The Procurement Office

Procurement Law Office | Procurement Training Office

Procurement Governance
Representative Transactions and Engagements

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.