



**Celebrating Municipal Excellence**

# 2022 Nomination Form

**Deadline:** 4:00 p.m. on Friday, November 25, 2022

Nominee Contact Information	
<b>Name of municipality/ municipalities being nominated:</b> <small>(please include the names of all partner municipalities)</small>	City of Melfort
<b>Contact Name:</b>	Adam Homes
<b>Contact role in project:</b>	City Manager
<b>Telephone #:</b>	(306) 752-5911
<b>Mailing Address:</b>	Box 2230 Melfort, SK S0E 1A0
<b>E-mail Address:</b>	a.homes@melfort.ca
<b>Name of Nominated Practice or Project:</b>	City of Melfort Procurement Project
<b>Date of Project or Practice Initiation:</b>	March 24, 2022
<b>Date of Project or Practice Completion:</b> <small>(If ongoing, please indicate)</small>	October 20, 2022
	Ongoing: <input type="checkbox"/>

Nominator Contact Information	
<b>Name:</b>	Danette Romard
<b>Organization:</b>	Colliers Project Leaders
<b>Position:</b>	Director, Infrastructure Advisory
<b>Mailing Address:</b>	Box 2230 Melfort, SK S0E 1A0
<b>Telephone #:</b>	306) 752-5911
<b>E-mail Address:</b>	a.homes@melfort.ca

***Please provide as much detail as possible. Winning practices are posted in the Best Practices Library as a reference or resource to others. Nominations that clearly outline the practice and all steps involved have a higher chance of being selected for an award.***

## **The Practice**

### **1. What issue inspired the nominated project or practice?**

Municipalities are obligated to meet local, provincial, and international requirements in their procurement practices. In 2023, the new Canadian Auditing Standard (CAS) 315 will require more robust risk identification and assessment to promote improved risk mitigation.

Like many small and mid-sized municipalities, the City of Melfort's (the City) procurement policies and procedures were written prior to the establishment of some current requirements. A lack of alignment with trade agreements and public sector obligations had the potential to expose the City to financial, contractual, and performance/outcome risks. In addition, it was recognized that consistent procurement policies, procedures and documentation are important in making sound strategic decisions that impact the community and ensuring value for money. For these reasons, the City initiated the Procurement Project to update policies and procedures and create tools and templates to improve procurement activities and deliverables.

### **2. What has this project or practice done to address the issue?**

The objectives of this project were to ultimately drive operational efficiency, establish compliance with relevant standards, and reduce risk. To do so, the City staff retained Colliers Project Leaders as an independent consultant to provide subject matter expertise in public sector procurement. The project resulted in a series of improved documentation that aligned with the City's commitments and obligations based on current policies and provincial, federal, and international trade agreements. Training was also provided to staff to create a mutual level of understanding and educate how to implement new policies and/or procedures. Addressing procurement inconsistencies has allowed the City to mitigate risks and provided them with a solid foundation of practices that impact everyday tasks.

## The Process

***This section should be the longest and most detailed part of your nomination. Include enough information, such as steps, resources accessed, and considerations to support a municipality interested in applying the same project or practice.***

3. Indicate who had a direct role in this project or practice:

- Municipal Council
- Municipal Administration
- Other

*Colliers Project Leaders*

4. What was the role of the municipal council and/or municipal staff in this project or practice?

The City staff participated in a series of meetings and interviews conducted by Colliers Project Leaders. Their input formed the basis of a Current State Review which identified specific gaps in documentation and procurement processes. They provided various documents such as a summary of on-going purchases and the City's Master Budget that supported an analysis of the City's purchasing patterns.

Adam Homes, City Manager at the City of Melfort, ultimately approved the project and confirmed completion at project close.

5. Were other groups were involved in developing this project or practice? If so, who were they and what role did they play?

The City of Saskatoon provided the City of Melfort permission to use their online procurement templates as guidelines. These documents were modified for the specific needs of the City of Melfort.

6. What resources were involved?

City Manager of City of Melfort

- Adam Homes was the City's Executive Sponsor for the project and provided project oversight, approvals and definition of the scope of work. He provided access to documents and staffing as needed throughout the project.

City of Melfort Council

- Policies and Bylaws will be presented to City Council for approval prior to full implementation.

A team from Colliers Project Leaders was directly involved in the project, including:

- Bonita Craig, Executive Lead, provided overall guidance and leadership on this project, including quality assurance and quality control of deliverables.

- Danette Romard, Project Lead, directly supported the project by ensuring all deliverables and timelines were met. She worked closely with the Procurement Subject Matter Expert to provide a Current State Review, identify gaps in documentation, assist in the development of the final documentation and provide staff training.

- Sarah Friesen, Procurement Subject Matter Expert (SME), led the development a suite of procurement documents that included Policies, Procedures, a Playbook (procedure manual), tools and templates to support a streamlined procurement workflow. Sarah's role was to align documents with the City's local, provincial, and international requirement including the Canada Free Trade Agreement (CFTA), the New West Partnership Trade Agreement (NWPTA) and the Canada-European Union Comprehensive Economic and Trade Agreement (CETA).

## 7. How was the project or practice developed?

**Project Initiation:** The City engaged Colliers Project Leaders, seeking support from an external consultant to improve and standardize its procurement practices. Colliers Project Leaders (Colliers) provided a proposal which outlined the steps to assess current state, identify gaps and agree on the scope of documentation that would be needed to meet the City's needs. Colliers demonstrated their breadth of knowledge and expertise in procurement practices across Canada that was required to deliver the documentation. Work started on the project in March 2022.

**Policy Gap Analysis:** The initial engagement began with a series of interviews with City staff who are routinely involved in various stages of procurement on behalf of the City. These interviews allowed the project team to identify existing gaps in the City's current documentation and policies. The project team also did a thorough analysis of historical purchases and budgets, which provided a high-level view of categories of items purchased. This review allowed the project team to make recommendations that were benchmarked against public procurement leading practices in order to find the optimal solution for the unique needs of the City. Following these interviews and analysis of the City's budgets, a Current State Review was developed on procurement practices and it outlined the documents that would be developed to support the completion of a Procurement Playbook, which is also known as a procedure manual. The project resulted in a full suite of improved procurement documents that include policies, procedures, tools, templates and forms that will support the procurement activities which the City generally undertakes. Although not specifically a procurement activity, a Travel Expense Policy was also developed during the course of the project.

The documents provided are based on leading public sector procurement practices and procurement-related commitments under the New West Partnership Trade

Agreement (NWPTA), the Canadian Free Trade Agreement (CFTA) and the Canada-European Union Comprehensive Economic and Trade Agreement (CETA). In the creation of the final suite of documents, the team also relied on Saskatchewan Procurement Guide, procurement documents provided by the City of Saskatoon, existing policies and bylaws for the City and City staff input related to procurement thresholds.

The City's senior staff were provided with a training session which explained the rationale and need for the suite of documents and how the documents will be used. Once the City's Council has approved the new and updated Policies and related Bylaws, the staff will implement use of the documents and procedure into everyday procurement activities. Public facing documents will be posted on the City's website.

Documents developed as part of the project:

- Revised Procurement Policy (formerly known as the Purchasing Policy)
- Revised Signing Authority Policy (formerly embedded in Administration Policy)
- Revised Travel Expense Policy (formerly known as Travel Policy)
- New Credit Card Policy
- New Competitive Procurement Playbook (Competitive Procurement Procedure Manual)
- New Non-competitive Standard Operating Procedure (SOP)
- Request for Proposal (RFP) Template (includes built in instructions)
- Request for Quotation (RFQ) Template (includes built in instructions)
- New Bid Protest Procedure
- Criteria Based Scoring Template\_Master
- Criteria Based Scoring Template\_Evaluator
- Melfort Procurement Approval Form
- Melfort Quote and Evaluation Approval Form
- Melfort Procurement Approval Form
- Melfort Non-Competitive Approval Form

## The Results

### 8. What effect did this project or practice have on the community?

In addition to supporting the City in meeting its local, provincial, federal and international obligations and reduce risks associated with procurement activities, the City anticipates it will benefit from the new practice by:

- Maximizing value
  - Generating value for the organization through formalized procurement policies and processes
- Reducing the procurement burden and increasing efficiencies
  - Standardize processes, freeing staff for more value-add activities
- Creating lasting and high performing supplier relationships
  - Implement fair, open and transparent practices

9. Was a formal evaluation done after the project or practice was completed? Please explain.

The City intends to consult with staff involved in procurement for an informal review of the tools and procedures developed, after 12 months of having implemented the new policies and procedures. The City completed a Performance Survey at the end of the project related to the consultant's performance as per ISO 9001:2015 registered Quality Management System. The survey touched on areas such as schedule, budget, deliverables, and scope.

10. Describe any challenges faced.

The pandemic and the retirement of a critical member were the most significant challenges. These challenges had an impact on the schedule. The project was broken up into four phases. After phase 2, the team realized the scope and sequence of the remaining phases needed to be adjusted. This adjustment was documented and implemented. Following Council approval, it is anticipated that there will be an adjustment period during the implementation and adoption of the new and modified practices. Additional training and reviews will be considered to support the transition to the more formal and structured procurement practices.

### Lessons Learned

11. What lessons were learned and what would you recommend doing differently?

Would add an engagement process in phase 1 with other Saskatchewan Cities to gather information on their challenges and best practices. This engagement would have been helpful and informed phase 3 and 4 deliverables.

**All nominations will be listed on the Saskatchewan Municipal Awards website as a resource for other municipalities. Be sure to include specific information.**

Please submit your completed nomination package to:

**E-mail:** [awards@municipalawards.ca](mailto:awards@municipalawards.ca) (preferred)

**Fax:** Attn: Saskatchewan Municipal Awards Program

**Mail:** Saskatchewan Urban Municipalities Association, Unit 305 – 4741 Parliament Avenue, Regina, SK S4W 0T9

**Questions?**

**Contact Stephanie Bourassa at 306-525-4318.**

***Thank you for submitting a nomination for the  
16<sup>th</sup> annual Saskatchewan Municipal Awards.***