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**Subject:** Procurement Work Plan Update

**Report to:** Procurement Advisory Committee

**Report date:** Monday, November 16, 2020

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## **Recommendations**

That Report PAC-C 2-2020 **BE RECEIVED** for information.

## **Key Facts**

- The purpose of this report is to provide information on the approved work plan, procurement related initiatives and introduce a new initiative on procurement education for employees.
- Procurement remains committed to improving service delivery and driving efficiency through the implementation of the initiatives outlines herein, which support successful outcomes for Regional projects.

## **Financial Considerations**

Procurement and its related activities are critical in maintaining taxpayer affordability.

## **Analysis**

This report provides an update on the work plan initiatives identified in PAC-C 1-2020 including timing. These initiatives represent a continuation of this modernization and demonstrate how Procurement, as a strategic partner, continues to deliver services, which support Niagara Region in bringing value to the constituents of Niagara.

This report also introduces a new **procurement education** initiative, which is a comprehensive role-based, blended learning program that focuses on formal and informal learning opportunities for Niagara Region's leaders and employees who are responsible for the acquisition of goods and/or services.

## **2020-2021 WORK PLAN - Updates**

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

While Procurement By-law revisions are 80% complete, the amendments proposed by the Procurement Office (previously reported in PAC-C 6-2019) are substantive in terms of (amongst other consideration) removing procedural content. Based on this, the recommended approach is that the continued focus remain on completing the newly proposed training initiative identified herein prior to presenting the new By-law to this Committee for their review and comment.

### **2. 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.

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

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

### **4. Purchase Order Data Reporting: (Ongoing)**

Continued generation, development and assessment of PO Data to identify opportunities to initiate Corporate Agreements, which drive savings and audit compliance.

Staff will bring items 1, 3, and 4 to Committee for input and/or approval.

### **Procurement Education Program for Employees (New Q4-2020 and ongoing)**

A new work plan initiative designed to address high-risk areas identified through the audit reports and increase internal procurement capacity among employees, the Procurement team has developed a comprehensive role-based, blended learning program that focuses on formal and informal learning opportunities for Niagara Region's leaders and employees who requisition.

Program elements include:

### **1. eLearning Module – Procurement Essentials (Storyboard Complete)**

This eLearning module provides leaders with an overview of Niagara Region's Procurement By-law, as well as a detailed look into the formal and informal procurement processes utilized to support the acquisition of goods, services and construction.

Moving forward, this training program will be mandatory for new and existing leaders with mandatory participation for all staff who create requisitions under review.

Procurement will monitor statistics on uptake and completion rates through the Niagara Region learning management system.

### **2. Online, Interactive Tool - Procurement Navigator (Complete)**

On November 5, Procurement released this online, interactive tool available to all employees through the Vine's Application Directory to all staff. It is designed to assist in the identification of the correct procurement process to employ when acquiring goods and/or services on behalf of Niagara Region.

By answering a few questions about their purchase, the Procurement Navigator provide:

- An overview of the applicable procurement process;
- Next steps;
- Insight into required approvals (managed through PeopleSoft Financials);
- Documentation requirements; and
- Access to additional tools and resources

### **3. Webinar Series – Procurement Process Skill-builders (In Development)**

Procurement is currently developing (and will host) a series of bi-monthly webinars that will feature an in-depth look at the following procurement processes including

- Low Value purchases valued at below \$10,000;
- Informal Quotations valued at between \$10,000 – \$25,000; and
- Single Source acquisitions.

Webinars will commence in early 2021, with invitations extended to Niagara Region's leadership team and staff who frequently requisition for goods and/or services.

#### **4. PeopleSoft Financials Training (Ongoing)**

PeopleSoft Financials training, which focuses on how to create, manage and approve requisitions is available to all staff through the Niagara Region learning management system.

Courses include:

- Requisitioning and Receiving in PeopleSoft Financials
- PeopleSoft Requisitioning II: From Requisition to Payment and Match Exceptions
- PeopleSoft Financials for Leaders and Administrators

#### **Alternatives Reviewed**

None, other than that identified herein, though the Committee can suggest amendments to the proposed Work Plan.

#### **Relationship to Council Strategic Priorities**

While Procurement & Strategic Acquisitions and its related activities align with many of Council's 2019-2022 Strategic Priorities, the Procurement Work Plan perhaps best aligns with Sustainable and Engaging Government, specifically objective 4.1: High Quality, Efficient and Coordinate Core Services, which promote an organizational culture that values continuous improvement, collaboration, and innovation.

#### **Other Pertinent Reports**

PAC-C 1-2020 – Proposed Procurement Work Plan 2020-2021 (September 14, 2020)

PAC-C 6-2019 - Procurement Work Plan Update 2019-2020 (November 18, 2019)

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