



# REAL ESTATE REVIEW

## KEY AUDIT QUESTION

How can the Real Estate Services Unit (RESU) improve its financial and service delivery performance?

## SCOPE

### Functional areas to review

Real estate leasing, sales, acquisitions of property and rights of way

### Key Audit Participants

- Real Estate Services Unit

### Secondary Audit Participants to be Contacted During the Audit

- Capital Planning
- Community Projects Review Unit
- District Counsel’s Office
- Clerk of the Board

## AUDIT TEAM

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## AUDIT APPROACH

- Evaluate the District’s current organizational structure, staffing levels, and processes for the lease, sale, and acquisition of real estate and rights of way.
  - Identify and evaluate real estate roles and responsibilities administered throughout the District.
  - Assess the effectiveness of District real estate policies and procedures.
  - Assess information sharing and public transparency of property owners doing business with the District.
  - Adherence to state law for the purchase of property, including the Brown Act, CEQA and other pertinent requirements.
  - Alignment to best practices for real estate services for California public agencies.
- Assess the extent District’s has effectively mitigated the risks associated with the District’s current processes for the lease, sale or purchase of property.
- Assess the performance of the RESU.
  - Conduct quantitative analysis (frequency, types, and cost) related to real estate acquisitions since 2014 (past 5 years).
  - District’s past litigation costs from real estate acquisitions including claims of “unreasonable pre-condemnation delay or misconduct” against the District since 2014 (past 5 years).

## TIMELINE

PROJECT KICKOFF MEETING	8/8/2019
DATA COLLECTION AND ANALYSIS:	8/8/19-9/30/2019
RESULTS MEETING/EXIT CONFERENCE	9/30/2019
DRAFT REPORT	10/21/2019
AGENCY FEEDBACK	11/11/2019
DRAFT REPORT TO BAC	12/11/2019
FINAL DRAFT REPORT	5 DAYS LATER

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AGENCY COMMENT  
FINAL REPORT

15 DAYS LATER  
20 DAYS