

PSPP 203: Managing and Evaluation

Online, Instructor-led: 4-Weeks (Approx. 18 Hours)

This interactive 4-week course gives learners the skills and knowledge to manage contracts effectively and handle any performance or other issues that arise. Participants learn how to invoke contract remedies with minimal disruption to the contract deliverables and outcomes, and handle potential contract extensions, modifications and renewals so that they do not create policy, legal or other risks for their organization. This session also explores the key legal and practical considerations for moving towards termination and transition to a new contractor or service provider.

Participants learn how to analyze, evaluate and document contract performance, and how to ensure that file documentation provides a clear snapshot of how the contract unfolded and how any disputes or issues were resolved. The final step in the procurement and contract management cycle covers the importance of post-contract evaluation and internal team debriefing – capturing the lessons learned to incorporate them into the planning phase of the next contract or project.

Topics

- Ethical and professional conduct, managing vendor relationships
- Effective communication strategies, interest-based negotiation principles
- Invoking alternative dispute resolution (ADR) mechanisms such as mediation and arbitration
- Managing measurable contract monitoring plans to ensure goods/ services are delivered in accordance with contract
- Ongoing risk management: anticipate, track, address and monitor
- Management of agreement, progress reports, performance records
- Evaluating deliverables and outcomes against contract requirements
- Negotiating and drafting change orders, amendments and contract modifications while understanding the implications of each
- Timing of payments, release of financial guarantees, holdbacks
- Management of contract performance (positive and negative), handling performance issues, conducting root cause analysis
- Governance provisions, when and how to escalate, invoke, take corrective action
- Managing contract closure and corporate reporting
- Handling contract transition, phased termination and termination procedures
- Conducting internal team debriefing and capturing lessons learned for next procurement cycle

Learning Objectives

- Review the importance of managing vendor relationships and explore how to apply the win/win approach to your discussions
- Analyze strategies for designing a contract monitoring plan
- Demonstrate how to conduct ongoing risk assessment throughout the contract term
- Define contract governance and identify escalation provisions
- Recognize common performance issues and remedies/incentives that can be used to help address these issues
- Adopt ideas and best practices for continuous improvement through post-contract evaluation
- Define proper file retention and reporting requirements



Public Sector Procurement Program

PSPP courses are easily adapted for in-house delivery to public organizations across Canada and can be delivered online or in the classroom. For a collaborative approach, local groups can partner to host a shared training initiative.

Courses can be customized to address regional or organizational templates and nuances to ensure training is relevant and tailored to meet your needs, while preserving the integrity of the competency structure of the program.

Contact Us:

Learn more about what The Procurement School could do for your organization:

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Expected Outcomes

Upon completion of this course, participants will have the necessary knowledge and tools for managing and evaluating contracts – the final phase of the procurement and contract management cycle. They will develop techniques to effectively manage ongoing contracts and handle any issues that may arise, while sustaining positive relationships with service providers and contractors. Lessons learned through post-contract evaluation will help participants to identify areas for improvement and changes needed to processes and documents before their next procurement.

Pre-requisites

PSPP 101 (highly recommended)