

# File Management for Large Acquisition Projects

Greg Simmons B.Com., RI (BC)  
Doug Fourchalk RI(BC), FRI, SR/WA

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# PRESENTATION GOALS

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Improve our understanding of:

- File organization from a litigation support perspective
- Acquisition tracking from a major project and corridor management perspective

Sample demonstration approach— acquisition files and acquisition tracking both inextricably entwined

# BASIC FILE CATEGORIES

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For Hard copy file (“the OLD way”)

- Correspondence, notes of meetings, chronological section
  - Internal communications, issues, Briefing Notes, \$ approvals
  - Appraisals and Other Reports
  - Owner agreements, Licenses, Right of Entry;
  - Acquisition Plans, legal plans, titles, assessment data,
  - Conveyance/Closing documents- registered documents
  - Expropriation related documentation [ EA Section 3 and 6].
- Authority’s file, agent’s working file, and other ad hoc files should be merged as one file

# SPREADSHEETS VS. DATABASE SOFTWARE WITH INTERACTIVE MAPPING

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What is it ?

- A project management tool for managing the acquisition process as well as a reporting tool and file inventory;
- interactive map database application replacing reporting formerly done by excel spreadsheet;
- The primary objective of the application is to provide real-time information on the status of owner negotiations to a wide variety of stakeholders both in and outside your properties group.
- Why developed? A challenge of P3s and Design Build is the creation of a 'seamless team' between multiple firms in multiple locations with internal staff

# SPREADSHEETS VS. DATABASE SOFTWARE WITH INTERACTIVE MAPPING

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## Software Application Advantages :

- Accessibility to information is fast, simple, and user-friendly
- Saves significant time - when media/political issues arise on property issues;
- Minimal training required for users: application is logical, user friendly utilizing a windows environment;
- Real time access available 24-7 and can have multiple users simultaneously reading, editing, or uploading information to fields in a database record;
- supports a sharepoint site/data room and allows immediate referencing of documents & materials.

# SPREADSHEETS VS. DATABASE SOFTWARE WITH INTERACTIVE MAPPING

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## Spreadsheet Disadvantages :

- Having a 'gatekeeper' of the spreadsheet is limited to the person;
- Can you have 1 person dedicated to the function ?;
- becomes unworkable: hundreds of columns and rows;
- where do you find the information after the project is over?
- Is the information you are looking at current (multiple versions)?
- May not have the background information you need to make a decision.

# SPREADSHEETS VS. DATABASE SOFTWARE WITH INTERACTIVE MAPPING

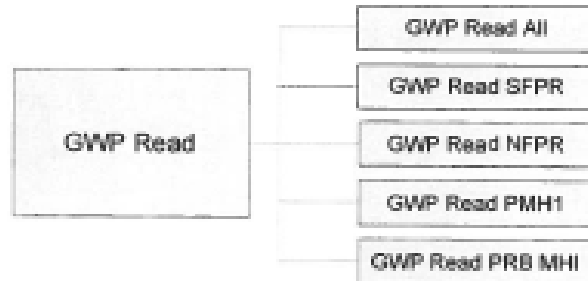
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## Challenges:

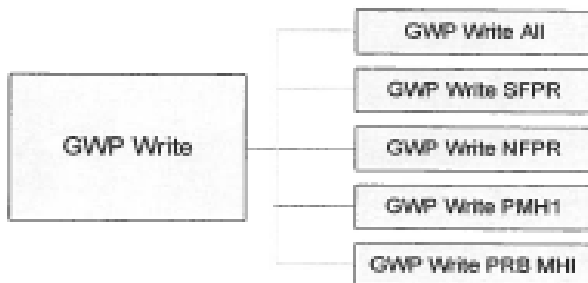
- The biggest challenge has been data entry ... “feeding the beast”
- One person responsible for data entry has similar limitations as having one person keep a spreadsheet up to date;
- Scope creep...can't be all things to all users.

# APPLICATION ACCESS STRUCTURE

## Basic Roles



Provides permission to read data which is considered non sensitive in the application



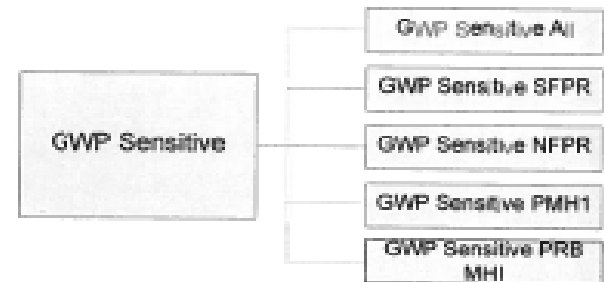
Provides permission to read, write and or delete data which is considered non sensitive in the application

GWP Administration

Provides permission to read, write, delete, modify and add data which is considered non sensitive in the application. Will include spatial edit role in GWP 2.0

GWP Developer

## Advanced Role



Provides permission to read, write and or delete data which is considered sensitive in the application

Sensitive Data Field are:

- Initial Estimate (Property Information)
- Compensation Paid (Property Information)
- Land Unit Rate Paid (\$/psf) (Property Information)
- Initial Estimate (Manage Subinterests)
- Compensation Paid (Manage Subinterests)
- Spending Authority Approvals (Manage Documents)
- H 179 (Manage Documents)
- Owner Contact Records (Manage Documents)



# Application Screen Shots

**BRITISH COLUMBIA** **GATEWAY PROGRAM**  
PROPERTY ACQUISITION TRACKING

Find Address

### Getting Started

Welcome to the GWP interactive map. Begin by choosing an option below or select a tool from the toolbar.

Zoom to PID:

Zoom to PIN:

Zoom to MoT PS #:

Zoom to Owner:

Zoom to Address:

Zoom to Subinterest:

Zoom to Project: -- Select One --

Zoom to Scale: -- Select One --

Run a Report: -- Select One --

Manage Reports:

Export all data:

Find Address

Layers



### Property Information

PID :	023-190-337	
PIN :		
Strata Plan Number :		
Segment :	340	
Property Acquisition Plans :	PR-100-C2-0006-1003 <a href="#">Edit Property Acquisition Plans</a>	
MoT PS Number :	702712	
Owner :	Boma Industries Ltd.	
Property Address :	98 Fawcett Road	
Municipality :	Coquitlam	
Other Owner :	contact: Bob Harrison (Presid	
Alias Name :	Surfwood Supply	
Ownership Type :	Private Property	
Other PID :	023-190-345, 023-190-353	
Appraisal :	Received	
Legal Survey :	Received	
Latest Arterial OIC :	YYYY None	OIC # None
	<a href="#">Edit OIC Data</a>	
Arterial Certificate :	YES	
Type of Taking :	Total Acquisition	
Acquisition Priority :	Critical Property	



Q Search Results

Acquisition Status :	File Complete (return to new owner requires)
Agreement Type :	Ownership - Crown
Expropriation Risk :	Acquired by Others
Construction Commitment :	Preliminary Design Stage
Demolition Flag :	Approved for Acquisition
Demolition Plan Date :	Owner Contacted
Demolition Complete Date :	Waiting for PA Plan
Initial Estimate :	PA Plan received / Approved
Compensation Paid :	Waiting for Appraisal
Land Unit Rate Paid (\$/psf) :	Negotiating
Surplus :	Offer Made
Surplus Value :	Contract Signed
Comment :	Possession for Construction
Agent's Name :	Ownership (tenure as road)
Modified By :	Expropriated
Date Modified :	Settled
Subinterests :	File Complete (return to MoT)
Documents :	surplus land subsequently sold by TFA
	Jack Miller/John Peebles
	gasimmon
	2014-12-22
	0
	Manage Subinterests
	82
	Manage Documents
	Save Edits Cancel Edits
	Delete Record



Q Search

Results

## Manage Documents

Status: OK

- Certificate of Title (pre-acquisition) (2 docs)
- Assessment Data (2 docs)
- Owner Contact Records (9 docs)
- Issues\ Alerts\ Correspondence (6 docs)
- PA PLANS (5 docs)
- Appraisals (3 docs)
- Appraisal Reviews (1 docs)
- Other Reports / Valuations (6 docs)
- Spending Authority Approvals (14 docs)
- Owner Agreements (4 docs)
- Licences (1 docs)
- H 443 (1 docs)
- Legal Plans (pre-acquisition) (2 docs)
- Certificate of Title (post-acquisition) (1 docs)
- Legal Plans (post-acquisition) (2 docs)
- Conveyance Closing Documents (8 docs)
- Expropriation Documents (8 docs)
- Images / Photos (1 docs)
- Other (6 docs)
- Orders In Council (OIC) (0 docs)

## Upload New Document

Document Description (optional):



Q Search

Results

**Manage Documents**

Status: OK

- Certificate of Title (pre-acquisition) (2 docs)
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- Spending Authority Approvals (14 docs)
- Owner Agreements (4 docs)
  - Boma Release - signed.pdf [View](#) [Delete](#)  
Description:
  - Boma Lease Agmt - signed.pdf [View](#) [Delete](#)  
Description:
  - Boma S 3 - signed.pdf [View](#) [Delete](#)  
Description:
  - Boma Agreement BCTFA Land - signed.pdf [View](#) [Delete](#)  
Description:
- Licences (1 docs)
- H 443 (1 docs)
- Legal Plans (pre-acquisition) (2 docs)
- Certificate of Title (post-acquisition) (1 docs)
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**Upload New Document**

Q Search

Results

Legal Plans (post-acquisition) (2 docs)

Conveyance Closing Documents (8 docs)

Expropriation Documents (8 docs)

 Ltr to Bob Harrison, Boma with sup. adv. pymt cheque (\$56,234.60) - signed by owner.pdf [View](#) [Delete](#)

Description:

 Boma Supplemental Form 8, Aug 2012 - signed.pdf [View](#) [Delete](#)

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 Boma Supplemental Form 8, Aug 2012 - backup.pdf [View](#) [Delete](#)

Description:

 Ltr to Wayne Powell with Boma supplemental adv. pymt, Jul 22, 2011 - signed by Graham Phillips.pdf [View](#) [Delete](#)

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 Boma Supplemental Form 8 - signed.pdf [View](#) [Delete](#)

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 Acknowledgment letter for service of S.3 and cheque - signed.pdf [View](#) [Delete](#)

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 Boma Form 8 - signed.pdf [View](#) [Delete](#)

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 Boma S.3 - signed.pdf [View](#) [Delete](#)

Description:

Images / Photos (1 docs)

Other (6 docs)

Orders In Council (OIC) (0 docs)

## Upload New Document

Document Description (optional):

Select The File You Wish to Upload (required):

 No file selected.

Select a Category (required):



Thank You