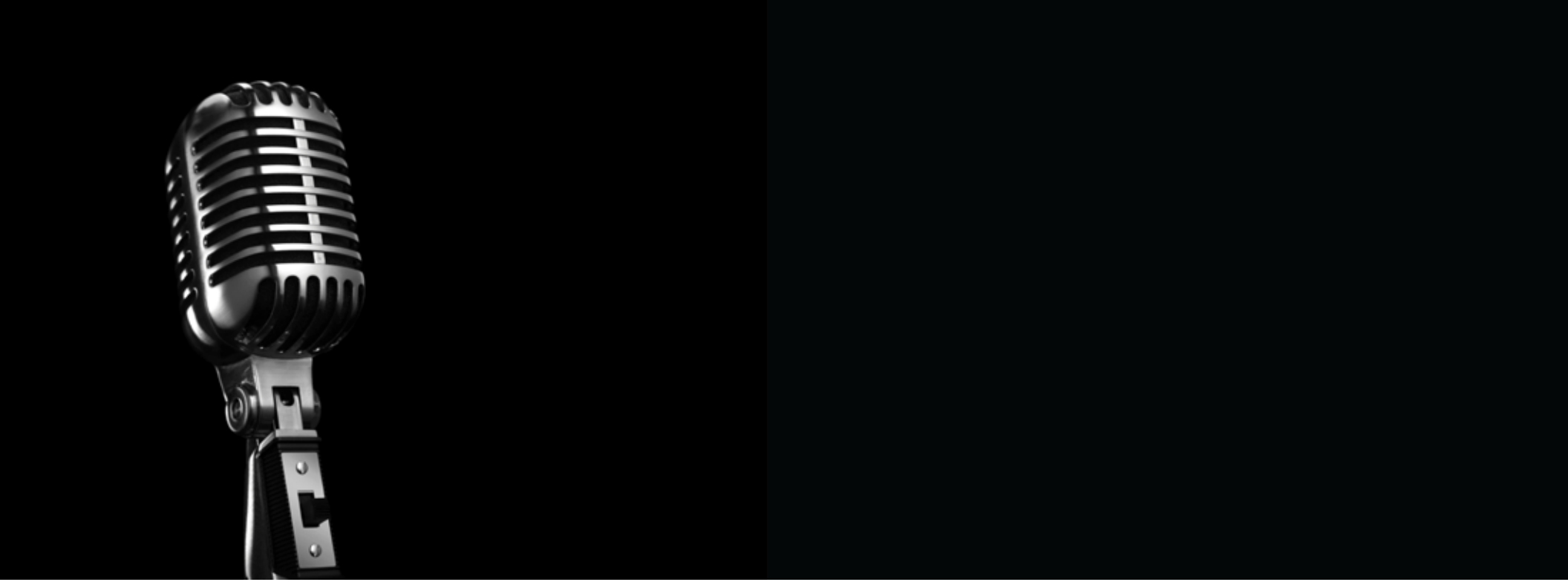
Precision Drafting Certificate

2020 Training Catalogue

The Procurement Office

Procurement Advisory Office | Procurement Training Office



About the Instructor

Paul Emanuelli is the General Counsel and Managing Director of The Procurement Office. He was recognized by Who's Who Legal as one of the top ten public procurement lawyers in the world. His portfolio includes advising on strategic governance in public purchasing and on negotiating high-profile major procurement projects. Paul has an extensive track record of public speaking, publishing, and training. He is the author of *Government Procurement*, *The Laws of Precision Drafting*, *Accelerating the Tendering Cycle*, and *The Art of Tendering: A Global Due Diligence Guide*. Paul also publishes a weekly procurement newsletter and hosts a free monthly webinar series. Over the last 20 years, he has trained and presented to thousands of procurement professionals from hundreds of institutions across North America through The Procurement Office and in collaboration with leading industry organizations, including NIGP, SCMA, the University of the West Indies, and Osgoode Hall Law School.

The Public Interest

"It should be a self-evident proposition that the procurement professionals responsible for properly spending vast amounts of public funds should have access to the necessary resources and training to ensure value-for-money and to protect the public interest."

Paul Emanuelli, *The Art of Tendering: A Global Due Diligence Guide* (Procurement Publishing Office, 1st ed. 2019)

Overview

Featuring new content from *The Art of Tendering: A Global Due Diligence Guide*, Paul Emanuelli's Precision Drafting certificate offers 16, 90-minute modules divided into four days of training that help guide project teams in designing and drafting solicitation documents.

Our training content is available through self-directed learning on our new Procurement Office eLearning platform. This new platform allows individuals to select single modules to explore specific topics of interest and features interactive modules and quizzes, along with a deep library of reference materials. Individuals interested in earning full-day training certificates can select one of our existing four-module bundles or build their own custom full-day training program by selecting their own modules from our catalogues. Those one-day certificates will then count towards the completion of the full certification. Larger groups that are interested in certification should inquire about our eLearning group discounts and should also consider supplementing their eLearning experience with live training with Paul Emanuelli through his Live Online Learning Program and his in-house training.

Training Bundles

The Art of Design

- ☐ PD101 - Applying the 95/5 Rule of Project Design
- ☐ PD102 - Scoping the Project
- ☐ PD103 - Aligning Payment Structures
- ☐ PD104 - Implementing Integrated Team Disciplines

The Art of Drafting

- ☐ PD201 - Leveraging Templates and the Laws of Interpretation
- ☐ PD202 - Adopting Professional Writing and Editing Practices
- ☐ PD203 - Battling Biased Specifications
- ☐ PD204 - Managing Material Disclosures

The Art of Selection Part 1: Managing Mandatories

- ☐ PD301 - Managing Mandatories: Governing Principles
- ☐ PD302 - Procedural Compliance
- ☐ PD303 - Conditional Bids
- ☐ PD304 - Technical Compliance

The Art of Selection Part 2: Pricing and Rated Requirements

- ☐ PD401 - Price Evaluations: Governing Principles
- ☐ PD402 - Low Bid Disputes and Cancellations
- ☐ PD403 - Rated Criteria: Governing Principles
- ☐ PD404 - Rated Criteria: Defensible Evaluations

The Art of Design

The Art of Design identifies the key design considerations needed to improve the success rate of your procurement projects.

PD101 - Applying the 95/5 Rule of Project Design
Covering the five critical design factors that account for 95% of project successes or failures, this module focuses on guiding your project team through the project design planning checklist and explains how the proper integration of scoping statements and specifications, material disclosures, evaluation requirements, pricing structures, and legal agreements within your solicitation document serves as the blueprint for project success.

PD102 - Scoping the Project
With reference to leading case studies, this module explains the importance of managing your project teams to develop clear, thorough, and concise scoping statements and specifications.

PD103 - Aligning Payment Structures
This module surveys the risks of failing to properly align payment structures to performance requirements and identifies the critical differences between using progress payments and milestone payments in your procurement contracts.

PD104 - Implementing Integrated Team Disciplines
Analyzing the key advantages of implementing integrated specification design and contract delivery methods in your procurements, this module explains how leveraging integrated project delivery principles can help create proper incentives for clear specifications and timely, on-budget performance for everything from low-value goods and services to high-cost and complex infrastructure and technology projects.

The Art of Drafting

The Art of Drafting covers the core concepts and techniques that will help sharpen your drafting skills and streamline your drafting process by focusing on clear drafting and avoiding unnecessarily complicated and cluttered tendering documents.

PD201 - Leveraging Templates and the Laws of Interpretation
Surveying the architecture of professionally designed temples, this module explains how to manage the concurrent drafting of project content and integrate that content into tendering templates. This module also explains how to leverage the principles of legal interpretation, using the entire document rule, implied terms analysis, and *expressio unius* principle to draft content details, while navigating the class rule, association rule and ranking rule to organize lists and subparagraphs.

PD202 - Adopting Professional Writing and Editing Practices
Featuring professional editing practices drawn from leading industry authorities, this module provides a checklist of drafting conventions that will help you maintain consistency in your tendering documents while avoiding delays in your editing process by using plain language, avoiding technical jargon, vague terms, clichés, and filler, and legalistic drafting, controlling the use of cross-referencing, acronyms, and definitions, and understanding how improper punctuation and sloppy shorthand can lead to interpretive disputes and protracted legal battles.

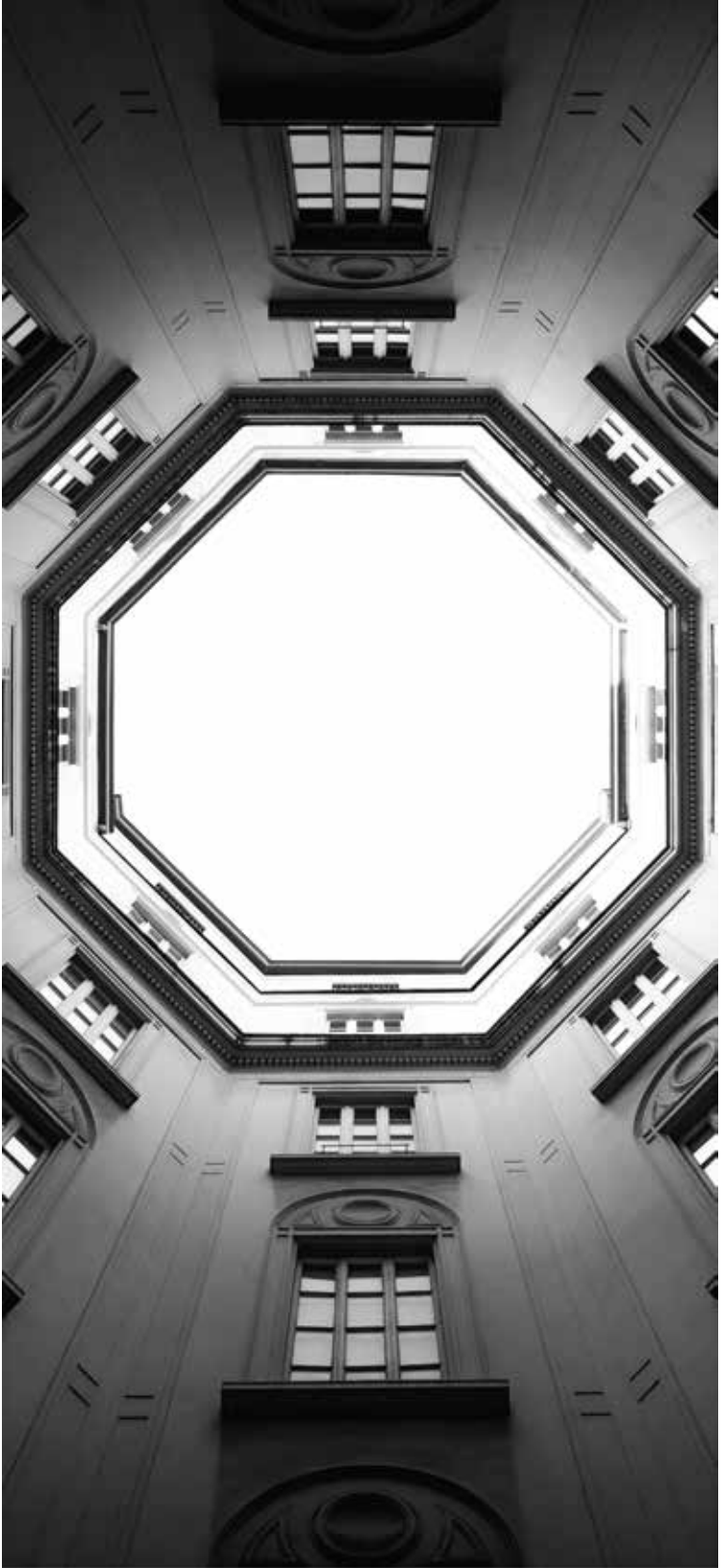
PD203 - Battling Biased Specifications
This module explains how to properly incorporate technical content into your documents, while avoiding biased specifications, and focuses on the importance of properly integrating subject matter experts into your drafting process.

PD204 - Managing Material Disclosures
Summarizing the material disclosure rules from leading case studies, this module explains how to avoid downstream delays and cost disputes by using clear specifications, disclosing work volumes and identifying project risks in your tendering documents.

The Art of Selection Part 1: Managing Mandatories

The Art of Selection Part 1: Managing Mandatories focuses on the key considerations for establishing bid compliance and contract performance standards, and provides an in-depth exploration of procedural compliance, conditional bids, and technical compliance.

PD301 - Managing Mandatories: Governing Principles
Covering the governing principles for managing mandatory requirements, this module explains the importance of distinguishing mandatory evaluation requirements from post-award performance requirements.



PD302 - Procedural Compliance
Surveying leading process-based compliance disputes, this module highlights the importance of defining and strictly enforcing procedural compliance standards.

PD303 - Conditional Bids
Assessing leading conditional non-compliance case studies, this module explores the pitfalls of conditional bids and the duty to reject non-compliant counter-offers.

PD304 - Technical Compliance
Surveying leading technical compliance case studies, this module focuses on how to determine technical compliance in a transparent and defensible manner.

The Art of Selection Part 2: Pricing and Rated Requirements

The Art of Selection Part 2: Pricing and Rated Requirements focuses on the key considerations for establishing clear and defensible criteria for the evaluation of price and other rated requirements.

PD401 - Price Evaluations: Governing Principles
Covering the governing principles for price evaluations, this module explains the importance of ensuring clear and transparent price scoring mechanisms.

PD402 - Low Bid Disputes and Cancellations
Surveying leading price-based bid protest, this module explores the recurring issues of low bid bypass, abnormally low bids, and price-based cancellation disputes.

PD403 - Rated Criteria: Governing Principles
Covering the governing principles for rated criteria, this module explains the importance of ensuring clear and transparent scoring criteria for the evaluation of bids and proposals.

PD404 - Rated Criteria: Defensible Evaluations
Highlighting the hazards of hidden evaluation requirements, this module focuses on the need to transparently integrate rated criteria and sub-criteria into your tendering documents.

Contact Us

Paul Emanuelli
Managing Director
416-700-8528
paul.emanuelli@procurementoffice.com

Lisa Kuechler
Training Manager
416-700-8536
lisa.kuechler@procurementoffice.com

The Procurement Office

Procurement Advisory Office | Procurement Training Office