



Renfrew

Town of Renfrew
127 Raglan Street South
Renfrew, Ontario
K7V 1P8

Request for Standing Offer of Professional Real Estate Services RFSO 2025-03-DE

Section II – Information Package

Background

The Town of Renfrew, situated along the Bonnechere River in the heart of the Ottawa Valley, both embraces its rich history, and is committed to progress. Less than an hour from the amenities of the Nation's Capital, the Town offers exceptional educational opportunities, affordable residential opportunities, and a commercial sector on the cusp of growth. The pending extension of Highway 17 is expected to be a driver of growth and development for the decades to follow, presenting a compelling opportunity to participate in shaping the future of the Town through development of the Town's extensive real estate portfolio.

The Town of Renfrew is issuing this RFSO in order to establish a **Standing Offer** listing of up to five qualified firms to be drawn from by the Town on an as-required basis within the time period of **up to five (5) years**. During the time period, the Town's Standing Offer list of firms may be evaluated or rated based on quality of services provided, timeliness of services provided, and cost effectiveness. Maintaining status on the Town's Standing Offer list for assignment of work will be dependent on performance in the identified key areas. As the Town gains experience with the retained firms, the Town reserves the right to utilize the firms more, less, or not at all, on the basis of performance, service, value, expertise, resources, timeliness, and any other criteria that the Town deems relevant. For greater clarity, firms should not assume that recruitment to the Town's standing offer list will result in any particular volume of assignments, including the possibility for no assignments in any given year. By submitting a response to the RFSO, proponents accept any and all costs associated with responding to the RFSO and maintaining status on the Town's Standing offer list, and the Town shall bear no liability or responsibility for costs whatsoever.

It is expected that the firms will work across the departments and resources of the Town, to undertake assignments. The successful firms are expected to become familiar with the Town of Renfrew's policies/procedures, organizational structure, and guiding documents, in particular with respect to procurement of goods/services, disposal of assets, finance, legal matters, the Town's Master Plans, Official Plan, Zoning By-law, and Strategic Plan. The successful firm should have an expert understanding of provincial legislation, particularly the Municipal Act, pertaining to real estate and land development. The firms will be available on an on-call basis to address any and all real estate and land development requirements the Town of Renfrew may have during the term of the Standing Offer Agreement.



Proponents are permitted to use sub-consultants for specialized areas of expertise within a specific category, providing such sub-consultants and their specific personnel are clearly identified in the appropriate sections of the proposal. Proponents that have a breadth of in-house resources, rather than sub-consulting, will generally be scored higher.

Scope of Services

The scope of work will differ on a project-by-project basis. The projects, studies and assignments that may occur will include, but not be limited to, the following:

1. Strategic Real Estate Advisory

- **Portfolio Optimization** – Evaluating municipal real estate holdings to maximize revenue generation.
- **Highest & Best Use Analysis** – Assessing holdings for the highest and best use of land in the context of the *Planning Act*, the *Provincial Planning Statement*, the County of Renfrew and the Town of Renfrew Official Plans, and relevant regulations.
- **Surplus Property Disposition** – Managing the sale or lease of surplus land per the *Municipal Act, 2001*, ensuring compliance with the Town’s disposal of surplus land and other applicable policies.
- **Strategy Development** – Assisting in the development of plans and strategies for the management and disposal of the Town’s real estate portfolio.

2. Property & Asset Management

- **Public Facilities Management** – Overseeing and advising on municipally-owned buildings, facilities, and infrastructure, as required.
- **Lease Administration** – Managing leases for municipal-owned assets.
- **Capital Improvements & Infrastructure Planning** – Assisting with planning and budgeting for maintenance and long-term capital projects, aligning with Ontario’s Asset Management Planning for Municipal Infrastructure regulations, including the preparation, implementation, and review of Building Condition Assessments and Designated Substances Reports.

3. Economic Development & Public-Private Partnerships (P3s)

- **Public-Private Partnerships (P3) Structuring** – Supporting municipalities in working with private developers for mixed-use, mixed-tenure, and mixed-density developments, including expert familiarity with alternative financing models and capital stack arrangements. Proponents should have direct experience with closed deals and completed projects, and have financial pro-forma models and legal instruments (multi-party agreements, etc.) reflecting this experience.
- **Affordable & Workforce Housing Development** – Assisting with the planning and delivery of affordable and below-market housing options on municipal lands, including leveraging P3s as well as available funding from provincial, federal and agency sources.



- **Industrial and Commercial Marketing and Promotion** – Developing and executing a strategy for the promotion and sale of town real estate to industrial and commercial businesses, developers and real estate trusts.
- Maintenance of a list

4. Leasing & Transaction Services

- **Tenant Representation for Municipal Offices & Services** – Securing leased spaces for government operations.
- **Landlord Representation for Municipally Owned Assets** – Marketing municipal properties for lease to maximize revenue and support local economic growth.

5. Development & Project Management

- **Master Planning & Urban Redevelopment** – Advising the municipality on market and product factors (e.g., building use, format, lotting affecting the development and design of surplus municipal land projects).
- **Deal Structure and Partnerships** – Informing the approach to municipal land sales in terms of appropriate and innovative legal, financial, and business structures, to support municipal development objectives.
- **Project Capital Stack Advisory** – Advising on the capital stack of development projects, including creative financing approaches in accordance with the Municipal Act, to advance large-scale projects.

6. Valuation & Market Analysis

- **Property Valuations & Appraisals** – Conducting valuations and market value appraisals in line with accepted methodologies, undertaken by professionals appraisers (P.App, AACI designations).
- **Demographic & Economic Impact Studies** – Supporting municipal planning with population growth, workforce, and economic development projections.
- **Market Studies** – Characterizing and analyzing the local and regional market with respect to residential, commercial and industrial real estate and development products.

7. Investor & Buyer Database Management

- **Municipal Buyer & Investor Registry** – Maintaining a centralized database of potential buyers for municipal land, surplus assets, and industrial/commercial properties, including institutional investors, developers, and local business owners.
- **CRM & Prospect Tracking** – Using real estate CRM software (e.g., REthink CRM, Apto, CoStar) to manage buyer interest, track engagement, and streamline deal flow for municipal property transactions.
- **Public-Private Partnership (P3) Investor Engagement** – Identifying and maintaining relationships with developers, infrastructure funds, and investment groups for P3 projects related to affordable housing, mixed-use developments, commercial and employment lands.



- **Targeted Municipal Asset Marketing** – Implementing structured marketing campaigns through expressions of interest (EOI), requests for proposals (RFPs), and direct investor outreach to match available properties with qualified buyers.
- **Off-Market & Strategic Land Dispositions** – Proactively engaging pre-qualified investors for municipal land sales, long-term leases, or strategic redevelopments.
- **Compliance with Municipal Act & Procurement Policies** – Ensuring all investor interactions and property transactions align with the *Municipal Act, 2001*, the Town’s disposal of surplus land, procurement, and other applicable policies.

It is understood and acknowledged that while the scope within the RFSO lists the specific types of services to be provided, it should not be considered a complete and comprehensive list.

Terms of Reference

The Technical Proposal content to be addressed by the Proponent shall adhere to the following format and provide a response to the criteria as outlined below and in the Scope of Services. This list should be supplemented as required, and as believed necessary, based on the consultant’s experience and knowledge.

Please note that for those Proponents who are using contracted services or sub-consultants, the requirements must be completed first identifying the prime consultant (Proponent), with the contracted services information following.

Proposal Content

Task 1: Technical Proposal Content

Letter of Transmittal:

A Letter of Transmittal or covering letter, dated, and signed by an official authorized to negotiate, make commitments, and provide any clarifications with respect to the proposal.

Executive Summary:

An Executive Summary will provide a brief and concise summary of the proposal contents, drawing out pertinent points in the proposal that the Proponent wishes to highlight.

Corporate Profile:

A brief corporate profile will cover the company’s history, office location(s), and scope of services, including subconsultants.

Proponent’s Team:

Proponents are to clearly identify each member on the project team, including subconsultants, and describe the involvement they have on the team. Each team member will include a CV.



Experience and Expertise:

The Proponent will provide a comprehensive list of related projects from the past five (5) years. For Proponents that plan to utilize contracted services, the same must be included for all subconsultants. Proponents who are not able to provide all of the required credentials or specific areas of expertise either in-house or through subconsultants will not be ruled out, however the Town reserves the right to score Proponents lower based on experience provided, and once the Standing Offer List is developed, the Town may call upon consultants from the list based on their expertise specific to the individual assignment.

Proponents that have current or previous experience and expertise with Standing Offer Agreements, specifically with Municipalities, shall provide a comprehensive list that will identify the Municipality, the year the agreement was commenced, if the agreement is still active or if the agreement has concluded. If the agreement is concluded, please provide a brief description of the reason.

Local Context:

The Proponent will provide a brief perspective on the Town of Renfrew and any current and past involvement in the Town of Renfrew. In addition, identify experience on projects within the Town of Renfrew and familiarity with local and regional conditions and markets.

Ability to Comply with Identified Requirements:

Proponents will identify and detail their ability to satisfy all aspects as outlined in the “Scope of Services” section of this proposal.

Value-Added Services:

Proponents are required to provide a description that:

- Identifies any unique aspects of the Proponent’s services that supplement the essential requirements of the Scope of Services.
- Describes what the Proponent has to offer as a value-added service or feature that will benefit the Town of Renfrew as compared to competitors.

Insurance:

As outlined in the Insurance (Section I.12) and Health & Safety and WSIB (Section I.13)

Proponents are required to provide proof of insurance satisfactory to the requirements of the RFSO document as part of their proposal submission but will not be required to name the Town of Renfrew as an additional insured until such time as they are awarded status on the Town’s Standing Offer List. If the Town requests to have the amount of coverage increased or to obtain other special insurance for the services for the project, then the Consultant shall endeavor straightway to obtain such increased or special insurance at the Town’s expense.



References:

The Proponent shall include a list of three (3) references, with preference for municipal, with their proposal package. Each of the references shall include the municipality's name, contact person and title, phone number, and email address. The references, where possible, should reflect municipalities to whom similar consulting services are or have been provided.

Task 2: Financial Proposal Content

In a **separate document**, clearly identified as **Financial Proposal**, the Proponent shall submit a financial proposal as follows:

- A current schedule of fees for service, disbursements and travel expenses for each member identified as part of the project team. This will also include any proposed sub-consultant's services.
- A proposed methodology for managing and charging out time on projects and day-to-day requests from the Town of Renfrew.
- A proposed first year Standing Offer Agreement schedule of fees for service, disbursements and travel expenses for each member identified as part of the project team. Hourly rates, disbursements, and travel costs should be broken down separately and provided for each team member. Annual increases in the proposed fees, disbursements, and expenses for each subsequent year of the Standing Offer Agreement will be based on the CPI inflation rate in the preceding year, with the exception of percentage-based commissions, which shall not exceed the proposed first year rates for the term of the Standing Offer Agreement.
- The Town will pay directly for all advertisements, meeting room rental and refreshments and any fees charged by approval authorities.

Assignments Under Standing Offer List

Once established, the firm selected from the Standing Offer list should have the ability to provide a response, or callback, to the Town no later than two (2) business days of a commission request.

As opportunities develop under the scope of the RFSO the Town will generally request a proposal from one of the qualified/eligible firms, with the option for the firm to pass on the assignment if they are not able to fulfill the request.

Regardless of the order, distribution or size of previous assignments, the Town reserves the right to award assignments to any firm whatsoever. Regard will be had for value for money, expertise and resources of the firm, quality, and timeliness of work on previous assignments, previous work related to the assignment being considered, anticipated speed of project startup and familiarity with the Town's systems, processes, and policies, and the Town's overall experience with the firm on previous assignments. The Town may determine



based on previous work experience that certain firms are better suited to certain types of work and may award based on the category of the work being undertaken. The Town's decision to award or not, as the case may be, shall be determinative, and shall not be subject to dispute as to the perceived distribution of work or the reasons therefor. For greater clarity, firms should not assume that recruitment to the Town's standing offer list will result in any particular volume of assignments, including the possibility for no assignments in any given year.

If a firm opts to pass on an assignment, a notification of the decline of offer shall be sent to the Town within the specified time period of the opportunity. In this case the Town will contact another firm from the Standing Offer List. In such a case where the firm has passed a third assignment request, the Town reserves the right to evaluate the firm's position on the Standing Offer List and replace or remove the firm from the Standing Offer List as required.

If a firm chooses to opt out of the Standing Offer List by choice, the Town reserves the right to replace the firm on the Standing Offer list as required. The Town also reserves the right, in its sole discretion, to remove or add any firm, or modify the Standing Offer List at any time.

Assignments will be administered as follows:

- Each assignment under this Standing Offer List will be requested, authorized, and managed by the Town.
- A description of the task to be performed will be provided to the firm from the Town in sufficient detail to enable the firm to establish a fixed amount or maximum upset amount for the task.
- The firm will submit a proposal, including a fixed amount or maximum upset amount, together with supporting details (including a cost breakdown), to the Town prior to commencement of the work.
- Subject to the Town's acceptance of the proposal, the Town will issue a contract agreement/signed proposal and/or purchase order authorizing the firm to proceed with the work. Any proposal amounts over \$100,000 will require the authorization of Council pursuant to the Town's procurement policy.
- Any additional work over and above the proposal authorized must be approved in writing by the Town prior to being performed by the firm. Any additional costs not budgeted for, and amounts over \$100,000 will require the authorization of Council pursuant to the Town's procurement policy.
- If a Stop Work Order by the Town is issued to the firm after commencement of the work, it will be the firm's responsibility to demonstrate to the Town that productive work was performed between the time of authorization and the Stop Work Order.



Additionally, the firm will be required to provide evidence of all costs which they may have incurred in association with such productive work. The Town will not be responsible for any lost commissions associated with land sales or tied to the completion of other work in this event.

- The requested services shall be performed in accordance with professional standards and current “best practices”. The firm shall skillfully and competently perform the services, and shall employ only skilled, competent, and qualified staff thereon who shall be under the supervision of a senior member of the Consultant’s staff.

Peer Review

The Town reserves the right to hire, at its own cost, an independent Consultant to peer review the works of the Consultant. The Consultant will be compensated for the time and materials associated with the peer review, as an extra to the assignment, but at the rates stipulated in the agreement.

Errors or Omissions

The Proponent takes full and complete responsibility for the actions of its personnel, subconsultants and subcontractors, and agrees that it shall undertake all work with the highest standards of care and quality in its completion of assigned work. The Proponent shall carry sufficient professional liability and errors and omissions insurance in force throughout the term of the Standing Offer Agreement, and shall submit a valid certificate of insurance annually, and any time prior to expiry of an existing policy.

Compliance

All federal, provincial, and local laws and regulations now or hereafter enacted shall become a part of the Contract and be compiled within the performance of all portions of the work. The successful firm shall be responsible to obtain, review, and abide by the terms and conditions of the following applicable laws including, but not limited to:

- Ontario Regulation 191/11 made under the Accessibility for Ontarians with Disabilities Act, 2005
- Bill 168, Occupational Health and Safety Amendment Act (Violence and Harassment in the Workplace) 2009

The proponent is assumed to be familiar with all such laws and regulations which, in any manner, affect those engaged or employed in the work, facilities or equipment used in the proposed work or which, in any way, affect the conduct of the work and no plea of misunderstanding will be considered on account of ignorance thereof.

If the proponent shall discover any provisions in the specifications or RFSO which is contrary to or inconsistent with any laws or regulations, he shall forthwith report it to the Primary Contact, in writing, prior to the closing of the RFSO.



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Personnel Change

The selected firms shall notify the Town promptly of any changes to Key Personnel named in the proponent's submission, otherwise the firm's Key Personnel shall remain in their designated roles for the duration of the Standing Offer List. In the event of a personnel change, the firm shall promptly submit resumes of all proposed replacement personnel to the Town. Proposed replacement personnel must possess professional and/or technical qualifications and experience equivalent to the Key Personnel being replaced. Proposed replacement personnel shall not assume any duties until they are accepted by the Town.

Should any of the Proponent's Key Personnel be considered in any respect unsatisfactory, replacement personnel shall be proposed by the Proponent within five (5) days of receipt of the notice of dissatisfaction from the Town.

Failure to honour these requirements may affect the Proponent's eligibility for Assignments or result in removal from the Standing Offer List.

Licensing Requirements

The Proponent team members and key personnel shall be certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by law in the Province of Ontario.

By virtue of submitting a Proposal, the Proponent certifies that the Proponent has satisfied itself that the proposed Consultant Team and Key Personnel are in compliance with the requirements of the above paragraph. The Proponent acknowledges that the Town reserves the right to verify any information in this regard and that false or erroneous certification shall result in rejection of the Proposal and/or termination of the Standing Offer Agreement.

Basis of Payment for Assignments

Payments to the Consultant for Assignments under this Standing Offer List will be identified in each opportunity and shall be either on a maximum upset amount, fixed amount, or commission basis.

Maximum Upset Amount

Maximum Upset Amount denotes an estimated cost based on an agreed upon scope of work, and includes fees, disbursements, and travel.

The expectation of the firm is completion of the work assigned within the maximum upset amount, unless revisions are made to the scope of work that may increase the level of effort.



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Fees are calculated on a time basis by multiplying the number of hours each member of the Consultant Team expends on an assignment by the Charge Rates quoted in the Proponent's Financial Proposal.

Fixed Amount

A fixed amount is a lump sum which includes fees, disbursements, and travel.

The expectation of the firm is completion of the work assigned for the fixed amount, unless revisions are made to the scope of work that may increase the level of effort.

Commission

A commission basis is a proposal where costs are represented as a percentage of revenues resulting from a transaction, inclusive of all costs to undertake the work, except where such costs are identified in the proposal separately.

The expectation of the firm is that the full scope of work of the assignment is undertaken in order to complete the transaction, and that the commission shall only be applicable and payable upon completion of the transaction and the Town's receipt of funds therefrom. For greater certainty, where the transaction does not occur or is otherwise not successful, the commission shall not apply or be paid, despite any work completed under the assignment. In the event that the assignment is not proceeding in accordance with the terms of the proposal, the Town reserves the right to terminate the assignment, and shall not be responsible for any costs incurred to the point of termination.



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Section III – Form of Proposal

Bidders Information

1.	Company Name	
2.	Bidder's Contact Individual	
3.	Address (incl. Postal Code)	
4.	Office Phone #	
5.	Cellular #	
6.	Fax #	
7.	Email address	
8.	HST Account #	

I/We hereby submit the attached documents to satisfy the requirements as issued by the Corporation Town of Renfrew.

I/We agree that we have reviewed and understand the Proposal documents and I/We are capable and qualified to perform the requirements of the contract and enter into a legal agreement with the Municipality in regard thereto and where the Proposal is submitted by a Corporation, it shall be signed by a duly authorized officer of the company. Should the Proposal be submitted by a Partnership or Proprietor, it shall be signed by the partners or owner.

I/We agree that this offer shall be irrevocable from the time the Proposals are opened for a period of 90 calendar days.

I/We agree that this offer acknowledges all addenda and that the pricing includes the provisions set forth in this RFSO.

Addendum #	Date Received
# _____	_____
# _____	_____
# _____	_____

Check here if No Addenda considered.



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Bid Submission

The undersigned affirms that they are duly authorized to execute this bid and that all costs associated with this proposal have been submitted in the fee envelope.

BIDDER'S SIGNATURE AND SEAL: _____

NAME AND POSITION: _____

WITNESS SIGNATURE: _____

NAME AND POSITION: _____

DATED AT: _____

THIS _____ DAY OF _____ 202__

RFSO 2025-03-DE - Request for Standing Offer of Professional Real Estate Services

From: _____

Contact: _____

Telephone: _____

Deliver to:

**The Town of Renfrew
127 Raglan Street South
Renfrew, ON K7V 1P8
Attention: Ashley Robertson, Purchasing Assistant**

Tender Number:

Closing Date and Time:

Description: