

Staying in Touch

SEPTEMBER 2004

A Word from the President

Steve Johnston

One of the principle mandates of the Materiel Management Institut is information sharing. This issue of *Staying in Touch* fulfills that goal and provides highlights of recent accomplishments – all undertaken to serve you and the procurement and materiel management profession.

As a result of strategic planning sessions undertaken by the MMI Board of Directors, a major reorganization of the governance structure was undertaken which obtained ratification at the May 2004 Annual General Meeting. Revised by-laws and relevant documentation will be posted to the MMI web site. Of particular significance is the appointment of Kathy Jones as Executive Director. Kathy is the senior partner with The Willow Group and has been involved with MMI since it was formed in 1990.

Though much has been done, there remains much to do. We need your assistance! In the article "Member Services Initiatives" by Colleen Post, she makes reference to the enhanced MMI web site. You are encouraged to send us your "Point of View" – help us help you in moving our profession forward and obtaining well-deserved recognition.

Staying In Touch is published in September and March.

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Mark Your Calendars

Refer to the MMI web site for program details and registration at www.cipmm-icagm.ca

Sep 10, 2004	Information Exchange Series #2 Ottawa
Sep 14, 2004	How to Write Better Statements of Work Toronto
Sep 14, 2004	CITT & Legal Risks Toronto
Sep 20-22, 2004	Eastern Regional Workshop St. John's
Sep 28, 2004	Procurement Policy and the Trade Agreements Ottawa
Oct 5, 2004	Bullet-Proofing Your Request for Proposal Ottawa
Oct 5, 2004	How to Write Better Statements of Work Montreal
Oct 5, 2004	CITT & Legal Risks Montreal
Oct 12, 2004	CITT and the Legal Risks of Contracting Ottawa
Oct 18-20, 2004	Western Regional Workshop Vancouver
Oct 19, 2004	Contract Management in Government Ottawa
Oct 25, 2004	Values & Ethics in the Procurement Process Ottawa
Nov 2, 2004	IT Procurement Pitfalls and Challenges Ottawa
Nov 9, 2004	How to Write Better Statements of Work Ottawa
Nov 16, 2004	How to Write Better Evaluation Criteria Ottawa
Nov 2004	Information Exchange Series #3 Ottawa
Jan 2005	Information Exchange Series #4 Ottawa
Apr 2005	Information Exchange Series #5 Ottawa
May 2-4, 2005	Materiel Management National Workshop Ottawa



Materiel Institut
Management de gestion du
Institute matériel

The Parliamentary Secretary's Government-Wide Review

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A hot topic on people's lips these days is the issue of federal government procurement. From reforms initiatives at Public Works and Government Services Canada (PWGSC), to mandates of accountability and transparency, how and what the government spends is a key issue for its number one stakeholder, the Canadian public.

The Review

The current system is under an extensive review. The review began on December 12, 2003, when the Prime Minister named the Honourable Walt Lastewka as Parliamentary Secretary to the Minister of Public Works and Government Services, with special emphasis on Procurement Review. The Government-Wide Review of Procurement flows directly from this mandate.

The Assistant Deputy Minister, Acquisitions Branch established a Task Force to conduct the review and this Task Force is not only made up of members from PWGSC, but also includes the Department of Justice, National Defence and the Treasury Board Secretariat (TBS). In addition, the review is advised and supported by the Deputy Minister of PWGSC, Mr. David Marshall, and the Secretary of the Treasury Board, Mr. Jim Judd. The work of the Task Force is a government-wide initiative including reviews of procurement objectives, activities, policies, legislation and management.

Scope and Objectives

The objectives of the review are clear. Not only does the government seek a procurement system that is faster, simpler, and less costly, but also one that has strong ethical foundations, ensures value from a whole-of-government perspective and provides effective support for broad government priorities. Last, but certainly not least, the Task Force seeks to make recommendations for a procurement system that demonstrates transparency, accountability and fiscal responsibility.

During the course of the review, Task Force members have examined the whole process of acquisition from suppliers, including goods, services and construction projects. It includes procurement by and for 98 departments and agencies listed in Schedules I, I.1 and II of the Financial Administration Act (FAA). In 2002, these departments and agencies awarded 434,220 contracts and 63,031 amendments worth more than \$12.7 billion for goods, services and construction. The review does not include, in this phase, procurement by organizations listed in Schedule III of the FAA (Crown Corporations), or real property purchase, leasing and disposal.

The Task Force has also been presented with a unique, collaborative opportunity. Not only is there advice and representation from TBS, but the work of the Task Force will also feed directly into the Treasury Board Expenditure Review Sub-Committee (ERC). This committee has nine teams or pillars conducting reviews of specific areas (more information on the ERC can be found at http://www.tbs-sct.gc.ca/spsm-rgsp/media/0324_e.asp/). The work of the Task Force will serve as the ERC review of procurement.

of Procurement

Claire Crush, Junior Policy Analyst

Data Gathering

As Mr. Lastewka affirmed and reaffirmed in many of his presentations and interviews, before any conclusions are drawn, much less recommendations made, the focus of the Task Force is data gathering. Ensuing from his direction, the Task Force embarked on ongoing, extensive data gathering exercise. Thus far, the Task Force has interviewed 17 major private sector purchasers to understand their procurement practices; met with eight trade associations representing government suppliers and obtained information from five more; obtained views and suggestions from more than 150 public servants; analyzed government procurement approaches from four countries; obtained information from six program departments with regard to socio-economic programs involving procurement; consulted with academics from four countries; obtained information from more than 35 academic sources; reviewed 106 audit reports; identified and analyzed 23 Acts of Parliament and Regulations and 69 government policies related to procurement; reviewed 176 cases submitted for consideration of potential socio-economic benefits to the Procurement Review Committee; and initiated five special research activities.

The Task Force and the MMI

The MMI has been a great support to the Task Force and a conduit for members to submit their own ideas and experiences with government procurement. In March 2004, Mr. Lastewka spoke at the MMI Breakfast Session held at Novotel in Ottawa. This session was an introduction to the Task Force and a Q & A forum for MMI members. The Task Force's relationship with MMI continued in May at the annual MMI National Workshop, where Mr. Lastewka was a keynote speaker, introducing those unfamiliar with the Task Force to its work. The Workshop also presented an excellent data gathering opportunity for the Task Force. While hosting one of the numerous breakout sessions, Task Force members engaged in discussion with MMI members. Through worksheets and member reporting, the session provided ample support for Task Force findings thus far and raised some new and interesting issues for consideration.

The Task Force's most recent collaboration with the MMI came at focus group sessions arranged by Kathy Jones, MMI Executive Director. With facilitator Normand Côté, a materiel management and contracting consultant from NC Consulting and Training, the MMI held five sessions aimed at gathering the opinions and concerns of government procurement personnel. Much like the breakout session at the Workshop, these focus groups provided valuable insight into concerns of procurement practitioners. A success all around, data gathering from the MMI sessions has been incorporated into reports and proposals for analysis.

Where do they go from here?

The Task Force is wrapping up its research. Consultations will begin shortly, followed by a final report. Task Force members will be on hand at the MMI Regional Workshops in St. John's and Vancouver to present on the ongoing work of the Task Force. The Task Force encourages all members of the MMI to make use of the website at <http://www.pwgsc.gc.ca/prtf/> to get information about the Task Force, view presentations and make comments and suggestions through the contact forms.



Connecting with Your Board

Micheline Brunette (MMI Director)

Senior Analyst, Management Office, Professional Development and Certification Program for the Procurement, Materiel Management and Real Property Community, TBS

As part of her 27 years of service within the federal government, Micheline spent 20 years of her career in PWGSC in the field of Training and Development. For her last nine years at PWGSC, Micheline managed the Supply Operations Service Branch's Training and Development Division that provided procurement related training to employees of PWGSC, client departments, Aboriginal communities across Canada and international organizations such as UNICEF in Copenhagen. Since 1999 Micheline has been the Canadian representative on the UPPCC.

Lucille Chase (MMI Corporate Secretary and Regional Director for Saskatchewan, N.W.T, Yukon and Nunavut)
Saskatchewan Contracting Services, Western Region (Regina), PWGSC

Lucille joined the federal government in 1980 and has served as a staffing assistant, service unit supervisor in procurement, buyer, contracting officer and supply specialist. In 2004 she became the Supply Team Leader, Acquisition with PWGSC and interacts with other levels of government. Lucille is a Subject Matter Expert, teaches the Introduction to Procurement and is a "train the trainer" and "facilitator".

Elène Fromanger, CPPO, CPPB, (MMI Director)
Senior Trainer and Accreditation Coordinator, PWGSC

Elène is also a Certified Instructor and text reviewer with the National Institute of Governmental Purchasers Inc. (NIGP) delivering core courses for certification as a Professional Public Buyer (CPPB) or a Public Purchasing Officer (CPPO). With more than 20 years in administration, purchasing, materiel and management across Canada in three levels of government, Elène has extensive knowledge of the challenges facing procurement professionals and materiel managers. She represents PWGSC in the Procurement Working Group of the Government of Canada's Professional Development and Certification Program for the Procurement, Materiel Management and Real Property Community.

Roger Houde (MMI Director)

Director, Contracting Division, Materiel Management Directorate, Canada Revenue Agency

Roger served 18 years with PWGSC, specializing in IT and telecommunications acquisition and established the first series of supply arrangements for telecommunication services following the deregulation by the CRTC in 1995. In 2002, Roger joined the Joint Canada Customs and Revenue Agency (CCRA now CRA) as the Director of Contracting. His organization is responsible for the procurement activities in the agency for hardware and software products, telecommunication services, information technology professional services, consulting services in various business fields, contracting for forms and printing services. Roger graduated from the Université du Québec à Trois-Rivières in 1984 in Electrical Engineering.

Lawrie Huck (MMI Regional Director for BC)
Manager, Corporate Services, Pacific Region, Fisheries and Oceans Canada

Beginning with Transport Canada and moving to Fisheries and Oceans with the merger in 1995, Lawrie has 35 years of experience working in the materiel management field. During this time, he has held positions responsible for inventory and warehousing, procurement and contracting, and assets and vehicle management. Lawrie has served on the MMI Board of Directors for eight years.

Steve Johnston (MMI President)
Director, Administrative Services, Indian and Northern Affairs Canada

Steve has an extensive background with the federal public service. First elected President of the MMI in 2002, he has been active in promoting professional development among the materiel and assets management community for a number of years. He is a member of the Editorial Advisory Board of Summit magazine, as well as a member of the Community Advisory Committee for the E-Supply Chain Management Degree Program at Algonquin College in Ottawa.



Geoff Mace (MMI Director)

Professor, School of Business, Algonquin College, Director of Education for APICS Ottawa Chapter, and a Member of the Advisory Board of the Ottawa Manufacturer's Network

Geoff has developed and currently teaches several courses in Supply Chain Management. Recently, Geoff was responsible for the introduction of the four-year Bachelor Degree in Applied Business, e-Business Supply Chain Management at Algonquin College. He also coordinates the full-time Materials and Operations Management Program as well as college part-time programs for APICS and PMAC. Geoff holds an MBA from McGill University and is certified at the Fellow Level with APICS (CFPIM).

Colleen Post (MMI Chair, Member Services)

Principal Policy Advisor, Program Management Office, Professional Development and Certification Program for the Procurement, Material Management and Real Property Community, TBS

With the Secretariat since 1989, she has worked on files to support the management board approach, such as Results for Canadians - A Management Framework for the Government of Canada, Program Integrity, the renewed approach to business planning and has developed expertise in Estimates, Alternative Service Delivery and Evaluation, Audit and Review. In a career that spans 27 years, Colleen's experience includes human resource management, both from a central agency perspective and as a human resource specialist in the areas of human resource planning, staffing, training and development in three departments. Colleen holds a degree from Carleton University in sociology and history and has certification in program evaluation, audit and in human resource management.

This issue of
Staying in Touch features
the backgrounds of several
of the MMI Directors.
Look for the others
in the next issue.

David Swift (MMI Treasurer)

Managing Director, RFP SOLUTIONS – Procurement Strategies for Government

David is a member of the Editorial Advisory Board for SUMMIT magazine - Canada's magazine on public sector purchasing, as well as a member of the Algonquin College e-Business Supply Chain Management Advisory Committee. David is a leading specialist in the field of Canadian public sector procurement, and is very active within the public sector procurement community. During his career, he has written numerous articles within professional journals on the subject of public sector procurement, including: Parliament Review Competition in the Award of Federal Contracts; Public Perceptions Influence Procurement Decisions in Canada's Red Chamber; Implementing the Procurement Strategy for Aboriginal Business; and, The Internet's Impact on Procurement. David holds a Bachelor's degree with Honours from Queen's University in Kingston, in both Political Science and Economics. He is also a graduate of the Systems Analysis program at Algonquin College in Ottawa, and is currently completing the Certified Professional Purchaser (C.P.P.) accreditation from the Purchasing Management Association of Canada.



Professional Development Initiatives

Jacques LaBonté, Chair, MMI Professional Development

Material Management National Workshop

The annual Material Management National Workshop (MMNW) is an event not to be missed by procurement and materiel management professionals. This annual event has grown steadily since its inception in 1990 and is now deemed to be one of the most successful public sector professional development events.

The 15th Annual Material Management National Workshop (MMNW) entitled "Material Management at the Forefront: Working at Reducing Costs and Maximizing Efficiencies", was held in May 2004 and attracted 625 delegates from across Canada. Realigning structures to meet new priorities, providing a more efficient and cost effective government and innovative approaches to meet these challenges are all integral parts of the government's blueprint for fiscal success. Sessions addressed the numerous changes and enhancements necessary to help government meet these goals. Refer to the MMI web site for some of the presentations.

Mark your calendar for the 16th Annual National Workshop to be held May 2 – 4, 2005 in Ottawa. Guaranteed to offer opportunities to gain important insights, share experiences, and exchange ideas about issues and latest developments in the procurement and materiel management field.

MMI Annual Regional Workshops

**6th Annual Eastern Regional Workshop
in St. John's, Newfoundland and Labrador
September 20 – 22, 2004**

**7th Annual Western Regional Workshop
in Vancouver, BC
October 18 – 20, 2004**

Program highlights include:

- Pre-Workshop training on Values and Ethics, recognized by the TBS Professional Development and Certification Program for the Procurement, Materiel Management and Real Property Community
- Keynote Address on the government-wide review of procurement practices and policies by The Hon. Walt Lastewka, PC, MP, Parliamentary Secretary to the Minister of PWGSC who will share the results of the findings and possible recommendations of his Task Force, created to collect data on procurement practices from government and private sector sources.

Sessions on:

- A half-day training program from the Procurement Awareness Seminar Series on How to Write Better Statements of Work and Bid Evaluation
- Procurement: Where We Are Now and What The Future Looks Like

- The Shared Travel Services Initiative: Travel Modernization, and You
- Canada School of Public Service: What's It All About
- The Path to Certification
- The Procurement Website and Intellectual Property: A Practical Example of Modern Comptrollership
- The Federal Vehicles Initiative: Sharing the Cost of Leadership

Refer to the Regional Workshop brochure insert for program details and registration information.

Procurement Awareness Seminar Series

Enabling Learning Corporation (ELC) in partnership with the Materiel Management Institute and Algonquin College has developed a series of exclusive Procurement Awareness Seminars for federal, provincial and municipal government employees. The series includes eight highly interactive and informative sessions that cover a range of topical subjects related to the public sector procurement process:

- Procurement Policy and the Trade Agreements
- Bullet-Proofing Your Request for Proposal
- IT Procurement Pitfalls and Challenges
- Contract Management in Government
- How to Write Better Statements of Work
- C.I.T.T. and the Legal Risks of Contracting
- How to Write Better Evaluation Criteria
- Values and Ethics in the Procurement Process

These three-hour sessions provide essential, awareness level information for anyone associated with procurement practices within government departments. This would include but is not limited to procurement specialists and non-specialists, program managers and program administrators.

All of the instructors are well known within procurement and materiel management and the public sector. They have been carefully selected based on their area of expertise and their high-energy delivery styles. Presenters who have delivered sessions include R.J. Kelly, Carolyn Montague, Norman Beaudry, Robert (Bob) Mornan, David Swift, Paul Lalonde, and Lorne Plunkett.

French language and customized programs are available by contacting ELC at www.enablinglearning.com, or Algonquin College at ranierj@algonquincollege.com.

For course details and registration information, visit the MMI web site at: http://www.cipmm-icagm.ca/en/professional_development/Procurement.html

Member Services Initiatives

Colleen Post, Chair, MMI Member Services

As part of our service to members, we have developed and implemented a communications and marketing plan that includes several initiatives to keep you informed of the MMI's activities. The MMI is busy and plans to become even more involved in serving your professional development interests.

Staying in Touch Newsletter

Three years ago, the MMI issued the last *Staying in Touch* newsletter. I am pleased to report that this newsletter has been reborn. This is the first of two annual publications (providing general information on MMI's activities), the next to be issued in March. This newsletter is a way for you to connect with your colleagues. Send us information that you would like to share with the procurement and materiel management community. Have you implemented a new program? Has a new policy been developed? Need input on a project? Looking to fill a position? We'll help you get your message out!

Staying in Touch Broadcasts

Electronic communication is today's norm. We appreciate that your time is precious so we will be sending monthly e-mail broadcasts that feature short and sweet news items with links to the MMI web site where you can obtain detailed information on those items of particular interest to you. Keep an eye out for incoming e-mails named "MMI-*Staying In Touch*".

Information Exchange Series

Another way to keep you informed! Regular exchanges will be offered across Canada. Sessions delivered in the National Capital Region are promoted as "Information Exchange Series". Similar sessions will be delivered via the MMI Regional Workshops.

The first of the Series was offered on March 25, 2004 in Ottawa to discuss the government-wide review of procurement policies and processes.

Series #2, entitled "The New Canada School of Public Service and MMI Working Together for You" will be offered in Ottawa on September 10, 2004 and presented at the Fall 2004 Regional Workshops.

Additional sessions are planned for November 2004, January and April 2005, initially in the National Capital Region.

MMI Web Site <www.cipmm-icagm.ca>

An easy to remember URL and a valuable resource! The MMI web site has been recently re-designed and contains several features. Firstly, we value your feedback. Via the web site you can send us "Your Point of View" (for example, suggestions for initiatives that you would like to see offered by the MMI such as professional development, training or information sessions on a particular topic in a preferred location).

Another feature is the "Reports, Presentations, Policies" section under "Services". The procurement and materiel management community is constantly producing reports and delivering presentations of merit to share with colleagues. Requests for input to policies under development and those policies that are to be implemented are also of vital interest to the community. Send information and documentation to the MMI webmaster for posting. Recent postings will be featured in the monthly MMI *Staying in Touch* broadcasts.

Want to promote a position opening within the federal government procurement and materiel management community? Looking for a change in your career? Check out the MMI web site "Career Opportunities".

And finally, "Links of Interest" are included on the site for research and reference purposes. Let us know if additional links should be added!

SUMMIT Magazine

Summit magazine is distributed to a wide public sector purchasing audience. The MMI is profiled in regular issues of Summit and promotes the Institute's initiatives and how it serves the procurement and materiel management community. Members of MMI receive a complimentary copy of Summit.

Regional Roundup

Are you aware that in addition to the MMI Annual Regional Workshops in the Fall that other forums for networking take place? For example, in Toronto, Vancouver and Victoria there are ongoing meetings of materiel managers led by PWGSC where departmental representatives share best practices, new initiatives and procedures and other items of interest.

The gathering of various departmental materiel managers that meets quarterly in Victoria and Vancouver is called the 'Materiel Manager's Forum'. Many sessions have guest speakers who address the hot topics of the day (for example, Travel Modernization, Materiel Management Career Development Program, contracting changes and initiatives, etc.). Managers from various departments also conduct a round table that provides an opportunity to share information and discuss issues with their colleagues. The contact at PWGSC for the Victoria and Vancouver Materiel Manager's Forum is Gayle MacDonald at 250-363-3264.

We hope that these and other regions with similar events will share some of their great ideas with us in our monthly *Staying in Touch* e-mail broadcasts.

Recognition of the Profession – MMI Awards

Lucille Chase, MMI Corporate Secretary

The Materiel Management Institute's Awards Program recognizes contributions by individuals involved in the field of materiel management. The purpose of these awards is to provide an opportunity to recognize contributions by peers and colleagues and to raise the profile of the materiel management function. Federal procurement, materiel and supply managers carry out diverse management functions, from policy development and implementation through information systems design and management to the negotiation of complex, multi-million dollar contracting arrangements. These managers have a direct impact on materiel asset holdings valued at over \$50 billion. Nominating a colleague for one of the Institute's prestigious awards demonstrates the value, importance and professionalism of the materiel management function.

Check out the web site for newly revised details on submitting nominations for the 2005 awards.

Outstanding procurement and materiel management professionals over the years...

<http://www.cipmm-icagm.ca/en/awards/index.html>

Materiel Management Recognition Award

- 1995 Jacques Gelinas, PWGSC (Individual)
- 1996 Commander Barry Saladana, National Defence (Individual)
- 1997 National Research Council – Administrative Services & Property Management Branch
- 1998 Fisheries & Oceans – Inventory Review Project (Team)
- 1998 DND Vehicle Fleet – Long Term Standing Offer Initiative (Team)
- 1999 The Vehicle Fleet Remarketing Initiative (DND, PWGSC, RCMP and P&L Consulting) (Team)
- 2000 Ross Naylor, Citizenship & Immigration (Individual)
Le 25^e Dépôt d'approvisionnement des Forces canadiennes (Team)
- 2001 Tom Ramsey, Agriculture & Agri-Food (Individual)
Fred Dupuis, RCMP & Doug Woods, DFAIT (Team)
- 2002 Marc Whelan, Transport Canada (Individual)
- 2003 Monique Thibault, National Defence (Individual)
Centre of Expertise on Contracting for Services, Foreign Affairs & International Trade (Team)
- 2004 Allen Frost & Serge Langlois, Indian & Northern Affairs Canada (Team)

Environmental Recognition Award

- 1995 Ian Malcolm, Transport Canada (Individual)
- 1996 Sylvia Stock, Human Resources Canada (Individual)
- 1997 PWGSC – Crown Assets – National Capital Region Crown Assets Distribution Centre (Team)
- 1997 David Chappell, Environment Canada (Individual)
- 1998 no award
- 1999 Greening of Government Tiger Team, Nova Scotia (DND, Health, Environment, Heritage) (Team)
- 2000 Dan O'Hara, Correctional Service Canada (Individual)
Le 25^e Dépôt d'approvisionnement des Forces canadiennes (Team)
- 2001 DND-DSVPM & NRCan (Team)
- 2002 Jacques Labonté, PWGSC (Individual)
Canadian Coast Guard (Team)
- 2003 Rhéal Pilon, Environment Canada (Individual)
Alberta ENMAX Energy Agreement–The Energy Team (Team)
- 2004 Serge Joannis, TBS (Individual)

Award of Recognition for Excellence in Service as a Materiel Manager – sponsored by Summit

- 2000 Virginia McEwen, Solicitor General of Canada
- 2001 Bonnie Chatelain, INAC
Roger Pineault, CCRA
- 2002 Russell Faulkner, Fisheries & Oceans Canada
- 2003 Lisa Reynolds, Canada Customs & Revenue Agency
- 2004 Fred Nadeau, Canada Revenue Agency

Ambrose Churko Good Citizenship Award

- 2003 posthumously to Ambrose Churko
- 2004 Gary Jeddrie, Fisheries & Oceans Canada

Lifetime Memberships

- 1995 Norm Perry, Health Canada (now retired)
Gary Graham, DND (now retired)
- 1998 Bill Douglas, TBS (now retired)
- 2000 Robert Kelly, TBS (now retired)

Recognition of Achievement

- 2000 Don Chillibeck, TBS & Dave Keays, PWGSC, New Disposal Policy Development (Team)