

## Contract Management Program (CMP 201) - Planning

**Delivery:** Online instructor led 4 Weeks (Approx. 20 Hours)

**Course Structure:** Four weekly self-directed modules + four weekly LIVE instructor-led sessions

**Price:** \$31,920 for up to 20 learners

This comprehensive program has been developed by seasoned procurement and contracting experts with decades of experience supporting clients in the Canadian public and private sectors with procurement and contracting projects. It is designed to enhance knowledge and capacity of anyone involved in assisting clients with procurement planning and the preparation of related procurement and contracting documents. The program provides knowledge, resources and practical tools for individuals working in either the private or public sector.

### Who Should Take this Program

This program will benefit any individual whose job involves supporting Canadian clients with procurement and contracting projects including procurement and contract professionals, paralegals, lawyers, engineers, and architects.

### Topics

Corporate Governance Fundamentals, including risk management and strategic planning
Designing an organizational procurement and contracting framework
Best practices in policy drafting
Best practices in procedure drafting
Best practices in template drafting
Foundations of procurement planning
Developing the Scope of Work for: <ul style="list-style-type: none"> <li>• Goods</li> <li>• Services</li> <li>• Capital Equipment</li> <li>• Construction</li> <li>• IT Solutions</li> </ul>
Developing a procurement strategy
Fundamentals of Canada's tendering laws
Review of the tendering/RfX document
Preparing the tendering/RfX document

### Learning Objectives

- Identify the major decision-makers in any organization, from the board to the contract manager.
- Understand the role of major decision-makers.
- Understand how budgets are set and spending decisions are made in organizations.
- Understand the organizational risk management process.
- Learn the process of identifying and managing organizational risk.
- Identify the common components of a procurement and contracting framework, including the policy, procedures and templates.
- Learn best practices in policy, procedure and template drafting to optimize clarity and organizational efficiency.

- Understand the needs identification and how to make a sourcing decision.
- Understand the principles of procurement planning, including the importance of developing a strong Scope of Work (SOW) document.
- Compare and contrast SOWs for goods, services, construction, capital equipment and IT Solutions using model samples included in the course materials.
- Understand the typical approval process for SOWs.
- Understand the basics of Canada's tendering laws.
- Understand the components of a procurement strategy.
- Learn the major components of any RFP/tendering documents, using a model RFP document.
- Learn how to prepare an RFP/tendering document.

### **Program Format: Online + Weekly Face-to-Face with Experts**

This program consists of 4 weeks of self-directed learning of approximately 4 hours/week, with a weekly face-to-face group online session with a seasoned procurement and contracting expert. The weekly online session provides learners the opportunity to share their own experiences and ask questions on the materials.

### **Expected Outcomes**

Upon completion of this course, participants will have a foundational understanding of the key principles involved in procurement planning and decision making in an organization. Participants will gain basic experience and increased confidence in supporting their clients in the development or updating of policies, procedures or templates for procurements and contracting. Participants will also learn what they need to consider when planning for procurements and preparing specifications for common goods and services for use in obtaining quotes or in tendering processes. Finally, participants will gain exposure to sample SOWs for the purchase of various types of goods and services which should position participants to be a key contributor when asked to assist clients in the development of specifications for goods and services used in a future solicitation. (CMP202 will pick up where CMP201 ends and cover the solicitation and contract creation process.)

### **PRE-REQUISITES**

CMP101 Contract Management Essentials