

**“It is recommended that grant Recipient’s contact the FCT Acquisition Staff for assistance prior to Project Plan preparation.”**

## **PROJECT PLAN PREPARATION**

The attached is a guide for Recipients in the preparation of the PROJECT PLAN for presentation to the Florida Communities Trust (FCT) governing board for approval. The lists of items are a guide to assist you in the preparation of the Project Plan. The sample table of contents, statement of award request, total project costs and conditions met example pages can be utilized as a format in your preparation of the Project Plan. The dollar amounts for items in the Total Project Costs page will be supplied by FCT unless the Recipient contracted for the services. The approved Management Plan letter from FCT will be included in the Project Plan.

**YOU WILL NEED TO SUPPLY TWO (2) SETS OF THE PROJECT PLAN TO FCT**

If you have any questions on the preparation of the Project Plan, please call for assistance.

**PLEASE VERIFY CALCULATIONS OF ALL AMOUNTS**

## CHECK LIST FOR PROJECT PLANS

- \_\_\_\_\_ Transmittal Letter includes Statement that conditions imposed as part of the Grant Contract are satisfied.
- \_\_\_\_\_ Transmittal Letter includes Statement of no violations
- \_\_\_\_\_ Transmittal Letter includes Statement that Project Plan complies with local and other laws and (Name of Local Government) Comprehensive Plan(s).
- \_\_\_\_\_ **If a reimbursement**, a statement that Recipient has followed acquisition activities consistent with Rule 9K-8.004(3)(d), F.A.C.
- \_\_\_\_\_ **If a reimbursement**, a letter from Recipient of Liability for ESA.
- \_\_\_\_\_ Statement of Amount of Award Being Requested
- \_\_\_\_\_ Breakdown of Total Project Cost
- \_\_\_\_\_ Management Plan approval letter from FCT
- \_\_\_\_\_ Copy of Executed Option/Purchase Agreements(s), Signed by Seller and Recipient
- \_\_\_\_\_ Map of Project Site showing Project Site and parcels purchased (8 ½ x 11)

### APPENDIX includes Copies of:

- \_\_\_\_\_ Invoices, Paid receipts, or other items supporting acquisition costs **if a reimbursement.**
- \_\_\_\_\_ Certified survey (**ORIGINAL**)- **if a reimbursement. (2 Survey's required)**  
\*\*\*SEE ADDITIONAL SURVEY REQUIREMENTS BELOW
- \_\_\_\_\_ Title insurance policy – **if a reimbursement.**
- \_\_\_\_\_ Environmental Site Assessment- **if a reimbursement**
- \_\_\_\_\_ Signed closing statement (Buyer & Seller)- **if a reimbursement**
- \_\_\_\_\_ Recorded deed (Copy)- **if a reimbursement.**
- \_\_\_\_\_ Any other pertinent items from closing. **if a reimbursement**

### The following work product must be submitted to FCT:

\*\*\* **Geographic Information System data provided as a shapefile (ArcView or ArcMap), with projection, datum, and units specified, on CD. The shapefile should contain the boundary of the acquired parcel(s) and include in the attribute table the name of the parcel, name of the Florida Communities Trust project, closing date(s), and deed acres.**

## *SAMPLE TABLE OF CONTENTS*

### PROJECT PLAN TABLE OF CONTENTS

- I. Transmittal Letter of Project Plan (See Example Letter)
  - A. Statement that conditions imposed as part of the Grant Contract are satisfied.
  - B. Statement of no violations
  - C. Statement that Project Plan complies with local and other laws and (Name of Local Government) Comprehensive Plan(s).
  - D. **If a reimbursement, a statement that Recipient has followed acquisition activities consistent with Rule 9K-8.004(3)(d), F.A.C.**
- II. **Statement of Amount of Award Being Requested (See Example)**
- III. **Breakdown of Total Project Cost (See Example)**
- IV. **Management Plan approval letter from FCT**  
(If Mgt Plan in review & not approved send Project Plan for contingent approval)
- V. **Copy of Executed Option Agreements(s)**
  1. Signed by Seller and Recipient
- VI. **Map of Project Site showing Project Site and parcels purchased (8 ½ x 11)**

#### **APPENDIX:**

Copies of:

1. Invoices and/or paid receipts (i.e. Copy of check) supporting acquisition costs.
2. Items related to acquisition of property **if a reimbursement or pre-acquired.**
  - a. This would include copies of
    - i. Signed Purchase Agreement,
    - ii. Certified Survey, (Original),  
and **Geographic Information System data**
    - iii. Title Insurance Policy including copies of recorded documents referenced by O.R. Book and Page number in schedule "B" of Title Insurance Policy.
    - iv. Environmental Site Assessment,
    - v. Signed Closing Statement,
    - vi. Recorded Deed and
    - vii. Any other pertinent items from closing.

**ON RECIPIENT (LOCAL GOVERNMENT) LETTERHEAD**

Number I on Sample Table of Contents:

Date

Mr. Ken Reecy, Community Program Manager  
Florida Communities Trust  
2555 Shumard Oak Boulevard  
Tallahassee, Florida 32399-2100

RE: FCT Project Name: \_\_\_\_\_  
FCT Project Number: \_\_\_\_\_  
FCT Recipient Name: \_\_\_\_\_

Dear Mr. Reecy:

The [**FCT Recipient Name**] has reviewed the proposed [**Project Name**] Project Plan and represents that the conditions imposed as part of the Grant Contract have been satisfied and evidences thereof to FCT, that all activities associated with this Project Plan comply with all applicable local, state, regional and federal laws and regulations, including zoning ordinances and the applicable adopted and approved comprehensive plan.

Further, after conducting a diligent search and to the best of my knowledge, the Recipient is not aware of any pending criminal, civil or regulatory violations imposed on the Project Site by any governmental agency or body.

Sincerely,

Name  
Title

Number II on Sample Table of Contents:

**Amount of Award Being Requested from  
The Florida Communities Trust**

The total amount of the award requested from the Florida Communities Trust by the (Recipient Name) is the lesser of \$(Amount of Request) or (Grant Award Percentage) % of Total Project Costs for FCT Project Number **04-000-FF4**.

<b>GRANT AWARD AMOUNT</b>	<b>\$</b>	<b>00.00</b>
<b>PERCENTAGE OF GRANT AWARD</b>		<b>00.00%</b>
<b>AMOUNT OF THIS REQUEST</b>	<b>\$</b>	<b>00.00</b>
<b>REMAINING GRANT AWARD AMOUNT</b>	<b>\$</b>	<b>00.00</b>

Number III on Sample Table of Contents:

**TOTAL PROJECT COSTS**  
**(Project Name)**  
**FCT Project Number**  
**04-000-FF4**

**Land Purchase Price**

Purchase Price \$ \_\_\_\_\_

Total Land Purchase Price \$ \_\_\_\_\_

**Estimated/Actual Acquisition Expenses**

Title Report	\$ _____	(O&E report for appraisal use)
Appraisals	\$ _____	(obtain from FCT unless Recipient provided)
Appraisal Review	\$ _____	(obtain from FCT)
Certified Survey	\$ _____	(actual, from contract or estimate) **
Environmental Audit	\$ _____	(actual, from contract or estimate) **
Title Commitment	\$ _____	(promulgated rate) **

**Total Acquisition Expenses** \$ \_\_\_\_\_

**Total Project Costs** \$ \_\_\_\_\_

\*\*If Recipient did not incur a cost listed above or reimbursement is not being requested for a cost listed above, please remove from the list.

**(NEEDED IF A REIMBURSEMENT OR PREACQUIRED ON RECIPIENT-LOCAL GOVERNMENT LETTERHEAD)**

[DATE]

Mr. Ken Reecy, Community Program Manager  
Florida Communities Trust  
2555 Shumard Oak Blvd.  
Tallahassee, FL 32399-2100

RE: FCT Project Number: \_\_\_\_\_  
FCT Project Name: \_\_\_\_\_  
FCT Recipient: \_\_\_\_\_

Dear Mr. Reecy:

In reference to the above-captioned transaction and in accordance with Rule Chapter 9K-8.012(4), Florida Administrative Code, please be advised that [Recipient Name] has examined the environmental site assessment and understands that (recipient name) may be assuming liability for future adverse action or cleanup associated with the lands covered by the environmental site assessment.

Sincerely,

[Name of Recipient]

By: \_\_\_\_\_

As: \_\_\_\_\_

**(NEEDED IF A REIMBURSEMENT OR PREACQUIRED ON RECIPIENT-LOCAL GOVERNMENT LETTERHEAD)**

[DATE]

Mr. Ken Reecy, Community Program Manager  
Florida Communities Trust  
2555 Shumard Oak Blvd.  
Tallahassee, FL 32399-2100

RE: FCT Project Number: \_\_\_\_\_  
FCT Project Name: \_\_\_\_\_  
FCT Recipient: \_\_\_\_\_

Dear Mr. Reecy:

The acquisition activities for the project referenced above complied with all (Recipient)'s land acquisition procedures which are consistent with Rule 9K-8, F.A.C. The (Recipeint)'s land acquisition procedures are substantially similar to the Trust's procedures.

Sincerely,

[Name of Recipient]

By: \_\_\_\_\_

As: \_\_\_\_\_