** STATE OF OHIO DEPARTMENT OF TRANSPORTATION**

 **RELOCATION ASSISTANCE AGENT’S NOTES**

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| FAI 033 2.64 |
| County Route Section037 77555  |
| Relocation Parcel No. PIDRon L. and Judith L. Johnston |
| Relocatee’s Name(s) |

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| *NOTE: All entries must be typed and signed or initialed by the Agent on the date of entry.**To add an additional row, tab from the end of the last Entry field.* |

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| **Date** | **Entry** |
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| 1/3/2024 | Visited 6920 Pickerington Road NW, Carroll, OH, to meet face to face with owner and hopefully set an appointment for the following week. Mrs. Johnston works from home and met with us to set appointment for 01/12/2024 at 10:00 am. |
| 01/11/24 | Confirmed our appointment by telephone. |
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| 1/12/24 | Patty Moorman and I, Kimber Heim, arrived at 6920 Pickerington Road, Carroll, OH, 43112 to meet with Mr. and Mrs. Johnston. After introducing ourselves to Mr. and Mrs. Johnston and some pleasantries. Mr. and Mrs. Johnston were present and invited us into their kitchen to sit down and begin our discussions. |
|  | I began the discussion by making sure the Johnston’s understood the project to upgrade Pickerington Road and US33 interchange. Both the Johnston’s agreed they understood the need for the project and for a couple of years had been expecting our visit. At this time, I provided Mr. Johnston the brochure which he handed to Mrs. Johnston. I began by explaining their will be two processes being accomplished. The first being the acquisition or purchase of their home and then my part which is to assist them in finding a new home. I explained the Relocation program assists the owners in finding and purchasing a replacement home which is comparable to the home they are being displaced/moved from due to the project. I explained there are reimbursements for the following: move costs, attaining a new mortgage if they have one, search expenses while looking for a new home and assisting in purchasing a new home and expenses associated with attaining the new mortgage. |
|  | Relocation Advisory Services were explained to them by informing the Johnston’s that my job would be to present them at least three (3) comparable replacement properties for them to consider. We can look for properties together, they can enlist the assistance of a real estate agent and if they wanted all of us could meet and look at homes together. I let the Johnston’s know I would try to inform them of any issues and if they had questions to call or email me and I will find out for them.  |
|  | At this point, I confirmed they did still have a mortgage. I requested them provide me the payoff balance, their payment and interest rate so I could get a preliminary idea on the interest differential due to the increased interest rates currently happening on all types of loans.  |
|  | Mrs. Johnston had concerns about the replacement property and what is needed due to her work as an animal behavioral scientist and foster for cats and dogs. Mrs. Johnston also has two(2) fish tanks and a larger tank which accommodates her 8’ boa constrictor. |
|  | Their personal pet is blind and will need time before moving in totally to get her acclimated to the yard and house. I told her we will definitely accommodate this as we would like to find you a property and have moved to the replacement home by the end of September 2024. |
|  | I took this opportunity to move to the Moving benefits with Relocation Program. I let the Johnstown’s know there are several types of moves and it is their decision how they will move their personal property and animals. The first type we discussed was the Commercial Move where a commercial move company provides a quote for complete move and 100% replacement cost insurance for their personal property. We require two (2) quotes for reference, each quoting and providing a signed, written quote. If there were items you wanted to move yourself, Mrs. Johnstown interjected my boa…and I agreed she would be best to move the boa, but if there was a company that she felt more comfortable doing the move for the health and welfare of the pet, this would also be a reimbursable expense. I mentioned the fish tanks would require special move considerations? Mrs. Johnston said she already knew where to contact to get a quote. I asked her to gather that information for me and I would stop by and pick it up and make it part of the relocation package for approval. It was also explained, if there were other things they wanted to move themselves this would be considered a combination move. Explained a combination move is any “combination” of commercial move, actual cost move or fixed residential room move cost which is governed by regulation and law. I asked them to think about what would be the best for them and then we would move forward with the particulars. Both the Johnston’s agreed it would probably be best to have a commercial move and for them to claim actual move expenses for their specific items. |
|  | I added that we would reimburse for the 100% replacement value insurance on the items they would self-move. I asked them to keep receipts for the items they purchase to assist in packing, securing, etc. I asked for a written estimate of the costs to move the pets, the boa, any specific items they choose to move themselves and I will submit as an estimate, contact the fish tank movers and the boa constrictor habitat movers to get their payment information as we can pay them direct and cut out the extra steps and thoughts for Mrs. Johnston. |
|  | I moved on to the Replacement Housing Payment benefit the Relocation Program offers. I explained I had already been looking to get an idea on the properties that are comparable to their home and property to see what was available in the market. The benefits are determined by me identifying the three (3) best comparable dwellings and choosing a prime comparable as the ideal replacement property in my opinion, you do not have to be of the same thought and can then utilize the amount to purchase the property of your choice. I explained the criteria I will use is the type of house, size of house, lot size, number of bedrooms, number of bathrooms, specialty rooms, distance to work or school, finding a property with the same amenities in your current home, and locality.  |
|  | Patty then explained the Replacement Housing Payment process with respect to the acquisition compensation for your home. Patty explained say your property has the Fair Market Value of $100,000 and Kimber cannot find you a property for less than $125,000. The $25,000 difference would be paid through the Relocation Program which is non-taxable. Mr. Johnston confirmed so ODOT is going to help us move into a new house? I said, yes. ODOT is going to make sure if you choose to purchase a home within the Prime Comparable price, nothing will change for you with respect to the amount you pay each month for your mortgage payment. If you have a mortgage the Relocation benefits also reimburse/pay the costs of the new mortgage except the prepays for taxes, insurance and any additional points. These benefits will be explained once you have found your new property and we begin the purchase. |
|  | The Increased Interest benefit was explained as money that is paid to you direct to make sure the remaining term of your loan and remaining payment level remain the same as currently. This is done by making sure any increased interest is calculated and paid to the property owner in a lump sum. The idea is if you put this additional money on your purchase it will bring it to the level it is now, if in fact interest has increased.  |
|  | Other expenses which are reimbursable were explained as costs incurred when purchasing a home in the normal fashion: inspection fees, title search and insurance fees, recording fees and closing costs as presented by the title company. |
|  | At this point, Stella had questions concerning what type of house would I be looking for as a replacement. I asked her to confirm this house has 3 BRs and 1 BA, full basement, attic, asked how heated, with weird fuel oil system, which they both commented will be one thing they will enjoy not worrying about at their new place. We confirmed the house does have AC, school system is not a concern, but they would like to stay on this side of Columbus, in Carroll, Baltimore and possibly Canal Winchester, but not in Columbus and did not want to go into Lancaster if possible as Mr. Johnston’s work is in this area. I told them I would work very hard to find them a property that was equal to or better than their current home and property. |
|  | Mrs. Johnston wanted to review the money for their house and how that worked. I explained that is what is called an acquisition. Our appraiser, Frank Hinkle, who they had accompanied on his assessment, would provide a summary appraisal to us concerning the Fair Market Value. I would then take the particulars identified in the appraisal and this visit to locate a property equal to or better than. I went on to explain the expectation is if you use the acquisition money to pay off your current loan, the remainder to go towards the new property with the addition of relocation housing payment money, increased interest payment if determined necessary will have you in the same position financially with your home as you are in now, same payment, term of loan and payoff amount when you have moved to your new property, the replacement house. |
|  | Patty did explain the appeals process and how if we could not come to agreement with the reimbursements levels a written appeal could be submitted for review. |
|  | At this time, I walked with Mrs. Johnston around the home and took pictures of the fish tanks, and boa habitat, the upstairs and all the plants to be moved.  |
|  | When I finished with the inside photos, Mr. Johnston accompanied around the outside of the property. |
|  | Once finished with the photos, Patty and I said our good byes and let The Johnston’s know I would be in touch when the process had advanced. I would follow-up to get the mortgage interest, balance and payment information and re-discuss the properties I have found and they have found before filing my documents for final approval. |
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