The Procurement Office

Procurement Law Office | Procurement Training Office

Representative Transactions and Engagements

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Procurement Governance

Alberta Public Library Governance and Template Development (2022)
Updated the procurement policies and procedures and provided a full suite of RFX templates to an Alberta public library.

Ontario College Policy and Protocols (2022)
Provided an updated procurement policy and protocol framework to an Ontario college.

British Columbia Municipal Policy Review (2022)
Reviewed and advised on updating a British Columbia municipality's procurement policy.

Ontario Municipal Housing Agency Bylaw Review (2022)
Reviewed and advised on updating a municipal housing agency's procurement bylaw and related policies and procedures.

Alberta Municipal Template Overhaul (2022)
Provided a template overhaul for a full suite of RFX templates for an Alberta municipality.

Ontario School Board Templates and Standard Form Contracts Overhaul (2022)
Provided a template overhaul for a full suite of RFX templates and standard form contracts for an Ontario school board.

Alberta Municipality Template and Standard Contract Retrofit (2022)
Updated the full suite of tendering templates and standard form contracts for an existing Alberta municipal client that was using a prior version of those templates.

Ontario School Board Framework Agreement Protocol (2022)
Developed a new protocol for the administration of supplier roster arrangements in compliance with trade treaty open framework agreement protocols.

Alberta Regional Municipality Template Overhaul (2022)
Provided a template overhaul for a full suite of RFX templates to an Alberta regional municipality.

Ontario Municipality Template Overhaul (2022)
Provided a template overhaul for a full suite of RFX templates to a small Ontario municipality.

Ontario Municipality Full Governance Overhaul (2021)
Oversaw and implemented an institutional review of procurement practices for an Ontario municipality, including a legal risk assessment, trade agreement obligation gap analysis, field study, and recommendation report, followed by the preparation of RFX templates and standard form contracts and the drafting of updated policies and procedures.

Alberta Municipal Housing Agency Policy and Template Overhaul (2021-2022)
Provided a new policy and protocol framework and template overhaul for a full suite of RFX templates to an Alberta municipal housing agency.

Ontario Municipality Full Governance Overhaul (2021)
Implemented an institutional review of procurement practices for an Ontario municipality, including a legal risk assessment, trade agreement obligation gap analysis, field study, and recommendation report, followed by the preparation of RFX templates and the drafting of updated policies and procedures. Process included briefing municipal council as part of the implementation of this procurement modernization process.

Ontario Provincial Agency Template and Standard Contract Overhaul (2021)
Provided a template overhaul for a full suite of RFX template and standard form contracts to an Ontario provincial agency.

Federal Crown Corporation Template Overhaul (2021)
Provided a template overhaul for a full suite of RFX templates for a federal Crown corporation.

Ontario Municipality Template Overhaul (2021)
Provided a template overhaul for a full suite of RFX templates to an Ontario township.

New Brunswick Agency Full Governance and Template Overhaul (2021)
Provided a full policy and protocol framework and full suite of RFX templates and standard form contracts to a New Brunswick provincial agency.

Ontario Municipality Standard Contracts (2021)
Provided a full suite of standard form contracts to an Ontario municipality.

Nova Scotia Municipal Agency Template Overhaul (2021)
Provided a template overhaul for a full suite of RFX templates to a Nova Scotia municipal agency.

Ontario Public Library Policy Review (2021)
Provided a procurement policy review to an Ontario public library.

Alberta Municipality Template Overhaul and Standard Contracts (2021)
Provided a template overhaul for a full suite of RFX templates and full suite of standard contract documents to an Alberta municipality.

Ontario Provincial Agency Template and Contract Overhaul and Policy Review (2021)
Provided a template overhaul for a full suite of RFX templates and standard form contracts, as well as a procurement policy review, to an Ontario provincial agency.

Provincial Government Template Overhaul (2021)
Provided a template overhaul for a full suite of RFX templates for a provincial government.

Alberta Regional Municipality Policy and Protocols (2021)
Provided a full policy and protocol framework to an Alberta regional municipality.

Ontario Municipality Full Governance Overhaul (2021)
Provided a full policy and protocol framework and full suite of RFX templates to an Ontario municipal government. Assignment included providing briefing to municipal council as part of the procurement modernization process.

Ontario Municipal Housing Agency Procurement Policy and Procedures Update (2021-2022)
Provided review and drafting assistance to update procurement policy and accompanying procedures for compliance with new trade agreements.

Ontario County Template Overhaul (2020)
Provided a template overhaul for a full suite of RFX templates for an Ontario municipal county.

New Brunswick Agency Governance and Template Overhaul (2020)
Provided a governance overhaul, with a full suite of RFX templates and standard form contracts, as well as a full suite of procurement procedures and protocols to a New Brunswick provincial agency.

Alberta Municipality Requirement Categorization Protocol (2020)
Prepared a protocol to guide the development and categorization of mandatory bid compliance requirements, scored criteria, and performance specifications to help guide the drafting of solicitation documents in complex procurement projects.

Federal Entity Template Overhaul (2020)
Provided a template overhaul for a full suite of RFX templates for a federal government agency.

Alberta Agency Template Overhaul (2020)
Provided a template overhaul for a full suite of RFX templates for an Alberta provincial agency.

Ontario Municipality Template Overhaul (2019)
Provided a template overhaul for a full suite of RFX templates for an Ontario municipality.

Alberta Municipality Template Overhaul (2019)
Provided a template overhaul for a full suite of RFX templates for an Alberta municipality.

BC Regional Municipality Standard Contract Templates (2019)
Provided standard form contract templates to a British Columbia regional municipality.

Ontario Regional Municipality Template Overhaul (2019)
Provided a template overhaul for a full suite of RFX templates for an Ontario regional municipality.

BC Regional Municipalities Template Overhaul (2019)
Provided a template overhaul for a full suite of RFX templates for a British Columbia regional municipality.

Federal Agency Procurement Governance Review (2019)
Led an institutional review process that included extensive field study interviews and a compliance assessment of a federally regulated agency. Prepared strategic procurement recommendations to update the agency's procurement governance practices.

Multiple Jurisdiction CCDC Supplementary Conditions (2018)
Prepared supplementary conditions for public institutions from multiple Canadian jurisdictions for use with industry standard construction contract documents for a range of formats including design-bid-build, unit price, cost-plus, construction management, and design-build contracts.

Federal Crown Corporation Governance and Template Overhaul (2017-2018)
Oversaw an institutional review of procurement practices for a Federal Crown Corporation, including a legal risk assessment, trade agreement obligation gap analysis, field study and recommendation report, followed by the preparation of RFX templates and the drafting of a protocol for conducting procurement processes in accordance with trade agreement obligations. Provided training to assist the deployment of the new practices and procedures.

Post-Secondary Education Institution Risk Assessment, Templates and Policy Overhaul (2017)
Oversaw an institutional review of procurement practices for a post-secondary education institution, including a legal risk assessment, field study and recommendation report, followed by the preparation of a full suite of RFX templates and updated procurement policy framework.

Ontario Regional Municipal Template and Contract Overhaul (2016)
Provided a template overhaul and related training for a full suite of RFX templates as well as standard contract and purchase order templates.

Provincial Agency Contract Drafting and Advice (2016)
Prepared custom supplementary General Conditions for CCDC14 and provided legal advice on various matters

Provincial Government Template and Policy Overhaul (2015-16)
Prepared a full suite of RFX templates and updated procurement policy framework.

Ontario Municipal Governance and Templates Overhaul (2015)
Conducted an institutional review of procurement practices, including a legal risk assessment, field study and recommendation report, followed by the preparation of a full suite of RFX templates and updated procurement policy framework.

Provincial Agency Contract Drafting Support (2015)
Reviewed and provided comments on draft professional services agreements developed by client.

BC University Customized RFP for Quality-Based Selection (2015)
Developed a custom Negotiated RFP template designed for "Quality-Based Selection" procurement processes for a British Columbia university.

Municipal Custom Construction and Tendering Documents (2015)
Conducted a custom overhaul of client's full suite of tendering templates, including extensive tailoring of custom construction tender documents, construction management RFP documents, and trades and services tender documents.

Ontario School Board Template and Contract Overhaul (2015)
Conducted a template overhaul that included a full suite of RFX templates as well as standard contract and purchase order templates.

Ontario Municipal Governance and Template Overhaul (2014-15)
Conducted an institutional review of procurement practices for a mid-sized municipality, including a legal risk assessment, field study and recommendation report, followed by the preparation of a full suite of RFX templates and the drafting of an updated procurement policy framework and multiple deployment training sessions to various municipal departments.

Alberta Municipal Contract Development and Training (2014)
Prepared full suite of tendering templates and standard contract terms and conditions together with customized training on the implementation of both.

Energy Sector Organization Templates and Project Support (2014)
Provided customized Negotiated RFP template and associated project support.

Federal Agency Template Revision Services (2014)
Assisted with review of and amendment to existing RFP template.

Ontario Municipal NRFP Template and ERP Project Review (2014)
Developed Negotiated RFP template for municipality and provided review and support in the drafting and assembly of NRFP for the acquisition of an integrated Enterprise Resource Planning system for use in delivery of municipal services.

Provincial Agency Governance Review (2013)
Led governance review of procurement processes for major operational government agency in partnership with an independent management consultant.

Alberta Municipal Policy Overhaul (2013)
Provided an institutional risk assessment and re-development of procurement policy and governance framework for an Alberta municipality.

Provincial Health Sector Agency Risk Assessment, Templates and Policy Overhaul (2013)
Conducted an institutional review of procurement practices, including a legal risk assessment, field study and recommendation report, followed by the preparation of a full suite of RFX templates and the drafting of an updated procurement policy framework.

School Board Policy and Template Overhaul (2013)
Assisted Ontario school board in updating its procurement templates and procurement policy framework to ensure compliance with the Broader Public Sector Procurement Directive and best practices in public procurement.

Ontario Housing Agency Governance and Template Overhaul (2012)
Assisted in a comprehensive overhaul of the procurement practices of a large housing agency. Services included an institutional legal risk assessment, field study and recommendation report, followed by the drafting of an updated procurement policy framework and a series of integrated procurement protocol documents. Provided a full RFX template overhaul, along with deployment-stage briefings and transactional support services to assist in the implementation of policy, protocols, and tendering templates.

Provincial Government Template Retrofit (2012)
As part of a provincial government's procurement modernization initiative, developed a simplified invitational Request for Quotations format for large volume front-line field-level transactions and a Negotiated RFP format for IT projects, along with corresponding legal agreement templates and end-user instructions.

Federal Regulatory Agency Risk Assessment and Template Retrofit (2012)
Provided a federal regulatory agency with an institutional legal risk assessment to support its procurement process review and modernization initiative. Provided the agency with new Request for Quotations and Negotiated RFP templates, along with a hybrid RFX template that combined the simplicity of the RFQ format and the flexibility of the Negotiated RFP format.

Federal Crown Corporation Risk Assessment and Template Overhaul (2012)
Provided a federal crown corporation with an institutional legal risk assessment. Advised on and drafted an updated procurement policy framework. Provided a template overhaul that included new Request for Information, Prequalification RFSQ, Framework RFSQ, Request for Quotations, and NAFTA-Compliant Negotiated Best and Final Offer RFP templates.

Provincial Government Legislative Drafting Support (2012)
Provided strategic legal advice and drafting assistance to a provincial government to assist in the revision of its procurement statutes, regulations, and directives. Advice focused on the establishment of a statutory code that enabled the use of a broad range of procurement format options based on the UN Model Procurement Law.

Large Resource Sector Governance and Template Overhaul (2011-12)
Assisted in a comprehensive overhaul of the procurement practices of a large multi-national resource sector company with a multibillion-dollar annual purchasing portfolio, multiple operational field locations and a newly centralized shared services office. Project included an institutional legal risk assessment, field study and recommendation report, followed by a process improvement stage that included drafting of an updated procurement policy framework and a series of integrated procurement protocol documents. Delivered a full RFX template overhaul, updated contract terms and conditions to use in conjunction with the tendering templates and provided related deployment training.

Housing Agency Governance and Template Overhaul (2010-12)
Assisted in a comprehensive overhaul of the procurement practices of a large provincial housing agency. The project included an initial institutional legal risk assessment, followed by the provision of a full suite of RFX tendering templates, the development of updated contract terms and conditions to use in conjunction with the tendering templates, and related training.

Alberta Municipal Governance and Template Overhaul (2011-12)
Conducted an intensive due diligence audit of an Alberta municipality's tendering and procurement practices, including recommending governance and process changes. Assisted in implementation of revised governance strategy, drafting of revised procurement policy and procedures, and drafting of revised suite of templates to comply with trade treaty requirements. Provided ongoing briefings related to new processes and templates, including senior level briefings, as well as deployment training and ongoing transaction support services on high-priority projects to assist in the implementation of the policies, procedures, and templates.

Health Sector Purchasing Consortia Template Retrofit (2011)
Provided template retrofit services to health sector purchasing consortia, drafting new Request for Quotations and Negotiated RFP formats to be used by the shared services operation for hospital sector procurements.

Ontario Municipal Bylaw and Protocol Development (2011-12)
Provided strategic legal advice in support of the revision of a large Ontario municipality's purchasing bylaw, along with advice on and drafting of related procurement protocols and procedures. Initiative included providing senior level briefings, including live submissions to City Council, in relation to the modernization of the municipality's overall procurement governance framework.

Ontario Community College Template Retrofit and Transactional Support (2011)
Provided template retrofit and related transactional support services to an Ontario community college. Drafted new Request for Quotations and Negotiated RFP templates and assisted in the deployment of the new formats by providing transactional advice and assistance on a number of high-priority projects.

Ontario Regional Municipal Purchasing Bylaw Development (2011)
Drafted a new purchasing bylaw for a regional municipality with clearly identified roles, responsibilities and processes for project approvals, tender call drafting, tender call posting, bid receipt and evaluation, contract award and contract performance.

University Sector Purchasing Consortia Template Retrofit (2011)
Provided a template retrofit for a multi-jurisdictional university purchasing consortia, drafted updated Request for Quotations and Negotiated RFP templates, and provided a legal briefing to purchasing staff from a broad range of universities to assist in the implementation of the new procurement formats.

Large University Template Overhaul (2010-11)
Provided ongoing legal services to a large university in the development of a new suite of tendering templates, contracting formats and procurement procedures to help achieve compliance with the Ontario Ministry of Finance Supply Chain Guidelines.

Province-Wide University Group Template Retrofit (2010)
Provided template retrofit services to a province-wide group of universities. Services including multi-participant consultation webinars and in-person briefings on the use of the newly developed Request for Quotations and Negotiated RFP formats.

Alberta Community College Template Overhaul (2010)
Provided legal review and drafting services to an Alberta community college to update a full suite of procurement templates and related purchasing policies.

Provincial Agency Service Provider Online Negotiated RFP (2010)
Drafted the terms and conditions for the online paperless Negotiated RFP framework used for the procurement of a broad range of goods and services connected to the maintenance of all provincially owned buildings.

Ontario Municipal Template Overhaul (2010)
Updated an Ontario municipality's complete suite of tendering templates, including updated Invitation to Tender, Negotiated RFP, Request for Supplier Qualification and Request for Information formats. Provided in-person briefings and staff training on the use of the new tendering formats to municipal purchasing staff to assist them with the deployment of the new formats.

Health Sector Agency Master Framework Arrangement (2010)
Provided strategic procurement advice to a health sector entity for the province-wide procurement of consulting services. Gave recommendations for managing procurements across multiple locations using pre-qualifications, master framework agreements, second stage competitions and paperless procurement.

Lottery Corporation Template Retrofit (2010)
Provided expedited template retrofit services to a Crown corporation to develop low-risk Request for Quotations and flexible Negotiated RFP formats. Customized the terms and conditions to comply with national and regional trade treaties requirements.

Ontario University Template Retrofit (2010)
Provided template retrofit services to a university to develop multiple procurement formats including low-risk Request for Quotations and flexible Negotiated RFP formats. Customized the terms and conditions to comply with the university's policies and procedures.

Provincial Education Agency Procurement Template Development (2009)
Advised a provincial distance learning agency regarding procurement formats best suited for its varied purchasing needs and assisted with the development of procurement templates and related contract documents.

Ontario Regional Municipal Bylaw Review (2009)
Provided a legal advice to an Ontario regional municipality to assist in updating its procurement bylaw with a particular focus on tender compliance and bid rejection policies.

Ontario University Governance Review (2009)
Conducted an institutional review of a major university, analyzing existing policies, procedures, practices, and documents. Conducted extensive interviews of key procurement personnel. Provided a recommendation report aimed at assisting the institution with compliance with new Ontario Ministry of Finance supply chain guidelines.

Federal Agency Governance Review (2009)
Conducted an institutional review of a high-profile federal government agency's procurement practices, including an analysis of existing policies, procedures, practices and documents and extensive interviews of key procurement personnel. Provided a recommendation report geared to reducing risk and identifying greater efficiencies in the institution's procurement process. Delivered two days of in-house training customized to the findings of the report.

Lottery Corporation Negotiated RFP Template Development (2009)
Developed a Negotiated RFP format for a provincial government lottery corporation to assist with technology and real estate sector procurements.

Reports, Opinions, and Dispute Resolution

Multi-Jurisdictional Regulatory Board Bid Protest (2022)
Provided strategic legal advice to a multi-jurisdictional regulatory board in relation to a bid protest for a major technology transformation project. Advised the board on compliance with the due process standards that apply to public tendering evaluation and award decisions.

Education Sector Multi-Institutional Purchasing Body Opinion (2022)
Provided a legal opinion to a multi-jurisdictional university purchasing group in relation to its trade treaty obligations to conducting open tendering procedures and related contract value quantification rules, contract-splitting prohibitions, and the treatment of specific exemptions under various trade treaties.

Negotiated RFP Audit Opinions (2022)
Provided a series of legal opinions in support of a public audit report on a high-profile Negotiated RFP process. Opinions focused on the legal duties and due process standards that apply to public institutions when using Negotiated RFPs.

School Board Technology Transformation Contract Dispute (2022)
Provided strategic contract management advice relating to the local implementation of a province-wide education sector technology transformation project. Liaised with central contract administrators and local school board officials to advise in the resolution of outstanding contract performance issues.

Nova Scotia Municipal Agency Infrastructure Project Advice (2021-2022)
Prepared detailed recommendations and briefed a project team and agency board on the selection of an appropriate tendering format and contracting structure for a major municipal infrastructure project. Also provided downstream strategic planning advice.

Ontario School Board Bid Protest (2021)
Provided bid protest dispute resolution advice to an Ontario school board in relation to the resolution of a construction tendering dispute involving a tender call for the installation of mechanical equipment.

Ontario School Board Construction Tendering Audit (2021)
Provided a legal review audit of the construction tendering practices of an Ontario school board in response to bid protest compliant. Interviewed key witnesses, reviewed the specific tendering procedures, and advised the board in relation to the implementation of remediation measures for future tendering procedures.

New Brunswick Agency Technology Transformation Project (2020-2021)
Provided ongoing advice, reports, and recommendations to a provincial agency in relation to ERP System project and related procurements, advising on the appropriate tendering and contract structures to assist in the downstream implementation of the initiative.

Ontario Agency Strategic Procurement Advice (2020-2021)
Provided strategic procurement advice to a provincial agency in relation to the re-procurement of a complex technology system through multiple separate bidding processes. Advice included strategic design planning for scoping the various projects, as well as related advice dealing with potential conflict of interest, unfair advantage, incumbent advantage, and intellectual property rights.

European Union Guide to Canadian Public Procurement (2020)
On behalf of the European Union, authored the European Union's Guide to Canadian Public Procurement, which summarizes the legal rights and related remedies for European Union companies bidding for public sector contracts across all jurisdictions in Canada under the Canada-EU *Comprehensive Economic and Trade Agreement*.

Ontario School Board Construction Dispute (2020)
Provided strategic advice for the resolution of a construction dispute involving multiple school roofing projects.

Ontario Health Sector Entity Treaty Compliance Opinion (2020)
Provided a legal opinion to a health sector entity regarding open procurement obligations and sole-sourcing rules in relation to the migration of a complex technology system.

Ontario School Board Piggy-Backing Opinion (2019)
Provided a legal opinion in relation to trade treaty open procurement obligations and how they relate to piggybacking and onboarding provisions in group purchasing standing agreements.

School Bus Mediation and Arbitration (2019)
Led a group of lawyers in a mediation and arbitration process involving a multimillion-dollar contract dispute over school bus transportation services.

Municipal Non-Compliance Opinion (2019)
Provided a bid compliance opinion addressing multiple compliance issues and related legal risks in relation to a major municipal P3 infrastructure project.

Municipal Bid Protest Trial Expert Witness (2016-2018)
Testified as an expert witness during pre-trial discoveries and at trial as part of the successful defence of a multimillion-dollar claim filed against a municipality by a losing proponent in relation to a nine-figure municipal infrastructure project.

Federal Crown Corporation Trade Agreement Exclusions Memorandum (2017)
Conducted review and analysis of exclusions under the *Canadian Free Trade Agreement* (*CFTA*) and the Canadian-European Union *Comprehensive Economic Trade Agreement* (*CETA*) and prepared memorandum to assist client in interpreting and determining the application of the new trade agreements in their future procurements.

Municipal Construction Contract Mediation (2017)
Provided strategic advice and assistance and led mediation discussions on behalf of a municipality in responding to and resolving a bid dispute with a construction contractor.

Yukon Legislature Procurement Panel Framework Report (2016)
Prepared report tabled in the Yukon legislature as a supplement to the Yukon Procurement Panel Advisory Report on use of vendor of record-open framework agreements.

Federal Crown Corporation Procurement Obligations Opinion (2016)
Provided opinion setting out procurement obligations under applicable laws and treaties and providing advice in relation to compliance with applicable trade treaty obligations.

Municipal Bid Dispute Expert Opinion (2015)
As part of a successful defence, prepared an expert report for a municipality in response to a complainant's expert opinion in relation to a lost profit claim by an unsuccessful bidder on a major construction project.

Ontario Ministry Student Transportation Review Panel Member (2015)
Served on panel on behalf of the Ontario Minister of Education in connection with a review of student transportation task force, with focus on establishing vendor of record/open framework agreements.

Municipal Audit Support for BAFO NRFP (2015)
Prepared a report to assist a municipal Auditor General on procurement law matters arising in relation to the audit of a major Best and Final Offer Negotiated RFP procurement project.

Provincial Agency Contract Termination Support (2014)
Provided advice and assistance in the termination of a contract with an existing supplier.

Municipal Legal Review of Major Construction Audit (2014)
Provided legal advice and recommendations in response to an audit of a major construction RFP for fire and paramedic facilities.

Ontario University Opinion on Revenue-Generating Contracts (2014)
Provided an opinion on the application of procurement rules to the award of revenue-generating contracts, with particular reference to the Ontario Broader Public Sector Procurement Directive, trade treaties, and common law obligations.

Industry Association Group Purchasing Research Opinion (2014)
Provided an opinion on public procurement rules that apply to group purchasing across all jurisdictions and sectors in Canada. Opinion provided best practice recommendations for the implementation of group purchasing and included a comparative analysis to international best practices from other jurisdictions.

Provincial Agency Good Governance Opinion (2014)
Provided a good governance opinion relating to a number of procurement compliance issues including sole sourcing, IT project cost overruns and use of Vendor of Record arrangements. Opinion included a detailed analysis of government procurement directives and related public audit reports relating to compliance issues.

Ontario Provincial Agency Conflict of Interest Assessments (2014)
Provided multiple conflict of interest assessments relating to the public procurement process, including advice relating to potential unfair advantage in the bidding process to a provincial agency for an accounting services RFP.

Ontario Provincial Agency Network Services VOR Opinion (2014)
Provided legal advice on the use of a provincial vendor-of-record for network services and the integration of the scope of services with their existing network support services.

Alberta Municipal Whitepaper on Land Purchasing Proposal (2014)
Performed analysis and prepared whitepaper on proposal to convert city's real estate department into a licensed brokerage, including analysis of statutory and regulatory framework and applicable good governance standards.

Federal Government Entity Opinion on Integrated Services Procurement (2014)
Provided a compliance opinion in relation to a multibillion-dollar services RFP process addressing issues relating to applicable trade treaty obligations and common law duties, including addressing issues of project scoping, specification bias, and material disclosures.

Provincial Oversight Body Conflict of Interest Opinion (2014)
Provided a conflict-of-interest opinion in support of an investigation relating to IT procurement practices of organization. Opinion addressed issues of unfair advantage, incumbent advantage, and bias in the public procurement process.

Provincial Government Ministry Litigation Defence Opinion (2013)
Provided a legal opinion for an intervening Ministry on a lawsuit challenging a broader public sector procurement process, which included analysis on the RFP's compliance with best practices in government procurement and resulting exposure to a judicial review challenge.

Federal Government Entity Major Project Audit Opinion (2013)
Provided a compliance opinion in support of the audit of a major multibillion-dollar federal procurement project. Opinion focused on applying the Contract A tendering law analysis to assist in the assessment of the defensibility of the government's competitive bidding process and its award of contracts to competing bidders.

Senior Level Government Litigation Defence Services (2012)
Provided an opinion and strategic legal advice to a senior level government to assist in the defence of a nine-figure lost profit claim arising out of a high-profile telecommunications tender. Worked with a team of internal government counsel, providing legal research and advice in support of the development of defence arguments in preparation for trial and during trial.

Provincial Education Ministry Legal Advice to Provincial Task Force (2011)
Delivered legal advice to a provincial task force that was mandated to provide recommendations for the implementation of open public procurement for the acquisition of student transportation services by school boards in the province. Advised on legal due diligence and accountability issues with a view to ensuring compliance with the *Broader Public Sector Procurement Directive*, *Supply Chain Code of Ethics*, *Agreement on Internal Trade*, and other common law due diligence duties.

Mid-Sized Municipal Bid Dispute Arbitration Defence Services (2011)
Provided bid dispute defence services to a mid-level municipality in connection with an arbitration dispute arising out of the tendering process for a major construction project. Advised the municipality in relation to Arbitration Act protocols, the development and defence of arguments, and the drafting of submissions in preparation for the arbitration and in support of the resolution of the dispute.

Provincial Agency Treaty Compliance Opinion (2011)
Provided a treaty compliance opinion to a provincial financial agency in relation to the scope of its open procurement obligations under national and regional trade treaties.

Ontario Legislative Hearings (2010)
Provided a deputation to the Ontario Legislature's Standing Committee on Social Policy in relation to hearings the Broader Public Sector Accountability Act, making recommendations on the creation of clear good governance guidelines and the implementation of national and international best practices to support the procurement operations of broader public sector entities.

Municipal Bid Dispute Procurement Practice Review Audit (2010)
Conducted an intensive independent legal due diligence audit of a municipality's tendering and contract management practices to assist in the preparation of a legal defence against multiple lost profit and breach of contract claims. Review included a detailed analysis of various procurement processes, interviews with key staff, and the preparation of a detailed findings and recommendations report that addressed compliance with municipal treaty, bylaw, and common law duties.

Provincial Transportation Agency Treaty Compliance Opinion (2010)
Provided a provincial transportation agency with an expedited opinion on the scope of its open procurement obligations under relevant trade treaties and procurement policies and directives in relation to a high-profile mass-transit infrastructure project.

New Brunswick Municipal Debarment Advice (2010)
Provided a legal opinion canvassing relevant case law authorities and providing specific recommendations to a New Brunswick municipality in relation to the implementation of a bidder barring policy.

Alberta Municipal Bylaw Review (2010)
Provided legal advice to an Alberta municipality to assist in updating its procurement bylaw with particular emphasis on ensuring that its direct award policies and procedures complied with the Agreement on Internal Trade.

Public Utility Construction Project (2010)
Provided expedited legal advice to a public utility regarding tender compliance issues in response to a dispute by a rejected bidder on a large construction project.

Procurement Association White papers (2009-10)
Authored Local Preference in Public Purchasing: Risks and Recommendations, in reply to the CAW's Buy Canadian Campaign, and Defending the Public Interest, in reply to an industry group criticism of public sector construction tendering practices in southern Ontario, on behalf of the Ontario Public Buyers Association.

Provincial Regulatory Agency Legal Opinion (2009)
Provided a legal opinion outlining internal trade treaty obligations applying to newly established provincial Crown corporation. Advice focused on the scope of open competition requirements and trade treaty exclusions pertaining to regional economic development.

Procurement Projects

Federal Security Operations Centre Services NRFP (2022)
Provided full project support for the design, drafting, evaluation, and contract award negotiation stages of a two-staged dialogue RFP for a new security operation centre services contract for a federal government entity.

Regional Airport Operations Dialogue RFP (2021-2022)
Provided full project support for the design, drafting, and evaluation stages of a two-staged dialogue RFP for the outsourcing of airport operations.

Ontario Municipal Tax Administration Software NRFP (2021-2022)
Provided full project support for the design, drafting, evaluation, and contract award negotiation stages of a two-staged dialogue RFP for a new municipal tax administration system.

Ontario Agency Regulatory Solution NRFP (2021-2022)
Led contract award negotiations for a two-staged dialogue RFP for a new provincial agency regulatory system for a cloud-based solution and related implementation services.

Federal Enterprise Professional Services Supply Arrangement (2021-2022)
Advised and assisted in the design and drafting of a new open framework multi-supplier roster arrangement for the provision of multiple categories of professional services that included treaty-compliant second-stage selection processes and annual refresh protocols for a federal government entity.

Ontario Municipal Care Home Development Project NRFP (2020-2022)
Provided full project support for the design, drafting, evaluation, and contract award negotiation stages of a $100 million two-staged dialogue RFP for a design-build infrastructure project for a new municipal health agency long term care home.

Provincial Health Agency Laboratory Services NRFP (2021)
Provided full project support for the design, drafting, and evaluation stages of a multibillion-dollar two-staged dialogue Negotiated RFP for a provincial health agency.

Alberta Municipal Broadband NRFP (2021)
Assisted an Alberta municipality in the negotiations of a broadband network provider agreement as part of a Negotiated RFP process.

Ontario University ERP System Negotiations Support (2021)
Assisted an Ontario university in the negotiations of a new ERP system contract.

Ontario Agency Prequalification Framework (2021)
Assisted an Ontario agency in the design and drafting of a prequalification framework arrangement to establish a roster of service providers in compliance with trade treaty open procurement standards.

New Brunswick Agency Business Analytics Platform Implementation Services RFP (2021)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a two-staged dialogue RFP process for a contract to implement a business analytics platform for a provincial agency.

New Brunswick Agency Enterprise Backup Solution NRFP (2021)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a New Brunswick provincial agency enterprise backup technology services RFP.

Provincial Agency Electric Buses, Chargers, and Infrastructure NRFP (2020-2021)
Provided full project support for the design and drafting of a two-staged dialogue RFP that included the drafting of a complex multi-phased contract architecture for the design and manufacturing of new electric buses and related physical infrastructure for a provincial agency.

Provincial Health Ministry Health Care Navigation Service NRFP (2020-2021)
Provided legal advice and support through the RFP drafting, evaluation, and contract award negotiation stages of a major technology transformation project for a provincial health ministry.

Alberta Municipal Broadband Network Provider Negotiations (2020-2021)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a two-staged dialogue RFP for a new broadband network provider arrangement.

Provincial Transportation Agency Electronic Fare Collection NRFP (2020-2021)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a two-staged dialogue RFP process for a provincial agency mass transit electronic fare collection system contract.

Federal Agency Investment Strategy NRFP (2020)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a federal strategic investment services contract.

Alberta Municipal 911 System Update Dialogue NRFP (2020)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a two-staged dialogue RFP for the procurement of a new municipal 911 system for an Alberta municipality.

Ontario Regional Municipality Broadband NRFP (2021)
Provided full project support for the design, drafting, and evaluation stages of a two-staged dialogue RFP for a new broadband network provider arrangement for an Ontario regional municipality.

Federal Agency Conference Display NRFP (2020)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a federal conference display design and development contract.

New Brunswick Agency Framework Agreement (2020)
Provided full project support for the design, drafting, evaluation, and award stages of a provincial agency Request for Supplier Qualifications – Framework Agreement multi-party services arrangement that incorporated treaty-compliant protocols for second-stage assignments and annual refresh processes.

Federal Agency Marketing Services NRFP (2020)
Provided full project support for the design, drafting, evaluation, and negotiation stages of a federal marketing services contract.

Alberta Municipal ERP System Negotiated RFP (2018-2020)
Acted as lead counsel advising a municipality in designing and drafting Negotiated RFP documents for a multi-phased ERP project and leading related contract award negotiations. Project involved multiple consulting services NRFPs to retain project support staff, as well as the main ERP system RFP. Also

provided advice and assistance in relation to the evaluation process and competitive dialogues for this series of Negotiated RFPs.

Saskatchewan Provincial Agency Engineering Roster (2019)
Designed and drafted a Request for Supplier Qualifications – Framework Agreement for a Saskatchewan provincial agency for the prequalification of engineering consulting services and second-stage selection process for ongoing province-wide work assignments, in compliance with applicable open framework trade treaty obligations.

Ontario County Housing Development Project (2019)
Provided full project support for the design, drafting, evaluation, and award stages of a municipal housing development design-build construction project.

Police Body Camera RFP (2019)
Lead counsel advising a police services board in designing, drafting, and implementing a two-stage Best and Final Offer Negotiated RFP process for the acquisition of body cameras and related could-based data processing and storage services.

University Benefits Negotiated RFP (2019)
Lead counsel advising in the design and drafting of a two-stage Best and Final Offer Negotiated RFP process for the award of a benefits contract. Provided ongoing advice in structuring and implementing the resulting evaluation process and leading the contract award negotiations for this nine-figure transaction.

School Bus Services Negotiated RFP (2019)
Lead counsel advising a school bus services consortium in designing, drafting, and implementing a Negotiated RFP process and leading a successful contract award process.

Municipal Operations Centre (2018)
Lead counsel designing and drafting a Negotiated RFP process for the award of a contract for the design and construction of a new municipal operations centre.

Provincial Agency Back Office Hosting and Deployment Services RFP (2018)
Lead counsel designing and drafting an RFP and leading the evaluation and contract negotiations process for the award of a contract for a cloud-based service provider and related consulting contract for system deployment services.

Ontario Municipal Bridge Design-Build IPD Negotiated RFP (2016-2018)
Lead counsel advising an Ontario municipality in designing, drafting, and implementing an Integrated Project Delivery ("IPD") Best and Final Offer Negotiated RFP process for bridge design and construction project. Provided ongoing project support in relation to evaluation and award process and related group evaluations and competitive dialogue stages.

Municipal Parks Registration System (2016-2018)
Lead procurement counsel on a large-scale Ontario municipal parks registration project using a Best and Final Offer Negotiated RFP for the acquisition of a cloud-based solution to replace the municipality's current recreational registration system. Led a multi-disciplinary negotiation team of over 20 members in successfully executing time-sensitive negotiations.

Health Agency Clinical Information Systems (2016-2017)
Provided fairness advisory services for a Negotiated RFP for a clinical information system. Support included advice and oversight during consensus scoring meetings and financial validation sessions, into Best and Final Offer submissions and through to final proponent selection.

Health Agency Air Ambulance Services (2016-2017)
Provided fairness advisory services on two concurrent Negotiated RFPs for aviation and medical crew services. Support included advice and oversight through RFP development, evaluator selection and briefings, evaluations, consensus scoring, and oral presentations through to final proponent selection.

Ontario Regional Municipality Maintenance Management System NRFP (2016)
Provided an RFP review, drafting assistance and project support for a flexible Negotiated RFP for an Enterprise Maintenance Management System that invited proposals for either an on-premises solution, a cloud solution, or a combination of both.

Ontario Municipal Lighting Systems NRFP (2016)
Provided strategic legal advice and contract drafting assistance for an innovative municipal lighting project to replace existing street lighting with a fully integrated centrally controlled lighting system city-wide.

Education-Sector Purchasing Group Bus Route Optimization Software BAFO NRFP (2016)
Provided strategic advice, legal review and drafting services for the planning and development of a Best and Final Offer Negotiated RFP for an externally hosted software-as-a-service bus route optimization software solution accessible to participating school boards province-wide.

Ontario Regional Municipality Combined Ambulance-Fire Station BAFO NRFP (2016)
Provided legal advice, including Negotiated RFP drafting services and related process advice, for a Best and Final Offer Negotiated RFP for the construction of a combined ambulance-fire station for a regional municipality. High-profile project was the municipality's first ever use of the two stage Best and Final Offer Negotiated RFP format for a major construction project.

Education Agency Software Project Support (2016)
Advised on all aspects of an RFP process providing legal advice and contract drafting for a software licensing RFP for a provincial-level education agency.

Ontario Regional Municipality Construction NRFP Project Support (2016)
Provided strategic advice in relation to NRFP contract award negotiations for construction of a major municipal infrastructure facility.

Utility Sector Consortium Joint Procurement Project Co-Ordination (2016)
Provided overall project support for a utility sector joint procurement initiative on behalf of multiple electrical utilities for the selection of a single service provider to service the multimillion-dollar small-business lighting upgrade project. Services including strategic design advice; RFP drafting support for two-stage Best and Final Offer Negotiated RFP format that enabled maximum contract aggregation and price improvements across the multi-institutional user base; advising on and coordinating multi-institutional consensus scoring; and negotiating and drafting multi-party framework agreement terms and conditions with the selected proponent.

Alberta Municipal Fire Halls Integrated Project Delivery (2015)
Provided legal advice and related contract negotiation and drafting services for a municipal procurement using the integrated project delivery contract model for the construction of two fire stations. Project was

one of the first of its kind in the Canadian public sector based on advanced US contract practices using a contract model developed by the American Institute of Architects.

School Board Purchasing Co-op Group Purchasing Initiative (2015)
Advised on all aspects of a school board group purchasing initiative for a province-wide natural gas supply contract.

Regional Municipal Police Headquarters BAFO NRFP (2015)
Provide legal services to support the drafting and development of two-staged Best and Final Offer Negotiated RFP for the construction of a new regional police headquarters. Legal services included extensive advice in relation to the contract award negotiation process for this major eight-figure infrastructure project.

University Purchasing Co-Operative Group Purchasing Initiative (2015)
Advised on a two-stage vendor of record/framework arrangement in relation to a broad range of commodities for a province-wide university sector purchasing cooperative.

Federal Entity Financial System Software RFP (2014)
Provided strategic advice for a federal government entity's acquisition of financial system software. Advised the project team on the design of their Negotiated RFP process and assisted in drafting an integrated proposal evaluation and contract negotiation process using an accelerated Best and Final Offer Negotiated RFP format.

Federal Health Sector Entity Sole-Sourcing Opinion for IT RFP (2014)
Provided risk assessment and recommendations regarding potential availability of sole-sourcing for specific IT project, including analysis of applicable trade treaty and common law obligations.

Provincial Agency Advice on Marketing Services Procurement (2014)
Provided strategic project advice for establishing a roster of marketing services vendors. Support included advising the project team on the structuring of a scope of services and evaluation process.

Purchasing Group Network Services RFP (2014)
Provided an expedited legal review for a multi-agency, multi-jurisdictional purchasing group using a Negotiated RFP for the procurement of shared network services.

University Consortium Group Purchasing BAFO NRFP (2014)
Provided strategic advice and drafting assistance to a university group purchasing organization in the deployment of a Best and Final Offer Negotiated RFP format for the negotiation and award of framework agreements to facilitate group purchasing across multiple acquisition categories.

Provincial Agency Software-as-a-Service Procurement (2014)
Provided strategic advice and transactional support using a Negotiated RFP to procurement software as a service for conducting automated province-wide testing. Support included assistance in drafting and reviewing the NRFP and in negotiating the IT contract.

Federal Entity Project Support on MFD Procurement (2014)
Provided strategic advice and transactional support to a federal entity using a Negotiated RFP to acquire enterprise-wise multi-function devices. Support included advising the project team in the design and structuring of the Negotiated RFP deliverables and evaluation criteria and in conducting the final contract award negotiations.

Negotiated RFP for Major Infrastructure Project (2014)
Provided strategic legal advice and drafting services for the development of a Negotiated RFP document for the retention of legal services in connection with a major infrastructure project.

Ontario School Board BAFO NRFP for School Construction Partnership (2013)
Assisted an Ontario school board in developing and issuing a Best and Final Offer Negotiated RFP for the selection of a construction partner to share facilities in a new secondary school.

Provincial Agency RFP for Education-Related Hosted Software (2013)
Assisted a provincial agency with a Best and Final Offer Negotiated RFP process for the acquisition of a major education-related hosted software solution.

Provincial Shared Services Organization RFP for Audit Services (2013)
Provided advice and development assistance in connection with the procurement of a long-term audit services provider to a governmental non-profit organization.

Provincial Agency RFP for Sponsorship Brokerage Services (2013)
Provided strategic legal advice in respect of the selection of the appropriate procurement format and expedited legal review and drafting services for the development of a Negotiated RFP document. Provided ongoing strategic legal advice in support of the evaluation and proponent selection process and the contract negotiation and award process.

Provincial Health Sector Agency Joint Solution RFP for Support Services (2013)
Provided legal review and drafting services for the development of a Joint Solution RFP for a multi-stage procurement process designed to allow for the joint development of a solution and the negotiation of a contract for the provision of provincial support services management.

Provincial Agency RFP for Customized Software-as-a-Service Solution (2012-13)
Assisted a provincial agency with the acquisition of a customized software-as-a-service solution. Provided legal review, advice, and drafting assistance in the development of a Negotiated RFP document and provided ongoing strategic legal advice and transaction services in support of the proponent selection and contract negotiation and award process.

Consortium of Regulatory Agencies Strategic Advice and RFX Review, IT Project (2011-12)
Provided strategic legal advice and RFP review services for a complex multi-party IT transformation project involving a cross-Canada consortia of regulatory agencies. Advised on compliance with open public procurement duties with a particular focus on the development and disclosure of evaluation, selection and award criteria and the structuring and use of a concurrent negotiation Best and Final Offer Negotiated RFP format.

Regional Municipal BAFO NRFP for Emergency Communications (2011-12)
Assisted a large municipality with the acquisition of a police and fire emergency communication system. Services included developing a flexible, concurrent negotiation Best and Final Offer Negotiated RFP process and providing ongoing strategic legal advice and transaction services in support of the proponent selection and contract negotiation and award process.

Ontario University Information Management System RFP (2011-12)
Provided expedited assistance to a large university for the acquisition of an information management system and related services in support of the university's high-profile multibillion-dollar fundraising campaign. Advised on the RFP drafting process for a consecutive negotiation Rank and Run Negotiated

RFP process and provided transactional support services for the negotiation and drafting of a complex multi-tiered software licensing and support agreement.

Federal, Provincial and University Consortium BAFO NRFP for Cloud Computing Infrastructure (2011-12)
Assisted in the expedited drafting and negotiation of a concurrent Best and Final Offer Negotiated RFP and resulting contract for a multimillion-dollar information technology hardware, software, and services acquisition related to the development and maintenance of high-performance cloud computing infrastructure. Provided strategic legal advice and drafting assistance throughout the multi-stage evaluation and concurrent negotiation process involving a multi-national IT conglomerate and a purchasing consortium including the Government of Canada, Government of Ontario, and several Ontario universities.

Provincial Agency Transactional Surge Control Services (2011-12)
Provided surge control services to assist a large provincial operational agency with multiple transactions. Provided advice and assistance in the drafting of RFPs for a wide variety of required services including the acquisition of architectural and consulting services for construction and renovation projects, as well as the acquisition of refrigeration equipment and related installation and maintenance services.

Provincial Regulatory Agency Strategic Advice and Transaction Support (2010-12)
Provided ongoing legal advice to a provincial agency in relation to its procurement processes and practices to help the institution ensure compliance with the Ontario *Procurement Directive*. Delivered transaction-specific advice and services in support of a broad range of discrete procurements.

Provincial Operational Agency Major Tourist Attraction RFP (2010-12)
Advised a provincial agency on a high-profile nine-figure RFP for a major international tourist attraction in relation to the due diligence standards required to administer a defensible evaluation process. Project support services included strategic legal advice, legal reviews of RFP documents and addenda, the customization of rank-and-run consecutive negotiation RFP process rules to help facilitate the negotiation and award of a complex multi-year contract, ongoing advice in relation to the evaluation process and negotiation and drafting services for the finalization and award of a complex long-term contract.

Ontario University Transactional Surge Control Services (2010-12)
Mobilized a multi-disciplinary team to provide surge control services to assist a university in processing multiple RFQs and RFPs. Provided ongoing legal services on multiple transactions while updating the institution's contract templates to ensure compliance with Ontario *Supply Chain Guidelines* and *Broader Public Sector Procurement Directive*. Transactions involved a diverse range of deliverables including high-value research equipment, facilities management services, information technology acquisitions and basic goods and services.

BC Provincial Agency IT Outsourcing Procurements (2010)
Provided ongoing legal advice, including expedited legal reviews of RFPs, to a provincial corporation in relation to a major multi-faceted information technology modernization project. Prepared Negotiated RFP frameworks to facilitate the negotiation of multiple complex outsourcing agreements with selected suppliers.

Ontario University Spectrometer RFPs (2010)
Provided legal services for two concurrent rank-and-run NRFP processes for the acquisition of multiple spectrometer units required for high-profile university research projects. Led expedited negotiations with international suppliers and drafted complex multi-tiered legal agreements as part of the selection and award process.

Mid-Sized Municipal Police Headquarters Tender (2010)
Provided an expedited legal review and related drafting services to help meet tight project timeframes for a high-profile municipal construction project.

Provincial Government Negotiated Corporate Accounting Systems RFP (2009)
Provided legal advice and legal review and drafting services for a Best and Final Offer Negotiated RFP process for the acquisition of a corporate accounting services system. Provided ongoing strategic legal advice during the selection, negotiation and contract drafting and award phases of the project.

Lottery and Gaming Corporations Gaming Management System RFP (2009)
Provided legal reviews, advice and drafting assistance in relation to a nine-figure IT project for the overhaul of central casino monitoring systems for two provincial lottery and gaming corporations. Assisted in the creation of a flexible Negotiated RFP template that enabled low risk negotiations with prospective suppliers.

Ontario Regional Municipality Waste Removal RFP (2009)
Assisted an Ontario regional municipality in the development of a nine-figure waste removal RFP. Provided strategic legal advice and assisted in the coordination a multi-disciplinary drafting process and advised regional council in relation to the evaluation and award decision.

Ontario School Board School Construction Tender (2009)
Provided a legal review and advice for the preparation of a school construction tender under expedited timeframes.

Health Agency IT Field Services Pre-Qualification (2008-09)
Advised a provincial health agency and provided related drafting services in the creation of a prequalification process to establish multiple master agreements for the provision of province-wide technology services to health care practitioners.

Provincial Government Negotiated BAFO Telecommunications NRFP (2009)
Provided strategic procurement advice to a provincial government on the creation of a Negotiated RFP for a ten-figure telecommunications project involving nine separate service categories. Drafted the process rules governing the Best and Final Offer Negotiated RFP procurement process and provided ongoing evaluation and negotiation advice.