

Sunday, November 3 – Wednesday, November 6

CANADIAN PUBLIC
PROCUREMENT FORUM

2019

TORONTO, ONTARIO

CPPC
Together in the
public eye



CCMP
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du public



TRANSITIONING
TO STRATEGIC PROCUREMENT

MARK YOUR CALENDAR

PRELIMINARY PROGRAM
TORONTO, ONTARIO
NOVEMBER 3 TO 6, 2019

Dated September 6, 2019

November 3 to 6, 2019 | Toronto, Ontario

FORUM 2019

15:00-18:00 Registration opens

Pre-Forum Seminar #1

Sunday November 3, 2019

8:30-16:00 **Drafting a Statement of Work**

Debby Shapero Propp, Lawyer – Debby Shapero Propp, Law Office

A Statement of Work (“SOW”) can play a critical role in planning, procurement and contracting. A well-developed SOW is at the heart of strategic procurement. This workshop reviews the importance and benefits of a SOW, legal and risk considerations, what makes an effective SOW and how your organization can benefit from an SOW. Participants will be provided with take-away strategies and a pro-forma SOW template that will be worked with during the interactive workshop.

Learning objectives: At the end of this workshop, participants should be able to:

- Recognize the importance of a SOW and when to use it and when not to use it;
- Be able to integrate a SOW into the planning phase of a project and into the contract;
- Understand the legal and risk considerations of using a SOW;
- Identify the components of a SOW and how to develop a SOW;
- Address technical specification requirements under CFTA and CETA;
- Apply writing strategies and tips for developing a SOW;
- Mitigate project and contractual risk through the use of a SOW.

This interactive workshop is suited for participants involved in your organization’s project planning, procurement process or contract management.

10:30-10:45

Break

12:00-13:00

Lunch

14:30-14:45

Break

17:30-18:30

“First Timers” Meet and Greet Wine & Cheese

**Please make sure to refer to the right pre-forum number when registering to one or the other.*

Register at www.cpsc-ccmp.ca

Pre-Forum Seminar #2

Sunday November 3, 2019

8:30-16:00 **Negotiation Preparations and Practice Outline**

William D Agee Jr, President - William D. Agee & Associates Inc.

This session has been deemed the most critical of all negotiation session by certified masters in the field. This session will show the participants where to find sources of information about the counterpart or their organization to assist in looking at areas of weakness or critical needs. In understanding such it can make the accomplishment of your objectives both easier to attain and more manageable. In this session the participants will be able to develop key negotiation templates for the major areas of spend. A sample will be discussed shown and example to assist the attendees in develop their own when back at their offices. The two Negotiation L-O-B's will be discussed, and examples provided in the workbook for both a Price L-O-B and a Non-Price L-O-B will be explained with sample forms provided. Another key centerpiece of any negotiation is the development of a Negotiation Postmortem. This sheet will critique the negation for areas of being better prepared, techniques applied by the other side of the table and aspect the buyer applied. This is the first piece of information reviewed before the second or annual negotiation with this company. Everybody says they can negotiate but being able to ascertain before you go in what the negotiation will end around will impress your constitutes. When Bosses attend session with their staff and see other applied three to four items to the table and you applied twenty to thirty who do you suppose they will want to handle the next major transaction---you!

10:30-10:45

Break

12:00-13:00

Lunch

14:30-14:45

Break

17:30-18:30

"First Timers" Meet and Greet Wine & Cheese

****Please make sure to refer to the right pre-forum number when registering to one or the other.***

Register at www.cppc-ccmp.ca

Monday, November 4, 2019

8:00-17:00

Registration opens

8:00-8:45

Continental Breakfast

9:00-9:30

Welcome Remarks and Opening Ceremony

9:30-10:15

Concurrent Sessions

Procurement as a Driver of the Circular Economy. What's your Game Plan?

Clare Hobby, Director Purchaser Engagement Global - TCO Development

The session will provide attendees with an overview of the circular economy; its principles and goals of developing a system where products and materials stay in high value use for as long as possible before being recovered and fed back into a regenerative system. The goal is elimination of waste, conservation of natural resources and smarter use of the products and materials we already have. Procurement has been identified as a strategic driver of a more circular future, with the power to influence large scale shifts in product lifetimes, innovation and new business models. This session will help procurement professionals get started with the fundamentals of the circular economy as well as provide some practical examples of circular procurement happening around the world.

Negotiation Strategies and Negotiation Techniques

William D Agee Jr, President - William D. Agee & Associates Inc.

In this session the participants will learn about:

- factors that influence a negotiation including psychological factors;
- where to find sources of information about the counterpart or their organization to assist in looking at areas of weakness or critical needs.

A sample of negotiation template will be discussed to assist the attendees in developing one on their own when back at their offices.

10:15-10:30

Refreshment Break

Adding Public Value through Engagement with Social Enterprises

Maureen Sullivan, President – NECI

Social Procurement: Strategic procurement is about more than maximizing value, it is about becoming a thought leader within your organization. While the cost of goods and services is important, the opportunities that social procurement brings to the table complement and leverage traditional procurement strategies. This session will review the myths and misunderstandings related to social procurement and explore the means to impact a broad set of stakeholders. Through case illustrations of public sector engaging with social enterprises, you will learn how you can contribute to this growing global trend to do more 'social good' within the fiscal resources you are responsible for.

Learning Objectives:

- Discuss core principles, as well as risks and benefits of social procurement;
- Explore recent Canadian public sector social procurement initiatives.
- Differentiate between local sourcing and social procurement.

Engaging the Market to Procure Effectively

Tania Massa, Director, Industry-Academic Programs and Program Administration – Ontario Centres of Excellence

Building public sector procurement capacity means involving the right internal and external stakeholders to efficiently capture perspectives from all departments. These stakeholders are responsible for establishing best practices and ensure that a fair and transparent process has been adopted. Methodologies are essential and form the basis of an outcomes-based approach that result in the identification and selection of the right solution(s). The interactive panel will share examples of how their organizations are adopting innovation procurement.

Learning Objectives:

- How innovation procurement can empower an organization to define/refine the outcomes needed to achieve a more effective procurement process;
- Why involving the market early in the process is important and how this engagement can educate the team on the solution landscape.

11:30-12:20

Plenary Session

The Present and Future of Supplier Diversity in Canada

Silvia Pencak, President - WBE Canada

Women Business Enterprises Canada (WBE Canada) works with corporations and government organizations to provide certification, training and connections with Canadian businesses that are majority owned, managed and controlled by women. This session will review the latest developments and future role of supplier diversity in Canada. Join us to learn how your organization can support Canadian women-owned businesses and other diverse suppliers through procurement, investing directly into communities and strengthening local, regional and national entrepreneurial ecosystems.

Note: this is a panel conversation with representatives of government buyers & WBE community in the room.

12:25-13:35

Lunch – AEP Award Presentation

13:40-14:30

Concurrent Session

Agility: Achieving Agile Procurement in the Digital Transformation

Stephany Lapierre, Chief Executive Officer - Tealbook

Tealbook CEO Stephany Lapierre will be sharing her insights on how innovative technology empowers procurement to be agile in their organizations. Stephany will explore what agility looks like during the digital transformation, and how procurement can be leaders in fostering it amongst their teams. She will be including examples of Fortune 100 clients who have achieved agility by adopting emerging, best-in-class technology. There will be a special focus on improving supplier diversity outcomes through Tealbook’s IMPACT solution and how Tealbook has provided this support to its client, the Canadian Council for Aboriginal Business.

Learning Objectives:

- Leveraging technology to help progress procurement’s digital transformation;

Collaboration in Construction Procurement

Lorice Haig, President and Chief Executive Officer - Xenex Enterprises Inc.

Construction procurement involves the multiple players of Owners/Obligees, Surety Carriers, Brokers and Contractors/Principals. These players already work together through the construction procurement process but there are new opportunities for collaboration in response to new requirements and expectations. A panel of representatives from each of the participating sectors will share their perspectives on current and future collaboration initiatives and the longer-term implications.

Learning Objectives:

- Hear about existing and new collaboration initiatives and their impacts on construction procurement;
- Identify possible applications for these initiatives in other procurement disciplines – e.g. goods and services contract procurements.

- How to empower their teams to become more agile;
- Information on baselining for emerging diversity programs.

14:30- 14:45
14:50-15:40

Refreshment Break

Concurrent Sessions

Better Buying with the Canadian Collaborative Procurement Initiative

Sean Crossan, Director of Federal, Provincial, Territorial and International Relations - Public Services and Procurement Canada (PSPC)

Where are we at with the advancement of the Canadian Collaborative Procurement Initiative (CPPI)? Join together with federal, provincial, territorial and municipal governments, along with broader public sector organizations to learn about opportunities to reduce administrative costs, streamline procurement and leverage our joint buying power to generate best value for suppliers and Canadians. Discover what the CPPI 3-Year Plan (www.canada.ca/buying-together) has to offer you without paying any fees or commissions. Find out how to join the CPPI and add another procurement tool to your toolbox.

Learning Objectives:

- Participants will learn how a collaborative procurement approach can bring better value to an organization through its purchasing activities;
- Hear how the CCPI has been successfully leveraged by provinces, territories, and other public sector organizations over the past year; and
- Learn how public sector organizations across Canada can

Innovation Procurement: Building Blocks to Your Smart Cities

Karen Gomez, Program Manager, Municipal Innovation Exchange – City of Guelph
Sergio De Lara, Senior Associate – MaRS Solutions Lab

Each municipality is unique, but our challenges aren't. In this session, participants will learn the innovation procurement work currently underway at the Municipal Innovation Exchange – a multi-city collaboration with the City of London, the City of Barrie and the City of Guelph, along with the MaRS, to leverage procurement as a valuable tool for innovation. This approach allows for cities to explore municipal challenges with the market and collaborate on solutions that are built WITH cities. It is these small solutions that create the building blocks to the future of our cities.

Learning Objectives:

- Participants will learn, at a high level, how they can bring innovation procurement as an effective tool to make strategic purchasing to their cities;
- Have concrete examples to explore this approach and ground the conversations on the importance of making strategic purchases for today's challenges and tomorrow's ambition to build smart cities;
- Tools that demonstrate any procurement department can achieve this.

join the CCPI, and what specific goods and services are available to them through the program.	
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15:45-16:15

Plenary Session

Modernizing Procurement in the Public Sector

Emilio Franco, Senior Director, Procurement Business Modernization – Public Services and Procurement Canada

Federal procurement operations provide countless economic opportunities to Canadians every year and have the ability to encourage greater competition, foster innovation and support Canadian-owned small and medium enterprises. We also know that our current procurement processes are time-consuming, largely paper-based, administratively burdensome and highly complex, both on our procurement professionals and our suppliers, as well as our clients.

With that in mind, the Government of Canada is deploying a modern cloud-based platform that will automate and streamline procurement – making it user-friendly, as well as easier and faster for procurement professionals, suppliers and clients to do business and provide the goods and services needed to deliver for Canadians.

Learning Objectives:

- Participants will receive an overview of the Government of Canada's Electronic procurement solution (EPS) project.
- Learn how, at a high level, public sector is re-imagining procurement operations and, in doing so, how it will better meet the evolving needs of its clients.

16:30-18:45

Wine and Cheese Exhibitor Hospitality Reception

19:00-22:00

Dinner and Social Event

Tuesday, November 5, 2019

8:00-17:00

Registration opens

8:00-8:40

Continental Breakfast

8:45-9:45

Plenary Session

Information Bombardment

Dr Nick Bontis – Keynote Speaker

Information bombardment is the single most damaging threat to productivity. But it doesn't have to be this way. Why not transform this threat into a sustainable competitive advantage for you and your firm? During this enlightening and action-packed presentation, you will learn how to:

- cope with information bombardment;
- improve your ability to manage change;
- lift productivity and efficiency;
- speed up innovation through collaboration;
- achieve industry leading competitiveness;
- determine what leadership action you can take tomorrow.

Concurrent Sessions

<p>IT Procurement – Challenges and Strategies <i>Debby Shapero Propp, Lawyer – Debby Shapero Propp, Law Office</i></p> <p>IT procurement can be highly complex, covers a broad range of IT acquisitions and is often associated with a relatively high failure rate. This session will provide participants with strategies designed to improve their IT procurement. Debby Shapero Propp, a seasoned lawyer and educator, working in the area of Supply Chain and IT across Canada, will address this topic.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> • Understand the challenges and key pitfalls in IT procurement. • Review why so many IT projects fail. • Explore selected strategies for IT procurement success, such as: <ul style="list-style-type: none"> • <i>Effective Planning</i> • <i>Methodology including Innovation Procurement and Competitive Dialogue</i> • <i>Statement of Work</i> • <i>IT Procurement Techniques</i> • <i>Containing Costs</i> • <i>Transitions and Exits</i> <p>This presentation is designed for any individual working in the area of IT procurement or is involved with IT at their organization.</p>	<p>Procurement Built for Value <i>Lydia Lee, Partner and National Leader, CIO Advisory Services and Digital Health – KPMG</i></p> <p>How can you ensure that your procurement strategy sets up your organization to achieve the best value? How can you orchestrate your procurement process to get the best responses from vendors? Lydia Lee, a 20+ year public sector hospital leader, now Partner at KPMG leading the National Digital Health and CIO Advisory Services Consulting Practices, will answer these questions and more as she shares her perspective from “being on the other side” about leading practices (and not so leading practices) in procurement including:</p> <ul style="list-style-type: none"> • The art and science of writing an effective RFP, including well-considered evaluation criteria and fit for purpose terms and conditions • Key considerations for large-scale, complex procurements • What vendors really want...it may not be what you think <p>This presentation is intended for anyone who is responsible for procurement, purchasing decisions, contract management, or oversight of third parties for public sector organizations.</p>
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Refreshment Break in Exhibit Hall

<p>Interactive Case Study: Navigating Change Management and the Digital Transformation of Strategic Procurement</p> <p><i>Arien Gough, Sales Executive – MERX Networks</i></p> <p>Learn from the experiences of other public sector organizations who have successfully navigated the balance of defining a strategic procurement vision, finding a technology partner to support their digital transformation and developing a risk adverse implementation approach that factors their organization’s procurement capabilities and capacity while also ensuring flexibility to evolve as their capabilities and capacity increases.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> • Key factors that influence short- and long-term strategic procurement vision; • Considerations in finding a technology partner; • Importance of understanding your procurement organization’s maturity level and capacity to embrace the change that you envision; • How to increase success by ensuring flexibility to adapt to changing business requirements. 	<p>Debarment Disputes</p> <p><i>Paul Emanuelli, General Counsel and Managing Director - The Procurement Office</i></p> <p>While public institutions typically have the right to bar bidders due to poor performance and inappropriate conduct, these disqualification decisions remain subject to legal challenge. This presentation will cover the core rules regulating bidder barring and analyze some recent rulings dealing with legal challenges to debarment decisions.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> • Understand the core rules regulating bidder barring; • Understand how recent case law informs those rules.
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Trade Treaties Rules: Innovation, Collaboration and Fairness

Daniel Fabiano, Partner – Fasken Law Firm

The Canadian Free Trade Agreement and Canada's trade agreement with the European Union have changed the public procurement landscape by introducing new rules for publicly funded purchasers. These rules give vendors new rights and require greater transparency and accountability from purchasers.

In this session, you will learn:

- How the new rules are not an impediment to innovation;
- About the requirements for purchaser transparency and accountability;
- How to effectively participate in group buying in compliance with treaty requirements.

How Strategic Procurement Leverages Data and Leads to Social Impact

Corry Flatt, Co-Founder and Chief Executive Officer - Bonfire

It's the 21st century and data is king - it's how we're able to move toward strategic procurement. But as we work to continuously review and improve purchasing processes, how do we actually leverage data insights to truly make an impact on our organization? The term "Big Data" is trending in conversation, but what does it actually mean for the world of procurement? This presentation will discuss examples of data use cases and how data can transform our practices and teams. Above all, insights will be shared on how data can unlock positive impact within our communities - it's not just about cost savings. By sourcing smarter, organizations can improve their bottom line and gain an opportunity to reinvest saved dollars for social good. This could mean higher transparency for taxpayers, improved city parks, better medical equipment for hospitals, or higher quality supplies for schools. This talk will explore what strategic procurement really looks like and how teams can get started today.

Learning Objectives:

- Understand what big data is and what it means for procurement;
- Learn about the types of insights that data can offer public sector procurement;
- Discover how data insights of spending decisions can have profound positive effects on your community.

15:10-16:10

Plenary Session

Ask the Lawyers

Moderator: Maureen Sullivan, President – NECI

Debby Shapero Propp, Lawyer – Debby Shapero Propp, Law Office

Phil Symmonds – Torys LLP

Paul Emanuelli, General Counsel and Managing Director – The Procurement Office

Daniel Fabiano, Partner - Fasken Law Firm

Join us for a panel conversation with 4-5 experienced public procurement lawyers discussing the latest themes in industry. The session will be moderated by Maureen Sullivan, President National Education Consulting Inc (NECI).

16:15- 16:55

Concurrent Session

Empowering Strategic Procurement by leveraging business intelligence and data analytics

Pooja Nagra, Director, Supplier Relationship and Management and Rupa Gill, Director, Sourcing Solutions - OECM

High-quality analytics and business intelligence (BI) processes are major drivers to enable strategic procurement and strengthen an organization's performance and competitive advantage. Collecting and analyzing data related to the procurement landscape, market intelligence, supplier performance measurement and historical spend can be challenging. It requires commitment, expertise, time and resources. Over the last few years, OECM has taken bold steps in developing a strategic roadmap to leverage data and the use of procurement analytics. Throughout the session, OECM will showcase how the organization has approached this initiative, challenges encountered, quick wins and achievements.

Procurement Ombudsman Digs Deeper on "Low Dollar Value (LDV) Contracting" and "Dispute Resolution in Vendor Performance Management"

*Alexander Jeglic, Procurement Ombudsman
David Rabinovitch, Deputy Procurement Ombudsman - Office of the Procurement Ombudsman (OPO)*

The Office of the Procurement Ombudsman (OPO) is dedicated to advancing pertinent research on topics that matter to procurement practitioners. As such, OPO launched its "Knowledge Deepening and Sharing" initiative and has completed reports on two important topics. The first report looks at what factors procurement practitioners should consider when deciding whether or not to sole-source low dollar value (LDV) contracts, from a risk/reward basis. The second report examines the issue of dispute resolution in the context of vendor performance management, and the types of appeal mechanisms that are available to dissatisfied vendors.

Learning Objectives:

- The challenges and constraints driving the selection of procurement methods for LDV contracts;

<p>Learning Objectives:</p> <ul style="list-style-type: none"> • OECM’s journey in transitioning to strategic procurement by leveraging data throughout the procurement and supplier relationship management; • ‘Poor data versus good data’ – how to identify good data and its impact; • Insights on BI processes and tools OECM uses to gather/analyze data to streamline sourcing activities; • Why a dashboard and key performance indicators is a must to address procurement challenges; • How to establish a Supplier Recognition Program to engage 200+ supplier partners in achieving key performance metrics. 	<ul style="list-style-type: none"> • Key risks that should be taken into consideration in LDV contracting, as well as the potential rewards associated with those risks; • Important considerations when assessing the cost-effectiveness of a procurement method for LDV contracting; • Linkages between the impact of vendor ratings/ scores and the existence of appeal mechanisms; and • The pros and cons of various types of appeal mechanisms in terms of their process, time, cost and finality in resolving the dispute.
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Sector Open Discussions

17:00-17:30

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).

17:30-19:00

Mix ‘n’ Mingle Reception

Wednesday, November 6, 2019

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

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

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

9:30-10:20 **Concurrent Sessions**

Leadership thru Certification

The Certified Public Procurement Officer (CPPO) and Certified Professional Public Buyer (CPPB) credentials, are recognized throughout the public procurement profession and demonstrate an individual's comprehensive mastery of public procurement. The CPPO and CPPB are widely recognized as the gold standard of excellence in public procurement. This session will discuss the value that the certifications provide to the individual and the profession as a whole. The presenters will also highlight the recent changes to the certification eligibility requirements

Learning Outcomes:

- Discuss the benefits and value of obtaining the CPPB and CPPO certifications;
- Explain de changes to the CPPB and CPPO eligibility requirements;
- Identify resources to assist professionals in becoming certified.

Prompt Payment Regime

Sharon Vogel, Partner and Bruce Reynolds, Partner – Singleton Reynolds

Bruce Reynolds and Sharon Vogel were retained by the Ontario government as experts to advise on the modernization of Ontario's construction laws. After extensive industry consultation, the new Construction Act was passed in December 2017 and its impacts are relevant to all actors in the sector, including those participating in public procurement. Bruce Reynolds and Sharon Vogel will speak about how planning for the new prompt payment regime should be top of mind for the management of future projects in Ontario.

10:20-10:35 **Refreshment Break**

10:40-11:30 **Concurrent Sessions**

Using Risk Assessment to Allocate Resources and Identify Readiness

Jelena Maric, Manager, Procurement and Insurance and Risk Management and Bob Neale, Department Manager for Capital Projects and Infrastructure - City of Airdrie

This session is focusing on assessing the risk associated with capital projects and using risk matrix to identify if Project Manager is required to run the project. Additional tool

Transforming an Organization from Tactical to Strategic

Mark Wilson, Associate Director, Strategic Sourcing and Julia Formosa, Senior Executive- Head of Strategic Sourcing - Greater Toronto Airports Authority

Transformation of a Sourcing/Buying/Procurement/Supply Chain organization involves a multifaceted approach in order to achieve positive

is also created to assess completeness of the project documents prior to submitting it for budget approval.

Learning Objectives:

- Understand how risk assessment can provide input on level of resourcing;
- Identify what in the City’s opinion indicates readiness of the project to proceed (from understanding needs, budget availability or requirements, stakeholders, functionality, scope of work, etc.);
- Understand how this approach is directly linked to the likelihood of success of the project.

results for all stakeholders within the organization. Collaboration, communication and employee enablement are well known concepts that are integral to successfully implementing change, but what do these concepts really mean? How can they be implemented?

Presenting a unique perspective on transforming an organization from tactical to strategic, Mark Wilson and Julia Formosa will be sharing their experiences gained in moving the Greater Toronto Airport Authority (GTAA) forward to become a proactive strategic partner for all operational units within Pearson International Airport. With continued success and growth, their ultimate goal is to help the airport become the “Best in Class” within the air transportation industry.

11:35-12:05

Plenary Session

Building your Bench – Strategies and Resources to Develop the Talent in Your Office

Matt Oyer, Director of Learning Solutions - National Association of State Procurement Officials (NASPO)

This session will identify strategies to continuously develop the talent in the procurement office. This will include actual examples of state procurement offices utilizing innovative approaches to talent development, such as mentorship programs, and professional development initiatives. Resources available through the National Association of State Procurement Officials will also be highlighted.

Learning Objectives:

- Evaluate potential strategies for talent development in the procurement office;
- Identify professional development resources available to all procurement professionals.

12:10-12:25

Forum Closing Remarks

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