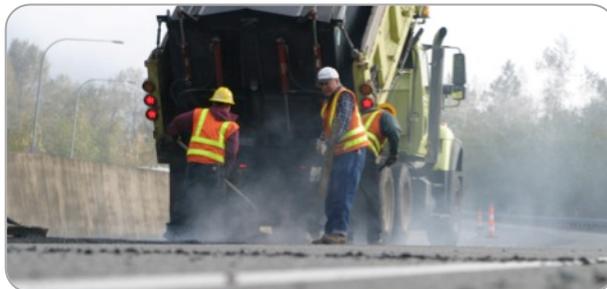


# Did I Say That?

## *Tips on Diary Entries*



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“Did I Say That?”

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# Why Diary Entries?

- Inquiring minds want to know:
  - *Are we adequately documenting what we do?*
  - *Have we met the requirements of applicable laws, regulations, policies and procedures?*
  - *Have we “closed the loops” before we close the file?*
- A clean and complete file is the basis for a clean and complete review or audit.
- It’s wise to follow the “Almost Golden Rule”.....>>

# The Almost Golden Rule



***“If it ain’t documented, it didn’t happen!”***

# Three Scenarios

# Scenario 1: Say What?

- Acquisition agent's diary entries:
  1. Met the owner a couple of days ago. We had some discussion about the appraisal. Talked about a settlement. Will talk again next week.
  2. Met again with owner. May settle on a counter-offer. Original offer was \$95,000; countered at \$100,000. Will get back with owner.
  3. Settled for \$107,500.
  4. Acquisition package sent to HQ to arrange closing.

# Scenario 1: Say What?

1. Limited information w/this entry, does not explain what is going on.
2. Tells what the original offer was (\$95K), but not clear on the counter—who made it?
3. Nothing in these diary entries tells us the basis for a settlement at \$107,500.

***What really happened?*** The owner countered @ \$120,000, citing some improvements he had made to his house the previous year. The agent thought a couple of the improvements warranted a small increase and negotiated a settlement at \$107,500.

# Key Points

1. Write your entry as if you were speaking to someone else.
2. Be accurate—do the Aaron Rodgers “double check”.
3. When you have finished your diary entries for the day, take a few moments to go back and re-read them. You’ll be surprised at what you might find.



# SCENARIO 2: WHERE'S THE BEEF

# Scenario 2: Where's the Beef?

- Entry by Relocation agent after making the relocation offer to a business tenant:
  - Met tenant, Roger's Rods and Reels, at his business. We discussed moving expenses. Gave the 90-Day Assurance letter and other docs. The tenant wants to move as close to this location as possible. Will meet next week to look at replacement sites.

# Scenario 2: Where's the Beef?

Where we are missing the beef:

- Met **tenant**, Roger's Rods and Reels, **at his business**.
- **We discussed moving expenses.**
- Gave the 90-Day Assurance letter and **other docs.**
- The tenant wants to **move as close to this location as possible.**
- Will meet **next week** to look at replacement sites.

# Key Points

1. Do NOT assume the reader knows what you are saying. Be clear, concise, but include sufficient detail.
2. Remember: You may hit the big time and be gone the next day. Someone will be assigned your file—they need to know what you did.
3. “If it ain’t documented, ...” (you know it!)

# SCENARIO 3: DID I SAY THAT?

# Scenario 3: Did I Say That?

*In his recommendation for payment of move expenses, the relocation agent gave this description of the displaced business:*

Dave's Fine Furniture has been selling furniture and appliances at this location for over 20 years. Dave has built up an established clientele, to whom he has been selling quality merchandise at reasonable prices. There are currently no sites available in that neighborhood to accommodate this business, so the displacee has been searching in nearby areas for a replacement site. His plan is to lease a replacement site and move within 90 days.

# Scenario 3: What's the Issue?

- There are two “opinion” words in this memo that could be challenged; can you spot them?
  - Dave has built up an established clientele, to whom he has been selling **quality** merchandise at **reasonable** prices.
- If this document was made public, could a competitor's attorney claim the state is endorsing Dave's over his client's business?

# What's "In" Your Diary?

Your diary should include:

- **Who?** (Who'd you meet or talk with?)
  - **What?** (What information was discussed & what response/direction/guidance was given?)
  - **When?** (Date/time of contact?)
  - **Where?** (Location of contact—on site, phone)
  - **Why?** (What was the purpose of the contact?)
- 
- The bottom line—be sure to put in ***the facts!***

# What's "Out" of Your Diary?

Your diary entries should NOT contain:

- Judgmental language (“The owner is a jerk!”)
- Opinions (“Her swimming pool is not worth that much.”)
- Irrelevant comments (“It was a hot day out there.”)
- Adverse comments about property owners, displacees, lessees, etc. (“This guy doesn’t have a clue how to run a business.”)
- Profanity (“What the owner said about me is a \*\*\*\*ed lie!”)
- Comments that might be taken by competitors as an agency endorsement (e.g., “Bob’s Burgers is a **great** place to eat.”)

# Remember This!

- Diaries are **NOT** about literary style.
- Diaries **ARE** about facts.



# AND.....

- Diaries are **NOT** about opinions or judgments.
- Diaries **ARE** about facts.



# Let's Take a Test Drive!



# Pick an Entry 1

Which of these diary entries would you select:

1. I met with the property owner at the Starbucks near his home; his house is old and the smell is just too strong to be there very long.

.....OR,

2. I met with the property owner at the Starbucks near his home. The owner suggested this location.

# Pick an Entry 2

Which of these diary entries would you select:

1. I called the tenant to discuss some items related to their move to a replacement site. We talked about the pre-move and post-move inventory, the payment to a commercial mover, and the options available to replace some outdated equipment.

.....OR,

2. I called the tenant to talk about their move.

# Pick an Entry 3

Which of these diary entries would you select:

1. The owner wants to do a lease-back. I told the owner we will demolish the house and other improvements.

.....OR,

2. The owner asked about a lease-back. I told him I would check with relocation and PM to see if we can do that. He asked me what would eventually happen with the house and I told him we would have to clear the land before construction began, so would either demolish the improvements or possibly sell them for removal from the site.

# Extra Credit

Find at least 7 things you would change in this diary entry:

I met with the property owner on the 10<sup>th</sup> at his house. It was raining cats and dogs! He invited me into his living room and after offering me a nice cup of tea, we discussed the acquisition offer. I gave him a copy of the appraisal and we went through it together. The owner was nice at first, but the more we talked about the offer, the angrier he became. He finally told me he wanted to have a friend of his, a real estate agent, take a look at the offer and I discussed the SEA with him. That seemed to settle him down. He did tell me he would be willing to settle for \$200,000, but that's not realistic since the offer is only \$95,000. I asked him why he thought his property was worth \$200,000 and he made some good points. I plan to ask my supervisor if I can settle this for \$150,000.

# Extra Credit

Did you find these:

I met with the property owner on the **10<sup>th</sup>** at his house. **It was raining cats and dogs! He invited me into his living room and after offering me a nice cup of tea,** we discussed the acquisition offer. I gave him a copy of the appraisal and we went through it together. **The owner was nice at first, but the more we talked about the offer, the angrier he became.** He finally told me he wanted to have a friend of his, a real estate agent, take a look at the offer and I discussed the SEA with him. **That seemed to settle him down.** He did tell me he would be willing to settle for \$200,000, **but that's not realistic since the offer is only \$95,000.** I asked him why he thought his property was worth \$200,000 and **he made some good points.** I plan to ask my supervisor if I can settle this for **\$150,000.**

# Questions?

