



Treasury Board of Canada
Secretariat

Secrétariat du Conseil du Trésor
du Canada

Canada

Updates to Policies and Practices

Acquired Services & Assets Sector - TBS

December 2022

Purpose

To outline key changes resulting from the Acquired Services and Assets Policy Suite Reset Phase 2 and what this means for organizations

Assets and Acquired Services (ASAS)

- Materiel
- Procurement
- Real property
- Investment Planning
- Project Management
- Capacity building for ASAS communities

Context

Treasury Board reset its policies to better enable departments and agencies in the planning and management of investments

TREASURY BOARD

TB sets the Policy Framework for the Management of Assets and Acquired Services

TB also makes decisions on departmental proposals such as investment plans, contracts, projects, and real property transactions

WHY CHANGE?

Complex suite of 34 instruments related to the management of assets and acquired services

Instruments are out-of-date (e.g., the Contracting Policy was established in 1989)

Policies do not reflect today's realities or best practices (e.g. accessibility, digital, green, results, Indigenous)

Need to break down silos between asset functions and communities

WHY NOW?

Departments and agencies want a complete suite of policies that allow them to work in more efficient and effective ways

Key contribution to the TB President's shared mandate commitment on procurement modernization.

To align with phased implementation and change management

Implementation Approach

To ensure departments could adjust to the requirements within the directive, the implementation of the new instruments occurred in two phases:

May 2021

Effective on date of approval:

- **Amendments to the *Policy on the Planning and Management of Investments*;**
- ***Directive on the Management of Materiel*;**
- Amendments to the *Directive on Management of Communications*;
- Rescindment of the *Common Services Policy*, except for Appendix E, 6.5.3;
- *Directive on the Management of Procurement*; and
- *Directive on the Management of Real Property*;

May 2022

Rescind nine (9) policy instruments:

- ***Policy on Management of Materiel*;**
- ***Directive on Disposal of Surplus Materiel*;**
- ***Directive on Fleet Management: Light Duty Vehicles*;**
- ***Directive on Fleet Management: Executive Vehicles*;**
and
- ***Controlled Goods Directive*;**
- *Contracting Policy*;
- *Policy on Decision Making in Limiting Contractor Liability in Crown Procurement Contracts*.
- *Policy on Management of Real Property (including associated standards)*; and
- *Directive on the Sale or Transfer of Surplus Real Property*;

Departments had twelve months for full transition

Socio-Economic Considerations

A strategic framework that supports socio-economic considerations over the lifecycle

Best Value: consider socio-economic and environmental outcomes in addition to financial considerations

Senior Designated Official: implement strategic framework supporting socio-economic considerations

Life Cycle Management: socio-economic and green initiatives considered at each step of the process

Consult with TBS: when proposing government-wide policies/programs leveraging procurement for socio-economic benefits. Seek endorsement for surplus real property in Canada that qualifies for sale to CLC.

Diversity and Inclusion: unbundling to allow smaller more specialized firms to bid, custodians consider diversity for built amenities, and donation of surplus materiel

Indigenous: Consider opportunities to support Indigenous participation. Engaging Indigenous groups in a manner as with other orders of government.

Accessibility: accessibility considerations in bid requirements and for vehicle purchases, and accessibility standard on barrier free access to real property

Green: include achievable, measurable environmental considerations in bid requirements. Leverage procurement practices in accordance with *Policy on Green Procurement*. Implement the commitments in the Greening Government Strategy.

Senior Designated Official

The new instruments formalize the roles and responsibilities of the Senior Designated Official (SDO) for each function

Materiel Management:

Advise Deputy Head on materiel management strategy

Identify/Protect assets with heritage value and cultural significance

Facilitate collection of data for fleet management

Manage controlled goods (in cooperation with chief security officer)

All functions:

Promote innovation and agility

Build and optimizes workforce capacity

Inform decision making

Framework for each function and contribute functional perspective

Facilitate collaboration between stakeholders

Oversight, planning and reporting

Procurement:

Support improvement of government-wide procurement tools and practices

Advise Deputy Head on procurement management function

Facilitate collaboration between contracting authority and business owner

Real property:

Development of real property portfolio strategy

Cultivating relationship with Indigenous peoples on real property matters

Ensure compliance with standards and codes (building, fire, etc.)

Investigate serious fires, ensuring recommendations addressed

Directive on the Management of Materiel

Objective

To ensure that materiel is planned, acquired, operated, maintained and divested in a manner that supports the delivery of programs and services to Canadians, while ensuring best value to the Crown.

Impact of Directive

To streamline:

- Combines four Directives into one, with mandatory procedure for fleet and controlled goods

To reduce burden:

- Allow delegation of the Minister's authority for the sale or divestiture of surplus materiel

To encourage enterprise-wide considerations:

- Greater emphasis on transfer to other departments when divesting
- Digital equipment to other departments prior to transfer to Computers for Schools
- Greater use of GCTransfer/GCSurplus/GCDonate for disposal of surplus materiel

To emphasize planning and life-cycle approach:

- Increased integration and collaboration with other functions
- Explicit references to environmental objectives (i.e. refit, repurpose and reuse)
- Divestiture decisions must document justification and include a valuation of the materiel.
- To clarify roles/responsibilities: One point of accountability for the management of materiel and to strengthen the materiel management function and workforce capacity.
- SDO to work with Chief Security Officer to manage controlled goods

Questions?

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