

Pipeline Safety Coalition

US DOT PHMSA - Technical Assistance Grant (TAG) -#DTPH5615GPPT20

Midterm Report: April 21, 2016

Pipeline Safety Coalition (PSC) received technical assistance funding to conduct a study of the practice of real estate in conjunction with gas, liquids and hazardous liquids pipeline safety in order to develop informational resource for real estate professionals on pipeline safety and awareness in the US Atlantic Coastal States.

The Pipeline and Informed Planning Alliance (PIPA) is a stakeholder initiative focused on pipeline planning and safety. PIPA's founding key stakeholders are 1) Local Governments, 2) Property Developers/Owners, 3) Transmission Pipeline Operators, and 4) Real Estate Commissions. These founding stakeholders serve as the basis for support of this proposal. Utilizing this founding stakeholder hierarchy, PIPA establishes baseline (BL) Recommended Practices which "should be implemented by stakeholders in preparation for future land use and development" and New Development (ND) Recommended Practices which "should be implemented by stakeholders when specific new land use and development projects are proposed." However, PSC observed that although real estate commissions are a key foundational stakeholder group of PIPA, according to PIPA, [page 32 - 33, Recommended Practices Chart] BL 18: Disclose Transmission Pipeline Easements in Real Estate Transactions, is the sole BL recommendation listed as pertaining to real estate commissions. There is no ND recommendation pertaining to real estate commissions or the real estate profession.

In regard to real estate commissions, PIPA also states, "Practice Statement: As part of all real estate sales contracts, each state should require the disclosure of known transmission pipeline easements on the property." While PSC agrees with this practice statement, PSC will vet the need and ability for expansion of the state-by-state recommendation to the National Association of Realtors as a program that discloses regulatory processes, sets standards and educates realtors who in turn disseminate information and play an informal educational role during the course of property transactions with residential and commercial clients.

Landowners and developers depend upon the expertise of local real estate professionals when making decisions about real estate investments, home relocations, short-term or rental housing, planned lifetime activities, or business ventures. Given this central role that real estate brokers and agents play in these important transactional decisions, this project will vet expanding PIPA recommendations for real estate professionals into common sense, practical practices that enhance public, private and environmental safety over time through transparency built on real estate full disclosure practices by real estate professionals.

In consideration of the broad context in which real estate professionals have the potential to provide transparency, education and enhance safety and the diverse array of stakeholders with whom they interact, it is notable that this professional group is perhaps under-served and under-utilized in promoting pipeline safety initiatives. PSC is therefore conducting research of existing real estate practices in harmony with PIPA BL 18, and will vet the potential for inclusion of PIPA recommendations that lend themselves to timely inclusion by nature of the role real estate brokers and agents play and could play in enhancing pipeline safety.

The project timeline was delayed due to the first receipt of partial funding for this project on December 09, 2015. Milestones are therefore impacted and altered as well. Despite this set back in time, the project is moving swiftly and efficiently.

Upon receipt of funding, RFPs were written and disseminated, proposals reviewed and qualified contractors with expertise and a real estate license contracted. Contractors are researching readily available pipeline education resources for real estate agents and identifying key licensing requirements pertinent to the investigation. One result of this project to date is outreach from PA State Senator Andrew Dinniman upon learning of this effort. The Senator is investigating licensing requirements for pipeline operator land agents and the principal investigator was asked to educate the Senator on current requirements. The Senator has asked for updates on this project so that he can provide input, learn more of the process and potentially lend support.

Section 10.01: Progress Report/Mid-Term Report: PSC herein provides a reiteration of expected project outcomes and in compliance with Section 10.01, submits this Mid-Term Report:

Article III: Expected Project Outcomes: (By percent work accomplished)

1) Conduct a comprehensive investigation to identify what actively licensed real estate professionals are required to know about existing and proposed pipelines based on readily available educational resources as well as licensing requirements and normalized professional practices. Milestones: October 2015 - March 2016. Estimated Cost/Resource: Personnel, Contractual: (40%)

2) Conduct a state-by-state review of statutes and regulations pertaining to real estate disclosure and transactional practices in the 14 US Atlantic Coastal States of Maine, New Hampshire, Massachusetts, Rhode Island, Connecticut, New Jersey, New York, Delaware, Maryland, Virginia, North Carolina, South Carolina, Georgia, and Florida. Milestones: October 2015 - June 2016. Estimated Cost/Resource: Personnel, Contractual) (40%)

3) Identify organizations and experts who can answer the question: What role do, could, or should real estate professionals play in community education and awareness with regard to pipeline safety issues? Such organizations will include, but not be limited to:

- Coastal States Organization (CSO)
- National Association of Realtors (NAR)
- National Association of Counties
- National Association of Planning Councils
- State Real Estate Commissions
- Local Real Estate Boards

Milestones: October 2015 - June 2016. Estimated Cost/Resource: Personnel, Contractual (70%)

4) Survey organizations and interview experts identified in Objective #3 in order to understand existing and possible relationships between real estate professional roles and responsibilities and community education and awareness regarding pipeline safety issues, and specifically answer the following research questions: What education and information resources around the specific topic of disclosure of transmission pipeline easements in real estate transactions

already exist? Are real estate professionals taking advantage of existing resources? Why or why not? Is there a need for more specific education or targeted information for real estate professionals focused on pipelines, either existing or newly proposed? Milestones: March 2016 - June 2016. Estimated Cost/Resource: Personnel, Contractual (10%)

5) Correlate all investigation and research to PIPA BL 18 and to PIPA recommendations that lend themselves to timely inclusion such as BLs 03, 04, 06, 07, 08, 09, 10, 11, and NDs 02, 03, 04, 07, 10, 17. Milestones: October 2015 - September 2016. Estimated Cost/Resource: Personnel, Contractual (20%)

6) Create a blueprint for a handbook, manual, or on-line resources based on the review and investigation of real estate professional educational and informational needs. Development of this blueprint will include the solicitation of expert knowledge and opinions, outlining of generalized handbook or manual contents, identification of venues of dissemination, and vetting of outline and dissemination venues through experts in real estate law and practice. Milestones: June 2016 – August 2016. Estimated Cost/Resource: Personnel, Contractual: (0%)

7) Market educational materials, including blueprint for handbook or manual and on-line resources, to national and state real estate organizations and boards. Milestones: June 2016 – September 2016. Estimated Cost/Resource: Personnel, Contractual (0%)

8) Incorporate real estate stakeholder organizations, project outcomes, and materials developed into the PSC website and the PPSEP Educational Platform. Milestones: August 2016 - September 2016. Estimated Cost/Resource: Personnel, Contractual (0%)

9) Maintain records for project transferability. (Ongoing)

10) Produce a final report. (Ongoing)

Budget summary to date 4/20/2016:

Real Estate 2015 TAG	PSC	Dr Perry	Other/Web buildup	Total
Total Budget	\$19,200.00	\$60,800.00	\$10,000.00	\$90,000.00
# 1094	\$5,000.00			
# 1112		\$15,200.00		
#1113	\$5,000.00			
Total Expenditures	\$10,000.00	\$15,200.00	\$0.00	\$25,200.00
Balance	\$9,200.00	\$45,600.00	\$10,000.00	\$64,800.00
				\$90,000.00

SF 425:

FEDERAL FINANCIAL REPORT

(Follow form instructions)

1. Federal Agency and Organizational Element to Which Report is Submitted US DOT PHMSA		2. Federal Grant or Other Identifying Number Assigned by Federal Agency (To report multiple grants, use FFR Attachment) #DTPH5615GPPT20		Page 1	of 1 pages		
3. Recipient Organization (Name and complete address including Zip code) Pipeline Safety Coalition, 331 Norwood Road, Downingtown, PA 19335							
967074373	27-4783696	5. Recipient Account Number or Identifying Number (To report multiple grants, use FFR Attachment)		6. Report Type <input type="checkbox"/> Quarterly <input checked="" type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual <input type="checkbox"/> Final	7. Basis of Accounting <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual		
8. Project/Grant Period From: (Month, Day, Year) 10/01/2015		To: (Month, Day, Year) 03/30/2016		9. Reporting Period End Date (Month, Day, Year) 03/30/2016			
10. Transactions				Cumulative			
<i>(Use lines a-c for single or multiple grant reporting)</i>							
Federal Cash (To report multiple grants, also use FFR Attachment):							
a. Cash Receipts				45,000			
b. Cash Disbursements				25,200			
c. Cash on Hand (line a minus b)				19,800			
<i>(Use lines d-o for single grant reporting)</i>							
Federal Expenditures and Unobligated Balance:							
d. Total Federal funds authorized							
e. Federal share of expenditures							
f. Federal share of unliquidated obligations							
g. Total Federal share (sum of lines e and f)							
h. Unobligated balance of Federal funds (line d minus g)							
Recipient Share:							
i. Total recipient share required							
j. Recipient share of expenditures							
k. Remaining recipient share to be provided (line i minus j)							
Program Income:							
l. Total Federal program income earned							
m. Program income expended in accordance with the deduction alternative							
n. Program income expended in accordance with the addition alternative							
o. Unexpended program income (line l minus line m or line n)							
11. Indirect Expense	a. Type	b. Rate	c. Period From	Period To	d. Base	e. Amount Charged	f. Federal Share
				g. Totals:			
12. Remarks: Attach any explanations deemed necessary or information required by Federal sponsoring agency in compliance with governing legislation:							
13. Certification: By signing this report, I certify that it is true, complete, and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)							
a. Typed or Printed Name and Title of Authorized Certifying Official Lynda K Farrell				c. Telephone (Area code, number and extension) 484-340-0648			
				d. Email address lynda@pscoalition.org			

Respectfully Submitted,

A handwritten signature in black ink, appearing to be 'L. Farrell', written in a cursive style.

Lynda Farrell, Executive Director, Pipeline Safety Coalition