



# **Evaluation of the Certification Program for Procurement and Materiel Management Communities in the Government of Canada**

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# Evaluation of the Certification Program for Procurement and Materiel Management Communities in the Government of Canada

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From Treasury Board of Canada Secretariat

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## Introduction

This document presents the results of an evaluation of the Certification Program for Procurement and Materiel Management Communities in the Government of Canada, which is managed by the Acquired Services and Assets Sector Communities Management Office within the Office of the Comptroller General (OCG) at the Treasury Board of Canada Secretariat (TBS). The evaluation was carried out by the TBS (Treasury Board of Canada Secretariat) Internal Audit and Evaluation Bureau (IAEB), with the assistance of Goss Gilroy Inc.

The evaluation:

- was conducted in accordance with the Treasury Board *Policy on Results*
- assessed the relevance and effectiveness of the program
- was conducted in 2018
- covered the last 5 fiscal years (2013 to 2014 until 2017 to 2018)
- included documents that date back to 2006 when the program was developed

## Results at a glance

1. The evidence demonstrates that there is an ongoing need to professionalize the procurement and materiel management communities. The program objective is aligned with federal government priorities and with TBS (Treasury Board of Canada Secretariat)'s role, although alignment between the program and procurement modernization could be improved by, for example, providing the complex skills and competencies needed for professionalization.
2. The program strengthens participants' procurement and materiel management capacity to some extent; however, the program does not add value to senior-level procurement and materiel management specialists. Issues in program design, delivery and administration present barriers to program participation and the achievement of program outcomes. In addition to issues with the candidate achievement record process, participants are deterred from pursuing or completing the program due to a lack of:
  - available courses
  - training in complex procurement and materiel management
  - courses in strategic thinking
3. The functional communities of procurement and materiel management are meeting the business needs of the Government of Canada only to some extent.
4. The program does not appear to contribute to the recruitment and retention of functional community members.

Appendix A provides an overview of the certification program and the associated findings of the evaluation.

## About the certification program

## ▼ In this section

- Highlights of the certification program
- Background of the certification program
- Structure of the certification program
- Governance: roles and responsibilities
- Champion, the Comptroller General of Canada
- Treasury Board Advisory Committee on Contracting
- Procurement and Materiel Management Advisory Committee
- Certification Program Working Group
- Objectives and design of the certification program
- Expected outcomes

The goal of procurement modernization is to achieve a procurement system that:

- is accessible
- provides value for money
- advances the government's socio-economic objectives
- simplifies the procurement system for suppliers and client departments
- delivers better results for Canadians

Building a modern procurement process and a professional workforce are key pillars of procurement modernization.

## Highlights of the certification program

The program supports Government of Canada employees who are responsible for procurement and materiel management. The program is available to more than 4,000 <sup>1</sup> procurement and materiel management

specialists, and thus it has an important role to play in modernizing procurement.

Federal procurement is valued between \$19 and \$20 billion annually, which represents 14% of Canada's gross domestic product.<sup>2</sup>

The legislative, regulatory and policy framework of Canada's federal procurement and materiel management regime includes:

- 15 acts of Parliament
- more than 35 policies
- various trade agreements, statutes and regulations, departmental policies, duties, rules and processes

Procurement modernization and e-procurement were both priorities in Budget 2018 and in the mandate letters for the Minister of Public Services and Procurement Canada (PSPC) and the President of Treasury Board. Overall, the program has had 1826 registered participants and only 108 (6%) graduates.

## **Background of the certification program**

A 2002 discussion paper on "the establishment of professional certification for materiel, supply and real property professionals in the federal government"<sup>3</sup> concluded that:

- a certification program is "very achievable"
- the work to date to develop a training curriculum is a solid base for establishing the core competencies required in a certification program
- there are a number of viable options for implementing certification, each option depends on the objectives of the government and the financial resources available to support these objectives

Based on these conclusions, the certification program, which was created in response to the *Federal Accountability Action Plan, April 2006*, needs to “provide accreditation and training for procurement officers.” <sup>4</sup> The initial goals of the program were to:

- raise the level of professionalism in the procurement and materiel management communities
- recognize that the communities form a knowledge-based profession

The program is subject to the *Directive on the Administration of Required Training* and the *Policy on Learning, Training, and Development*.

## **Structure of the certification program**

The program has the following stakeholders:

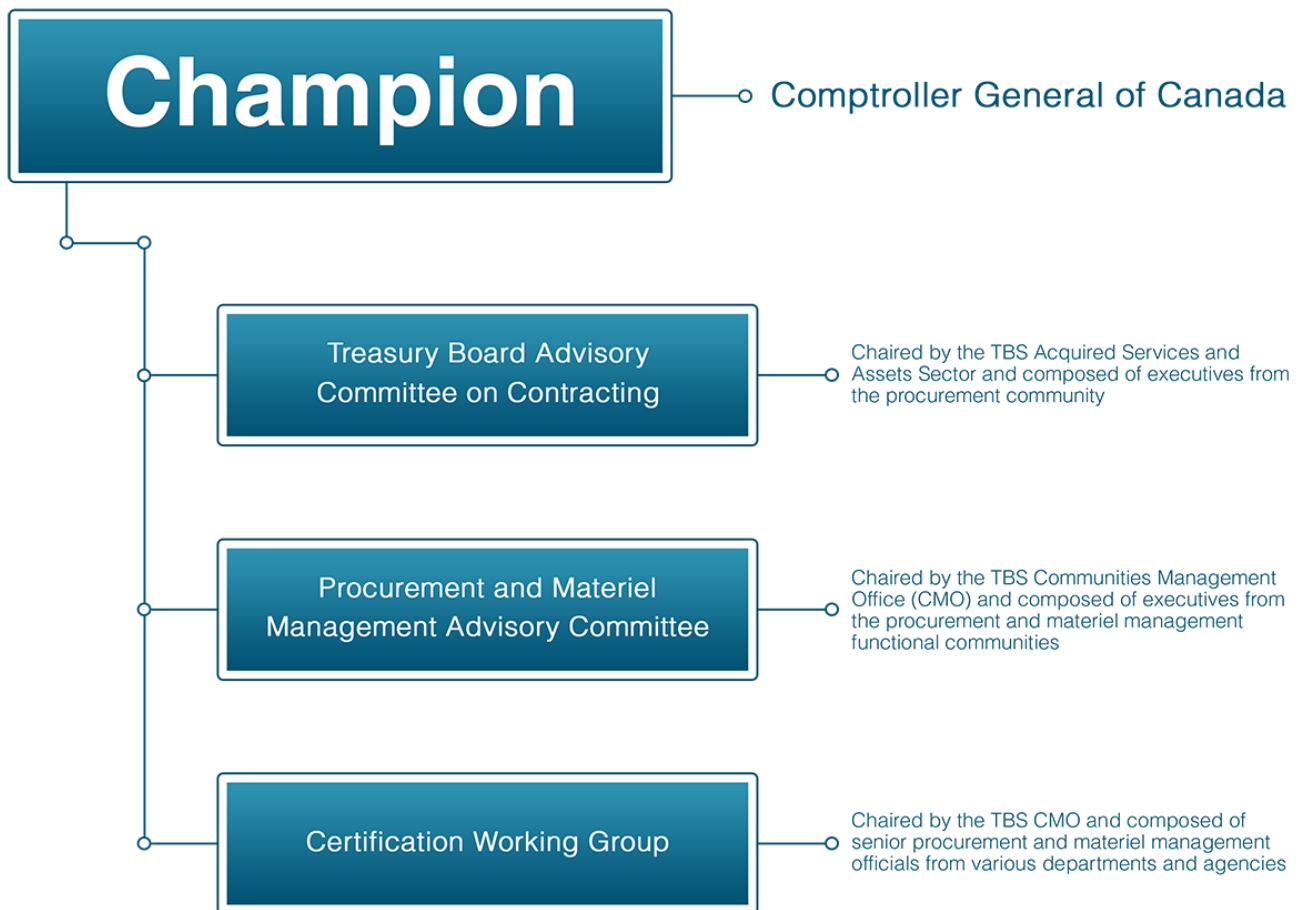
1. TBS (Treasury Board of Canada Secretariat)’s Procurement, Materiel Management and Real Property Communities Management Office (PMMRP CMO) manages the program and “provides strategic direction and central leadership for the collaborative development and implementation of strategies, programmes and initiatives to support capacity building, community development and the professional recognition of the Federal Government Procurement, Materiel Management and Real Property Communities.” <sup>5</sup>
2. PSPC (Public Services and Procurement Canada), represented by the Canadian General Standards Board (CGSB), administers the program through a memorandum of understanding (MOU) with TBS (Treasury Board of Canada Secretariat). A PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board) panel composed of procurement and materiel management experts reviews the functional competencies.



3. TBS (Treasury Board of Canada Secretariat) also consults with the Integrated Services Branch, Professional Training and Development Division of PSPC (Public Services and Procurement Canada) to determine the equivalency of courses between development programs and the certification program.
4. Although the Canada School of Public Service (CSPS) is the official training provider, PSPC (Public Services and Procurement Canada) is exclusively responsible for providing 3 courses:
  - 1 course in Level I procurement
  - 2 courses in Level II procurement
5. The Public Service Commission of Canada (PSC) provides assessment services and evaluates the core competencies of participants through an MOU (Memorandum of understanding) between TBS (Treasury Board of Canada Secretariat) and the Personal Psychology Centre of the PSC (Public Service Commission of Canada).

## **Governance: roles and responsibilities**

### **Figure 1: governance of the Certification Program for Procurement and Materiel Management Communities in the Government of Canada**



### ▼ Figure 1 - Text version

Figure 1 shows the governance of the certification program as a pyramid with 4 levels on the left and a description of each level on the right. The 4 levels of the pyramid and the accompanying descriptions are:

- Champion, which is described as the Comptroller General of Canada
- Treasury Board Advisory Committee on Contracting, which is described as chaired by the Treasury Board of Canada Secretariat Acquired Services and Assets Sector and composed of executives from the procurement community

- Procurement and Materiel Management Advisory Committee, which is described as chaired by the Treasury Board of Canada Secretariat Communities Management Office and composed of executives from the procurement and materiel management functional communities
- Certification Working Group, which is described as chaired by the Treasury Board of Canada Secretariat Communities Management Office and composed of senior procurement and materiel management officials from various departments and agencies

## **Champion, the Comptroller General of Canada**

The Comptroller General of Canada is responsible for providing functional direction and government-wide assurance for procurement and materiel management. The Comptroller General, through PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office), supports the procurement and materiel management communities by:

- maintaining and building the professionalism of the communities through recruitment and development activities
- advocating for the communities and representing their interests at senior-level executive forums
- gathering stakeholder support

## **Treasury Board Advisory Committee on Contracting**

Treasury Board Advisory Committee on Contracting considers matters involving the form and procedures of government contracting and the policy and guidelines on contracting.

# **Procurement and Materiel Management Advisory Committee**

The committee:

- provides a challenge role to the strategies and initiatives brought forward that affect the structure and funding of the communities
- considers recommendations from the PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) and working groups

## **Certification Program Working Group**

The working group:

- is used as a platform to discuss:
  - ongoing issues with the program
  - potential improvements and program modifications
- considers or develops specific initiatives to enhance the program
- brings forward issues for consideration to the Procurement and Materiel Management Advisory Committee

## **Objectives and design of the certification program**

The certification program aims to strengthen and professionalize the procurement and materiel management communities so that:

- they contribute to the effective management of assets and acquired services in the Government of Canada
- they are qualified and able to contribute informed advice on procurement strategies

The program provides both core and function-specific knowledge and skills that lead to better life-cycle management of the federal government's assets. It targets procurement and materiel management employees at all

levels, from entry-level to senior executives.

The program is not mandatory and offers 3 professional designations:

- Certified Federal Specialist in Procurement, Level I, which is certification for junior procurement specialists
- Certified Federal Specialist in Procurement, Level II, which is certification for senior procurement specialists
- Certified Federal Specialist in Materiel Management, Level I, which is certification for specialists in materiel management

The first 2 designations are based on the 2014 Federal Government Procurement Communities Competency Suite and the third is based on the 2014 Federal Government Materiel Management Communities Competency <sup>6</sup> Suite.

## **Expected outcomes**

The expected outcomes of the program, as shown in the logic model in Appendix B, are as follows:

### **Immediate**

1. Participants strengthen their procurement and materiel management capacity (knowledge, skills and competencies)
2. Participants understand the complex procurement and materiel management environment
3. The certification program adds value to the careers of functional community members who participate in the program
4. Functional communities are aware of, and senior managers support, the certification program

### **Intermediate**

1. Functional community specialists meet the business needs of the Government of Canada
2. Departments and agencies attract and retain functional community specialists

## **Long-term**

1. Functional communities contribute to the effective and strategic management of assets and acquired services in the Government of Canada

The PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) costs for the program between the 2015 to 2016 fiscal year and the 2018 to 2019 fiscal year are shown in Appendix C.

## **Evaluation methodology and scope**

The evaluation assessed the program's relevance and performance (effectiveness and efficiency) by using multiple lines of evidence in proportion to the program's risk and materiality. A theory of change was elaborated with the Acquired Services and Assets Sector Communities Management Office to identify:

- the outcomes of the program
- the assumptions or considerations needed for the desired results to occur

The evaluation assessed the extent to which the immediate and intermediate outcomes of the program have been achieved.

Appendix D provides a detailed description of the methodology. The lines of evidence included:

- a document review (including special studies, briefings and a human resources strategy)
- a review of administrative data
- 44 key informant interviews
- an online survey of the procurement and materiel management employees (1032 responses)
- 2 focus groups with 13 clients of procurement and materiel management

The evaluation did not assess the program's learning components, that is, the appropriateness of the curricula and competencies.

## Limitations of the evaluation

The survey population was derived through members of the Procurement and Materiel Management Advisory Committee because it included more than 90% of the communities. However, it did not include small departments. Evaluators mitigated this limitation by reaching out to small organizations, 7 of which participated in the survey.

## Relevance

### ▼ In this section

- Findings: ongoing need for the program
- Findings: alignment with priorities, roles and responsibilities
- Findings: development programs for procurement and materiel management

**Conclusion:** The evidence demonstrates that there is an ongoing need to professionalize the procurement and materiel management communities in the Government of Canada, which is supported by the certification program.

The evaluation found that the program is aligned with federal government priorities and with the role of TBS (Treasury Board of Canada Secretariat). However, the evaluation also found that the program's alignment with procurement modernization could be improved.

## **Findings: ongoing need for the program**

**All lines of evidence are consistent in showing that there is a need for the program.**

The documentation review indicates that in its role as the employer, TBS (Treasury Board of Canada Secretariat) aims to make the federal public service a model workplace where skilled workers are trained and motivated to serve Canadians.

Certification or licensure is a common attribute of a profession. It raises the professionalism of the community, recognizes a community as a qualified and knowledge-based profession, and provides value by ensuring that employees have the required foundational skills.

Most interviewees and almost half of survey respondents agreed that certification can promote standardization across the Government of Canada by providing minimum standard criteria (competencies, knowledge and education) for functional communities.

Only 48% of survey respondents think that certification is a valid requirement for the communities. Some respondents think that certification should be voluntary.



The document review shows there is a need to professionalize the community. An objective of modern comptrollership and procurement modernization is to improve the capacity to deliver complex procurement.

The *Directive on the Administration of Required Training* lends support to the certification program as a valid requirement for the procurement and materiel management communities.

One of the OECD (Organisation for Economic Co-operation and Development) recommendations for effective implementation of public procurement reform is to “develop a procurement workforce with the capacity to continually deliver value for money efficiently and effectively.”

### **Findings: alignment with priorities, roles and responsibilities**

All lines of evidence show that the objectives of the program are aligned with the objectives stated under “Better Government for Canadians” in Budget 2016, which committed to strengthening the public service in order to ensure that it is innovative, agile, collaborative and high-performing. In addition, the role of TBS (Treasury Board of Canada Secretariat) as enabler involves helping organizations improve management performance and program results.

The documentation shows that capacity building is a component of both procurement modernization and the renewed policy suite for Assets and Acquired Services. However, the document review and most interviewees confirmed that the program is not yet aligned with procurement modernization and the modern approach to comptrollership. The evaluation team verified that the program is based on the 2014 core and functional competencies for procurement and materiel management, which emphasize a transaction-based approach rather than a more tactical and strategic one.<sup>7</sup>

In October 2018, the PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) issued the new Government of Canada Procurement Community Competencies, which include a set of 5 technical competencies. The program intends to implement them, pending the results of this evaluation.

While efforts are being made outside the program to advance the modernization of procurement,<sup>8</sup> some interviewees agreed that the program has not kept pace. Procurement and materiel management are changing with analytics, agile practices, digitization, and new evaluation technologies and tools being used to deliver results. Moving to more strategic thinking would:

- imply a culture change in the way procurement is done
- indicate how the community needs to be supported

## **Findings: development programs for procurement and materiel management**

The evidence shows that the certification program complements development programs established in a few large departments and agencies to recruit and develop entry-level employees in the purchasing and supply (PG)<sup>9</sup> group. The evaluation found that there is no formal development program in the Government of Canada for the procurement and materiel management communities.

The document review and interviews show that, due to operational requirements, a few departments and agencies that manage complex procurement have created developmental programs to recruit, develop and retain purchasing and supply specialists. These programs develop candidates to the PG-04 level. PMMRP CMO (Procurement, Materiel

Management and Real Property Communities Management Office) has worked with these departments on components, such as course equivalencies and exams, in an effort to reduce duplication.

The document review and interviews show that the certification program is a component of the Intern Officer Development Program at PSPC (Public Services and Procurement Canada) and of the Purchase and Supply Development Program at Global Affairs Canada. The program is aligned with the Materiel Acquisition and Support Officer Development Program for the Procurement Group at National Defence and participation in the program is encouraged.

## Performance

### ▼ In this section

- Management and administration
- Design and delivery.

### Management and administration

#### Conclusion: management and administration

The evidence shows that the program's structure (organizational structure, roles, leadership and mechanisms) needs improvement. The evidence also shows a need to rethink how to effectively and efficiently assess competencies, which may mean significantly improving the assessment of the candidate achievement records (CARs). The level of investment and leadership has not allowed the program to keep pace with other functional communities in comptrollership.

**Findings:** A few interviewees stated that the certification program lacks a strong vision and needs to professionalize to support the continued development of the procurement and materiel management communities. Although improvements have occurred, the lack of investment and adherence to program administration requirements (for example, response times to enrollees) has put the integrity of the program at risk. According to TBS (Treasury Board of Canada Secretariat) key informants, it is difficult to coordinate the program's stakeholders (PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board), CSPS (Canada School of Public Service), PSC (Public Service Commission of Canada) and PSPC (Public Services and Procurement Canada)).

CSPS (Canada School of Public Service)'s mandate is to provide core and common training. It does not have the authority to provide advanced training. CSPS (Canada School of Public Service) recently changed the certification program's curriculum and how the program is delivered, moving from in-class training to online training. As part of these changes, some courses were retired and not replaced (for example, C279, G243, T008), other courses were redesigned, and some courses are being developed. These courses are essential to certification, which means that the program cannot offer a complete curriculum to its learners, and participants cannot complete the required training. This creates frustration and increases the estimated time needed for certification.

PSPC (Public Services and Procurement Canada) is the sole provider of 3 of the program's required courses. Interviewees indicated that this presents a challenge since PSPC (Public Services and Procurement Canada) employees have priority for those courses, which limits access to those courses for other employees.

PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board) is the administrator of the program and it:

- maintains the database of candidate files
- performs registrar duties (such as registering students, deciding on course equivalencies, holding exams)
- administers review panels

The document review shows that resourcing issues at PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board) have led to significant delays in:

- reviewing CARs (The candidate achievement records)
- providing feedback to participants or answering their questions

To accelerate the review of CARs (The candidate achievement records), TBS (Treasury Board of Canada Secretariat) engaged the PSC (Public Service Commission of Canada) in 2018 to help assess core competencies, which helped shorten the CAR reviews.

Some interviewees believe that there are gaps in:

- clearly communicating the requirements of CARs (The candidate achievement records) and changes in the program
- providing feedback on results

Most interviewees and 34% of survey respondents enrolled in the certification program identified clear communication of the CARs (The candidate achievement records) as the main barrier to the success of the program. The process of reviewing CARs (The candidate achievement records) is not considered effective.

## **Design and delivery**

## Conclusion: design

The evaluation shows that the design of the certification program is hampering the achievement of its expected outcomes.

**Findings:** According to the document review, the program was designed to provide procurement and materiel specialists with general knowledge. Documentary evidence revealed that the program was not initially intended to move participants along a formal career path toward certification, given that it was voluntary and did not actively recruit participants via incentives such as promotions. According to key informants, there is an increasing need to formalize the program so that it offers career building and professionalization. Such a redesign would bring the procurement and materiel management communities in line with how other functional communities are professionalizing.

The document review shows that some participants face challenges meeting the experience requirements of the CAR because of the type of procurement work they perform (for example, non-operational procurement <sup>10</sup>). Requirements for CARs (The candidate achievement records) have not been aligned to:

- reflect the changes in government procurement (such as new procurement systems, processes or tools)
- consider that procurement is a multidisciplinary function composed of operational and non-operational procurement

Some interviewees who indicated that they were not interested in the program stated that the program is not useful for their work.

The certification program curriculum reflects the competencies found in the 2014 Federal Government Materiel Management Competency Suite and the 2014 Federal Government Procurement Competency Suite (see Table E1

in Appendix E).

According to interviewees and the document review, the 2014 procurement competencies do not meet the needs of the community because they focus on process rather than on strategic thinking. Moreover, adding risk management to the curriculum would be beneficial because risk management reflects changes in the business environment of government procurement and innovation. The 2018 competencies (see Table E2 in Appendix E):

- improved language and usability
- expanded proficiency levels
- added technical competencies that focus on negotiations, project management, risk management, data analytics and business acumen

### **Conclusion: delivery**

All lines of evidence show that the program delivery model is not meeting the needs of TBS (Treasury Board of Canada Secretariat), PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office), program partners, and stakeholders in terms of training and review of competencies. The way that the program is delivered needs to be significantly strengthened.

**Findings:** Most interviewees cited the lack of available courses and the inability to choose the language in which the course was delivered as obstacles to completing the program. These obstacles:

- result in delays in program completion
- create frustration
- reduce active participation in the program

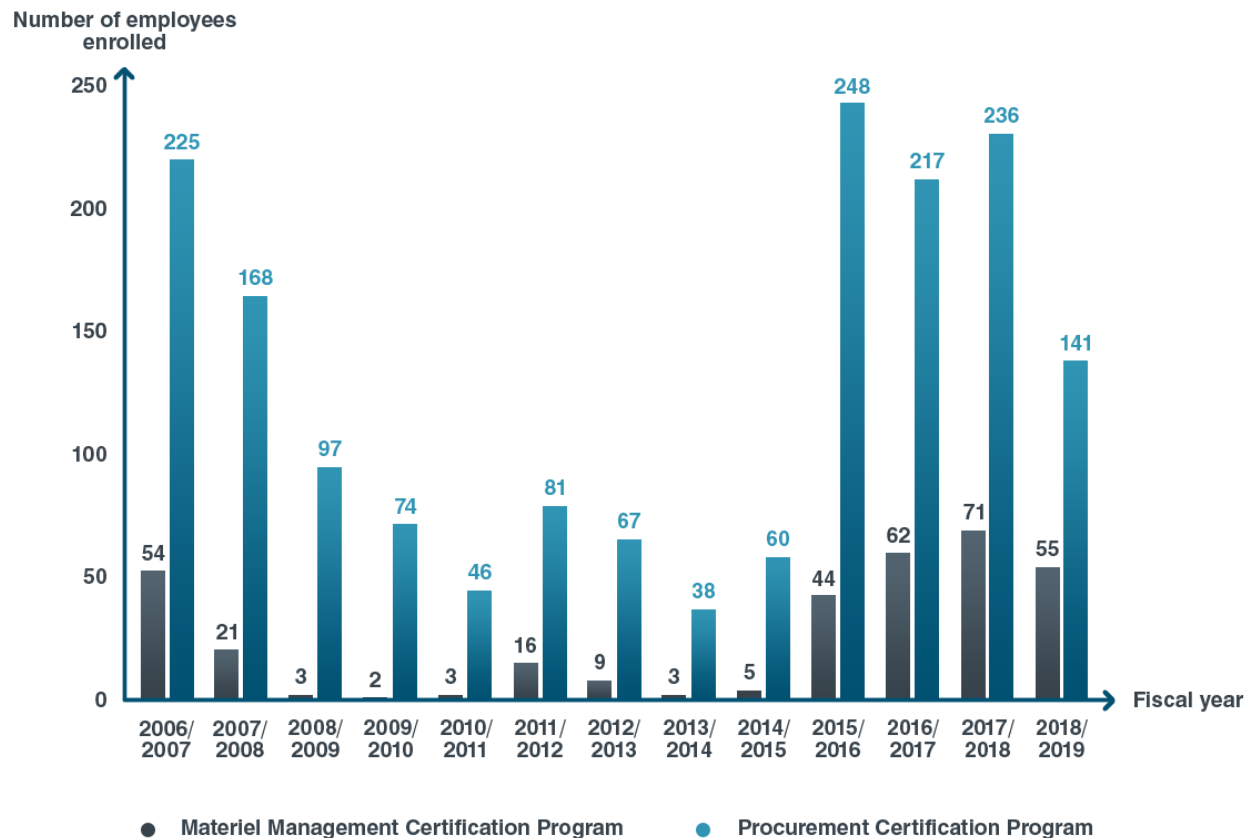
For instance, based on course activity in the last 2 years, only 375 active participants have taken a course or registered for an equivalency. Similarly, survey results show that:

- some participants have been enrolled in the certification program since 2006, even though the program is supposed to take only 3 to 4 years to complete
- 78% of the participants who have been enrolled since 2006 are enrolled in Level I
- less than half of the participants have completed the training requirements
- only a few of the participants have completed their CARs (The candidate achievement records)
- according to administrative data, between the 2006 to 2007 fiscal year and the 2018 to 2019 fiscal year, 1,826 employees were enrolled in the program (see Figure 2), but only 108 participants were certified
- since 2006, only 5.9% of those enrolled have been certified

In the 2015 to 2016 fiscal year, the highest number of enrolments were reported since the program's launch. The increase is attributed to the inclusion of questions about the certification program in the Management Accountability Framework and increased communication and outreach efforts by the PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office).

**Figure 2: trends in enrolment in the certification program between 2006 to 2007 and 2018 to 2019**





### ▼ Figure 2 - Text version

Figure 2 is a clustered column chart that shows the number of employees enrolled in the materiel management and procurement certification programs between the 2006 to 2007 fiscal year and the 2018 to 2019 fiscal year.

Fiscal year	Number of employees enrolled in the materiel management certification program	Number of employees enrolled in the procurement certification program
2006 to 2007	54	225

<b>Fiscal year</b>	<b>Number of employees enrolled in the materiel management certification program</b>	<b>Number of employees enrolled in the procurement certification program</b>
<b>2007 to 2008</b>	21	168
<b>2008 to 2009</b>	3	97
<b>2009 to 2010</b>	2	74
<b>2010 to 2011</b>	3	46
<b>2011 to 2012</b>	16	81
<b>2012 to 2013</b>	9	67
<b>2013 to 2014</b>	3	38
<b>2014 to 2015</b>	5	60
<b>2015 to 2016</b>	44	248

<b>Fiscal year</b>	<b>Number of employees enrolled in the materiel management certification program</b>	<b>Number of employees enrolled in the procurement certification program</b>
<b>2016 to 2017</b>	62	217
<b>2017 to 2018</b>	71	236
<b>2018 to 2019</b>	55	141

Source: administrative data, PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board), 2018 to 2019 Canadian General Standards Statistical Report

Despite the increase in enrolments in recent fiscal years, administrative data show consistently low completion rates, which is one of the program's most critical issues. As of February 2019, 102 participants had been certified since the start of the program (see Table 1). Approximately 42.5% of participants who have received certification were certified between 2017 and 2019.

Six employees have obtained Level I Certification of Advanced Standing as a Certified Federal Specialist in Procurement as of the program's launch.

**Table 1: number of employees certified since 2006 according to type of certification**

<b>Type of certification</b>	<b>Number of employees certified</b>
<b>Certified federal specialist in procurement: Level I</b>	90
<b>Certification of advanced standing as a certified federal specialist in procurement: Level I</b>	6
<b>Certified federal specialist in materiel management: Level I</b>	9
<b>Certified federal specialist in procurement: Level II</b>	3
Source: statistics about <u>certified personnel</u> from <u>PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board)</u>	

## Immediate outcomes

### ▼ In this section

- Expected outcome: participants strengthen their procurement and materiel management capacity.
- Expected outcome: participants understand the complex procurement and materiel management environment
- Expected outcome: the certification program adds value to the careers of functional community members who participate in the program
- Expected outcome: functional communities are aware of, and senior managers support, the certification program
- Awareness
- Procurement community managers

## **Expected outcome: participants strengthen <sup>11</sup> their procurement and materiel management capacity**

**Conclusion:** All lines of evidence show that this outcome has been achieved to some extent. Participants have increased their basic knowledge (although the improvement is only somewhat due to the training courses). However, there needs to be a focus on strategic thinking, complex procurement and interpersonal skills.

**Findings:** The document review shows that despite improvements to the certification program, there are still capacity issues in the procurement community.

Furthermore, the following was noted during the document review:

- a lack of knowledge and experience in the procurement and materiel management communities
- challenges in recruitment and retention of procurement and materiel management personnel
- the lack of a government-wide approach for developing and managing the talent of procurement specialists

The survey and interview results were not consistent with each other. A majority of survey respondents (58%) who are enrolled in the program agree that the program in its current form strengthens their knowledge and skills. However, most interviewees think that only junior employees benefit from the program.

There is evidence that the certification program increases participants' basic knowledge (such as their knowledge of legal authorities), but the data show that the program does not address how to solve complex problems in procurement and materiel management nor does the program include hands-on training to improve strategic thinking. The curriculum of the program does not cover:

- the strategic advisor role
- the concept of supply chain management
- the management of complex procurement

A few interviewees also said that training is neither well supported nor available. For example, the course “Writing in Clear and Concise Language” has been retired <sup>12</sup> even though it provides training in a key skill and its absence is a concern for interviewees. Another example is a course in project management in procurement that was only offered once as a pilot.

### **Expected outcome: participants understand the complex procurement and materiel management environment**

**Conclusion:** The evidence shows that the program does not equip participants to understand and effectively navigate the complex procurement environment in the Government of Canada.

**Findings:** According to interviewees, complex procurement and materiel management varies by departmental contract authority. Therefore, in order to gain experience in this area, many specialists have to transfer to a large department. The departments and agencies that have the most complex projects are PSPC (Public Services and Procurement Canada), Shared Services Canada and National Defence.

The document review, survey and interview results indicated that the program does not necessarily provide adequate training in complex procurement. Only 47% of survey respondents agreed that they have better skills to take on more complex assignments as a result of training.

Focus group discussions with procurement clients indicated that there is a lack of capacity in the procurement and materiel management communities with respect to soft skills, specifically in navigating the Government of Canada environment. Clients felt that, in today’s

environment, key elements to successful procurement are effective communication and client relationships in order to obtain appropriate information and have a deeper understanding of business goals.

Key informants indicated that none of the current courses deal with complex procurement or complex issues and this contention was verified by the evaluators. For example, the “Complex Procurement” course (PSPC (Public Services and Procurement Canada) 02225) has been under development for some time. This gap was also observed by some CAR reviewers. To help employees broaden their expertise in complex procurement, some large departments and agencies support employees who wish to take university courses and programs.

The document review shows that the Office of the Procurement Ombudsman raised issues about the experience or knowledge of the procurement community in its annual reports. It was mentioned that federal organizations “do not have sufficient procurement staff or have staff that do not have the experience or knowledge needed to tackle the volume and complexity of federal procurement in a way that is fair, open and transparent.” <sup>13</sup>

### **Expected outcome: the certification program adds value to the careers of functional community members who participate in the program**

**Conclusion:** All lines of evidence show that the program only adds value to the career paths of procurement and materiel management specialists to some degree.

**Findings:** The document review shows that there is no clear government-wide career path or roadmap for the professional development of procurement and materiel management specialists. The program provides

baseline knowledge and is useful largely for entry-level positions. Both the document review and interviews show that a few large departments and agencies are using university programs to train senior-level procurement and materiel management specialists and managers.

Many (49%) survey respondents agreed that the program is recognized by the Government of Canada, although the interviews indicated that not all senior managers are supportive. Among managers, the relevance of the program declines after employees have a few years of experience.

Most key informants indicated the following disincentives to certification, which may be the main reasons why 34% of all survey respondents did not see value in certification:

1. Certification does not seem to be a priority for hiring managers; certification appears only as an asset criteria in some job postings.
2. Certification is not mandatory for those working in procurement and materiel management and does not result in promotion.
3. The program is not comparable to a private industry designation. A private industry designation includes a third-party endorsement (which was initially provided by the PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board)), post-secondary requirements, and a maintenance process.

Some interviewees indicated that development programs (for example, the Intern Officer Development Program) within departments and agencies helped to show employees a career path and retain entry-level employees. When asked if certification can be used as a career tool for professional development, most key informants and most (57%) of the survey respondents agreed.



Most survey respondents indicated that they would be more likely to pursue certification if:

- CARs (The candidate achievement records) were better managed (52%)
- courses were more readily available (63%)
- courses were more often available in their regions (47%)
- the program was a requirement for promotion (60%)

### **Expected outcome: functional communities are aware of, and senior managers support, the certification program**

**Conclusion:** Functional communities are aware of the program to some extent, and senior manager support varies across the Government of Canada.

### **Awareness**

Though all survey respondents indicated that they are aware of the certification program, the majority (62%) agreed that the demands and pressures on their current job limit their ability to participate in it. This was confirmed by most key informants who also believe that the communities are aware of the program. However, it was recognized that more awareness is needed in the regions and in small departments and agencies.

### **Procurement community managers**

There were mixed views on management's support of the program. Some key informants believe managers have been supportive by:

- promoting the program
- providing the resources needed for completing the program

- embedding the program in employee performance management agreements

Others believe there is no buy-in from middle management and that there is support in principle but not in practice.

On the other hand, a majority of survey respondents (58%), many of whom were already enrolled in the program, agreed that their management supports their pursuit and completion of certification.

The document review showed that procurement and materiel management managers are short-staffed and feeling overwhelmed, making it difficult for them to support a program that is not mandatory.

## Intermediate outcomes

### ▼ In this section

- Expected outcome: functional community specialists meet the business needs of the Government of Canada
- Expected outcome: departments and agencies attract and retain functional community specialists

### **Expected outcome: functional community specialists meet the business needs of the Government of Canada**

**Conclusion:** All lines of evidence show that procurement and materiel management specialists only meet the business needs of the Government of Canada to some extent.

**Findings:** The document review shows that there is a lack of capacity in procurement to meet the business needs of the government. In the Annual Report 2016 to 2017 from the Office of the Procurement Ombudsman, the

lack of capacity among procurement staff in the Government of Canada was cited as:

- a reason for delays during various stages of the procurement process
- the possible cause of an increasing reliance on non-specialists to undertake some procurements

Moreover, the report stated that “the lack of capacity results in experienced and knowledgeable procurement specialists being highly sought after, with federal organizations routinely poaching staff from one-another.”

Even though half (50%) of the survey respondents who are enrolled in the program agreed that they have a better understanding of the business needs of the Government of Canada, most key informants believe that procurement and materiel management specialists do not meet the business needs of the Government of Canada because not all of them are equipped with the skills and abilities needed to provide strategic advice.

Most interviewees said that the focus of the procurement and materiel management function is changing, and there is a need to move from a transactional, risk-averse approach to an agile <sup>14</sup> process (outcome-based procurement and the ability to negotiate with complex industries). But procurement and materiel management specialists are still trained to use procedures and rules. Interviewees stated that procurement specialists are like a fish out of the water in the new federal environment. In some cases, they felt that procurement and materiel management specialists do not understand how their daily tasks tie into the strategy or priorities of their department and the government.

In an effort to meet government business needs, TBS (Treasury Board of Canada Secretariat):

- has linked investment planning, project management, materiel management and real property to procurement
- has updated the policy suite in procurement
- is considering establishing procurement leadership within organizations (piloting the chief procurement officer role in departments to support deputy heads)

PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) is also increasing collaboration with departments and agencies on how to address the need for professionalization.

### **Expected outcome: departments and agencies attract and retain functional community specialists**

**Conclusion:** The program does not appear to contribute to attracting or retaining functional community specialists.

**Findings:** All evidence shows that most departments and agencies face challenges attracting employees to the procurement and materiel management profession. Indeed, some members of those communities are leaving for other functions. A key concern is the retention of experienced employees above the PG-04 level.

Only a third (34%) of survey respondents believe that having a certification program helps retain specialists. The most common challenges mentioned by interviewees to attracting and retaining procurement specialists are:

- a lack of recognition as a profession, particularly among post-secondary graduates and the private sector procurement community
- salary differences with the private sector
- work requirements, such as language and security
- a poorly defined government-wide career path

Most departments and agencies attract specialists by offering desirable work environments, such as flexible work arrangements, work-life balance, training and mentoring. Some use co-op programs and the Federal Student Work Experience Program to hire students from post-secondary supply chain management programs. A few large departments and agencies have development programs for entry-level positions (such as the Intern Officer Development Program) or have taken on Intern Officer Development Program candidates from PSPC (Public Services and Procurement Canada).

Most key informants commented on the lack of a government-wide human resources strategy to attract and retain employees in procurement.

Departments and agencies have had a more reactive focus and have run staffing processes when they needed to fill vacancies rather than planning to ensure that they have the capacity that they need. More recently, PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) developed a government-wide human resources strategy for procurement (a shorter version of which was published on GCpedia) and ran collective competitions for PG-02, PG-04, PG-05 and PG-06 positions.

## Alternatives to the current program design

**Conclusion:** The interviews, documentation and literature review indicated other ways to deliver the certification program, although a thorough assessment of these was outside the scope of the evaluation.

One option is adopting a graduated approach to development that includes certifications at different levels (for example, progression to PG-06). This would ensure that employees have the required knowledge by level and

would allow participants to be assessed more uniformly (generalist to specialist to strategic specialist). The graduated levels could be described as follows:

- Levels 1 and 2: general procurement certification to develop a baseline in technical knowledge and competencies. Certification at this level would be equivalent to PG-01 to PG-03.
- Level 3: a generalist may obtain a specialist certification by completing a variety of advanced courses and training. Certification at this level would be equivalent to PG-04 to PG-05. Candidates who wish to be certified at Level 3 may need to pass an exam.
- Level 4: a specialist procurement officer may become a strategic analyst in procurement (PG-06) by demonstrating a variety of skills, competencies and knowledge in areas such as data analytics and strategic advice.

The graduated approach by levels is similar what is in place in Australia and the United States (see Appendix F). In the United States, certification is mandatory and there are 3 different levels of certification that cover project managers for advanced procurement, professional procurement and contract management officers.

Another option is transferring administration of the certification program to TBS (Treasury Board of Canada Secretariat) from PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board). Though a few interviewees suggested that PSPC (Public Services and Procurement Canada) should be the administrator because of its role in procurement operations and the high number of PG positions in the department, others suggested that TBS (Treasury Board of Canada Secretariat) should administer the program. TBS (Treasury Board of Canada Secretariat) was proposed because:

- it is the policy centre for assets and acquired services
- the Comptroller General is the champion for the procurement community

Yet another option noted by a few interviewees is using a private service provider for accreditation purposes. The literature review shows there are some accreditation service providers in Canada that have different focuses. The possible benefits of using a private service provider are international recognition, lowered costs and clear requirements.

## Recommendations

1. It is recommended that PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) strengthen program management design and establish alternative service providers for training.
2. To reduce barriers and increase the program's relevance for learners, PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) should:
  - a. consider a graduated approach to certification that targets the emerging and future needs of the procurement and materiel management system and includes the critical component of complex procurement
  - b. determine a more effective and efficient way, than the CAR process, of assessing competencies based on jurisdictional research
3. In line with how other functional communities are professionalizing, PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) should develop a career-path framework for procurement and materiel management specialists and

explore the possibility of developing a common, government-wide development program that includes certification.

## Appendix A: journey to become a certified federal specialist in procurement and materiel management and related evaluation findings

Step 1: enrolment in the certification program	
Information about enrolment	<p>Prerequisites for the certification programs depending on level and focus:</p> <ul style="list-style-type: none"><li>• <b>Procurement</b><ul style="list-style-type: none"><li>◦ Level I: 3 years in public procurement (2 years at the federal level)</li><li>◦ Level II: 5 years in public procurement (4 years at the federal level, 2 years in management)</li></ul></li><li>• <b>Materiel management</b><ul style="list-style-type: none"><li>◦ Level I: 3 years in materiel management (2 years at the federal level)</li></ul></li></ul> <p>A consent form is required for the assessment of core competencies. There are no enrolment costs for the employee. The estimated time needed to successfully complete the program is 3 to 4 years.</p>



## Step 1: enrolment in the certification program

### Evaluation findings about enrolment

- 55% of survey respondents agree that the requirements for enrolment are reasonable
- Management support varies
- The majority (62%) of survey respondents agree that the demands and pressures of their current job limit their ability to participate in the program
- The program provides knowledge and value for junior-level specialists, but it is not suitable for senior procurement specialists
- Communities are aware of the program to some extent, but more awareness is needed in small departments and regions
- Information about the program was posted in GCpedia, but participants still found the information unclear or not up to date, for example:
  - it is not clear how to request more information
  - the lack of clarity is seen as a lack of coordination

### Comments from survey respondents

- “The program is not mandatory and in general there is no incentive in the system for senior management to support it. The program is not a requirement at any level.”
- “Actual program needs to be overhauled.”

## Step 2: training provided as part of the certification program

## Step 1: enrolment in the certification program

### Information about the training provided

#### Procurement

- Level I: 12 mandatory courses and 1 elective course or approved course equivalences
- Level II: 4 mandatory courses and 1 elective course or approved equivalencies

#### Materiel management

- Level I: 12 mandatory courses and 1 elective course or approved equivalencies

## Step 1: enrolment in the certification program

### Evaluation findings about the training provided

- Courses required for certification are often not available: departments depend on courses offered by the Canada School of Public Service and Public Services and Procurement Canada, which may not be available
- The 3 main barriers for the success of the program are:
  - the lack of available courses, which is the main reason why participants enrolled in the program have not finished it yet
  - the difficulty of completing the candidate achievement record process and limited support
  - the lack of time to pursue training

### Comments from survey respondents

- “Courses are not offered every year or are heavily booked. In some cases not available in the official language of choice.”
- “Delay in training has caused me a lag of 1 to 2 years to be trained on required courses.”
- “Courses should be offered in other organizations to increase accessibility.”
- “Mandate for school is to provide **core** and **common** curriculum needed across the government versus specialized courses. The school does not have the authorities to provide advanced training. Anything falling outside this must be assessed.”

## Step 3: the candidate achievement record process

## Step 1: enrolment in the certification program

### Information about how to complete a candidate achievement record

1. Complete the candidate achievement records according to the guideline introduced in 2019
  - Procurement certification**
    - Level I: 8 candidate achievement records
    - Level II: 6 candidate achievement records
  - Materiel management**
    - Level I: 7 candidate achievement records
2. Obtain the validator's signature for each candidate achievement record
3. Submit the signed candidate achievement records for pre-screening
4. Submit the candidate achievement records to the Review Panel for approval or revision and resubmission
5. Complete the process by receiving approval of all the required candidate achievement records

## Step 1: enrolment in the certification program

### Evaluation findings about the candidate achievement record process

- Many have completed the candidate achievement records workshop and most found it helpful
- Interviewees (80% of the cases) and survey respondents (34% of those enrolled) identified the candidate achievement record process as the main barrier to the program's success
- The candidate achievement record process is challenging, time consuming, confusing and subjective
- The feedback from the process is not useful, and the reviewers may not be able to attest to the accuracy of the details in the record
- The candidate achievement record structure has not been reviewed to reflect changes in the procurement environment, business transformation and the abilities or experience required (such as the requirements of non-operational procurement)
- Most survey respondents indicated that they would be more likely to pursue certification if the candidate achievement record process were better managed (52%)

### Comments from survey respondents

- "No mobility to gain experience to complete candidate achievement records."
- "I had to leave a position that I truly love to focus on gaining other procurement experience to fit in the current certification program."

## Step 4: exam

## Step 1: enrolment in the certification program

### Information about the exam

#### Before writing the exam

1. Submit a request to write the exam once you have completed all the required training
2. Wait to receive approval to write the exam
3. Follow the preparation guide for the exam

#### Procurement

Level I: multiple-choice exam composed of 92 questions (answer 70 questions correctly in order to pass)

If you fail:

- 1st failure: you must wait 3 months before you can retake the exam
- 2nd failure: you must wait 6 months before you can retake the exam
- 3rd failure: you must wait 24 months before you can retake the exam

Level II: case-study exam that does not have a pass mark (candidates are scored as meets expectations or does not meet expectations)

#### Materiel management

Level I: multiple-choice exam (structure similar to the exam for Procurement Level I) administered by the Public Service Commission of Canada

## Step 1: enrolment in the certification program

### Evaluation findings about the exam

Of those survey respondents who have completed all course requirements, most have tried to write the Level 1 exam.

Of those who have not written the exam, the major reasons for not having done so are:

- not being able to finish the required training due to reasons such as delays in training offered or lack of available courses
- lack of available time due to workload
- a loss of interest or a belief that the certification program has no value

## Step 5: certification

### Information about certification

Once a candidate has passed their exam, they can receive their certification by submitting an application form.

#### Certifications

Procurement: Certified Federal Specialist in Procurement (CFSP), Level I and Certified Federal Specialist in Procurement (CFSP), Level II

Materiel management: Certified Federal Specialist in Materiel Management (CFSMM), Level I.

## Step 1: enrolment in the certification program

### Evaluation findings about certification

#### Facts about the certification program

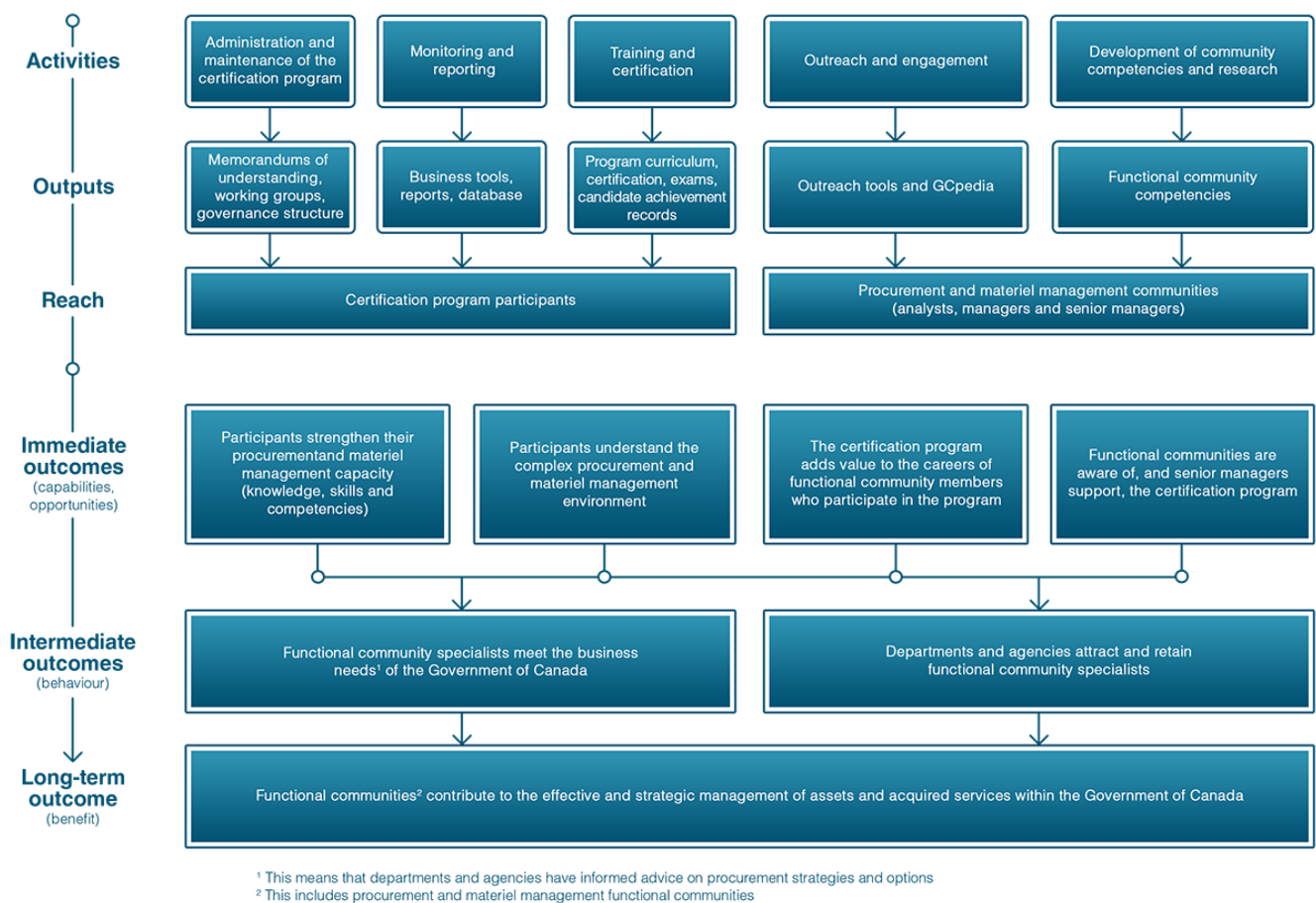
- 1,826 participants have enrolled but only 108 participants have been certified
- Since 2006, only 5.9% of those enrolled have been certified
- The program takes longer to complete than estimated, and there are no incentives for completion
- Certification does not provide value outside of government
- The program does not meet the needs of government to a great extent

#### Comments from survey respondents

- “Current certification program has a philosophical value. There is no need to be certified to be hired.”
- “Certification is not tied to tangible benefits (for example, money or career advancement).”
- “It would be great if the certification would be valued not only at the government level but also for the industry level.”
- “There is a need to move to an agile process.”
- “PGs are a fish out of the water in the new Government of Canada environment.”

## Appendix B: logic model for the certification program





### ▼ Figure 3 - Text version

The logic model shows, from the bottom to the top, the activities, outputs, reach, immediate outcomes (capabilities, opportunities), intermediate outcomes (behaviour) and long-term outcome (benefit) for the certification program:

#### Activities

- Administration and maintenance of the certification program
- Monitoring and reporting
- Training and certification
- Outreach and engagement
- Development of community competencies and research

## **Outputs**

- Memorandums of understanding, working groups and governance structure
- Business tools, reports and database
- Program curriculum, certification, exams and candidate achievement records
- Outreach tools and GCpedia
- Functional community competencies

## **Reach**

- Certification program participants
- Procurement and materiel management communities (analysts, managers and senior managers)

## **Immediate outcomes (capabilities, opportunities)**

- Participants strengthen their procurement and materiel management capacity (knowledge, skills and competencies)
- Participants understand the complex procurement and materiel management environment
- The certification program adds value to the careers of functional community members who participate in the program
- Functional communities are aware of, and senior managers support, the certification program

## **Intermediate outcomes (behaviour)**

- Functional community specialists meet the business needs of the Government of Canada, which means that departments and agencies have informed advice on procurement strategies and options

- Departments and agencies attract and retain functional community specialists

### **Long-term outcome (benefit)**

- Functional communities, including the procurement and material management functional communities, contribute to the effective and strategic management of assets and acquired services within the Government of Canada

## **Appendix C: costs of the certification program and key assumptions for costing**

**Table C1: costs of the certification program for the Procurement, Materiel Management and Real Property Communities Management Office from 2015 to 2019**

<b>Source of cost</b>	<b>2015 to 2016</b>	<b>2016 to 2017</b>	<b>2017 to 2018</b>	<b>2018 to 2019</b>
<b>Program administration (Canadian General Standards Board)</b>	\$296,596	\$295,461	\$241,669	\$314,624
<b>Management office <sup>*</sup></b>	\$75,000	\$75,000	\$75,000	\$75,000

**\*** Estimated

Source of cost	2015 to 2016	2016 to 2017	2017 to 2018	2018 to 2019
<b>Core competencies: assessments and exam development (Public Services and Procurement Canada)</b>	\$55,435	\$84,562	\$19,504	\$52,272
<b>Total</b>	\$430,031	\$458,023	\$339,173	\$442,896
<hr/> <p>* Estimated</p> <hr/>				

**Table C2: key assumptions for estimating the average cost per participant in the certification program by cost type**

Type of cost	Key assumptions
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Based on the assumptions, the average cost per participant in the certification program was estimated at \$11,315.

Type of cost	Key assumptions
<b>Administration</b>	<ol style="list-style-type: none"> <li>1. Salaries of Treasury Board of Canada Secretariat staff supporting the program assumed at the PG-06 level (\$104,000 per year)</li> <li>2. Certification Program Review Panel: <ol style="list-style-type: none"> <li>a. members spend approximately 1 day per month per member</li> <li>b. use an average of 5 members</li> <li>c. assume an average salary of \$115,000 per year (members range from PG-06 to EX-01)</li> </ol> </li> <li>3. Cost of Public Service Commission of Canada time to redo exams is approximately \$10,000 every 2 years</li> <li>4. Assume 4.3 years to take training and write exams</li> </ol>
<b>Opportunity</b>	<ol style="list-style-type: none"> <li>1. Use PG-04 salary (\$80,000) to calculate opportunity cost for procurement and materiel management (level 1)</li> <li>2. Assume materiel management enrollees account for 13% of overall enrolment</li> </ol>
<b>Enrolment</b>	<ol style="list-style-type: none"> <li>1. Identify active enrollees since many people enroll in the course but are not active</li> <li>2. Base enrolment on course activity from November 1, 2016, to November 14, 2018 (the last 2 years of available data)</li> <li>3. Active participation is defined as having taken a course or registered an equivalency in the last 2 years</li> </ol>
Based on the assumptions, the average cost per participant in the certification program was estimated at \$11,315.	

## Appendix D: evaluation methodology

## ▼ In this section

- Evaluation questions
- Methodology
- Document review
- Analysis of administrative data
- Key informant interviews
- Online survey of the procurement and materiel management communities
- Focus groups

The evaluation was guided by an approved evaluation framework, which was a detailed plan of the evaluation activities, questions and indicators.

## Evaluation questions

### Relevance

1. Is there an ongoing need for certification in procurement and materiel management? What are the needs of the functional communities and the Government of Canada? Is certification needed for the community?
2. To what extent does the certification program complement programs in other departments and agencies? Is there overlap or duplication?

### Performance

3. How appropriate is the program's governance structure?
4. To what extent does the program's design and delivery enhance enrolment and certification?
5. To what extent have the certification program outcomes been achieved?

6. What factors have contributed to the achievement of the expected outcomes?
7. What have been the barriers to achieving outcomes?

## **Alternatives**

8. What best practices and design features can be learned from the certification and professional development programs?

## **Methodology**

Consistent with best practices, the evaluation of the program included multiple lines of evidence to ensure that reliable and sufficient information is produced from both quantitative and qualitative analysis. The methods, summarized below, are:

- a document review
- an analysis of administrative data
- interviews
- an online survey of targeted procurement and materiel management communities
- 2 focus groups with procurement clients

## **Document review**

The document review provided evidence to supplement and expand on the analysis of the administrative data and the survey. The documents included:

- memoranda of understanding (MOUs) and agreements between Public Services and Procurement Canada's Canadian General Standards Board (PSPC (Public Services and Procurement Canada)-CGSB

(Canadian General Standards Board)) and the Public Service Commission of Canada (PSC)

- discussion papers
- briefings and presentations to various audiences
- a profile of the program
- a summary of procurement in other jurisdictions
- a comparison of different departmental development programs for procurement
- terms of reference for committees and review panels
- annual reports and information from the Office of the Procurement Ombudsman
- applicable policies and directives
- minutes from governance bodies
- information about the certification program published on GCpedia and Canada.ca
- survey results from the Public Service Employee Survey about the procurement and materiel management communities

## **Analysis of administrative data**

The analysis of program administrative data that is maintained by the PSPC (Public Services and Procurement Canada)-CGSB (Canadian General Standards Board) includes the analysis of the data collected for:

- regular reports prepared for the Treasury Board of Canada Secretariat (TBS (Treasury Board of Canada Secretariat))
- the day-to-day management of the program

## **Key informant interviews**



There were 42 interviewees in 33 in-depth sessions with key informants. The interviews were conducted using open-ended questions in 14 departments and agencies, and a session was held with the ombudsman procurement officer. Key informant interviews are a qualitative method used in evaluation to address most evaluation issues and questions. The interviews gather views and factual information from key informants selected from within the federal government and the core public administration.

Interviews were conducted with representatives from:

- the procurement certification program's management team (5 interviews)
- classification policy at the Office of the Chief Human Resources Officer (2 interviews)
- program administration at PSPC (Public Services and Procurement Canada) (5 interviews)
- curriculum development at the Canada School of Public Service (2 interviews)
- the PSC (Public Service Commission of Canada) (6 interviews)
- National Defence (2 interviews)
- the Procurement and Materiel Management Advisory Committee (2 interviews)
- the departments and agencies that have the largest number of procurement practitioners (7 interviews)
- the Certification Program Working Group (3 interviews)
- the departments and agencies that have development programs for procurement (7 interviews)
- other functional communities in the Government of Canada (2 interviews)
- the Office of the Procurement Ombudsman (1 interview)

The people who were invited to interviews were given the opportunity to organize group interviews. Each interview was weighted equally regardless of the number of interviewees at the interview.

## **Online survey of the procurement and materiel management communities**

Evidence from the procurement and materiel management communities was gathered via an online survey. An attempt was made to contact all Government of Canada employees in the procurement and materiel management communities. Each department and agency was sent a letter from the Office of the Comptroller General and asked to provide a list of employees in the purchasing and supply (PG) occupational group who would be eligible to participate in the certification program. These lists were then provided to the evaluators by the certification program at TBS (Treasury Board of Canada Secretariat). Contact information included each participant's name, email and department. All files were assessed for duplication in order to create a unique set of individuals for sampling.

In total, 3,656 participants were contacted by email to participate in the survey. Of the individuals with valid contact information (3371), 1032 completed the population survey producing a response rate of 31%. The margin of error for this proportion is plus or minus 2.5% at a confidence level of 95%.

For the results of the survey, the following scale was used:

- Few: less than 20%
- Some: 20% to 39%
- Many: 40% to 49%
- Half: 50%
- Most: 51% or more

## Focus groups

Two focus groups were held with clients of procurement services. A total of 13 people representing 8 departments participated in both focus groups. The focus group sessions focused on:

- issues that arise when dealing with procurement
- suggestions for improving procurement
- the skills required for procurement
- improvement of the certification program
- service standards

## Appendix E: 2014 and 2018 competencies

### ▼ In this section

- 2014 core and functional competencies for procurement and materiel management
- 2018 core, functional and technical competencies for the procurement community.

## 2014 core and functional competencies for procurement and materiel management

### Core competencies for procurement and materiel management

- Values and ethics
- Communication
- Relationship building
- Thinking and judgment
- Adaptability

## **Functional competencies for:**

### **1. Procurement:**

- Assessment and planning
- Acquisition
- Managing contract and contract close-out

### **2. Materiel management:**

- Managing materiel
- Disposal

Source: 2014 Competencies for Procurement and Materiel Management

## **2018 core, functional and technical competencies for the procurement community**

### **Core competencies according to the *Directive on Performance Management***

- Demonstrating integrity and respect
- Thinking things through
- Working effectively with others
- Showing initiative and being action oriented

## **Procurement community competencies:**

### **1. Functional competencies for a particular employee group**

- Assessment and planning
- Acquisition
- Managing contracts and close-out

### **2. Technical competencies for a particular job**

- Negotiations
- Project management
- Risk management
- Data analytics

- Business acumen

Source: 2018 Government of Canada, Procurement Community Competencies

## Appendix F: governmental procurement and materiel management training programs in other countries

Country	Main characteristics	Best practices
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Country	Main characteristics	Best practices
<b><u>United States</u></b>	<p>The United States has a Chief Acquisitions Officer (CAO). Training to onboard employees includes the following:</p> <ul style="list-style-type: none"> <li>• The mandatory certification program is managed by the Federal Acquisitions Institute and divided into 3 levels: <ul style="list-style-type: none"> <li>◦ Contracting officers</li> <li>◦ Contract officer representatives</li> <li>◦ Program and project managers</li> </ul> </li> <li>• The employer determines the level required based on employee duties and competencies</li> <li>• Certification must be obtained within 24 months of employment unless the time frame is extended by senior management</li> </ul> <p>To modernize procurement, the United States Digital Service (USDS) and the Office of Federal Procurement Policy (OFPP) developed Digital IT Acquisition Professional Training (<b><u>DITAP</u></b>), which is an immersive development program. In 2018, the Office of Management and Budget established the Federal Acquisition Certification in Contracting Core-Plus Specialization in Digital Services (<b><u>FAC-C-DS</u></b>).</p>	<ul style="list-style-type: none"> <li>• Strategic onboarding for new appointees is a systematic and designed approach during the first year of an appointee's tenure</li> <li>• The Federal Acquisitions Institute works with several commercial training providers who offer support for one or more of the programs</li> </ul>
<b><u>United Kingdom</u></b>	<p>The United Kingdom has a Government Chief Commercial Officer.</p>	<ul style="list-style-type: none"> <li>• The development</li> </ul>

Country	Main characteristics	Best practices
	<p>Relevant measures in place and in development include:</p> <ul style="list-style-type: none"> <li>• a career path for commercial specialists (specialists and practitioners)</li> <li>• the Government Commercial Organization was created to develop talent</li> <li>• a Commercial Career Framework that aligns with the Commercial People Standards for the Profession and the Commercial Professional Skills and Competency Framework: <ul style="list-style-type: none"> <li>◦ Junior levels: develop competencies according to the Framework</li> <li>◦ Senior level: training is provided to develop attributes according to the Standards</li> </ul> </li> <li>• the Assessment and Development Centre assesses expertise, skill, and capability against the Standards and accredits participants</li> </ul>	<p>program supplements what might already be available in a participant's organization</p> <ul style="list-style-type: none"> <li>• A range of interviews and simulated exercises are used to assess the commercial expertise, skills and capability of individuals against the Government Commercial Function People Standards for the Profession</li> <li>• The assessors are the most senior and experienced individuals</li> <li>• The current pool of assessors consists of accredited senior commercial specialists from</li> </ul>

Country	Main characteristics	Best practices
		<p>across government</p> <ul style="list-style-type: none"> <li>• The Government Commercial Function signed a memorandum of understanding with the <u>Chartered Institute of Procurement and Supply</u> (<u>CIPS</u>) as a means of securing enhanced expertise at a senior level</li> </ul>
<b><u>Australia</u></b>	<ul style="list-style-type: none"> <li>• The government has established a curriculum at various levels (certificate, diploma, advanced diploma, and graduate certificate)</li> <li>• The onboarding approach is in developmental stages and it is followed up with regular progress evaluations</li> <li>• The onboarding process also involves a structured employee induction process and the establishment of a point of contact</li> </ul>	<p>The onboarding approach:</p> <ul style="list-style-type: none"> <li>• can extend for weeks or months rather than the usual few days for induction</li> <li>• should be in developmental stages and followed up with regular progress evaluations</li> </ul>



Country	Main characteristics	Best practices
	<p>who can provide general support (such as a team member)</p> <ul style="list-style-type: none"> <li>• Training is provided at the foundational, intermediate and advanced procurement levels</li> <li>• Each level has online training modules and professional development</li> <li>• Professional development aligns with the 70-20-10 learning and development model (experience, exposure and education)</li> <li>• Training is provided by the Institute of Public Administration of Australia</li> <li>• At the advanced procurement level, participants can obtain a diploma of procurement and contracting or an advanced diploma of procurement and contracting</li> <li>• The government outsources training to registered organizations</li> </ul>	<ul style="list-style-type: none"> <li>• is not complete until the employee has been successfully integrated into the workplace and is achieving an acceptable level of performance</li> </ul>

Country	Main characteristics	Best practices
<b><u>New Zealand</u></b>	<p>The government of New Zealand offers:</p> <ul style="list-style-type: none"> <li>• regular information sessions for people working in public sector procurement</li> <li>• an introductory online course, which consists of 4 modules, that provides tools and techniques to anyone involved in procurement</li> <li>• a graduate program to develop tomorrow's procurement leaders</li> </ul> <p>The graduate program is a professional skills development program that lasts 2 years. It provides mentoring, a buddy program, networking events and training. The program includes 3 to 4 placements in select government agencies.</p>	n/a

## Appendix G: Management response and action plan

### ▼ In this section

- [Recommendation 1](#)
- [Recommendation 2](#)
- [Recommendation 3](#)

The Communities Management Office (CMO) in the Acquired Services and Assets Sector, Office of the Comptroller General, Treasury Board of Canada Secretariat (TBS (Treasury Board of Canada Secretariat)), has reviewed the evaluation and agrees with the recommendations. Proposed actions to address the recommendations of the report are outlined in the tables below.

## Recommendation 1

It is recommended that PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) strengthen program management design and establish alternative service providers for training.

### Management response

TBS (Treasury Board of Canada Secretariat) agrees that program management design needs to be strengthened and that alternative service providers should be examined and established for program training.

Proposed action for recommendation 1	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will research new approaches for program management design. This research will involve reviewing</li> </ul>	July 2, 2019	December 31, 2019	CMO (Communities Management Office)

Proposed action for recommendation 1	Start date	Target completion date	Office of primary interest
<p>frameworks from similar programs in other jurisdictions (international, provincial) and communities (human resources, financial management, internal audit).</p> <ul style="list-style-type: none"> <li>• This research will include exploring other arrangements for the administration of the program, such as internal program administration, as well as the use of private service providers and post-secondary institutions for accreditation purposes.</li> </ul>			

Proposed action for recommendation 1	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>Based on the review, TBS (Treasury Board of Canada Secretariat) will work with key stakeholders to create a new design for program management. If possible, the design will include flexibility, such as multiple paths to obtain certification.</li> </ul>	January 6, 2020	September 9, 2020	CMO (Communities Management Office)

Proposed action for recommendation 1	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will work with key stakeholders to explore and identify alternative service providers for training. This work will include continued partnership with the Canada School of Public Service (CSPS) to pilot third-party options for complex procurement courses that align with the competencies of the procurement and materiel management communities.</li> </ul>	July 2, 2019	March 31, 2022	CMO (Communities Management Office) with CSPS (Canada School of Public Service) as co-lead

<b>Proposed action for recommendation 1</b>	<b>Start date</b>	<b>Target completion date</b>	<b>Office of primary interest</b>
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will also engage with post-secondary institutions to help identify courses that align with procurement and materiel community competencies. TBS (Treasury Board of Canada Secretariat) will develop standard tools and processes for reviewing learning opportunities and equivalencies for inclusion in the program.</li> </ul>	July 2, 2019	March 31, 2022	CMO (Communities Management Office)

## Recommendation 2

To reduce barriers and increase the program's relevance for learners, PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) should:

- a. consider a graduated approach to certification that targets the emerging and future needs of the procurement and materiel management system and includes the critical component of complex procurement
- b. determine a more effective and efficient way than the candidate achievement record process of assessing competencies, based on jurisdictional research

## Management response to recommendation 2a

TBS (Treasury Board of Canada Secretariat) agrees with the recommendation to consider a graduated approach to certification that addresses emerging and future needs within the procurement community, including the critical component of complex procurement.

<b>Proposed action for recommendation 2a</b>	<b>Start date</b>	<b>Target completion date</b>	<b>Office of primary interest</b>
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Proposed action for recommendation 2a	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>• TBS (Treasury Board of Canada Secretariat) will examine options for a graduated certification program that links certification levels to training and competencies. TBS (Treasury Board of Canada Secretariat) will work with key stakeholders to create a possible graduated approach that includes an inventory of available learning options that increase in complexity throughout the program.</li> <li>• This work will include reviewing risk-based approaches and models of required certification credentials in other communities and internationally, such as the required credentials for delegated financial signing authorities.</li> </ul>	July 2, 2019	March 31, 2021	CMO (Communities Management Office)

<b>Proposed action for recommendation 2a</b>	<b>Start date</b>	<b>Target completion date</b>	<b>Office of primary interest</b>
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will update the required competencies for the materiel management community.</li> </ul>	January 6, 2020	March 31, 2021	CMO (Communities Management Office)
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will align the new competencies for the materiel management community with appropriate training.</li> </ul>	April 1, 2021	January 6, 2023	CMO (Communities Management Office)
<ul style="list-style-type: none"> <li>Implementation of the new certification program will be conducted in phases and TBS (Treasury Board of Canada Secretariat) will:               <ul style="list-style-type: none"> <li>work with key stakeholders to develop a plan</li> <li>ensure that current enrollees will be appropriately transitioned within the new program</li> </ul> </li> </ul>	April 1, 2020	March 31, 2023	CMO (Communities Management Office)

## Management response to recommendation 2b

TBS (Treasury Board of Canada Secretariat) agrees with the recommendation to determine a more effective and efficient method of assessing competencies, based on jurisdictional research.

Proposed action for recommendation 2b	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will complete research of knowledge, competency models and assessments used in other jurisdictions and communities. This research will also explore models that rely on competency assessments linked to performance, talent management or staffing (that is, assessment tools that are already in use by departments).</li> </ul>	January 6, 2020	January 6, 2021	CMO (Communities Management Office)

Proposed action for recommendation 2b	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>Using this research, TBS (Treasury Board of Canada Secretariat) will work with key stakeholders to identify the best way to assess community competencies in order to ensure that they are obtained and maintained by functional specialists. TBS (Treasury Board of Canada Secretariat) will develop an associated implementation plan.</li> <li>TBS (Treasury Board of Canada Secretariat) will also work with stakeholders to ensure that certification that demonstrates community competencies is recognized by deputy heads.</li> </ul>	January 6, 2021	March 31, 2022	CMO (Communities Management Office)

## Recommendation 3

In line with how other functional communities are professionalizing, PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) should develop a career-path framework for procurement and materiel management specialists and explore the possibility of developing a common, government-wide development program that includes certification.

### Management response

TBS (Treasury Board of Canada Secretariat) agrees that it should:

- develop a procurement and materiel management career-path framework
- research the feasibility of a common, government-wide development program that includes certification

<b>Proposed action for recommendation 3</b>	<b>Start date</b>	<b>Target completion date</b>	<b>Office of primary interest</b>
<ul style="list-style-type: none"><li>• <u>TBS (Treasury Board of Canada Secretariat)</u> will work with key stakeholders to create and provide career-path frameworks for procurement and materiel management specialists.</li></ul>	September 6, 2020	September 6, 2021	<u>CMO (Communities Management Office)</u>

Proposed action for recommendation 3	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will work to standardize and align the work of procurement specialists and materiel management specialists (for example, business case for the review of the Purchasing and Supply (PG) Classification Standard or a set of common work descriptions).</li> </ul>	July 2, 2019	March 31, 2021	CMO (Communities Management Office)

Proposed action for recommendation 3	Start date	Target completion date	Office of primary interest
<ul style="list-style-type: none"> <li>TBS (Treasury Board of Canada Secretariat) will align the new certification program with the career-path frameworks for procurement and materiel management professionals. These alignments will better support procurement and materiel management professionals in a modernized environment.</li> </ul>	September 6, 2021	March 31, 2022	CMO (Communities Management Office)
<ul style="list-style-type: none"> <li>In consultation with key stakeholders, TBS (Treasury Board of Canada Secretariat) will research the feasibility of creating a common</li> </ul>	April 1, 2021	March 31, 2022	CMO (Communities Management Office)

<b>Proposed action for recommendation 3</b>	<b>Start date</b>	<b>Target completion date</b>	<b>Office of primary interest</b>
<p>government-wide development program. This research will include examining options for common development programs, such as updating and further expanding existing departmental programs or producing guidance on recommended common elements for development programs in departments.</p>			

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## Footnotes



- 1 The program is working on a profile to identify members of the procurement and materiel management communities.
- 2 OECD (Organisation for Economic Co-operation and Development): Strategic Innovation Procurement Forum, Office of Small and Medium Enterprises (OSME), October 5, 2016.
- 3 CIDI Corporate Education Services, *The Establishment of Professional Certification for Materiel, Supply and Real Property Professionals in the Federal Government: A Discussion Paper*, March 31, 2002.
- 4 Quote taken from the section entitled “Cleaning up the procurement of government contracts” in the Federal Accountability Action Plan, April 2006.
- 5 Organisation for Economic Co-operation and Development (OECD), Country case: The Canadian certification program for the Federal Government Procurement and Materiel Management Communities, 2016.
- 6 Competencies “are defined as the characteristics of an individual which underlie performance or behaviour at work.”
- 7 The certification program has not yet been updated to the 2018 competencies because the program was under evaluation.
- 8 For information about these efforts, see Government of Canada awards contract for electronic procurement solution and agile procurement for better digital solutions.

- 9 The PG Classification Standard was issued by the Classification Human Resources Information Systems and Pay Division Personnel Policy Branch in August 1990 with an effective date of May 28, 1990.
- 10 Work in procurement includes several different types of positions that are deemed to be “non-operational.” Examples of non-operational areas are policy, systems (such as e-procurement, system application products in data processing) and reporting (such as procurement activity reports, procurement planning, and analysis). The procurement community is diverse. Data from the program shows that most employees enrolled belong to the PG classification, but there are employees from over 24 classification groups that are enrolled in the certification program (including CR, AS, GS, CS, EN, ST, FI, MA, HR, EC).
- 11 “Strengthening capacity” refers to increasing knowledge and skill, developing or updating and implementing competencies, and creating a supportive network.
- 12 PMMRP CMO (Procurement, Materiel Management and Real Property Communities Management Office) indicated that the “Writing in Clear and Concise Language” course can be taken elsewhere. This course is a general course and not specific to procurement.

- 13 Office of the Procurement Ombudsman, *Annual Report 2016 to 2017*, quote taken from pages 2 and 3.
- 14 “Agile” denotes “a method of project management, used especially for software development that is characterized by the division of tasks into short phases or work and frequent reassessment and adaptation of plans.” (definition taken from Lexico)
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