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**RESIDENTIAL REAL ESTATE  
MANAGEMENT WITH THE USE  
OF OUTSOURCING – CASE STUDY:  
A SELECTED WORKPLACE**

**Abstract**

*This article concerns the process of real estate management, including residential ones, to which a selected workplace was analysed in cooperation with external suppliers and contractors in the implementation of outsourcing in real estate management procedures in accordance with the workplace's methods of work. The determined scope of outsourcing has operational, organizational and economic outcomes.*

*Key words: outsourcing in residential property management; areas, functions and tasks in residential property management, outsourcing methodology in selected workplace*

**1. Introduction**

Real estate management can be held in accordance with three models of management: direct, indirect and work order (outsourcing). Administrators and property owners can choose between those alternatives and decide if they want to conduct a management process on their own or with suppliers or external contractors. Real estate management is a very complex activity and in order to ensure proper functioning of real estate, it is necessary to have an interdisciplinary knowledge and ability as to its practical application.

The aim of this article is to approach the problems of real estate management, with detailed consideration to residential properties. This article also includes an examination of using outsourcing in real estate management by the selected workplace.

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## **2. The essence of property management**

Management is concentrated on four functions: planning and decision making, organizing, leadership and monitoring (Griffin, 2000). These functions were also used in the organization of property management processes shaping its nature. In Art. 185 Act of 21 August 1997 on real estate management we can find that property management involves making decisions and making activities aimed at ensuring proper economical and financial management, ensuring the proper energy management, the current administration of the estate, property maintenance without deterioration for its intended purpose and justified investing in real estate. There are two easily noticeable approaches that ascribe different significance to the above-mentioned functions: narrower – classic / static and wider – modern / dynamic (Śliwiński, 2000, p. 21-22). As far as the narrower approach to management is concerned, tasks performed in property management are acts connected to administration being restricted to carrying out ordinary affairs arising from property usage (Zarządzanie nieruchomościami, 2000, p. 27) called operational management (Encyklopedia wiedzy o nieruchomościach, 2008, p. 374). An approach similar to this can be found in art. 185, item 2, Act on real estate management, stating that current administration is one of many tasks that go into the making of property management. This act gives weight to taking reasonable action to invest in properties – however, client-user type politics are bypassed. The narrower approach ascribes the four functions mentioned before a marginal meaning. In the case of properties from which the administrator or owner expects to gain a profit, the narrower approach seems to be insufficient (Nalepka, 2006, s. 27). Currently, among property administrators, the most popular is a wider approach which points to the necessity for planning and strategic management, searching for solutions to their optimization, organizing and commanding, while stressing at the same time the importance of supervising processes. It also presupposes the need for innovation and creativity in property management and concentration on their occupants needs. This is particularly noticeable in the growing popularity of facility management. Included in the core facilities, three areas of real estate management with their growing importance are: technique, area and financial management. In reference to Śliwiński and Śliwiński, these facilities are initiating activities not only in the domain of maintaining, supplying and real estate utilisation but also in the domain of investments. Facilities management is the synonym for the modern owners', users' and clients' approach or real estate clients' and also the powerful and their expectations (Śliwiński, Śliwiński, 2006, p. 122, 18-19). As far as literature is concerned, fulfilment of expectations

is connected with perceiving real estate as a subject of investments. These results in that the main tasks involve taking the activities in order to generate income, reduce operating costs, increase property values and enhancing the credibility and prestige of the real estate (Henclewska, 2002, s. 37). In practice, administrators and owners do not always aim to maximize the market value of managed property or its type does not predestine them to do so because the management plan for residential, office, commercial, industrial or special property looks different. Indication of the main areas of facilities and management process with emphasis on all or just those which are appropriate to the type of property – seems to be a natural transition from a narrower to a broader approach, especially that the broader one is not an effect of sudden and revolutionary change, but rather a consequence of the slow suppression of the narrower approach.

### **3. The essence of residential property management**

The differences in the process of real estate management are the effects of goals which were set up and in consequence also the effect of functions whose aims should be met. Such functions, in the case of residential estate management, are to meet residential demands. The areas of residential estate management are identical with those typical for different properties because very exact demarcation between them is impossible as real estate management is nevertheless part of the discipline “real estate management”. As noted earlier, real estate management consists of the areas concerned with techniques, fields and financial management. These areas were named appropriately as to the needs of the management process: management of technical maintenance, area utilization management and financial management which remains unchanged. Seemly essential to include with these areas are not only the domains as Śliwinski and Śliwinski suggest, but also their functions. Three areas of residential estate management should consist of nine types of functions in accordance to Table 1 In the first area and connected with management of technical maintenance, the greatest number of functions may be related to tasks connected with renovation, preservation, modernization and investment/capital expenditures and is related directly to the age of the real estate. The possibility of applying these functions correctly is the direct effect of taking basic steps in organizational planning, law and administration and social steps as well. For this reason including them here is a must. Not assigning them to this classification would have immediate and visible consequences not only in terms of security but also in terms of comfort level. The technical aspect of maintaining real estate should be treated as an activity aimed at

ensuring a sense of security to clients but also at maximizing their level of satisfaction from using the real estate. In technical maintenance the attitude of the administrator, the owner and all inhabitants actively participating in the process of property management affects the whole process as each party has their own contribution to make. In terms of area management, one group of functions of an organizational and supervisory nature have been indicated. These functions consist of four groups of tasks of great importance as having influence on the level of residents' satisfaction. In this case their personal involvement is not required. The responsibility for this element falls mainly with an administrator or owner. Alternatively, financial management is an area in which the tax and accounting functions are separated from economic and financial functions. The first focuses on keeping accounting and non-accounting records while the second, on the economic and financial management associated with broadly defined records of expenses and incomes, financial reporting, financial surplus or coverage of losses, depreciation charges or the creation of funds.

Residential property management requires a broader or wider range of functions in all or chosen areas. Force applied to particular areas of technical property maintenance, area utilization management and financial management is directly related to the type of property and purpose intended by administrator or owner. Some administrators manage real estate to draw income or increase the property value. However most of them manage real estate in order to fulfil responsibilities arising from relevant legislation.

**Table 1** Areas, functions and tasks in residential property management

| Area of management              | Functions of management  | Tasks   |
|---------------------------------|--|---|
| Technical property maintenance. | Renovation – conservation – modernization – investment (operational) | <p>Maintaining a proper condition, especially:</p> <ul style="list-style-type: none"> <li>- carrying out renovation,</li> <li>- troubleshooting,</li> <li>- carrying out repairs,</li> <li>- carrying out of general construction works,</li> <li>- modernization of buildings and their infrastructure,</li> <li>- identifying needs for renovation and related.</li> </ul> <p>Ensuring efficient operation of systems and devices.<br/>           Maintaining good order in terms of fire.<br/>           Maintaining proper hygienic, sanitary and aesthetic condition.</p> <p>Ensuring marking and lighting.<br/>           Ensuring protection. Caring for the property.<br/>           Conducting technical supervision and warranty inspection.<br/>           Coordinating and monitoring the work of technical services.</p> <p>Keeping the technical and field – legal documentation.<br/>           Organization of tenders for works and services.<br/>           Organization of recruitment tenders for works and services.<br/>           Developing concepts of investment.<br/>           Preparation of documentation to the concepts of investment.<br/>           Organizing and accounting of projects. Commissioning.<br/>           Handing over for use.<br/>           Implementation of development processes.<br/>           Entering into and termination of management contracts, with the administrators, suppliers and contractors.<br/>           Optimization of management expenses, in particular:</p> <ul style="list-style-type: none"> <li>- searching providers, negotiating prices and contract conditions,</li> <li>- reducing costs of utilities delivering,</li> <li>- reducing costs of external services.</li> </ul> |
|                                 | Planning   | <p>Creating a management plan.<br/>           Creating an annual and long-term economic – financial plan (financial – economic, social – economic).<br/>           Creating an annual and long – term plan of renovations and maintenance.<br/>           Creating a plan for economic – technological investments.<br/>           Creating a security plan.<br/>           Creating a social activity plan.</p>  |
|                                 | Legal  | <p>Clarifying the legal position of ground and property.<br/>           Completing the normative acts.<br/>           Preparing draft contracts, actions, court applications, motions for initiating executive proceedings.<br/>           Preparing draft internal regulations.</p>  |

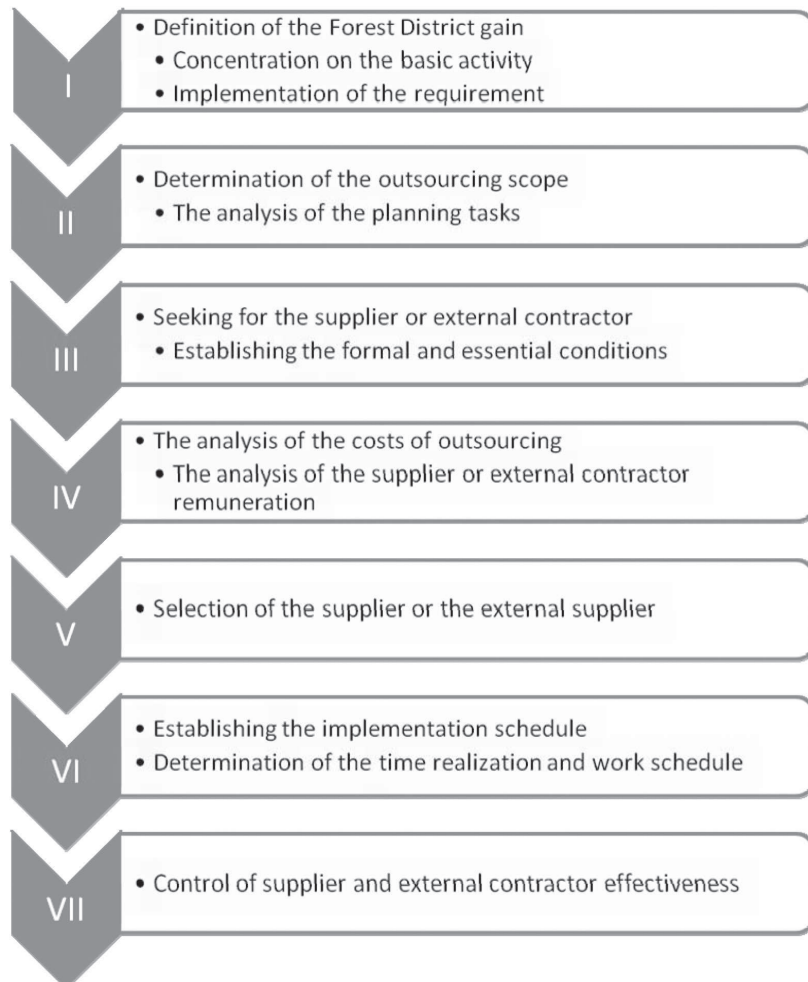
| Area of management              | Functions of management         | Tasks   |
|---------------------------------|---------------------------------|---|
| Technical property maintenance. | Legal                           | Controlling the formalities of draft resolutions, rules, regulations, and internal instructions.<br>Providing information, advice, issuing legal opinions and explanations.<br>Represent before third parties, particularly: on trial.  |
|                                 | Organizational - administrative | Organizing and administrative servicing of reporting meetings.<br>Keeping correspondence and in-coming correspondence log.<br>Receiving complaints and requests.<br>Providing direct and telephone information for residents and other interested.<br>Giving access to the selected documents for residents: statute, internal regulations and other.<br>Cooperation with the residents.<br>Giving the certificates for the resident's needs.<br>Registration of residents.<br>Housing stock registration.<br>Transformation of occupancy right.<br>Purchasing of fixed assets. |
|                                 | Social                          | Providing information about possibilities of assistance from different sources.<br>Helping the unemployed.<br>Volunteering as assistance for the elderly, solitary and disabled people.<br>Cooperating with the Employment Agency with reference to hiring interns, graduates and intervention employees.<br>Cooperating with social Assistance Centres in the organization of community work.<br>Organizing team-building meetings.  |
| Area utilization management.    | Organisational - supervisory    | Entering into contracts for utilities delivery, including:<br>- electricity, water, gas sewage and waste disposal.,<br>- telecommunication<br>Area management, including:<br>- analysing, planning designing in order to optimize utilities exploitation,<br>- organizing renting and leasing,<br>- running property marketing activities.<br>Caring for green areas.<br>Coordinating and controlling the works of property operating services, including::<br>cooperating with cleaning services.  |
| Financial management.           | Accounting - taxation           | Keeping accounting records.<br>Keeping non-accounting records, in particular:<br>- common property management expenses,<br>- advances paid to cover the management expenses,  |

| Area of management    | Functions of management | Tasks  |
|-----------------------|-------------------------|--|
| Financial management. | Accounting - taxation   | - settlements due to other matters in favour of the common property.<br>Tax information.   |
|                       | Clearing - vindicatory  | Calculating the assessment of charges.<br>Informing about rates of rent and other charges. Balance reconciliation.<br>Cost calculation (e.g. common property).<br>Settlement for cost of utilities delivered (periodic, annual).<br>Reconciliation of payments or forms of debt payments due to failure to pay the fee or current charges delays.  |
|                       | Economic - financial    | Financial planning.<br>Keeping the economic-financial management, especially:<br>- incomes,<br>- expenses.<br>Financial reporting.<br>Making analysis, in particular:<br>- economic-financial,<br>- indicatory,<br>- informative (in different sections, for residents).<br>Managing the renovation fund.<br>Investments accounting.<br>Insuring the housing units.<br>Developing strategies in order to increase economic and financial efficiency of property utilization. |

Source: Own work.

#### **4. Outsourcing in the residential property management of the selected workplace**

The Forest District is the basic, independent organizational unit of the National Forest Holding "State Forests" which is operating within the framework of Regional Directorate of State Forestry in Silesia. Management is performed by its own employees and external suppliers and contractors. Methodology in the implementation of outsourcing in the Forest District has seven phases. They are depicted in Figure 1.



**Figure 1.** The methodology of the outsourcing implementation [Source: Own study conducted on the basis of data gathered from research studies in the Forest District in Bielsko-Biała during years 2007-2011].

The Forest District's goals to concentrate on basic activities (in which residential resources managing is not included) combined with the lack of human resources to complete the chosen tasks, provided the push needed in making the decision to turn to outsourcing. The Forest District cooperates with suppliers and external contractors solely in the area of technical property maintenance. In the case of renovation, preservation, modernization and investment, the motivation to use outsourcing was simply demand. A decision here is dependent on a very detailed technical



description of dwelling's condition, installation and state of appliances in need of repair. The reason for legal outsourcing is lack of a full-time lawyer being employed. The administrative and economic department is searching for suppliers and external contractors, operating mainly on the status of the Act of the 29 January 2004- Public Procurement Law which has to provide the equivalent conditions to ensure their participation. For this reason a competitive bidding process is preferred and the Forest District need to meet their obligation of providing the bidders with identical, exhaustive information essential in order that interested parties may prepare their tenders. Simultaneously the process must ensure that data provided by prospective suppliers and contractors will not be transferred to other parties or used for other purposes. The Forest District addresses the issue of their technical and economical credibility by confirming that requirements are met. An evaluation of tendered bids is done and offers are compared. The proposed conditions are the base of the evaluation: target date, transport (completeness, punctuality, conformity with order), guarantee and advertisement (guarantee period and amount of security) and also the conditions of payment (time of payment). The Forest District assesses the attached documentation diligently according to Regulation of the Prime Minister of 30 December 2009 on types of documents that may be requested by the awarding entity from the economic operator and forms in which these documents may be submitted. The result of the assessment directly correlates with the quality of the later contract realization. The next phase of applying outsourcing is a cost analysis consisting of an analysis of supplier or external contractor bid, i.e. the cost of contract realization. The Forest District is obliged to asset these documents which confirm market value and guarantee a particular contract will be finalized not at premium rate but at current market value. The Forest District is guided by the principle of contract effectiveness, which is the achievement of the best possible effect at the lowest possible cost. At this point the choice of supplier or external contractor is considered to be the choice of optimal implementation of the contract. The next phase in outsourcing is the elaboration of the work schedule. The Forest District is responsible for the schedule. Non-conformity in terms of deadlines may result in the imposition of damages and interest charges on the supplier or external contractor according to regulations in force at present Art. 636 to 647 Act of 23 April 1964 - Civil Code. The last phase of the implementation of outsourcing is the control of suppliers' and external contractors' work effectiveness. This is achieved through a quality assessment check made by a licensed employee. All external suppliers and contractors are evaluated by the same response measurement in order to provide the highest degree of quality in

the performance of finalized contracts. External suppliers and contractors undergo evaluation on a one time only basis due to the short-term nature. This is done to ensure the problems don't arise in future contracts with the same contractors, especially in the case of faults or defects in execution of a contract. For a long-term contract, external suppliers or contractors undergo an evaluation twice a year. In the case of legal outsourcing, the Forest District's evaluation criteria are: competence in performing work, flexibility, reactivity and effectiveness. An evaluation is based on the current tasks arising from the contract.

### **5. The scope of implementing outsourcing in residential property management of the selected workplace**

Outsourcing should not always be considered as restructuring a business and shouldn't always necessarily be linked to the idea of restructuring. Research conducted in the Forest District indicates such is the case. The entity implemented tactical outsourcing characterised as follows:

- large number of short or medium-term outsourcing contracts,
- outsourcing contract concluded for the implementation of a specific task (ending with a specific effect),
- frequent use in emergency (immediate outsourcing),
- frequent lack of long-lasting relationship with external suppliers and contractors,
- external suppliers and contractors play only the role of the executor (do not build value, they are not the initiators of change),

Prerequisites for the implementation of tactical outsourcing in Forest District were:

- specific business activity of managing the residential resources, focusing on the implementation of time-changing needs and requirements of the residents,
- the inability in predicting needs for carrying out the functions and tasks in the technical areas of property maintenance, area management or financial management,
- large number of functions and tasks in the technical areas of property maintenance, area management or financial management,
- the inability to enter into long-term contracts, imposed by the Act on Public Procurement Law.

As mentioned before, the scope of outsourcing in Forest District housing stock includes technical property maintenance and realization of functions connected with exploitation and legal representation. Table 2 demonstrates the scope of outsourcing.

**Table 2** Outsourcing scope in Forest District residential property management

| Area                            | Functions     | Tasks  | Contract evaluation |
|---------------------------------|---------------|--|---------------------|
| Technical property maintenance. | Renovation    | Roof reparation, including:<br>- performance of roof construction,<br>- roof replacement.  | No faults.          |
|                                 | Conservation  | Renovation of the building, including:<br>- painting, construction and installation works,<br>- electrical installation.   | No faults.          |
|                                 | Modernization | Renovation works, including:<br>- plumbing repair.   | No faults.          |
|                                 | Investment    | Renovation works, including:<br>- floor repair,<br>- stairs repair.  | No faults.          |
|                                 | Legal         | Legal services for occupants of housing stock, including sound legal opinion related to:<br>- individual and intricate cases in terms of law,<br>- entering into long-term contracts, arrangements, liabilities of greater value,<br>- refusal to acknowledge claim,<br>- proceeding before an adjudicating body in civil cases,<br>- settling out-of-court in cases of inheritance,<br>- amortisation of a loan,<br>- promulgation of general legal act by the Forester,<br>- others. | Positive.           |

Source: Own study conducted on the basis of data gathered from research studies in the Forest District in Bielsko-Biala during years 2007-2011.

Outsourcing contracts apply to renovation, construction, modernization and legal representation works' realization. A distinctive feature of outsourcing is the complex records required concerning responsibilities. In terms of a work contract, the responsibility for concluding the contract rests on the external supplier or contractor who is obliged to implement and maintain the protection of construction site, construction works and ensuring the general safety, at their own expense. They are also obliged to comply with technological requirements, carrying out work in accordance with the tendered contract and also within occupational safety and health standards. The Forest District delegates a representative and an employee, who is a construction specialist, to supervise the construction work. If a supplier or contractor fails in its work commencements within fourteen days from the date of when the work was to commencement, abandons contract realization after receiving two warnings in written form, or does not carry out work or does not provide services as

specified in the contract, the Forest District has the right to withdraw from an agreement. In the case of legal outsourcing, a legal counsel's responsibility to the Forest District is connected primarily with disciplinary responsibilities for faults, failure in legal counsel work, acts not in accordance with Ethnical Principles of Legal Advice and the inability to maintain the order and discipline.

## **6. The consequences of implementing outsourcing in residential resources of the selected workplace**

In the Forest District operational, organizational and economic outsourcing consequences were observed.

Operational consequences are reflected in the operational management of residential resources. The Forest District decided not to employ a licensed real estate administrator. This move would result in hindering expenses optimization connected with resource maintenance while at the same time making it difficult to maintain level in various domains - property management, tax law, building regulations, civil code. It is necessary to add that real estate management which is incorporated in resources belonging to the State Treasury and is not handed over in permanent administration or usage, might be entrusted only to licensed administrators or entrepreneurs who employ such administrators. The Forestry Act of 28 September 1991 entitles also the Forest District, inter alia, to the administrative service to which the State Treasury wealth management also belongs. Hence, Forest Service employees and also white-collar workers who are not licensed administrators (within the meaning of Real Estate Management Act), through the realization of administrative tasks, can manage a property mandated to State Forests (art. 35, act. 2a The Forest Act). According to the Forest District the responsibility for residential resources rests on the Secretary who is in charge of the Administration Maintenance Section / Administrative Section. The scope of outsourcing in the Forest District is narrow what significantly impedes obtaining the reliable outsourcing results evaluation as a method of residential resource management improvement. Nonetheless, it should be pointed out that from the Forest District's point of view, the sphere connected with apartments and residential dwellings managing is very demanding and involving. The reason for this is the necessity of taking very intricate strategic decisions and connected with them tactical and operational ones the more difficult so because they have no direct impact on vision, mission and Forest District Value. The Forest District created an annual and long – term plans of renovations and maintenance, including work to be performed by their own employees:

- reliable evaluation of existing residential resources conditions,
- economic profitability of renovation and conservation works,

- Forest District financial capacity,
- prioritizing works into an urgency hierarchy.

The operational consequences of outsourcing were as follows:

- ensure the standard of quality of works carried out at a level corresponding to Forest District financial capacity and the expectations of the residents of residential resources,
- reduce the operational difficulties, associated with organizing and carrying out renovations, conservations or repairs. The Forest District draws attention to the need of taking into consideration the functionality improvement, thermal insulating power, including protection against damp and mouldy buildings as well as complications created by missing fixtures and fittings from external suppliers and contractors. Operational difficulties reduction is also the result of a functioning urgency hierarchy of the beginning of renovations and others. The Forest District, by providing an implementation timetable developed on the basis of the hierarchy mentioned before to the external supplier or contractor, for at least a specified time can focus on achieving other objectives than those associated with residential resources management,
- accurate definition of needs, which allows to not to exceed the bounds of profitability of investments and renovations carried out by the Forest District,
- satisfying quality of operational functions, reached by access to external resources. As mentioned before, the Forest District, opting for outsourcing did not have its own, competent in-building technical staff. For this reason the unit is not able to estimate the difference in quality level, between the effect of task realization of full-time employees and external entity. Therefore, it cannot unequivocally determine that the level of realization of the operational functions is higher.

Operational difficulties arising from a change of external supplier or contractor during the course of work and resulting in the necessity to find a new contractor, should be considered as a negative consequence. The Forest District, however, protects itself by including proper contractual provisions stipulating penalties and damages for the supplier or contractor in the case of disruption of contract.

Through the decision to entrust a selected range of activities into realization by external suppliers and contractors, the Forest District did not make any reductions in existing regular posts, assuming that all tasks in selected areas of residential resource management will be delegated to external realization. Organizational consequences in the Forest District were identified with observed improvement of residential resources management, which has been achieved through the realization of chosen

functions and tasks associated with them by specialized external entities outside of the organizational structure. These result mainly in the accuracy of actions taken in the scope of property exploitation, assured by compliance with contract requirements, standards, and specifications as well as current technical knowledge in the field of architecture. Thus the results of wrong decisions affecting both the Forest District and the tenants have been minimized. Dependency on external suppliers contractors is not a threat for the Forest District. In establishing cooperation with external entities and in the public funds involvement – based on Public Procurement Law - the policy of services purchasing operates on the basis of tenders submitted by different, competing external suppliers or contractors. Thus there is no possibility of preferential treatment for one particular company or person, product or service, unless he has presented the most attractive bid on a tender. Organizational consequences could be more positive if the Forest District used outsourcing on a wider range.

Other consequences have an economic nature. The Forest District bears the expenses of outsourcing which include: the fixed cost of supplier or contractor remuneration, costs of organization, maintenance of construction works and construction sites as well as construction supervision services. Remuneration for work performed cannot be higher than that specified by the cost effectiveness protocol for repairs made by a Forest District employee. The result of this calculation is the ascertainment of repair cost effectiveness or ineffectiveness which might result in construction of a new facility. Outsourcing connected with building works has had temporary financial implications, increasing Forest District financial expenses, especially in the case of investment type works. Investments connected with administrative and economic activity (including residential resource management) are solely undertaken when they are indispensable for realizing the project or to which State Forests and their departments are obliged (on the basis of the Forest Act, fire preventions regulations etc.) and which might be realized in a free/voluntary way (these which do not have to be but might be realized). In the case of obligatory investments, the economic calculation allowance relates to the expenses connected with external actors, financial options for selected tasks realization. The costs of future exploitation and investment maintenance are also included. For the non-obligatory investments, the economic calculation in the first instance allows cost criteria, next the future exploitation costs, cost of maintenance and optional the cost connected with investment abandonment and the cost of alternative investment undertaking.

## 7. Conclusions

Real estate management, including residential ones, is a very intricate process which demands interdisciplinary knowledge. Owners or administrators not always are qualified and competent for efficient property management.

The Forest District does not concentrate its efforts on residential resources management. - This entails a very small percentage of tasks of little significance in the whole structure. A linear organizational structure and the majority of its characteristic features has a simple structure and high level of awareness of responsibilities. But it has also a basic drawback - a quite conservative approach to management. For the Forest District amounts to taking action on a "need to" basis, not connected with the basic aim for which it has been created, but for which the current system of managing is successfully realized. However, despite the fact the Forest District endeavors to ensure the proper course of real estate management, whereas the elaborated implementation of outsourcing proves this, fulfilling the duty of choosing the best external supplier or contractor offer, in accordance with accepted principles, the Forest District is achieving a satisfactory level of quality. This is confirmed by the lack of tenant complains about the quality of work performed by suppliers or contractors and at the same time the individual is fulfilling its all possible duties resulting from the necessity of ensuring safety to the housing residence occupants.

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