

# Procurement Work Plan Update

Procurement Advisory Committee: November 16, 2020

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# Procurement Essentials

## 2020 – 2021 Employee Education Program

### Procurement Advisory Committee Overview

# Procurement Education – Why?

## Organizational Risk

- Oversight and monitoring
- Ensure correct selection of procurement process
- Ensure complete documentation
- Ensure consistent justification
- Non-mandatory training
- Procure to pay process is not being followed

# Procurement Education – How?

## Role-based, blended learning plan



Leaders (197) Project  
Managers (54)

- ✓ Procurement By-law accountabilities and processes
- ✓ Workflow, approvals and commitment control
- ✓ What to look for when reviewing requisitions (documentation, justification)
- ✓ Supporting documentation (\*)
- ✓ PeopleSoft Financials navigation (\*)
- ✓ Ethics / risk



Staff (Requisitioners)

- ✓ Procurement By-law accountabilities and processes
- ✓ Supporting documentation
- ✓ Workflow and approvals
- ✓ PeopleSoft Financials navigation



Regional Council

- ✓ Procurement By-law accountabilities and processes
- ✓ Ethics, risk
- ✓ Workflow, approvals and commitment control
- ✓ Supporting documentation

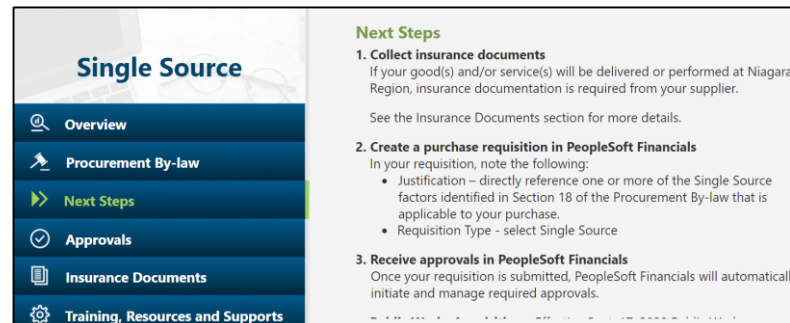
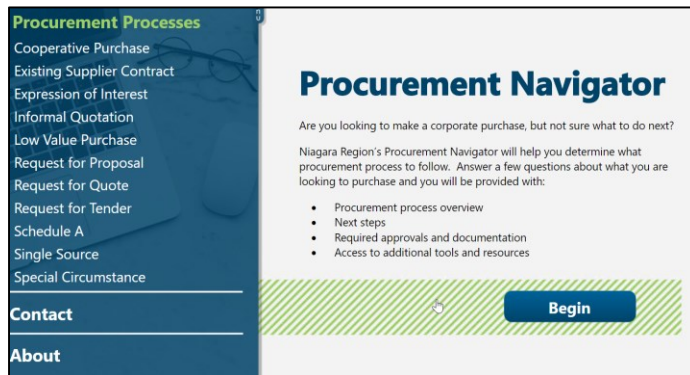
# Procurement Education Path

## Phase One: Leaders and Project Managers

Component	Format	Mandatory		Launch
		New	Legacy	
<a href="#">Procurement Navigator</a>	Online	No	No	Nov. 5
Procurement Essentials	eLearning	Yes	Yes	Nov. 25
Skill Builder Series Bi-monthly <div> <ul style="list-style-type: none"> <li>• Low Value &lt;\$10,000</li> <li>• Informal Quote</li> <li>• Single Source</li> </ul> </div>	Webinar	Yes	Yes	Jan. March May
PeopleSoft for Leaders Bi-monthly (existing)	Virtual Classroom	Yes	No	Jan. 14 Mar. 25
Requisitioning and Receiving (2) Monthly (existing)	Virtual Classroom	Yes	No	Nov. 19 Dec. 17 Jan. 21
Leaders Edge	Virtual Classroom	Yes	No	May 19
Communication Calendar - Tips and Hints	The Vine	No	No	Jan.

# Learning Snapshots

## Procurement Navigator: Live



## eLearning: Procurement Essentials

- Procurement By-law
- Terms
- Formal and informal procurement processes
  - Scenario + Overview
  - Next Steps
  - Leader role / approval
  - Required Documents

### Captivate / LMS Features:

- Knowledge checks and interactions
- Mandatory assignment
- Completion reporting

# Procurement Education Path

## Phase Two: Staff (requisitioners)

Component	Format	Mandatory		Launch
		New	Legacy	
<a href="#">Procurement Navigator</a>	Online Tool	No	No	Nov. 5
Procurement Essentials	eLearning	No	No	Jan.
Requisitioning and Receiving (2) Monthly (existing)	Virtual Classroom	No	No	Nov. 19 Dec. 17 Jan. 21
Communication Calendar - Tips and Hints	The Vine	No	No	Jan.

# Work Plan Initiatives / Timeline

## **Procurement By-law: (Q3-2021)**

- Substantive changes to the By-law - removing procedural content. Recommend a continued focus remain on completing the newly proposed training initiative Committee for their review and comment.

## **Procurement Templates: Version 4.0: (Q1-2021)**

- Procurement has acquired and are awaiting receipt of templates from the Procurement Office at which time they will implemented by Procurement.

## **Vendor Performance Management: (Q2-2020)**

- Procurement will build upon the Public Works pilot for contractor performance and present recommendations for vendor performance management for goods, services (consulting) and construction.

# Purchase Order Data / Timeline

- Procurement is reporting Niagara Region procurement information to Municipal Benchmarking Network Canada (MBN)
- Niagara Region's reporting of Procurement measures from 2018 through September 2020 is outlined in the following table.
- PO totals are through the end of October 2020

<b>Categories</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020 (September)</b>
Annual Number - Tenders	52	60	82	68
Annual Number - Proposals	55	72	74	59
Annual Number - Quotations	54	54	54	40
Average number of bids per call	4	3.5	3.7	4.1

<b>Categories</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020 (September)</b>
Annual Dollar Value - Tenders	\$ 57,738,724.00	\$ 94,742,302.00	\$ 118,816,040.00	\$ 57,495,009.00
Annual Dollar Value - Proposals	\$ 26,832,976.00	\$ 14,730,756.00	\$ 65,208,810.00	\$ 10,088,696.00
Annual Dollar Value - Quotations	\$ 2,521,371.00	\$ 2,366,656.00	\$ 2,167,737.00	\$ 1,183,676.00

<b>Categories</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020 (October)</b>
Annual Number of Purchase Orders	18410	18829	17712	13686
Annual Dollar Value - All Purchase Orders	\$ 279,362,461.00	\$ 297,529,008.00	\$ 319,954,706.00	\$ 303,882,804.00

# Thank you

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