



On behalf of the Organizing Committee, we would like to welcome you to the **22nd Canadian Institute for Procurement and Materiel Management (CIPMM) National Workshop**. This year will mark our return to the National Capital Region at the newly renovated Ottawa Convention Centre (OCC) and will be one of the first events to be held at this state-of-the-art facility from May 16 – 19th, 2011.

The theme for this year's National Workshop is: "Planning for Results: Achieving Strategic Outcomes through Procurement and Materiel Management". To achieve desired strategic outcomes, proper planning is essential through life-cycle materiel management and early in the procurement process. Attend CIPMM's National Workshop to share experiences and learn, with us, ways to achieve these objectives. The Organizing Committee surveyed the procurement and materiel management community to develop a program with relevant topics covering the following subject streams: Materiel Management; Procurement – The Basics; Complex Procurement; and, Procurement and Materiel Management Evolution.

CIPMM's Annual National Workshop is a significant training and professional development event for those with public sector responsibilities for procurement and materiel management. It is also a fantastic opportunity to network with peers and interact directly with industry leaders.

We thank you for attending this year's workshop, which promises to be interesting and professionally enriching.

Jérôme Thauvette
Barbara Brackett
Co-Chairs
National Workshop Organizing Committee
Canadian Institute for Procurement and
Materiel Management

PROGRAM-AT-A-GLANCE

Workshop – Wednesday, May 18, 2011

7:30 am – 8:30 am	Registration and Continental Breakfast in Trade Show Area	3RD FLOOR FOYER
8:30 am – 8:45 am	Opening and Welcoming Remarks	ROOM 301
8:45 am – 10:00 am	Keynote ADM Panel – Planning for Results: Achieving Strategic Outcomes Through Procurement and Materiel Management	ROOM 301
10:00 am – 10:30 am	Refreshment Break and Networking in Trade Show Area	3RD FLOOR FOYER
10:30 am – 11:45 am	Concurrent Breakouts	
		ROOM 205
	1 – How Do Public and Private Sector SD Strategies Affect You?	
		ROOM 206
	2 – Procurement Tools and Innovative Web Technology	
		ROOM 207
	3 – Construction and Real Property Contracting: Building Information Modeling (BIM)	
		ROOM 208
	4 – Project Management Principles: What PMBOK Has to Offer	
11:45 am – 12:45 pm	Networking Luncheon – Round Table Discussion	ROOM 301
12:45 pm – 1:15 pm	Dessert Break in Trade Show Area	3RD FLOOR FOYER

PROGRAM-AT-A-GLANCE

Workshop – Wednesday, May 18, 2011

1:15 pm – 2:30 pm

Concurrent Breakouts

ROOM 205

5 – Best Practices in Materials Management

ROOM 206

6 – The Only Game in Town: Understanding How to Sole-Source Effectively

ROOM 207

7 – Buying Software: An Introduction to The New Software Licensing Supply Arrangement (SLSA)

ROOM 208

8 – Green Procurement: Solutions and the Way Ahead

2:30 pm – 3:00 pm

Refreshment Break and Networking in Trade Show Area

3RD FLOOR FOYER

3:00 pm – 4:15 pm

Concurrent Breakouts

ROOM 205

9 – Role of Supporting Organizations: Panel – CAD and SPMD

ROOM 206

10 – Due Diligence in the Tendering Cycle

ROOM 207

11 – Contract Risk Management

ROOM 208

12 – Government Procurement Reform and Modernization of PWGSC's Service Delivery with Partners

4:30 pm – 6:00 pm

President's Dinner Reception in Trade Show Area presented by Grand & Toy

3RD FLOOR FOYER

6:00 pm – 11:00 pm

President's Dinner with Entertainment presented by BMO Financial Group

ROOM 301

PROGRAM-AT-A-GLANCE

Workshop – Thursday, May 19, 2011

7:30 am – 8:15 am	Registration and Continental Breakfast in Trade Show Area	3RD FLOOR FOYER						
8:15 am – 8:45 am	Welcoming Remarks and Annual General Meeting	ROOM 301						
8:45 am – 9:00 am	Keynote Address Jim Ralston, Comptroller General of Canada, Treasury Board of Canada Secretariat	ROOM 301						
9:00 am – 10:00 am	Keynote Address: Now or Never Jean-Marc Chaput, Motivational Speaker	ROOM 301						
10:00 am – 10:30 am	Refreshment Break and Networking in Trade Show Area	3RD FLOOR FOYER						
10:30 am – 11:45 am	Concurrent Breakouts							
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ROOM 208 16 – New Generation of National Printing Procurement Tools (Non-NCR)								

PROGRAM-AT-A-GLANCE

Workshop – Thursday, May 19, 2011

11:45 am – 1:15 pm	Lunch – Closing Remarks David V. (Jake) Jacobson, Chief of Staff, Materiel, Department of National Defence	ROOM 301						
1:15 pm – 1:45 pm	Dessert Break and Networking in Trade Show Area	3RD FLOOR FOYER						
1:45 pm – 3:00 pm	Concurrent Breakouts <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;"> ROOM 205 17 – TBS Certification Program for the Federal Government PMM Communities – Future Direction </td> <td style="width: 33%; vertical-align: top;"> ROOM 206 18 – Contract Negotiation Skills </td> <td style="width: 33%; vertical-align: top;"> ROOM 207 19 – Complex Procurement Planning and Procurement Approaches (SOIQ) </td> </tr> <tr> <td style="vertical-align: top;"> ROOM 208 20 – E-Payment: NRCan </td> <td colspan="2"></td> </tr> </table>	ROOM 205 17 – TBS Certification Program for the Federal Government PMM Communities – Future Direction	ROOM 206 18 – Contract Negotiation Skills	ROOM 207 19 – Complex Procurement Planning and Procurement Approaches (SOIQ)	ROOM 208 20 – E-Payment: NRCan			
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TRADE SHOW – MAY 18-19, 2011

Exhibitors

Booth

- 1 & 2 BMO Financial Group
- 3 Elavon Financial Services
- 4 & 6 Grand & Toy
- 5 Hewlett-Packard Canada Co.
- 7 PWGSC – Office of Greening Government Operations
- 8 ergoCentric Seating Systems
- 9 PWGSC – Professional Development and Change Management Directorate
- 10 Strategic Relationships Solutions Inc.
- 11 Indian & Northern Affairs Canada
- 12 PWGSC – Acquisition Branch
- 13 Heart & Stroke Foundation of Ontario
- 14 PWGSC – Industrial Security Sector
- 15 The Aim Group
- 16 Gadar Promotions
- 17 Sterling Marking Products
- 18 Natural Resources Canada
- 19 The Retirement Planning Institute
- 20 PayStation Inc.
- 21 EagleSpirit Marketing Inc.
- 22 AON Corporation
- 25 Correctional Service Canada – CORCAN
- 26 Canada School of Public Service
- 27 Treasury Board of Canada Secretariat
- 28 Canadian General Standards Board
- 29 Adirondack
- 30 Sage Data Solutions Inc.
- 31 RFPSolutions Inc.
- 32 Office of the Procurement Ombudsman
- 33 Ahearn & Soper Inc.
- 34 A-R Distributors and Philips
- A Canadian Association of Management Consultants
- B The Computer Media Group

PRE-WORKSHOP TRAINING

MONDAY, MAY 16, 2011

7:30 am – 8:30 am

Registration & Continental Breakfast

3RD FLOOR FOYER

8:30 am – 4:30 pm

Pre-Workshop Training Sessions

Treasury Board Secretariat Certification Program for the Federal Government Procurement and Materiel Management Communities-Candidate Achievement Records Training

ROOM 205

- Rosa Paliotti, *A/Senior Director, Procurement, Materiel Management and Real Property Communities Management Office, Acquired Services and Assets Sector, Office of the Comptroller General, Treasury Board of Canada Secretariat*
- Kirk Albert, *Supply Team Leader, Canada General Standards Board*
- Patricia Barcellos, *Standards Specialist, Canada General Standards Board*



Treasury Board of Canada
Secretariat

Secrétariat du Conseil de Trésor
du Canada

Canada

Strategic Materiel Management

ROOM 206

- Shawn Casemore, *CSCMP C.P.M.*

Risk Management in Public Contracting

ROOM 207

- Lynda Allair, *CPPO, Seven Towers Consulting*

The Foundations of Public Purchasing

ROOM 208

- Paul Emanuelli, *General Counsel and Managing Director, The Procurement Office™*

PWGSC Methods of Supply for Services (English)

ROOM 212

- Luc Laplante, *Supply Specialist, Task Based Informatics Professional Services and Solutions-Based Informatics Professional Services, Public Works and Government Services Canada*
- Rita Brown, *A/Manager, Task and Solutions Professional Services, Public Works and Government Services Canada*
- Sharon Dent, *A/Supply Specialist, Professional Services Online, Public Works and Government Services Canada*
- Matthew Henry, *Supply Team Leader, Learning Services, Public Works and Government Services Canada*
- Peggy Gilmour, *Supply Team Leader, Professional Audit Support Services Supply Arrangement, Public Works and Government Services Canada*
- Natalie Cousineau, *Supply Specialist, Temporary Help Services, Public Works and Government Services Canada*

10:00 am – 10:30 am

Refreshment Break

3RD FLOOR FOYER

12:00 pm – 1:00 pm

Lunch

ROOM 301

2:30 pm – 3:00 pm

Refreshment Break

3RD FLOOR FOYER

CIPMM 2011 NATIONAL WORKSHOP

PRE-WORKSHOP TRAINING

TUESDAY, MAY 17, 2011

7:30 am – 8:30 am

Registration & Continental Breakfast

3RD FLOOR FOYER

8:30 am – 4:30 pm

Pre-Workshop Training Sessions

Treasury Board Secretariat Certification Program for the Federal Government Procurement and Materiel Management Communities-Candidate Achievement Records Training

ROOM 205

- Rosa Paliotti, *A/Senior Director, Procurement, Materiel Management and Real Property Communities Management Office, Acquired Services and Assets Sector, Office of the Comptroller General, Treasury Board of Canada Secretariat*
- Kirk Albert, *Supply Team Leader, Canada General Standards Board*
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Treasury Board of Canada
Secretariat

Secrétariat du Conseil de Trésor
du Canada

Canada

Strategic Materiel Management *(continued)*

ROOM 206

- Shawn Casemore, *CSCMP C.P.M.*

Risk Management in Public Contracting *(continued)*

ROOM 207

- Lynda Allair, *CPPO, Seven Towers Consulting*

Advanced Issues in Public Purchasing

ROOM 208

- Paul Emanuelli, *General Counsel and Managing Director, The Procurement Office™*

PWGSC Methods of Supply for Services (French)

ROOM 212

- Luc Laplante, *Supply Specialist, Task Based Informatics Professional Services and Solutions-Based Informatics Professional Services, Public Works and Government Services Canada*
- Josianne Courteau, *A/Supply Team Leader, Task and Solutions Professional Services, Public Works and Government Services Canada*
- Denise St-Clair, *A/Supply Specialist, Professional Services Online, Public Works and Government Services Canada*
- Sophie Cayer, *A/Supply Specialist, Learning Services, Public Works and Government Services Canada*
- Robert Pilon, *Supply Specialist, Professional Audit Support Services Supply Arrangement, Public Works and Government Services Canada*
- Natalie Cousineau, *Supply Specialist, Temporary Help Services, Public Works and Government Services Canada*

10:00 am – 10:30 am

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3RD FLOOR FOYER

12:00 pm – 1:00 pm

Lunch

ROOM 301

2:30 pm – 3:00 pm

Refreshment Break

3RD FLOOR FOYER

CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP

WEDNESDAY, MAY 18, 2011

7:30 am – 8:30 am

**Registration and
Continental Breakfast
in Trade Show Area**

THE- AIM- GROUP
Worldwide Provision and Recruitment of Personnel

3RD FLOOR FOYER

8:30 am – 8:45 am

Opening and Welcoming Remarks

ROOM 301

8:45 am – 10:00 am

**Keynote ADM Panel
Planning for Results: Achieving Strategic Outcomes Through
Procurement and Materiel Management**

ROOM 301

Panelists:

- Marc O'Sullivan, *Assistant Comptroller General, Acquired Services and Assets Sector, Office of the Comptroller General, Treasury Board of Canada Secretariat*
- Filipe Dinis, *Chief Financial Officer and Assistant Commissioner, Canada Revenue Agency*
- Tom Ring, *Assistant Deputy Minister, Acquisitions Branch, Public Works and Government Services Canada*
- Dan Ross, *Assistant Deputy Minister (Materiel), Department of National Defence*

Trade Show Exhibitors Include:



Canada School
of Public Service

École de la fonction
publique du Canada



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Professional Development and
Change Management Directorate

CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP – WEDNESDAY, MAY 18, 2011

10:00 am – 10:30 am

**Refreshment Break and
Networking in Trade Show Area**

ORACLE®

3RD FLOOR FOYER

10:30 am – 11:45 am

Concurrent Breakouts

Stream A: Materiel Management

ROOM 205

1 – How Do Public and Private Sector Sustainable Development (SD) Strategies Affect You?

- Madeleine Plouffe, *Team Leader, Green Procurement, Acquisitions Branch, Public Works and Government Services Canada*
- Caroline MacIntosh, *Acting Director, Policy Development Directorate, Office of Greening Government Operations, Corporate Services, Policy and Communications Branch, Public Works and Government Services Canada*
- Frances Edmonds, *BSc.(Hons), Dip H&S, CRSP, Director, Environmental Programs, Hewlett-Packard (Canada) Co.*

Addressing greenhouse gas emission reductions, sustainable buildings, green procurement, paper reduction, e-waste management and more in Canada necessitates that focused, deliberate sustainable development strategies and plans are in place for both public and private sector organizations. In this presentation, participants will learn about the Sustainability Development Strategies from two perspectives. Firstly, the obligations associated with the Federal Sustainability Development Strategy (FSDS) tabled in parliament in October 2010 which impacts twenty-eight departments and agencies and secondly, the perspective of Hewlett Packard, a federal supplier with long standing sustainable development practices or “green in its’ genes”. Join this presentation to hear about the important role of materiel managers, procurement officers, information technology enablers and all employees in the development and implementation of strategies to meet the sustainable development targets in the FSDS and gain insight as to how to move the yardstick forward in sustainability through the adoption of leading versus lagging sustainable development practices.

Stream B: Procurement – The Basics

ROOM 206

2 – Procurement Tools and Innovative Web Technology

- John Jordan, *Senior Policy Advisor, Digital Engagement, Public Works and Government Services Canada*
- Roger Houde, *Director of Contracting Division, Administration Directorate (AD), Finance and Administration (FAB), Canada Revenue Agency (CRA)*

The presentation will focus on demonstrating how the web can be a powerful tool to deliver better service and to build trust with stakeholders. The two presenters will discuss their experience in using the web to build a new foundation to improve the delivering of procurement services and talk about future directions. The first presentation will provide a high level overview of some of the directions being taken by the federal government and the second presentation will then focus on Synergy, a tool developed for CRA to support the business process from the regular procurement world (like ABE at PWGSC) as well as “e-procurement”. The presentation will discuss the usage of on-line catalogues (office supplies, long-service awards, translation services and others), collaboration work (new) with 13 Suppliers of IT Consultants and also supporting the capture of data elements related to acquisition card transactions to improve data analysis and reporting.

WORKSHOP – WEDNESDAY, MAY 18, 2011

10:30 am – 11:45 am Concurrent Breakouts *(continued)*

Stream C: Complex Procurement ROOM 207
**3 – Construction and Real Property Contracting:
Building Information Modeling (BIM)**

- John Hale, *Director General, Military Engineering Division, Director Corporate Architecture and Engineering Directorate, Department of National Defence*

The BIM evolution is happening! BIM is taking foothold within the Real Property and Construction industries and it will have a significant impact on us. From a public owner's perspective, this presentation will provide an overview of the BIM process and its impact on stakeholders throughout the industry.

Stream D: Procurement and Materiel Management Evolution ROOM 208
**4 – Project Management Principles:
What PMBOK Has to Offer**

- Yvan Bastien, *P. Eng, PMP, Director, Programs, Project Management Institute – Ottawa Valley/Outaouais Chapter*

This session will explore the project management framework of the Project Management Institute's Project Management Body of Knowledge (PMBOK®) and how it applies to procurement specialists.

The session will explore the roles and responsibilities of the procurement specialist as an integral member of a project team

To accomplish these goals, the critical aspects of the PMBOK will be presented including: key definitions, process groups, knowledge areas, and processes with emphasis on procurement processes.

11:45 am - 12:45 pm

Networking Luncheon – Round Table Discussion ROOM 301

12:45 pm – 1:15 pm

Dessert Break in Trade Show Area 3RD FLOOR FOYER



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CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP – WEDNESDAY, MAY 18, 2011

1:15 pm – 2:30 pm **Concurrent Breakouts**

Stream A: Materiel Management

ROOM 205

5 – Best Practices in Materiel Management

- Shawn Casemore, *CSCMP C.P.M.*

The field of materiel management continues to evolve in both the public and private sectors. The continued development of technology has increased the accuracy and speed at which materials can be receipted, handled and issued; however, often the most effective solutions are those that are the most simplistic. This session will touch on best practices in materiel management in both the public and private sectors, allowing participants to gain a better understanding of the potential solutions that can be integrated into their day-to-day operations.

Stream B: Procurement – The Basics

ROOM 206

6 – The Only Game in Town: Understanding How to Sole-Source Effectively

- Derek M. Leschinsky, *Senior Associate, Borden, Ladner, Gervais LLP*
- Vince Mazzone, *Director, Auditor General of Ontario*

Canadian common law does not impose obligations on public institutions to use competitive tenders to procure goods and services. The common law has rather traditionally regarded government institutions as being no different than any other party that wishes to make a purchase. Obligations with respect to sole-sourcing arise rather by virtue of statutes or other legislation implementing international trade agreements. This presentation will review sole-sourcing obligations at the federal, provincial and municipal level under the applicable trade agreements.

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CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP – WEDNESDAY, MAY 18, 2011

1:15 pm – 2:30 pm **Concurrent Breakouts** *(continued)*

Stream C: Complex Procurement

ROOM 207

7 – Buying Software: An Introduction to The New Software Licensing Supply Arrangement (SLSA)

- Emilio Franco, *Supply Team Leader, New Methods of Supply, Software and Shared Systems Procurement Directorate, Public Works and Government Services Canada*
- Gabriele Mathieu Monger, *Supply Officer, Public Works and Government Services Canada*

It's a new day in software procurement with the *Software Licensing Supply Arrangement (SLSA)*, a new approach that makes buying software faster, better and less expensive. Learn about the software procurement changes and the recently launched procurement vehicle that will replace the DISOs.

Stream D: Procurement and Materiel Management Evolution

ROOM 208

8 – Green Procurement: Solutions and the Way Ahead

- Madeleine Plouffe, *Team Leader, Green Procurement, Acquisitions Branch, Public Works and Government Services Canada*
- Caroline MacIntosh, *Acting Director, Policy Development Directorate, Office of Greening Government Operations, Corporate Services, Policy and Communications Branch, Public Works and Government Services Canada*
- Frances Edmonds, *BSc.(Hons), Dip H&S, CRSP, Director, Environmental Programs, Hewlett-Packard (Canada) Co.*

Moving green procurement and the greening of government operations forward requires the development of effective strategies, actionable plans, and practical tools to support procurement activities, operations, and decision making. This session will focus on tools, solutions and approaches, related to specific goods and services as well as total cost of ownership, that are available to assist the procurement and materiel management community in supporting their organizational requirements to achieve improved green procurement performance.

2:30 pm – 3:00 pm

Refreshment Break and Networking in Trade Show Area

3RD FLOOR FOYER

Trade Show Exhibitors Include:



AON



GRAND&TOY.
Performance Enhancing Offices™



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Office of Greening Government Operations

CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP – WEDNESDAY, MAY 18, 2011

3:00 pm – 4:15 pm Concurrent Breakouts

Stream A: Materiel Management

ROOM 205

9 – Role of Supporting Organizations:

Panel – CAD and SPMD

- Robb Flemming, *Senior Director, Crown Assets Distribution, Public Works and Government Services Canada*
- Michel Violette, *Manager, Operations, Eastern Canada Division, Seized Property Management Directorate, Public Works and Government Services Canada, Gatineau Quebec*

The Crown Assets Distribution Directorate (CAD) of Public Works and Government Services Canada (PWGSC) is the mandatory disposal agent for surplus moveable assets belonging to the Federal Government, however it does much more than that. It also supports the disposal of seized assets and proceeds of crime. The Seized Property Management Directorate (SPMD) of PWGSC manages assets seized or restrained under specific sections of the *Criminal Code*, the *Controlled Drugs and Substances Act* and the *Proceeds of Crime (Money-Laundering) and Terrorist Financing Act*.

This session explores the synergies between CAD and SPMD and how both groups work closely together in providing an efficient and effective disposal process for seized assets and proceeds of crime.

Stream B: Procurement – The Basics

ROOM 206

10 – Due Diligence in the Tendering Cycle

- Paul Emanuelli, *General Counsel and Managing Director, The Procurement Office™*

Featuring new content from the forthcoming 3rd edition of his Government Procurement textbook, Paul Emanuelli's *Government Procurement: Due Diligence in the Tendering Cycle* distils the latest trends from a diverse portfolio of procurement projects and delivers leading-edge insights to help you manage your procurement process. Leveraging the latest case studies and legal developments, this interactive lecture will:

- survey twenty-four due diligence indicators to help you assess your existing practices in the areas of institutional governance, project management, template development, document drafting, bidding risks and contract administration;
- introduce the Good Governance Compliance Checklist, a quick-reference guide aimed at accelerating your procurement processes while managing legal risks; and
- cover major procurement policy developments, including the latest news from international trade treaty negotiations.

Trade Show Exhibitors Include:



Indian and Northern
Affairs Canada

Affaires indiennes
et du Nord Canada

WORKSHOP – WEDNESDAY, MAY 18, 2011

3:00 pm – 4:15 pm Concurrent Breakouts *(continued)*

Stream C: Complex Procurement

ROOM 207

11 – Contract Risk Management

- Garry McDonell, *MSM, FCIP, FIRM, CRM, CRSP, National Director, Aon Risk Consulting Services*
- Andy Akrouche, *Managing Partner, Strategic Relationships Solutions Inc., General Manager of FedBid Canada*

Contract Risk Management is about achieving expected outcomes. It is about bringing a higher degree of "certainty" to a project by employing assurance methods at every phase of a contract(s) life cycle. At the core of this added "certainty" lies advanced sourcing strategies, dynamic governance and continuous alignment.

Stream D: Procurement and Materiel Management Evolution

ROOM 208

12 – Government Procurement Reform and Modernization of PWGSC's Service Delivery with Partners

- Virginie Ethier, *Director, Procurement Renewal Directorate, Public Works and Government Services Canada*
- Vincent Robitaille, *Senior Director, Professional Services Procurement Directorate, Public Works and Government Services Canada*

The strategy for professional services represents an important component of the modernization of PWGSC's service delivery. Vincent Robitaille will describe how PWGSC intends to improve the procurement process for clients and increase access to SMEs by standardizing its processes, providing better support tools and focusing on usability.

Public Works and Government Services Canada is putting in place a more modern approach to procurement. Virginie Éthier will present how PWGSC is reducing barriers to doing business with the Government of Canada (GC); improving access to online procurement tools; increasing outreach to suppliers and other government departments to make the procurement system more effective.

4:30 pm – 6:00 pm

President's Dinner Reception in Trade Show Area presented by Grand & Toy

3RD FLOOR FOYER



6:00 pm – 11:00 pm

President's Dinner with Entertainment presented by BMO Financial Group

ROOM 301



WORKSHOP

THURSDAY, MAY 19, 2011

7:30 am – 8:15 am

Registration and Continental Breakfast in Trade Show Area

3RD FLOOR FOYER

8:15 am – 8:45 am

Welcoming Remarks and Annual General Meeting

ROOM 301

- Sharon Chamberlain, *President of CIPMM*

8:45 am – 9:00 am

Keynote Address

ROOM 301

- Jim Ralston, *Comptroller General of Canada, Treasury Board of Canada Secretariat*

9:00 am – 10:00 am

**Keynote Address
Now or Never**



ROOM 301

- Jean-Marc Chaput, *Motivational Speaker*

In his new conference-show entitled NOW OR NEVER, this exceptional motivational speaker targets the lethargy and indifference that people sometimes fall victim to. Jean-Marc will beguile you with personal anecdotes based on his own experiences and extensive research. Whether on stage or as a motivational speaker, he is capable of moving audiences to the point that they will leave his show asking themselves that one all-important question: if not now, then when?

10:00 am – 10:30 am

**Refreshment Break and
Networking in Trade Show Area**



3RD FLOOR FOYER

Trade Show Exhibitors Include:

Experience and excellence

Expérience et excellence



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SEATING • SYSTEMS



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Industrial Security Sector

CIPMM 2011 NATIONAL WORKSHOP

WORKSHOP – THURSDAY, MAY 19, 2011

10:30 am – 11:45 am Concurrent Breakouts

Stream A: Materiel Management

ROOM 205

13 – Office of the Procurement Ombudsman; Encouraging Smart Procurement

- Frank Brunetta, *Procurement Ombudsman*

On January 4th, 2011, Mr. Frank Brunetta became the federal Procurement Ombudsman. With his first 100 days in office completed, Mr. Brunetta will speak to us about what can be concluded from the Office's first three years of operation. Applying the legislation that created the Office and the Regulations that guide it, his Office works with all those involved in federal procurement, using whatever approach is best suited to the circumstance, to improve federal procurement for all stakeholders. On behalf of all Canadians, the Office ensures that federal procurement is fair, open and transparent, thus helping strengthen our trust and confidence.

Stream B: Procurement – The Basics

ROOM 206

14 – Tips for Preparing Effective and Flexible RFPs

- Cathryn Kallwitz, *Director, Operations, RFP Solutions Inc.*

A Request for Proposal (RFP) is one of the primary tools used to do business in government.

- It helps form the basis of the resulting contract, needing clear articulation of the requirements, and understandable, enforceable and mutually agreeable terms between buyer and seller to administer any ensuing agreement;
- It provides the basis for "picking the winners", needing strong, relevant criteria, process and logical basis of selection;
- During the solicitation process, the RFP also become the means of communication – between the buyer and potential suppliers, industry at large, and even the media and broader public.

This one document must serve multiple purposes, and, like procurement more broadly, needs to balance competing issues to achieve the buyer's objectives.

This session provides practical tips and techniques for developing RFPs; aimed at responding to these diverse challenges. Focus will be placed on planning, developing and administering the RFP process, in the context of the relationships involved – those between Contracting Authority and Project Authority; between departments and agencies; between the buyer and all potential bidders; and finally, with the successful contractor(s).

Trade Show Exhibitors Include:



Natural Resources
Canada

Ressources naturelles
Canada

WORKSHOP – THURSDAY, MAY 19, 2011

10:30 am – 11:45 am **Concurrent Breakouts** *(continued)*

Stream C: Complex Procurement

ROOM 207

15 – Life After Tercon: Is the Privilege Clause Alive or Dead?

- Gerry H. Stobo, *Partner, Borden Ladner Gervais LLP*

Privilege clauses have been a long-standing feature in procurements, giving owners – both in the public and private sectors – wide discretion in determining how bids will be evaluated and protecting those owners from financial consequences and liability when things go wrong. In 2010, the Supreme Court of Canada (“SCC”) struck down an attempt by a provincial government to rely on a privilege clause in order to limit its liability. In a divided decision, the SCC said that an owner’s discretion, when relying on privilege clauses, has limits. And, while courts and bid challenge agencies do grant considerable deference to owners when relying on privilege clauses, they will find a way to nullify the effects of those clauses when procurements cross the line. But, the question for owners now is: where is that line drawn? How should owners write privilege clauses to ensure the greatest discretion possible – does some wording work better than others?

Stream D: Procurement and Materiel Management Evolution

ROOM 208

16 – New Generation of National Printing Procurement Tools (Non-National Capital Region)

- Giselle Valdez Soc, *Supply Specialist, National Team Co-Lead (Non-NCR) Printing Acquisitions Branch
Winnipeg, Public Works and Government Services Canada*
- Marlene Hall, *Supply Specialist, National Team Co-Lead (Non-NCR) Printing Acquisitions Branch
Winnipeg, Public Works and Government Services Canada*
- Al Garlinski, *A/Manager, Acquisitions Branch, Western Region, Public Works and Government Services
Canada*

Printing requirements can be complicated. To help materiel managers and end-users make sense of it all, the PWGSC National Commodity Printing Team (Non-NCR) have introduced a New Generation of National Master Supply Arrangements and Standing Offers for Printing Services intended for federal departments and agencies in the Atlantic, Quebec, Ontario (except NCR), Western, and Pacific Regions.

To get the word out, an interactive workshop will be presented, showcasing these new procurement tools, along with other training and resource materials – all developed for materiel managers and procurement personnel to assist their end users with the various printing requirements. The workshop will also include a “how to” guide outlining the process in determining the most appropriate procurement tool (standing offer or supply arrangement) to use. A display of printed samples (brochures, posters, newspapers, business cards, and workbooks) will also be on display for workshop attendees.

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WORKSHOP – THURSDAY, MAY 19, 2011

11:45 am – 1:15 pm

Lunch – Closing Remarks

ROOM 301

- David V. (Jake) Jacobson, *Chief of Staff, Materiel, Department of National Defence*

1:15 pm – 1:45 pm

Dessert Break and Networking in Trade Show Area

3RD FLOOR FOYER

1:45 pm – 3:00 pm

Concurrent Breakouts

Stream A: Materiel Management

ROOM 205

17 – TBS Procurement and Materiel Management Certification Program – Future Direction

- Rosa Paliotti, *Acting Senior Director, Procurement, Materiel Management and Real Property Communities Management Office, Office of the Comptroller General, Treasury Board Secretariat*

Come join this highly interactive session to learn more about the key initiatives being planned to enhance the TBS Certification Program for Procurement and Materiel Management functional specialists, including an update on the work underway to develop Level II Certification. This is an opportunity to share your views as we strive to strengthen the Certification Program and professionalize our workforce to serve the current and future needs of the Public Service.

Stream B: Procurement – The Basics

ROOM 206

18 – Contract Negotiation Skills

- Jean Lacelle, *Owner, JL Procurement Consulting Services*
- Carolyn Montague, *Partner, Perfocus Management Inc.*

Discover the way to improve your negotiation skills in contracting through:

- Latest best practices and tips;
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WORKSHOP – THURSDAY, MAY 19, 2011

1:45 pm – 3:00 pm Concurrent Breakouts (continued)

Stream C: Complex Procurement

ROOM 207

19 – Complex Procurement Planning and Procurement Approaches (SOIQ)

- Brian P. McGee, Lieutenant-Colonel, *Project Manager, Project Management Office, Canadian Special Operations Forces Command, Materiel Group, Department of National Defence*
- Camil Giguere, *BGen (ret'd), Director, Land Training and Simulation, Thales Canada*
- William Miller, *Contracting Officer, Public Works and Government Services Canada*

The government achieves competitive contracting through two sourcing methodologies, which include: electronic bidding and traditional bidding using suppliers' lists. The three tendering approaches under the trade agreements are:

- 1) Open Tendering using a Notice of Proposed Procurement (NPP);
- 2) Selective Tendering – a two stage procurement where potential suppliers express an interest and meet predetermined qualifications publicized in the NPP;
- 3) Limited Tendering or sole sourcing.

Where does the Statement of Interest and Qualification (SOIQ) process fit in? Is it a pre-solicitation tool similar to a P&A or RFI or is it an integral part of a two-step procurement process?

Is the SOIQ aim to qualify vendors or disqualify them from proceeding to the second phase? How is PWGSC managing it? Come and see for yourself!

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WORKSHOP – THURSDAY, MAY 19, 2011

1:45 pm – 3:00 pm **Concurrent Breakouts** *(continued)*

Stream D: Procurement and Materiel Management Evolution
20 – E-Payment: NRCan

ROOM 208

- Luc Casault, *Senior Director, Financial Management Branch, Natural Resources Canada*

ePayment is an automated system for processing invoices from suppliers – from their receipt to cheque issue authorization. The national ePayment centre in Sherbrooke processes 40,000 electronic invoices annually (= \$1.4B). By consolidating manual operations from 13 locations, it generates annual savings of \$750K.

With ePayment, NRCan becomes the first department to make full use of the government policy on electronic signatures for payment approval.

ePayment has cut invoice payment time, input errors, lost invoices, and interest costs; has improved control; and enhanced managers' understanding of their financial accountabilities. In 2010, ePayment won first place at the 2010 GTEC awards.

The Treasury Board Secretariat has accepted ePayment as part of the government-wide "Web of Rules" initiative.

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A donation has been made on behalf of the 2011 CIPMM National Workshop speakers to the Heart & Stroke Foundation.

The Heart and Stroke Foundation, a volunteer-based health charity, leads in eliminating heart disease and stroke and reducing their impact through the advancement of research and its application, the promotion of healthy living, and advocacy.

Our thanks to all of our speakers for their support and participation in the 2011 CIPMM National Workshop.