County's Approved List of Appraisers
Contract Y21-191 (2022-2025)

Y21-191A (**ATS**)
AECOM Technical Services, Inc.
No Current Appraiser of Record
150 North Orange Avenue, Suite 200
Orlando, FL 32801
Phone: 407-843-6552
Fax: 407-839-1789
Email: jan.everett@aecom.com

Y21-191B (**CPI**)
Callaway & Price, Inc.
Curtis Phillips, **MAI**
1120 Palmetto Ave., Suite 1
Melbourne, Florida 32901
Phone: 321-726-0970
Fax: 321-726-0384
Email: c.phillips@callawayandprice.com

Y21-191C (**Eval**)
Eminent Valuations, PLLC
Kristin L. Soltys, **MAI**
2202 Curry Ford Road, Unit C
Orlando, Florida 32806
Phone: 321-445-1767
Email: Kristin@EminentValuations.com
cc: Katie@EminentValuations.com

Y21-191D (**IRR**)
Integra Realty Resources
Christopher D. Starkey, **MAI**, SGA
326 North Magnolia Avenue
Orlando, Florida 32801
Phone: 407.325.3885
Fax: 407.841.3823
Email: cstarkey@irr.com
cc: pdrury@irr.com

Y21-191E (**KCE**)
Kenneth C. Evans, PA.
Kent Evans, **MAI, CCIM**
PO Box 395
Tampa, Florida 33601
Phone: 813.545.4581
Email: kent.evans@kcepa.net

Y21-191F (**P&C**)
Pinel & Carpenter, Inc.
Mark Carpenter, **MAI**
1390 Hope Rd., Ste 100
Maitland, Florida 32751
Phone: 407.648.2199
Fax: 407.648.8901
Email: markc@pinelcarpenter.com
cc: walterc@pinelcarpenter.com
cc: gencio@pinelcarpenter.com

Y21-191G (**AGCF**)
The Appraisal Group of Central Florida, Inc.
Richard K. MacMillan, **MAI**
378 Center Pointe Circle, Suite 1286
Altamonte Springs, Florida 32701
Phone: 407.539.1288
Fax: 407.539.7004
Email: richard@tagcf.com
Cc: kim@tagcf.com

Y21-191H (**SG**)
The Spivey Group, Inc.
Ted Hastings III, **MAI** & Bob Simmons
1700 N. Orange Avenue, Suite 300
Orlando, Florida 32804
Phone: 407.423.1430
Fax: 407.422.2237
Email: bsimmons@spivey-group.com
Cc: jsanscrainte@spivey-group.com