



*Procurement  
Do's & Don'ts*

# Introduction

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the frame, creating a modern, layered effect. The rest of the background is plain white.

# Overview of Today's Session

- ▶ What is Procurement
- ▶ Why is Procurement Important
- ▶ Basis for Public Sector Procurement
- ▶ Common Issues/Why Projects Fail
- ▶ Sourcing Options
- ▶ Elements of Bid Opportunities
- ▶ Best Practices
- ▶ Trends
- ▶ Important Points
- ▶ Resources

# What is Procurement?

- ▶ Steps of Process
- ▶ Strategic Function
- ▶ Involves Entire Supply Chain

# Why is Procurement Important in Public Industry?

- ▶ Spending Public Funds
- ▶ Efficiency/Effectiveness
- ▶ Public Confidence
- ▶ Supplier Confidence
- ▶ It's the Law!

# Basis for Public Sector Procurement

- ▶ Rules
- ▶ Duties
  - ▶ Fairness
  - ▶ Award as Tendered
  - ▶ Reject Non-Complaint Bids
  - ▶ Of Disclosure
- ▶ Agreement on Internal Trade (AIT)

# Common Issues or Why Projects Fail

- ▶ Procedures
- ▶ Owners not Appreciating the Process
- ▶ Bidders not Appreciating the Process
- ▶ Drafting of Documents
- ▶ Key Stakeholders not Involved
- ▶ Evaluation Plans
- ▶ Bid Repair
- ▶ Timelines
- ▶ Legal Advice

# Development of "SOW"

- ▶ Statement of Work or Scope of Work
- ▶ Critical step that takes place at the onset of a project
- ▶ Completed/Requires Input of Stakeholders



# Typical Considerations for SOW

- ▶ Requirements
- ▶ Elements of Work
- ▶ Known Risks
- ▶ Tasks/Responsibilities
- ▶ Reporting Requirements
- ▶ Schedule
- ▶ Special Considerations
- ▶ Meetings/Events
- ▶ Technical Information/Data
- ▶ Evaluation Criteria
- ▶ Deliverables
- ▶ Contract Terms

# Sourcing Options

- ▶ Request for Information
- ▶ Request for Expression of Interest
- ▶ Tender
- ▶ Quote
- ▶ Proposal
- ▶ Price Quote (Request)

# Elements of Bid Opportunities

- ▶ Instructions to Bidders
- ▶ Supplemental Conditions
- ▶ General Conditions
- ▶ Bid Form/Pricing
- ▶ Agreement

# Best Practices

- ▶ Establish Processes & Controls
- ▶ Analysis & Analytics
- ▶ Align Staff with Values
- ▶ Risk Management

# Trends

- ▶ Collaboration (Cooperative Purchasing)
- ▶ Cost Reduction
- ▶ Flexibility
- ▶ Green Purchasing
- ▶ Social Networks

# Important Points to Keep in Mind

- ▶ Elected officials shall NEVER be involved in procurement. Their role is to approve expenses only
- ▶ It does not matter which bid solicitation method you've chosen, the courts will review wording and previous opportunities. If it reads like a tender and sounds like a tender, it's a tender.
- ▶ Poor planning does not constitute an emergency; there are rarely ever any emergencies
- ▶ Have a second set of eyes review documents prior to issue
- ▶ In competitive bidding you need to choose between existing offers, not seek better offers
- ▶ Pay now, or pay later

# Resources

- ▶ Personal Network
- ▶ Internet Searches
- ▶ Supply Chain Management Association (SCMA)
  - ▶ Manitoba ([www.scmamb.ca](http://www.scmamb.ca))
  - ▶ National Office ([www.scmanational.ca](http://www.scmanational.ca))
- ▶ National Institute of Government Professionals (NIGP)  
([www.nigp.org](http://www.nigp.org))

Questions?



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