



Canadian Association of Management Consultants    Association canadienne des conseillers en management

The **Single Voice** of Management Consulting in Canada

## **Doing Business with the Ontario Government Task Force Hearings**

CAMC Speaking Notes from Ottawa, London and Toronto Hearings

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**Date:**            **Tuesday, March 22, 2005**  
**Location:**    **Ottawa, Ontario**  
**Speakers:**    **Alice Kubicek CMC and Mike Appleton CMC**

*Alice Kubicek:*

### **Introduction**

- Good afternoon, my name is Alice Kubicek and I am a certified management consultant (CMC) with the Canadian Association of Management Consultants (CAMC). I Chair the Eastern Ontario Council of the CAMC and, as such, represent almost 400 CAMC members resident in Eastern Ontario.
- I welcome the opportunity to speak to you today regarding the procurement practices of the Ontario Government, particularly for Business and Management Consulting Services.
- I will be providing some introductory comments, then I will hand over to my colleague, Mike Appleton, CMC, who will address the detail of our submission.

### **About the CAMC**

- When you hold your session in Toronto on March 31<sup>st</sup>, a national representative of the CAMC will provide you with a full description of our Association; therefore, I will only give you a brief synopsis for today's purposes.
- The CAMC represents almost 3500 professional management consultants across Canada of whom approximately 2400 have earned the Certified Management Consultant (CMC) designation through the Association's Affiliated Provincial Institutes. A typical CAMC member holds a university bachelor degree in a relevant field and a Masters degree, typically in Business Administration or Public Administration. Over half of our members are sole practitioners and a large majority of the others work for Small- or Medium-size Enterprises (SMEs).

### **General**

- During the last election campaign the Ontario Liberal Party promised to make the procurement process more SME friendly. We were, therefore, surprised when the Management Board issued its RFP for Vendors of Record for Business and Management Consulting Services last June. Whether intentionally or not, the RFP put providers of management consulting services at a significant competitive disadvantage. This is particularly true for sole practitioners and small firms.
- The RFP was specifically oriented to Information Technology consulting projects and, therefore, gave an implicit preference to large IT firms at the expense of firms with specific business and management consulting expertise, many of which are smaller firms with a deep expertise in a specific consulting area.

- Last fall, the CAMC had the opportunity to meet with officials from the Management Board Secretariat, where we outlined a number of our concerns relating to the VOR in particular and to the procurement practices of the Government of Ontario, in general.
- At this point, I will hand over to Mike Appleton, CMC, who will address some detailed comments. Afterwards, I will end our submission with some concluding remarks.

***Mike Appleton:***

### **Introduction**

- I am Mike Appleton and I am a certified management consultant (CMC) with the Canadian Association of Management Consultants (CAMC). I am the Managing Director of DAMA Consulting Services, a management consulting firm with about 40 consultants specializing in project management consulting services.
- I have also served as Chair of the CAMC ad hoc Committee dealing with the federal government's Task Force on Procurement Reform.
- My firm has a recognized expertise in project management services. Recently, we were listed by the Ottawa Business Journal as the 9<sup>th</sup> largest project management consulting firm in the National Capital Region, behind companies such as IBM, EDS, CGI, Fujitsu, etc. We hold VOR-like procurement vehicles with a wide variety of federal government departments and agencies, as well as with the City of Ottawa. We also enjoy working with a large number of private sector firms.
- We do not, however, do any work at all with the government of the Province of Ontario. I was in receipt of the RFP for Business and Management Consulting Services when it was released last June. After we reviewed it, our decision was to NO BID.
- I propose to present the concerns of the CAMC using the real example of my own firm. The two areas that I will address will be:
  - the understanding of what business and management consulting is; and
  - the impact of this procurement strategy on SMEs.

### **What is Business and Management Consulting Services?**

- Management consulting covers a broad range of services and reflects diverse competencies. It is not synonymous with IM/IT - and the RFP in question is very IM/IT focused. There are several examples, but I will just highlight one: Change Management Services.
- According to the RFP, "CM develops, maintains, enhances and ensures compliance with IT Infrastructure Library (ITIL) and IT Service Management (ITSM) based CM and Release Management processes." It then goes on to describe the benefits of CM to IT Services and then the benefits of CM to the customers of IT Services. The skills identified, as an example, for the Project Manager/Leader were "selecting and establishing IT initiatives, designing and developing IT strategies and managing the implementation activities associated with large IT projects", among others.
- I discussed this with a colleague of mine who teaches the Change Management course on the EMBA at the University of Ottawa. He also developed and teaches the Management Consulting course in the MBA program at that university. He described the key skills in Change Management as facilitation, negotiation, conflict resolution, organizational culture, leadership, etc. and knowledge of the change management process that includes creating urgency, crafting the vision, identifying the quick wins, change implementation planning, etc.

From a business and management consulting perspective, change management is considerably different from the IM/IT focused approach evident in the VOR RFP.

- This is not an isolated instance. Another example I could have used is Business Metrics and Performance Management Services. (As an aside, my firm manages the Performance Management program at the Department of National Defence). The description of the service requirement only mentions Balanced Scorecard once - and then almost as a footnote - in a listing of general skill requirements for some of the job categories in an Appendix - and nowhere are vital Performance Management techniques such as strategy mapping, value chains, capability profiles, organizational lifecycle characteristics, among others, mentioned at all.
- There is much more to Business and Management Consulting Services than IT. Restricting Vendors of Record only to those with an IT focus simply shortchanges the government and the citizens of Ontario.

## **Impact on SMEs**

### **1. The Burden of Proposal Preparation**

- We all recognize that the RFP/Proposal cycle is a necessary evil. The structure, text and requirements of every RFP, however, should be kept as simple as possible in order to get the maximum number of responses from qualified firms and for ease of use by Provincial Government client managers. I certainly support the selection of vendors based on a minimum set of essential consulting competencies, on previous assignment descriptions and on the support shown through client references. However, the information required in those references must be reasonable. First, confidential information on pricing must remain confidential. Second, client confidentiality must also be respected - for example, a private sector client could very well be reluctant to provide complete reports due to commercial confidentiality requirements. In fact, many have difficulty getting supporting documentation from provincial government clients!
- Information should be collected from respondents only when reasonably required to evaluate bids and to protect legitimate government interests. It should be noted that the federal Privacy Commissioner has ruled in the past that some federal Treasury Board RFP's "routinely require information that is not reasonably required and represents an unnecessary and unauthorized intrusion into privacy". Only the required financial information about firms should be collected - and only if there is a fair and effective way of using it to evaluate the financial capability of respondents to provide the contracted services.

### **2. Bias Against SMEs**

- This VOR approach has built-in bias against small and medium-sized management consulting firms, contrary to previous Liberal concern over the need for SME-friendly procurement in the Province.
- Smaller firms are more likely to focus on specific management consulting competencies, such as Change Management; big firms more likely to focus on management consulting within a larger service offering, such as IT. The VOR's selection criteria favour high volume bidders which thereby favours the big firms at the expense of SMEs.

### **3. Cost of Insurance**

- We have all experienced high insurance costs as individuals - just think of the increased cost of your auto insurance during the past 2-3 years - the same is true with Errors and Omissions insurance where costs are double or triple what they were a few years ago - this often makes the requirement for Errors and Omissions insurance quite prohibitive for most small firms and sole practitioners.

#### 4. Other Costs

- The requirement for financial reporting of the past three years' audited financial statements is also quite prohibitive for small firms and sole practitioners.

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**Date:** Wednesday, March 23, 2005  
**Location:** London, Ontario  
**Speakers:** David Bratton FCMC and Bill Wilkinson

#### *David Bratton:*

Good afternoon, my name is David Bratton and I am a management consultant from London. I am also a member of the Canadian Association of Management Consultants or CAMC. I have been a practicing management consultant for 19 years, specializing in Strategic Change Management, Human Resources Management and Leadership Development. I welcome the opportunity to speak to you today regarding the procurement practices of the Ontario Government.

- During the last election campaign the Ontario Liberal Party promised to make the procurement process more SME friendly. We were, therefore, surprised when Management Board issued its RFP for a Vendor of Record for Business and Management Consulting Services last June. Whether intentionally or not, the RFP put providers of traditional management consulting services at a competitive disadvantage. This is particularly true for sole practitioners, small firms and for newly formed consortia of sole practitioners and small firms.
- This RFP was oriented to Information Technology consulting projects and, therefore, gave an implicit preference to predominantly large firms who would have a solid IT competency, as well as competencies in management consulting per se.
- Last fall, the CAMC had the opportunity to meet with officials from the Management Board Secretariat, where we outlined a number of our concerns relating to the VOR in particular and to the procurement practices of the Government of Ontario, in general.

#### **Overarching Concern**

- Ontario government has the wrong perspective on "management consulting".
  - It is not synonymous with IT;
  - It is not just long-term projects;
  - Management consulting covers a broad range of services, reflects diverse competencies, and is delivered by large, medium and small partnerships, corporations, consortia and sole providers.
- VOR approach has built-in bias against small and medium-sized firms and small providers

#### Examples:

- Smaller firms are more likely to focus on management consulting; big firms more likely to focus on consulting with IT or something else. VOR's selection criteria favour high volume bidders which thereby favours the big firms;
- onerous Errors and Omissions insurance (i.e.) \$2 million
- onerous financial reporting (e.g.) three years' audited financial statements;
- level of detail required by RFP (especially for first-time bidders).

## **Principles for VOR design**

- We propose five principles that should drive the design of any Vendor of Record (VOR) RFP for management consulting services. I would like to describe these principles for you now.
- These principles have all been endorsed by the Canadian Association of Management Consultants.

### **Principle 1:**

- The structure of any RFP for management consulting services should reflect the true nature of management consulting, where assignments, whether “solution-based” or “task-based”, are typically defined in terms of desired processes, deliverables or outcomes, rather than roles or resources.
- The traditional procurement approach to pricing of contracted services and the acquisition of resources as commodities is not appropriate to management consulting, where both consultant competencies and consulting projects tend to vary widely in their characteristics.
- The qualifications for each and every assignment should be defined in terms of consulting competencies that are specific to the assignment.

### **Principle 2**

- The RFP structure, text and requirements of every RFP, should be kept as simple as possible in order to get the maximum number of responses from qualified proponents and for ease of use by OPS clients.
- Firms should be qualified based on a minimum set of essential consulting competencies, based on previous assignment descriptions and supported by client references.
- Also recommend that the areas wherein firms practice be classified according to a scheme that is flexible and easy to understand.

### **Principle 3**

- RFPs should be equally available to all firms, regardless of size, structure or business model or line of service.
- The VOR evaluation process should not discriminate against how services are to be provided.
- Sufficient time should be provided in the VOR schedule for potential proponents to organize themselves in order to qualify under mandatory requirements (e.g.) on the legal form of the organization. Unincorporated entities should be given the opportunity to incorporate; sole providers should be given an opportunity to form consortia; and so on.
- There must also be a process for new or recently re-organized firms to be added at any time to the VOR during the term of the VOR.

### **Principle 4**

- Firms should be able to qualify independently of any particular tool, technology, methodology, or proprietary body of knowledge.
- The qualifications and services should be defined in terms of broadly-defined and generally understood consulting competencies. If there are requirements for a specific body of knowledge or experience, such criteria can be identified at the RFR stage.

## Principle 5

- Information should be collected from respondents only when reasonably required by the government to evaluate bids and protect its legitimate interests.
- It is sometimes our impression that MBS obtains information for the sake of obtaining information. It is sometimes difficult to understand why certain requested data is relevant to the RFP process.
- Particularly in the instance of private companies or sole practitioners financial statements are unreliable when used to evaluate or compare the financial health and stability of bidders.
- Financial information about firms should be collected only if MBS has a fair and effective way of using it to evaluate the financial capability of respondents to provide the contacted services. Information on the pricing of client assignments should be categorized, rather than required in exact amounts.
- It should be taken into account that the respondents are often bound by confidentiality agreements that limit what they can disclose about previous projects/clients.

### *Bill Wilkinson:*

- Introduction: Bill Wilkinson, management consultant in London, Ontario specializing in issues related to organization conflict and the resolution of workplace disputes. A sole practitioner since 1999 that became incorporated in 2001-02.
- A member of the Canadian Association of Management Consultants since 2002-03. Currently serve as Chair of the Southwestern Ontario Chapter. Chapter currently has 70 members stretching from Windsor to Guelph with the largest concentration in the London and K-W areas. Nearly two-thirds of chapter members hold the CMC designation.
- Urged the review committee to recognize the current procurement process is overly time consuming and bureaucratic for SMEs.
- Suggested Management Board needed to devote even more resources to providing visible and accessible resources and advisors to SMEs if the Government of Ontario was really serious about doing more business with them in the future.
- Current process requires a disproportionate amount of time and resources amongst SMEs in order to participate. Experience of many small firms has been negative and led to conscious decisions not to participate in the approval process associated with the Vendor of Record.
- Why does the process require more resources that are accessible and with a more human face?
- Studies done by the Kennedy Information Group in the USA have shown that for SMEs in the management consulting industry, those firms earn less than 6% of their business electronically (e.g. presence on the web, responding to electronic RFPs like the MERX system. The same organizations report that over 67% of their business on an annual basis is acquired on the basis of their business relationships and development. This speaks to the type of strategy required by the Government of Ontario in order to do more business with SMEs in the Province. In other words, resources are required to raise awareness and provide guidance and assistance to SMEs. Subject matter experts who can act as single points of contact are necessary.
- Similar research by the Kennedy Information has shown that SME management consulting firms have grown tremendously during the past 5 years. Why? Many of the major 6 large firms underwent tremendous

reorganizations in the 90's. Many good management consultants found themselves establishing sole practitioner and boutique-type firms.

- Large firms have now come to realize that they lost a lot of intellectual capital and capacity especially in terms of subject matter expertise. Rather than rehiring they now partner with these firms. The Government of Ontario may find it to be in its best interest (expenditure wise) to access some of these firms directly.

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**Date:** Thursday, March 31, 2005  
**Location:** Toronto, Ontario  
**Speakers:** Lynn Bennett CMC, Gordon Van Toen CMC, and Laren Stadelman CMC

*Lynn Bennett:*

Good afternoon, my name is Lynn Bennett and it is my pleasure to have the opportunity to speak to you today about the procurement practices of the Ontario Government. As a management consultant, I specialize in strategy execution, organizational effectiveness and leadership development. I have been consulting for 5 years and lead my own firm – Leadership Intelligence. Personally, my firm's work is focused on corporate and not-for-profits. Up until now, we have not done work in the public sector, however we have prepared and submitted RFPs, to various governments and their agencies. However these have not been associated with this province through we have used the MERX system.

My major reason for coming today is to share with you my view that the government's procurement practices should provide equal opportunity for all qualified consulting firms – both large and small – to do business with the Ontario government.

As a member of the Canadian Association of Management Consultants and the Provincial Institute, I hold my designation as a Certified Management Consultant. As well, I serve in a volunteer capacity with the association as Chapter Chair of the Greater Toronto Area. The GTA Chapter consists of over 1000 members who like me have written and passed the Association's Ethics Exam. As well, our members confirm their commitment to the Association's Professional Code of Conduct each year by reviewing and re-signing the code. As mentioned the GTA consists of over 1000 members, 80% hold their designation and 45% or approximately 450 members are classified as small firms or sole practitioners again like myself.

Generally, we find that these 450 members are part of a second career transition – these individuals having had successful careers in corporate or working for the large consulting firms have made the leap to being an entrepreneur. And therefore, some of these individuals will have consulted to you as a member of a large firm consulting team. Human Capital trends suggest there will be more 'second career' individuals making the transition.

From my personal experience dealing with other government bodies, and in listening to my fellow CAMC members, there have been occasions when the level of detailed information requested, or the experience requirements, or both, have tended to disadvantage smaller firms and sole practitioners. This includes things like 3 years of audited financial statements – the vast majority firms of this size do not have any requirement for this level of financial rigor to successfully manage their business.

Personally, when developing responses to RFPs I have found the structure, text and requirements complex and in developing a response I have invested on average at least 5 man-days. This investment is more than twice that of developing a letter of understanding for corporate work, which is the foundation for corporate contract terms. The reason for the difference in time – no personal contact with stakeholders, assignments are not defined in terms of desired processes, deliverables or outcomes but rather as roles, this is not the way a small firm consultant thinks of themselves, and finally, qualifications are not defined in terms of consulting competencies that are required by the

assignment. My request - qualifications and services should be defined in terms of broadly defined and generally understood consulting competencies. This is particularly true for VOR qualifications. If there are requirements for a specific body of knowledge or experience, such criteria should be identified at the RFR stage.

Secondly I request that you keep RFP/VORs as simple as possible in order to facilitate the maximum number of responses from qualified potential vendors and for ease of use from OPS clients. I believe the current process does not allow the Ontario government to take advantage of highly skilled and very competent consultants who have made a different employment choice.

Additionally, I would like to bring to your attention that small firms or sole providers from time to time and with more and more frequency will partner with fellow colleagues to provide to meet their clients' broader needs. Personally, my firm's attempt to enter the public sector market has been through a consortium, in each submission we were the only consortium, and up against the larger consulting firms. I believe proponents should be given a reasonable opportunity to qualify with any mandatory requirement on the legal form of the organization and sole providers should be given an opportunity to form consortium to meet the government's management consulting needs. Furthermore, newer or recently re-organized firms should be given the opportunity to qualify without waiting through an entire VOR term.

I recognize that the procurement process needs to be competitive to ensure value for money and it needs to be thorough to help manage risk. What I am suggesting, however, is that it should not be so rigorous or overwhelming in terms of what's required from potential vendors, that it discourages qualified smaller firms from responding and does not allow the Ontario government to take advantage of a growing pool of experts that have made a life choice that does not include large firm employment.

Thank you for giving me the opportunity to participate today. I hope that I was able to offer reasonable and sound personal insights to you in order to make the procurement process more straightforward and reasonable – particularly for the smaller consulting firms. I would be happy to answer any questions you might have.

***Gordon Van Toen:***

My name is Gordon Van Toen. I'm a sole consultant based in Markham and doing business throughout the GTA.

First, I would like to thank you for the opportunity to speak to you. I really appreciate that you have taken your time to listen to us today.

I will give some background as to who I am; my involvement with the Ontario Government; some problems I perceive with the current ongoing Vendors of Record RFP process with particular reference to that for Business and Management Consulting Services; some general concerns I have about the VORs; and some suggestions that I hope could benefit all parties.

I will be speaking purely from my perspective as a sole consultant. Though I hope that what I have to say represents the concerns of other sole consultants and small business consulting firms.

First a bit about me. I have a Bachelor of Science degree from Concordia University in Montreal and am a member of the Canadian Association of Management Consultants having passed my exams to become a Certified Management Consultant in 1985.

Prior to becoming a consultant I held a number of staff positions at in the Ontario Government and was last on staff as IT systems co-ordinator at Ministry of Health. I left the Ministry of Health in 1978 primarily as the position I was in was going to be transferred to Kingston. (Actually, position was to be split between Toronto and Kingston and I just did not want to spend all that time travelling).

Since then, I have worked full time as a consultant. Some of that time on the staff of large and small consulting firms, some as a sub-contractor to such firms and some directly as a provider of consulting services to Ontario Government.

I did not respond to either of the two previous “cycles” of the consulting services VOR or the any of the latest ones – for reasons I will explain shortly -- and I am not on any current VOR at Management Board.

One of the areas I have specialized in is the preparation, conduct and evaluation of RFPs. I have been responsible for RFPs with a value of millions of dollars. All the RFPs and selections I have worked on for the Government have been approved at all required levels. An \$8-million RFP I conducted recently passed an audit by the Provincial Auditor without any unresolved issues.

I have worked both sides of the RFP table -- as both a creator and evaluator of RFPs and as a respondent.

At least 90% of my assignments have been for the province but I have also worked in the private sector and for the Federal Government.

Since 1978, I have successfully completed more than 40 contract assignments for the province. These have ranged in length from a few days to eighteen months. I have provided services to at least a dozen ministries and agencies, boards and commissions.

Recently I have been finding it Increasing difficulty to obtain work with the province. This is almost entirely due to the introduction of the use of the VOR process as the mandatory way for government clients to obtain consulting services.

It is very difficult for a sole consultant to respond to the VOR RFPs.

- The actual clerical effort to create a response is quite onerous for one individual. This not such an issue for bigger firms.
- As a sole consultant, I just may not have two reference projects for a service category in the last two years. It is easy for big firms to provide reference projects as they can gather them world wide – though the relevance to the local office is close to zero except, possibly, for really large projects.
- I am required to have a significant amount of expensive insurance – although I may never get any business.
- The content for such mandatory requirements as the Project Management Processes, the Resources Plan and the Quality Management Plan is “boiler plate” for large firms but difficult to create for a sole consultant and much of it irrelevant as well.

The net effect of the above is that only large firms respond to the VORs. This is to the detriment of both the Government and the small firms and sole consultants.

Many sole consultants and small firms will not do work with the Ontario Government – even on a sub-contract basis – because of the VOR process. This is a loss to the Government of potential expertise.

I would also like to say a few words on how I see things actually working with the current and forthcoming VORs.

I understand that reasons for the many of the changes made to the VORs and VOR process are in response to comments made by the Provincial Auditor (now Auditor General) and problems identified in the two prior VOR cycles. However, I would assume that the true intent is to obtain the best services at the best price and do so in a manner that is fair to all parties. These objectives I don't believe are being met.

I have two examples that illustrate this.

The first is the cost overheads to do with Sub-contracting.

- The majority of firms (including the really big ones) obtain consultants for services by sub-contracting with other individuals and firms. The mark up can be as much as 60%. Consultants on projects are often sub-contractors to second-party firms who have contracted their services the firm that is actually providing services to the Government via a successful response to a Request for Services (RFS). This adds a cost overhead that eventually the Province is paying for.

The second example is the potential for the manipulation of ceiling rates.

- The requirement to cost for projects in the Statement of Work by way of VOR ceiling rates or reduced rates is subject to manipulation. If a proponent does not wish to establish a “reduced rate ceiling” with a ministry but, for reasons of say the current market situation, it may just underestimate the work involved and apply the original ceiling rates to provide a lower effective cost. This leaves open the use of the original ceiling rates for future work. This is not transparent to other responders to the RFS.

I do have some Recommendations.

- From my perspective I would like to see the under \$25,000 exclusion from the VOR process raised to \$50,000 to take account of the impact of inflation over the last decade or so. This will allow sole consultants to once again do business directly with the Government for small consulting assignments based on their own marketing and word-of-mouth recommendation.
- Give some credit to professional status, such as the CMC designation in contracting for consulting services.
- And additionally, a general review of VOR RFP requirements, content and the response process with aim to simplifying it for smaller firms and sole consultants.

**Thank you** again for the opportunity to speak to you today. I am open for questions as long as my voice holds.

***Laren Stadelman:***

*(Ms. Stadelman was unable to attend the afternoon session. The following speaking notes were prepared and left behind for the task force to review.)*

Good morning, my name is Laren Stadelman and I am a certified management consultant specializing in organizational change. I have been in consulting for over 15 years. Currently, I lead my own firm but over the years have worked for a variety of consulting firms, both large and small. I am also a member of the Canadian Association of Management Consultants and sit as a member of the Provincial Institute Council. I have worked with all levels of government and have tended to split my time more or less equally between the public and private sectors.

I welcome the opportunity to speak to you today about the procurement practices of the Ontario Government.

My major reason for coming today is to share with you my view that the government’s procurement practices should provide equal opportunity for all qualified consulting firms – both large and small – to do business with the Ontario government.

In my experience, however, there have been occasions when the level of detailed information requested, or the experience requirements, or both, have tended to disadvantage the smaller firms and sole practitioners.

I recognize that the procurement process needs to be competitive to ensure value for money and it need to be thorough to help manage risk. What I am suggesting, however, is that it should not be so rigorous or overwhelming in terms of what’s required from potential vendors, that it discourages qualified smaller firms from responding.

Last fall, the CAMC had the opportunity to meet with officials from the Management Board Secretariat. At that meeting, we outlined a number of our concerns relating to the procurement practices of the Government of Ontario. We also proposed five principles that should drive the design of any RFPs for management consulting services.

I would like to describe these principles for you now. They are a useful way to think about the procurement of management consulting services. And the help to ensure that there is equal opportunity for all qualified consulting firms – both large and small – to do business with the Ontario government

### **Principle 1: Management consulting is a service not a commodity**

We believe that the structure of any RFP for management consulting services should reflect the true nature of management consulting, where (i) assignments are typically defined in terms of desired processes, deliverables or outcomes rather than roles and (ii) where the qualifications are defined in terms of consulting competencies that are required by the assignment.

Treating consulting resources as a commodity is not appropriate because both consultant competencies and consulting projects tend to vary widely in their characteristics.

### **Principle 2: Keep it simple**

We are of the opinion that any RFP in its structure, text and requirements, should be kept as simple as possible in order to facilitate the maximum number of responses from qualified potential vendors and for ease of use from OPS clients.

We recommend therefore that firms be qualified based on a minimum set of essential consulting competencies, based on previous assignment descriptions and supported by client references.

### **Principle 3: Encourage equal opportunity**

RFPs should be equally available to all qualified firms, regardless of size, structure or business model or line of service.

I mentioned the question of size earlier and there are a number of related issues that need to be addressed. For example, unincorporated entities should be given the opportunity to incorporate; sole providers should be given an opportunity to form consortia; and so on. Furthermore, newer or recently re-organized firms should be given the opportunity to qualify without waiting through an entire VOR term.

### **Principle 4: Define qualifications based on consulting competencies**

The CAMC suggests that firms should be able to qualify independently of any particular tool, technology, methodology, or proprietary body of knowledge. To achieve this, that the qualifications and services should be defined in terms of broadly-defined and generally understood consulting competencies.

This is particularly true for VOR qualifications. If there are requirements for a specific body of knowledge or experience, such criteria should be identified at the RFR stage.

**Principle 5: Collect only the information you need**

Information should be collected from respondents only when reasonably required by the government to assess bids and protect its legitimate interests. It is sometimes our impression that more information is collected that is necessary for that purpose.

It should be taken into account that the respondents are often bound by confidentiality agreements that limit what they can disclose about previous projects.

Thank you for giving me the opportunity to participate today. I hope that I was able to offer reasonable and sound recommendations to you in order to make the procurement process more straightforward and reasonable – particularly for the smaller consulting firms.

I would be happy to answer any questions you might have.