

Transforming Public Procurement

September 16 – 19, 2018
Whitehorse, Yukon

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PRELIMINARY PROGRAM WHITEHORSE, YUKON SEPTEMBER 16 TO 19, 2018

August 10, 2018

September 16 to 19, 2018 | Whitehorse, Yukon

Register at www.cppc-ccmp.ca

FORUM 2018

15:00-18:30 **Registration opens**

Pre-Forum Seminar #1

Sunday September 16, 2018

8:30-16:00 **Getting the Results from Negotiations Using the Integrative Approach**
Maureen Sullivan – National Education Consulting Inc.

During this one-day skills-based course, participants will explore the theory and practice the skills they need to conduct interest-based negotiations that will preserve and enhance relationships while resolving some of the most difficult contracting challenges. They will also come to understand other approaches to negotiation, so they can determine which approach is most appropriate for any given circumstance, and they will be better equipped to handle those who may not subscribe to the integrative approach model. Participants will examine their own natural conflict style and come to understand the importance of being able to adapt their style to the dispute and personalities involved. In doing so, they will be better able to help their organization-and their supplier relationships-improve and move forward. Following this course, participants will know how to conduct routine procurement negotiation using the interest-based approach.

Learning objectives & outcomes:

- Define integrative negotiations and realize the benefits of this negotiation approach;
- Identify where negotiations falls along the dispute resolution spectrum;
- Explore when the integrative negotiation approach is appropriate and when it is not;
- Examine the integrative negotiation model;
- Develop communication techniques to create and sustain discussions and understanding;
- Discover personal conflict style and discuss how to move that personal style closer to a collaborative approach;
- Develop techniques to deal effectively with emotions during negotiations;
- Practice integrative negotiations using common procurement and contract management scenarios.

10:30-10:45

Break

12:00-13:00

Lunch provided

14:30-14:45

Break

17:30-18:30

Welcome Reception

Pre-Forum Seminar #2

Sunday September 16, 2018

8:30-16:00 **“Why did we ask this question?” Are we evaluating the “right” things?**
Steve Johnston & Cathryn Kallwitz - RFP Solutions

Procurement policy, trade agreements and good practice require evaluation criteria to be established prior to the issuance of a solicitation. Despite the work that goes into the upfront development of RfX processes, when later presented with supplier responses to the submission requirements, evaluation teams many times ask themselves “why did we ask this question?”

This can occur where industry may have understood the requirement differently than the buyer intended, where the responses do not provide the anticipated added value or differentiation in the evaluation process, or where there is a potential lack of fit between the operational requirements and the questions used to elicit and assess Proponent responses.

Once the RfX has closed, it is “too late” to change, remove or add to the evaluation criteria, and evaluators may be left with other questions or potential risks unaddressed prior to a contract award.

This one-day session explores ways to enhance the alignment of proposal submission requirements and evaluation criteria with the statement of requirements/scope of work at the solicitation development stage. Participants will be provided with practical methods and tools to assist in identifying, defining, documenting and applying evaluation criteria, aimed at providing a greater fit to operational requirements. Participants will have the opportunity to practice techniques discussed in the session.

Learning objectives & outcomes:

- Planning procurement requirements in consideration of operational outcomes and potential risks;
- Defining and documenting requirements – asking the questions that need to be answered when developing procurement documents;
- Aligning evaluation criteria to the statement of requirements / scope of work;
- Selecting evaluation criteria appropriate to the goods, services, construction/project requirement, and in consideration of the resulting contract structure;
- To prescribe or to seek proposals? Finding the “balance”;
- Sharing ways to better understand the marketplace when establishing proposal submission requirements and evaluation criteria – e.g. does the market do what we are asking for?
- Asking the “right” questions in the RfX, and differentiating among Proponent responses;
- Supporting greater transparency of evaluation in the procurement process;
- “Looks good on paper..” – considering options for evaluation in addition to the written proposal;
- Providing tips and techniques to support the implementation of the evaluation criteria within the procurement process with consistency and sound documentation.

Monday, September 17, 2018

8:00-17:00	Registration opens
8:00-8:45	Continental Breakfast
9:00-9:30	Welcome Remarks and Opening Ceremony – Keynote Speakers Honorable Sandy Silver & Honorable Richard Mostyn
9:30-10:15	Concurrent Sessions

<p>Are you Ready to Put your Competitive Skills to the Test in a Live Auction? <i>Ben Koberna - EASiBuy</i></p> <p>An electronic Reverse Auction (eRA) is an internationally recognized public procurement method that uses technology to give suppliers real-time feedback about their pricing, enabling them to lower their bid in order to secure a contract. Public buyers in Canada can now use eRA's to transform their procurement process by accelerating their negotiation process, increasing transparency and visibility into pricing, and delivering major savings to their organization.</p> <p>In this interactive session, selected attendees will role play and compete for a fictitious contract in a live online bidding event. Please bring your laptop.</p> <p>Learning objectives & outcomes:</p> <ul style="list-style-type: none"> • Understand how electronic reverse auction works; • Learn how eRA is now available for use in Canada under CETA and CFTA; • Know where and when to use reverse auction in your organization; • Hear results from a real life case study with a Canadian connection. 	<p>Cooperative Procurement: Tools and Trends to Help Get You More with Less <i>Jon Stodola – The Toro Company</i> <i>Ginger Line – Sourcewell</i> <i>Gerald R. Ford – Kinetic GPO</i></p> <p>Cooperative procurement is becoming an attractive option for government agencies. Municipalities and other MASH entities can benefit from cost savings and efficiencies while learning from cooperative partners. Hear from fleet professionals about real life innovative programs that you can adopt to save money.</p> <p>Learning objectives:</p> <ul style="list-style-type: none"> • Understand the value of cooperative purchasing; • Analyze cooperative programs and identify proactive purchasing programs to help reduce time while cutting costs; • Utilize government best practices for acquiring goods and services.
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10:20-10:35	Refreshment Break
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Taking longstanding processes and reimagining them in an eProcurement solution

Erin Poorooshab – Nova Scotia Procurement Services

Nova Scotia has been at the forefront of public procurement entities that have seen the value of adopting an eProcurement solution. Transforming our interactions with our staff, our clients and our suppliers – using technology has been a 'rollercoaster' ride - with high and low sections but has allowed Nova Scotia Procurement to break through longstanding barriers and offer solutions to paper based processes, in addition to having access to valuable procurement data that will increase and drive our strategic decision-making abilities. Join us as we detail our journey to date and the roadmap ahead.

Learning objectives:

- Provide an overview of the journey into adopting an eProcurement solution (so far);
- How we have transformed ourselves:
 - Sourcing/Contract Requests (intakes from clients);
 - Sourcing/Contract Workspaces - housing all of our tender information in one easily accessible location vs someone's desk, file cabinet, email, shared drive, etc.;
 - E-Bidding.
- The highs -
 - Government, client and staff benefits;
 - The Business Systems Team - our supporting superheroes.
- The lows (or areas for improvement)
 - Private vs public procurement systems;
 - Change;
 - The common phrase "We have always done it this way..."
- The next steps in our transformational journey.

Early Market Engagement Strategies

Maureen Sullivan – National Education Consulting Inc.

The times are changing and more innovation is expected from procurement professionals. As projects become more complex, timelines become tighter and proponents become more sophisticated, why not create an opportunity to engage with industry during the early planning process? In many cases the reason we look to contract with the market is because they are the experts, so doesn't it make sense to have them help you shape the way forward?

During this interactive session we will explore different market engagement methodologies through real Canadian procurement, and you will practice crafting meaningful questions for a complex procurement scenario.

Learning objectives & outcomes:

- Explore recent Canadian examples of innovative collaboration with suppliers;
- Discuss pros and cons of different market engagement strategies;
- Practice drafting market sounding questions for a real scenario.

11:35-12:20

Concurrent Sessions

Changing tomorrow today- Unlock the Power of Supplier Relationship Management

Karen Owen & Pooja Nagra – OECM

Effectively managing supplier contract performance while harnessing expertise and innovative ideas, are critical to a successful Supplier Relationship Management (SRM) program. Creating a SRM program can be challenging! Working collaboratively with key supplier, OECM has built a comprehensive program to effectively manage suppliers, drive innovation and deliver continuous improvement.

Using a collaboration tool, we will demonstrate how to :

- Use collaboration to open communication channels through the procurement/contract lifecycle;
- Improve supplier performance;
- Provide creative solutions to tackle challenges and manage difficult suppliers.

Learning objectives & outcomes :

- Why SRM is critical in the process of transforming public procurement;
- The key drivers for establishing a SRM program;
- How to establish a SRM program in order to maximize the value of supplier relationships.

Innovative Procurement Methods: A Guide to Successfully Tackling Challenging Projects

Michael Paul - Colliers Project Leaders

Learn the best practices of procurement featuring a prominent case study from a rural project in Northern Canada. Key items addressed within the case study will include the utilization of local vendors, innovative procurement methods and how to measure the value of your procurement through effective scoring evaluations, and the finished project.

Learning objectives & outcomes:

- Develop key procurement strategies to contribute to their project success;
- Identify problems to look out for in procurement;
- Incorporate best practices into their procurement procedures for both urban and rural projects;
- How to effectively analyze the value of your procurement;
- Understand the importance of procurement in successful infrastructure projects.

12:30-13:30

Lunch – AEP Award Presentation

13:35-14:35

Plenary Session

Sébastien Sasseville - Keynote Speaker

Sébastien Sasseville inspires organizations to create and maintain performance in changing environments. An endurance athlete, his extraordinary accomplishments—which include summiting Mount Everest, completing the mythical Sahara race, and running across Canada—are made all the more impressive by the fact that he lives with Type 1 Diabetes. Having held diverse sales roles in Fortune 500 companies and elsewhere in the corporate world, Sébastien marries his extensive business experience with his inspirational achievements to deliver dynamic messaging on change management, teamwork, peak performance, and leadership. Supported by superb imagery, his concrete and actionable content is truly unique.

14:40-14:55

Refreshment Break

15:00-15:45

Concurrent Sessions

Ripped from the Headlines: How Recent Bureau Enforcement Activity Matters to You

Terry Stechysin & David Jones - Competition Bureau

Senior enforcement and compliance personnel from the Competition Bureau will use recent high-profile cases to illustrate how cartel activity, immunity/leniency and corporate compliance can have an impact on public procurement.

Learning objectives:

- Learn how to recognize and detect bid-rigging and other collusive behaviour in public procurement;
- Learn how to guard against these behaviours;
- Learn how Bureau compliance instruments can help minimize anti-competitive activity.

How to Apply for the AEP Award- The Benefits

Teresa Rusk & Jeanne Pankiw – City of Airdrie

As a four time AEP recipient, the City of Airdrie will provide insight and suggestions on how to approach and complete the AEP application.

The workshop will provide a short overview of the history of the AEP, practical information on preparing and submitting the application, as well as a brief review of the evaluation and scoring criteria.

15:50-17:00

Plenary Session

Engaging people transforms culture and organisations

Nic Tsangarakis - Kwela Leadership & Talent Management

Engaged employees frequently report that that they understand what is expected of them, are empowered to make decisions as their skills improve, and receive feedback when they have done a good job and when they have not. This session provides the case for achieving high levels of engagement and practical tools and techniques for achieving engagement. It is applicable to both leaders of people and to people, that may not be managers currently, and who are interested in contributing to a culture of engagement.

17:05-18:30

Wine and Cheese Exhibitor Hospitality Reception

19:00-22:00

Dinner and Social Event at the Kwanlin Dün Cultural Centre– *Entertainment provided by the Snowshoe Shufflers and the Dakhka Khwaan Dancers*

8:00-17:00

Registration opens

8:00-8:40

Continental Breakfast

8:45-9:45

Concurrent Sessions

<p>Debriefing Obligations under New Trade Agreements <i>Maureen Sullivan – National Education Consulting Inc.</i></p> <p>The new trade agreements extend debriefing obligations right down to the local government level right across Canada, and impose a higher level of transparency than ever before. With easier access to dispute resolution mechanisms, public sector organizations can expect more challenges and scrutiny of their debriefing process than ever before. During this fast-paced, interactive session we explore some of the best practices that are emerging in this area and consider the nuances of some tribunal and court rulings already in place that will impact how debriefing is conducted.</p> <p>Learning objectives & outcomes:</p> <ul style="list-style-type: none"> • Review legal and trade agreement obligations related to debriefing; • Examine recent relevant debriefing cases and tribunal rulings; • Discuss documentation and confidentiality issues that arise with debriefing; • Explore best practices in debriefing from across the country. 	<p>Transformation through Innovation- A procurement game changer <i>Karen Owen & Rupa Gill – OECM</i></p> <p>Through a collaborative approach, OECM is introducing innovative tools and techniques into the sourcing processes focusing on driving value through engagement, analytics, strategic problem solving, and project management. By bringing our procurement solidly into the 21st century we will also raise the profile of procurement professionals as strategic partners. In this presentation you will gain insights into:</p> <ul style="list-style-type: none"> • Collaborative engagement strategies; • Innovative tools and techniques; • Scoring and evaluation methodologies. <p>Learning objectives & outcomes:</p> <p>Participants will increase their awareness of:</p> <ul style="list-style-type: none"> • Why innovation is critical in the process of transforming public procurement; • The key drivers for innovation in procurement; • Challenges and best practices adopting innovative techniques.
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9:50-10:35

Concurrent Sessions

<p>From Green to Sustainable- Including Social Responsibility in your Purchasing Practices <i>Clare Hobby - TCO Development</i></p> <p>While environmental or “green” aspects are now the norm in product purchasing, the shift to sustainable purchasing means adding social responsibility to your policies and product specifications. From conflict minerals to factory working conditions, what are the current challenges in human rights and social responsibility related to products? What practical steps can purchasers take to address them? Can purchasers have an influence in product supply chain conditions? Examples from IT and other industries will be discussed.</p>	<p>Transforming Construction Procurement through Job Order Contracting <i>Erica Edwards – City of Mississauga</i></p> <p>The session content will:</p> <ul style="list-style-type: none"> • Provide an overview of JOC, how it works and the types of projects to which it is best suited; • Describe the City of Mississauga’s journey to implement JOC and its success to date; • Discuss how JOC saves time and money and get results; • Discuss how JOC can transform procurement for low design/high volume construction, renovation and maintenance projects by eliminating repetitive and non-value adding work, giving buyers and project managers more time to focus on other strategic and innovation initiatives. <p>Learning objectives and outcomes:</p> <ul style="list-style-type: none"> • Participants will understand JOC and its potential to transform procurement for construction, renovation and maintenance projects; • They will have knowledge and food for thought to share with their agencies.
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10:40-11:30

Refreshment Break in Exhibit Hall

11:35-12:25

Concurrent Sessions

<p>Bringing Your Procurement to the 21st Century <i>Christine Wood - bids&tenders™</i> <i>Lorice Haig - Xenex Enterprises Inc</i></p> <p>Bringing your procurement department to the 21st century – a lively exchange of questions, answers, ideas, cautions and encouragement amongst e-procurement innovators, adoptors and enthusiasts.</p>	<p>A Common-Sense Approach to Transforming Public Procurement <i>Steve Johnston & Cathryn Kallwitz – RFP Solutions</i></p> <p>Transformation is front and centre in many conversations surrounding procurement. Often, discussion on this topic is far-reaching, focusing on corporate-wide initiatives and broad solutions. Seeing and realizing positive and practical outcomes at an</p>
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<p>The last several years saw great early strides in the transformation of procurement into e-procurement as it became a strategic objective for many organizations.</p> <p>Automation of parts of the procurement process (like e-bidding and e-bonding) are becoming common place in parts of Canada. But transformation takes time and is achieved at different rates.</p> <p>For those innovators leading the pack, it's time to take the next step and transform more parts of the procurement process – e-contract management perhaps?</p> <p>Join Bids and Tenders, Xenex Enterprises Inc and their customers to EXPLORE the achievements attained to date In e-procurement, REMINISCE about the hurdles that had to be overcome and LOOK into the crystal ball of the future – e-contract management?</p> <p>Come armed with your questions of how? how long? why? why not? what if? what now?</p>	<p>operational level is possible and is essential to achieve effective and sustainable change. Join us in discussing emerging procurement practices and practical ways to contribute to the transformation of procurement in an incremental / iterative manner, throughout your day to day activities.</p> <p>Learning outcomes:</p> <ul style="list-style-type: none"> • Practical ways to contribute to procurement transformation in your role; • Ideas on how procurement practitioners can make a difference within their role; • The value of collaboration – approaches to sharing practices with colleagues in your organization and externally.
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Buffet Lunch in Exhibit Hall

12:30-14:00

14:05-14:50

Concurrent Sessions

<p>#WTF....Where's the Fairness? <i>Derek Mersereau & Natalie Ashton - Office of the Procurement Ombudsman</i></p> <p>During this session, the Office of the Procurement Ombudsman (OPO) will highlight good practices in federal procurement through engaging and interactive case studies related to reviews conducted by the Office. As a federally legislated oversight office, OPO has seen the good, the bad and the ugly, which presents an opportunity to highlight lessons learned and share good practices in federal procurement.</p> <p>Learning objectives & outcomes:</p> <ul style="list-style-type: none">• OPO's place in the federal procurement process and the services we offer;• Good practices related to fairness and transparency in public procurement;• Common areas of improvement as discovered by OPO.	<p>Small and Local Suppliers- Trade Agreements, Collaborative Procurement and Gus the Painter <i>Tara Hartley - Public Services and Procurement Canada</i></p> <p>This session will be an interactive discussion of lessons, tips, and tricks to help maintain access by small and local suppliers in a context of national collaborative procurement and international trade agreements. Exploring questions of scope, process, and support programs, come prepared to learn and share the best of our collective knowledge and experience.</p> <p>Learning outcome:</p> <ul style="list-style-type: none">• You will leave with a collection of ideas to try and some factors to consider.
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15:00-16:00

Concurrent Sessions

<p>Innovation Start-Ups in Government <i>John Johnstone – Public Services and Procurement Canada</i></p> <p>The Build in Canada Innovation Program (BCIP) was launched by federal Public Works (PSPC) in 2010 as a pilot program and today continues to be view as a success by both industry and governments. John Johnstone had the privilege of being part of the program launch team where he developing a nationally coordinated public engagement delivery model. Through the successes and lessons learned from BCIP implementation to program maturity, John will discuss what it takes to get an innovative program up and running in a government environment and what is required to create real benefits for both the organization and the stakeholders.</p>	<p>Shape the future today: The fusion of Artificial Intelligence, Spend Visibility & Strategic Sourcing <i>Arien Gough - MERX</i></p> <p>Let's discuss the efforts in the industry to help procurement professionals apply 21st century technology and strategic sourcing strategy to achieve meaningful savings. Spend visibility solutions like MERX Spend Analytics informs sourcing strategy and effectively applied strategy enables desirable procurement outcomes. The next evolution of strategic sourcing solutions will apply artificial intelligence (A.I.) to dynamically evolve sourcing strategy to drive action as well proactively analyze, identify and present procurement professionals with actionable spend trend information.</p>
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	<p>Learning objectives and outcomes:</p> <ul style="list-style-type: none"> • Understand the challenges, risks and rewards related to modernizing procurement processes and supporting technology; • Understanding of the major technology building blocks that will influence procurement solutions in the future; • Participants will receive soft-copy information about the theoretical and practical use of A.I. by procurement organizations that they can easily take back to their workplace for sharing, research and guidance. This information will help participants understand how similar procurement organizations are or plan to apply modern technology such as A.I.
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16:00-16:45

Sector Open Discussions

Public Procurement Professionals only

Once again this year, we encourage sector open discussions to enable participants to get together and share common challenges related to their specific sector (municipal, provincial, federal, health, education and crown corporations).

17:00-18:30

Mix 'n' Mingle Reception

Preliminary

Wednesday, September 19, 2018

8:00-12:00 **Registration opens**

8:00-8:40 **Hot Breakfast**

8:40-9:25 **CPPC Annual General Meeting**

9:30-10:30 **Concurrent Sessions**

<p><i>Elizabeth Busch – BC Government</i></p> <p>Description to come</p>	<p>Post-Trade Agreements Innovative Procurement in Action</p> <p><i>Natalia Dumitrescu - Industry Training Authority</i></p> <ul style="list-style-type: none"> • New times, new challenges, new requirements require an innovative response. • In public procurement we need to create the market conditions where innovation can thrive by stimulating (1) supplier innovation, (2) early adoption of innovating sourcing solutions, (3) collaborating to create market demand, (4) replicating good ideas and due diligence. We also need to train efficiently our clients. • How do we do all of these at ITA? <p>Discussion Points:</p> <ul style="list-style-type: none"> • Industry Training Authority (ITA) Overview; • Using Six Sigma tools in public procurement; • Case Study: <ul style="list-style-type: none"> -Exam Eco-System; -Competitive Dialogue Process; • Innovative procurement training at ITA; • Lessons Learned. <p>Learning outcomes:</p> <ul style="list-style-type: none"> • Innovative procurement is not a virtual concept, it is real, adds value to the business, enhances procurement profile even in the most stubborn environments. • Procurement professionals must take a more active role in their respective organizations
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10:35-10:45 **Refreshment Break**

10:50-11:50

Plenary Session

Buying Smart- Public Procurement as a Tool of Innovation Policy

Daria Crisan – University of Calgary

Innovation is an essential ingredient for economic growth and a constant preoccupation for governments around the world. Governments of OECD countries in particular are increasingly turning their attention to public procurement as a tool to stimulate innovation. Canada is perfectly positioned to lead the way in this regard, as public procurement in Canada represents a larger share of government spending than the OECD average. In particular, public procurement in Canada is overwhelmingly conducted by subnational governments, with almost 90 percent of public procurement undertaken by provincial and municipal governments and institutions.

During this interactive session we will explore the main opportunities and challenges in using public procurement, particularly at the subnational level, as an active tool for innovation policy.

Learning objectives and outcomes:

- Exploring the mechanisms through which procurement can be used to stimulate innovation
- Understanding the main challenges in using government contracting to boost innovation. In particular, the relationship between costs, risks and outcomes will be discussed.
- Exploring some successful case studies of public procurement leading to innovative products
- Identifying the main directions in which current procurement practices should evolve if innovation is to become a core objective of the procurement process.

11:55-12:45

Plenary Session

Is there Value for Money in our Procurement System? A consequence of transforming public procurement in the 21st century

Lara Adewumi- Audu – CPO/Researcher, University of South Wales, United Kingdom

Prof. Hefin Rowlands

Dr. Ama Eyo

Dr. Theresa A. Chika-James

The concept of value for money has shifted in maturity to the importance of achievement and the worth of desired outcomes. The term has gone beyond the mere efficient use of resources to the realization of wider value as it regards public sector expenditure as compared to the private sector. In current times, it is obvious that most discussion has been around how best to entrench value procurement process.

Based on shrinking budget and the strive to achieve more with less, most organizational proposals are expected to introduce high-quality proposals with acceptable benchmarks that is competitive for legitimacy, accountability, transparency as well as effective management capable of delivering optimum value for money outcomes (Thai, 2001; Tassabehji and Moorhouse, 2008; Schapper and Malta, 2004; Dza and Gapp, 2013; McMurtry, 2014; White et al., 2016).

In the interactive session, participants will be given opportunity to discuss in their term what value for money entails and at what stage in their procurement procedures, is value given utmost

consideration. The only way out is for them to understand their procurement stages and consider value at each stage.

Learning Objectives:

- Define value for Money as a major goal in all Procurement system.
- Establish and determine the needs for which procurement is required.
- Formulate the appropriate procurement strategy to meet needs.
- Define how best to conduct your market/price survey.
- Provide tips and techniques on how best to build value that suit the buyer and the supplier across the stages of procurement without compromising quantity and quality.

12:45-13:00

Forum Closing Remarks

This is a preliminary program and the content is subject to change without notice.
