

## 257-2015 ADDENDUM 4

### REQUEST FOR PROPOSALS FOR PROFESSIONAL CONSULTING SERVICES FOR THE DEVELOPMENT OF A COMPREHENSIVE REAL ESTATE TRANSACTION MANAGEMENT FRAMEWORK AND IMPLEMENTATION PLAN

ISSUED: April 24, 2015  
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#### **URGENT**

**PLEASE FORWARD THIS DOCUMENT TO WHOEVER IS IN POSSESSION OF THE REQUEST FOR PROPOSAL**

**THIS ADDENDUM SHALL BE INCORPORATED INTO THE REQUEST FOR PROPOSAL AND SHALL FORM A PART OF THE CONTRACT DOCUMENTS**

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**Please note the following and attached changes, corrections, additions, deletions, information and/or instructions in connection with the Request for Proposal, and be governed accordingly. Failure to acknowledge receipt of this Addendum in Paragraph 9 of Form A: Proposal may render your Proposal non-responsive.**

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#### **PART D – SUPPLEMENTAL CONDITIONS**

Revise: D4.1 to read:

D4.1 The Work to be done under this Contract shall consist of consulting services to develop and recommend a Real Estate Transaction Management Framework and Implementation Plan that incorporates **12** of the 17 recommendations in the REMR. (These are recommendations # 1, 2, 3, **4**, 7, 8, 9, 10, 11, 13, 14 and 17). The recommended Framework must be based on and supported by a best practice analysis of like municipalities and jurisdictions.

Revise: D4.3 to read:

- D4.3 The Proponent is expected to ensure that the proposed Real Estate Transaction Management Framework addresses the following recommendations from the *Real Estate Management Review – Findings and Recommendations Report*:
- (a) Recommendation #2 – Establish PPD Directive for more complete reporting and provide checklist to assist with disclosures;
  - (b) Recommendation #3 – Establish Appraisal Guidelines;
  - (c) Recommendation #4 - Establish Guidelines regarding when to engage Materials Management;**
  - (d) Recommendation # 7 – Establish Guidelines when negotiating and establishing commission rates;
  - (e) Recommendation #8 - Retain documentation of internal communications;
  - (f) Recommendation # 9 - All significant agreements and contracts should be reviewed by Legal Services. Standard templates for all real estate transactions should be developed;
  - (g) Recommendation #10 - Develop standardized index and checklist for transaction files;
  - (h) Recommendation #11 - Establish guidelines for comprehensive procurement process when lease or acquisition transactions are over a certain size;
  - (i) Recommendation #13 - Perform market analysis for establishing lease rates;
  - (j) Recommendation #14 – Develop a tracking mechanism that will flag when real estate transactions require actions to be taken or decisions made; and
  - (k) Recommendation #17 - Develop an Environmental Site Assessment (ESA) procedure.

Add D4.3.1 as follows:

D4.3.1 Further to D4.3(f), the Proponent will be required to do the following:

- (a) Identify and establish guidelines for a process for review by Legal Services of all significant agreements and contracts;
- (b) Prepare a list of standardized templates to be developed for all real estate transactions; and
- (c) Develop standardized templates identified on the list, except for legal agreements and contracts, which include, but are not limited to, agreements of purchase and sale, lease agreements, terms and conditions, easement agreements and encroachment agreements. All legal agreements and contracts will be developed by the City of Winnipeg's Legal Services Department.