Consultant's Name:	Francis Pelletier OAA | CIA | MBA | CCSA | AQI³ |

Background:

Years of Experience:	25+
Languages and Security Clearance	English and French (CCE) Secret Security Clearance (valid until February 2, 2036)

Education and Professional Qualifications:

Education:	• Executive MBA – Ottawa University, 2006 – 2008 • Six Sigma Black Belt training, 2005 • Certified Internal Auditor Designation (CIA), 2002 • Control Self-Assessment Certification (CCSA), 2002 • Process Management Certificate, 2002 • Bachelor of Architecture – Laval University (Quebec), 1985 • Architectural Studies – Westminster University (London, United Kingdom), 1984
Professional Designations:	• Executive MBA – Ottawa University, 2008 • Certified Internal Auditor Designation (CIA), 2002 • Control Self-Assessment Certification (CCSA), 2002 • Member of Ontario Association of Architect (OAA), 1991 • Membre de l'Ordre des Architectes du Québec, 1987-1990
Professional Affiliations:	• Member of the Royal Architectural Institute of Canada (MRAIC), 2004 • Member of Institute of Internal Auditors, 2002 • Member of Ontario Association of Architect (OAA), 1991 • Membre de l'Ordre des Architectes du Québec, 1987 • Vice-President Alumni Executive MBA Ottawa University, 2008 -2009 • Member of the Board of Governors & Treasurer, Lycée Claudel, 2004-2007 • Association québécoise des informaticiennes et informaticiens indépendants (AQIII), 2009
Recognition and Awards:	Deputy Minister's Commendation Award in recognition of his exemplary service to Public Works and Government Services Canada [2001] Recognition by independent Shingo Institute as "world class "process mapping and process analytic methodology developed and applied at Export Development Canada [2017] BGIS Corporate Award for Delivering Memorable Customer Service, acknowledging improved field assessor efficiency, reporting accuracy, innovation, team engagement, and stronger collaboration with Infrastructure Ontario, including the Ontario Provincial Police [2025]

Statement of Experience and Ability:

- Demonstrated ability to quickly adapt to a variety of environments and challenges, alongside perseverance throughout a 40-year career, as well as a strong ability to engage, motivate, and lead multidisciplinary professional teams.
- Led the planning, development, and deployment of information technology strategies that generated innovative solutions in organizations dealing with complex operational and technical challenges using various project management methods (agile, waterfall, etc.).
- Strong ability to unpack existing multilayered business processes coupled with legacy systems typically associated with large public or private sector organizations.
- Demonstrated a strong ability to produce and deliver high-quality bilingual presentations to brief senior management on complex issues.

IT BUSINESS TRANSFORMATION

- Led an extensive internal control review of current and future state business processes for Human Resources, Payroll, Procurement, and Finance transformation, leading to the ERP system implementation for a large organization.
- Applied People-Process-Technology lenses to the business transformation delivery.
- Led process mapping/reengineering and applied agile/design thinking approaches to develop innovative solutions.
- Delivered cloud-based, SaaS, and Microsoft 365 / Azure-supported business solutions, including collaborative platforms, Power BI-type decision-support tools, metadata and security preparation, workflow standardization, and implementation planning for public sector transformation.

BUSINESS TRANSFORMATION

- Developed a business case to restructure District Energy's organizational model to commercialize low-GHG emission thermal energy in the National Capital Region.
- Led multiple business development initiatives to expand the district energy network in the Gatineau-Ottawa downtown area.
- Contributed to the development of a financial model simulator to support the district's low-GHG emission thermal energy rate.

AUDIT

- Planned, conducted, and documented internal audit mandates. Led interviews, analyzed big data sets, and produced detailed and summary reports following Internal Auditing Standards.
- Led audit engagements or special examination reviews related to HR, Procurement, International Travel, and special mandate areas at the federal departments, Crown Corporation, or municipal government level.

ARCHITECTURE & ENGINEERING

- From 1983 to 1998, led the business transformation from traditional analogue practices to innovative digital solutions in private-sector engineering and architectural firms.
- Contributed to the design and development of over 100 various institutional projects, such as Parliament, Museum, Embassy, Military infrastructure, and Bridges.

Extensive Digital Technology knowledge:

Project Management	Collaborative Tool	Business Transformation	Audit	Architecture & Engineering
Office 365 Microsoft Word Microsoft Excel Microsoft PowerPoint Access MS Project Power BI PowerApps	Microsoft Teams SharePoint Mural miro Azure DevOps WordPress	SAP ERP Microsoft Dynamics 365 SUNGARD HIGHER EDUCATION FileMaker An Apple Subsidiary Visio STANDARD & POOR'S RATINGS SERVICES amdocs Minitab Copilot Claude NRC AI Zone	Wolters Kluwer TeamMate acl transforming audit and risk IDEA Data Analysis Software	AUTODESK AUTODESK SOFTIMAGE AUTODESK BIM 360 esri SketchUp

This table shows some of the applications I had to learn quickly to generate pragmatic solutions to successfully a variety of consulting mandates.

- Delivering of Project Management mandates [Office 365 (SaaS), Word, Excel, PowerPoint, MS Project, Power BI ,PowerApps]
- Facilitating "Design Thinking" or "Agile" collaborative sessions [TEAMS, SharePoint, MURAL, MIRO, AZURE DevOps, WordPress]
- Implementing large business transformation [SAP Event Manager, SunGard, FileMaker (SaaS), VISIO, Standard & Poor's Rating Services, AMDOCS, Minitab]
- Performing Audit mandates [SAP, SunGard, FileMaker (SaaS), VISIO, , AMDOCS, Minitab]
- Developing Architectural and Engineering projects [AUTOCAD, SOFTIMAGE, BIM 360, ESRI, SketchUp]
- Artificial Intelligence Architectural and Engineering projects [Co-Pilot, National Research Council AI Zone, Claude AI]

REFERENCES

IT Business Transformation	Architecture & Engineering	Audit
Sandy Kyriakatos Chief Information Officer National Research Council of Canada Telephone: 343-990-8088 email: Sandy.Kyriakatos@nrc.gc.ca (reference to mandate 62) _____ Dr. Daniel Charlebois Cybersecurity / DRDC Scientist National Defence Headquarter DRDC Centre for Security Science Telephone: 613-218-8796 email: DANIEL.CHARLEBOIS2@forces.gc.ca (reference to mandate 61) _____ Justine Hendricks President Farm Credit Canada email: Justine.hendricks@fcc-fac.ca Phone: 306-510-5889 Formerly: Export Development Canada Vice-President, Financing and Investments Group (reference to mandate 48 and 49) _____ Sven List Senior Vice-President, Canadian Corporate Business Export Development Canada email: SList@edc.ca Phone: 613-598-3267 (reference to mandate 51 and 53) _____ Josh Glover Director Bell Canada Information Technology - Sympatico Reference Letter (reference to mandate 8) _____ Johanne Beausoleil Vérificatrice Générale Ville de Gatineau email: beausoleil.johanne@gatineau.ca Phone: 819-208-5887 Formerly: Chief Audit Executive at Ottawa University Reference Letter (reference to mandate 7) _____	David Hewitt BGIS - Senior Director Telephone: 416.554.3238 email: David.Hewitt@bgis.com (reference to mandate 60) _____ Tomasz Smetny-Sowa, eng. Senior Director Public Services and Procurement Canada Energy Services Acquisition Program (ESAP) eMail: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca Phone: 613-736-2644 (reference to mandate 52, 54, 56, 57 and 58) _____ Yvan Desmarais, eng. Senior Director Public Services and Procurement Canada, Real Property Division, Terrasses de la Chaudière eMail: Yvan.Desmarais@tpsgc-pwgsc.gc.ca Phone: 613-219-9323 (reference to mandate 25 and 28) _____ Janice Cochrane Deputy Minister Public Works and Government Services Canada Reference Letter (reference to mandate 1) _____ Ben Giani Associate Professor Azrieli School of Architecture & Urbanism Carleton University Reference Letter (reference to mandate 1) _____ Veronica Silva (Retired) Current valid phone (613) 219-8008 Formerly: Director Professional and Technical Services Public Works and Government Services Canada (reference to mandate 21 and 23) _____	Yves Genest Vice President of Research and Strategic Initiative Canadian Audit and Accountability Foundation email : ygenest@caaf-fcar.ca Phone 613-878-2710 Formerly: Chief Audit & Evaluation, Shared Service Canada (reference to mandate 32 and 35) _____ Johanne Beausoleil Vérificatrice Générale Ville de Gatineau email: beausoleil.johanne@gatineau.ca Phone: 819.208.5887 Formerly: Chief Audit Executive at Ottawa University Reference Letter (reference to mandate 2) _____ Nicole Goodfellow General Director Canada Post Employee Excellence Reference Letter (reference to mandate 2, 3, 4 and 5) _____

Consultation History:

Client:	National Research Council of Canada | CIO branch	More (+)
Mandate:	Change Management Roadmap and Business Case Standardization	
Years:	February 2024 to July 2026 - [6 Months] [Delivery Based] Please see project no **62** descriptions further below	

Client:	Royal Canadian Mounted Police	More (+)
Mandate:	Data Centric Security - Metadata Requirements and Implementation Readiness	
Years:	September 2025 to February 2026 - [6 Months] [Delivery Based] Please see project no **61** descriptions further below	

Client:	BGIS and Infrastructure Ontario (IO)	More (+)
Mandate:	Automating Building Condition Assessment and Capital Planning Integration	
Years:	December 2024 to August 2025 - [9 Months] [Delivery Based] Please see project no **60** descriptions further below	

Client:	Global Affairs Canada (GAC)	More (+)
Mandate:	Grants and Contributions Transformation Initiative for International Assistance (GCTI)	
Years:	February 2023 to July 2024 - [18 Months] On-demand [Delivery based] Please see project no **59** descriptions further below [Ref 2023–6009]	

Client:	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	More (+)
Mandate:	Formal business case: commercialization of thermal energy services in the National Capital Region (stage III)	
Years:	September 2022 to January 2023 [5 Months] [Delivery Based] Please see project no **58** descriptions further below [Ref 2023–6010]	

Client:	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	More (+)
Mandate:	Assessing addressable market expansion for low-carbon emission heating and cooling thermal energy	
Years:	April 2022 to August 2022 [5 Months] [Delivery Based] Please see project no **57** descriptions further below [Ref 2022–6008]	

Client:	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	More (+)
Mandate:	Modernized Gatineau Energy Center – Schematic Design	
Years:	April 2021 to March 2022 [12 Months] [Delivery Based] Please see project no **56** descriptions further below [Ref 2021–6007]	

Client:	City of Levis – General Auditor of City of Lévis	More (+)
Mandate:	Performance Audit – IT Governance	
Years:	May 2021 to September 2021 [3 Months] [Delivery Based - part-time assignment] Please see project no **55** descriptions further below [Ref 2020–6006]	

Client:	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	More (+)
Mandate:	Modernized Gatineau Energy Center - Concept Design package	
Years:	April 2020 to March 2021 [12 Months] [Delivery Based] Please see project no **54** descriptions further below [Ref 2020–6005]	

Client:	Export Development Canada – Project and Structured Finance Group	More (+)
Mandate:	SPF Underwriting Re-engineering – POLARIS Enhancement release 2	
Years:	April 2019 to March 2020 [12 Months] [Delivery Based] Please see project no **53** descriptions further below [Ref 2019–6004]	

Client:	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	More (+)
Mandate:	Feasibility Study: Commercialization of thermal energy services in the National Capital Region (stage III)	
Years:	February 2019 to April 2019 [3 Months] Please see project no **52** descriptions further below [Ref 2018–5001]	

Client:	Export Development Canada – Project and Structured Finance Group	More (+)
Mandate:	SPF Underwriting Re-engineering – POLARIS Enhancement release 1	
Years:	August 2018 to March 2019 [8 Months] [Delivery Based - part-time assignment ~ on-going] Please see project no **51** descriptions further below [Ref 2018–6001]	

Client:	Natural Resources of Canada - Corporate Management Services Sector (CMSS)	More (+)
Mandate:	Review of On-Boarding and Off-Boarding Program	
Years:	March 2018 [Delivery Based - Part Time ~ 1month] Please see project no **50** descriptions further below [Ref 2018–5002]	

Client:	Export Development Canada – Project and Structured Finance Group	More (+)
Mandate:	SPF Underwriting Re-engineering – Development new end-to-end underwriting & asset management platform - POLARIS	
Years:	January to July 2018 [7 Months] Please see project no **49** descriptions further below [Ref 2018–5001]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	Process Analysis, Process Map and Information Mapping in support to Continuous Improvement and Business Transformation	
Years:	January to December 2017 [12 Months] Please see project no **48** descriptions further below [Ref 2017–4003]	

Client:	Natural Resources of Canada - Office Energy Research and Development (OERD)	More (+)
Mandate:	Grant and Contribution Agreements Management - Process Mapping, Roles and Responsibilities	
Years:	September 2016 to March 2017 [Delivery based ~ 2 months] - Please see project no **47** descriptions further below [Ref 2016–4002]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	Process and Information mapping expansion to Business Development and Asset Management Group - Current State	
Years:	January to December 2016 [12 Months] Please see project no **46** descriptions further below [Ref 2016–4001]	

Client:	Department of Finance Canada - Audit and Evaluation Branch	More (+)
Mandate:	Coaching to support TeamMate Implementation	
Years:	December 2015 [Delivery Based - Part Time ~ 1 month] - Please see project no **45** descriptions further below [Ref 2015–3015]	

Client:	Canadian Food Agency of Canada - Audit and Evaluation Branch	More (+)
Mandate:	Coaching to support TeamMate Implementation	
Years:	November 2015 to October 2016 [Delivery Based - Part Time ~ 1 month] - Please see project no **44** descriptions further below [Ref 2015–3014]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	Process and Information mapping expansion to Business Development and Asset Management Group - Current State	
Years:	September to December 2015 [4 Months] Please see project no **43** descriptions further below [Ref 2015–3013]	

Client:	Statistic Canada - Audit and Evaluation Branch	More (+)
Mandate:	Coaching to support TeamMate Implementation	
Years:	June 2015 to March 2018 [Delivery Based - Part Time ~ 15 days] - Please see project no **42** descriptions further below [Ref 2015–3012]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	Process and Information mapping expansion to other Finance and Investment Group - Current State	
Years:	April 2015 to August 2015 [5 Months] Please see project no **41** descriptions further below [Ref 2015–3011]	

Client:	Environment Canada - Office of Audit and Evaluation	More (+)
Mandate:	Coaching to support TeamMate Implementation	
Years:	December 2014 to May 2015 [Delivery Based - Part Time ~ 1month] - Please see project no **40** descriptions further below [Ref 2015–3010]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	Roadmap application – Finance and Investment Group - CABL Process and Information mapping - Current State	
Years:	January to March 2015 [3 Months] - Please see project no **39** descriptions further below [Ref 2015–3009]	

Client:	Export Development Canada - Financing and Investment Group	More (+)
Mandate:	High-level Roadmap Data Profiling Data Modeling Data Migration and Data Retention	
Years:	December 2014 [Delivery based ~ 1 month] - Please see project no **38** descriptions further below [Ref 2014–3008]	

Client:	Canadian Dairy Commission - Internal Audit	More (+)
Mandate:	Coaching to support TeamMate Implementation	
Years:	September 2014 to November 2014 [Delivery Based - Part Time ~ 1month] - Please see project no **37** descriptions further below [Ref 2014–3007]	

Client:	Natural Resources of Canada - Environmental Studies Research Funds	More (+)
Mandate:	ESRF Processes Review and Mapping	
Years:	July to October 2014 [Delivery based ~ 2 months] - Please see project no **36** descriptions further below [Ref 2014–3006]	

Client:	Shared Services Canada, Office of Audit and Evaluation	More (+)
Mandate:	TeamMate configuration and deployment strategy - Phase 2	
Years:	November 2013 to December 2014 [12 months] - Please see project no **35** descriptions further below [Ref 2013–3003]	

Client:	Public Works & Government Services Canada, Accounting, Banking and Compensation Branch	More (+)
Mandate:	Quality Assurance plan to support evaluation of Documentation Imaging Solution	
Years:	Mid-January to Mid-April 2014 [3 months] - Please see project no **34** descriptions further below [Ref 2013–3005]	

Client:	Professional Institute of the Public Service of Canada, National Office	More (+)
Mandate:	Special Advisor to Chief Financial Officer to support IT Implementation	
Years:	Mid-October 2013 to Mid-January 2014 [3 months] - Please see project no **33** descriptions further below [Ref 2013–3004]	

Client:	Shared Services Canada, Audit and Evaluation Office, Office of Audit and Evaluation	More (+)
Mandate:	TeamMate configuration and deployment strategy – Phase 1	
Years:	July to August 2013 [2 months] - Please see project no **32** descriptions further below [Ref 2013–3002]	

Client:	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services, Centre of Expertise	More (+)
Mandate:	PWGSC Building Condition Report Monitoring Asset	
Years:	January to June 2013 [6 months] - Please see project no **31** descriptions further below [Ref 2013–2009]	

Client:	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services, Centre of Expertise	More (+)
Mandate:	Structural Podiums and Cladding Review Program, Validation and Investigation of Priority NCA Assets	
Years:	April 2012 to Sept 2013 [18 months] - Please see project no **30** descriptions further below [Ref 2012–2005 | 2012–2008 | 2013–3001]	

Client:	National Capital Commission – Audit and Corporate Ethics	More (+)
Mandate:	Audit of Procurement Activities	
Years:	July to September 2012 [Delivery Based - Part Time ~ 3 months] - Please see project no **29** descriptions further below [Ref 2012–2006]	

Client:	Public Works & Government Services Canada, Real Property, Operational Support Services, Mechanical Vertical Transportation	More (+)
Mandate:	Assessment Vertical Transportation Devices Program	
Years:	April 2012 to March 2013 [12 months] - Please see project no **28** descriptions further below [Ref 2012–2002 | 2012–2003 | 2012–2007 | 2013–2010]	

Client:	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services (P&T), Centre of Expertise	More (+)
Mandate:	Parking Garage and Structural Podiums Business Process Mapping and Development of a Structural Performance & Rehabilitation Monitoring System	
Years:	January to March 2012 [3 months] - Please see project no **27** descriptions further below [Ref 2012–2001]	

Client:	Environment Canada - Office of Audit and Evaluation	More (+)
Mandate:	Benchmarking study of procurement in 5 departments.	
Years:	January to April 2012 [4 months] - Please see project no **26** descriptions further below [Ref 2011–2000]	

Client:	Public Works & Government Services Canada, Real Property Division Professional & Technical Services, Centre of Expertise	More (+)
Mandate:	Professional and Technical Services - Classification documentation structure system aligned to Internal business process	
Years:	August 2011 to February 2012 [7 months] - Please see project no **25** descriptions further below [Ref 2011 – 1900]	

Client:	Public Works & Government Services Canada, Real Property Division, Operational Support Services (OSS), Mechanical / Vertical Transportation	More (+)
Mandate:	Map Registry Operational Events - Vertical Transportation on Site Visit Engineering Assessment	
Years:	April 2011 to March 2012 [1 year] - Please see project no **24** descriptions further below [Ref 2010–1700]	

Client:	Public Works & Government Services Canada, Real Property Division, Operational Support Services (OSS) Maintenance & Operational Assurance Services	More (+)
Mandate:	Management Action Plan (MAP) report, analysis and continuous update	
Years:	Oct - Dec 2011 [3 months] - see project no **23** descriptions further below [Ref 2010–1600 | 2011–1800]	

Client:	Public Health Agency of Canada (PHAC), Audit Service Division	More (+)
Mandate:	International Travelling Activities Audit	
Years:	January to March 2011 [3 months] - Please see project no **22** descriptions further below [Ref 2010–1500]	

Client:	Public Works and Government Services Canada, Real Property Division	More (+)
Mandate:	Accelerated Infrastructure Program (IAP) Advisory and Multi-Phases Consulting mandate	
Years:	August 2010 to June 2011 [11 months] - Please see project no **21** descriptions further below [Ref 2010–1400]	

Client:	Public Health Agency of Canada (PHAC), Audit Service Division	More (+)
Mandate:	Audit of Crisis and Emergency Communications	
Years:	July to September 2010 [3 months] - Please see project no **20** descriptions further below [Ref 2010–1300]	

Client:	Treasury Board of Canada Secretariat, Policy, Methodologies Platforms, Guides and Tools	More (+)
Mandate:	Literature Review for the Policy on Internal Audit	
Years:	April to May 2010 [2 months] - Please see project no **19** descriptions further below [Ref 2010–1200]	

Client:	Natural Resources of Canada - Centre of expertise, Grant & Contribution monitoring program	More (+)
Mandate:	Grant & Contribution monitoring program	
Years:	February to June 2010 [5 months] - Please see project no **18** descriptions further below [Ref 2010–1100]	

Client:	Foreign Affairs and International Trade Canada, Internal Audit Division (ZBD)	More (+)
Mandate:	Global Partnership Program (GPP) administered by the Major Program Bureau (IGX)	
Years:	January to February 2010 [2 months] - Please see project no **17** descriptions further below [Ref 2009–1000]	

Client:	Public Works and Government Services Canada, Office of Audit and Evaluation (OAE)	More (+)
Mandate:	Seized Property Management Directorate (SPMD)	
Years:	December 2009 to March 2010 [4 months] - Please see project no **16** descriptions further below [Ref 2009–500]	

Client:	PWGSC Accounting, Banking and Compensation Branch	More (+)
Mandate:	Monitoring program of procurement of services	
Period:	October to November 2009 [2 months] - Please see project no **15** descriptions further below [Ref 2009–400]	

Client:	Natural Resources of Canada - Office of Audit Branch	More (+)
Mandate:	Accelerated Infrastructure Program – Advisory and Multi-Phases Audit mandate	
Period:	June to August 2009 [3 months] - Please see project no **14** descriptions further below [Ref 2009–300B]	

Client:	Natural Resources of Canada - Office of Audit Branch	More (+)
Mandate:	International Travel Audit – Compliance and value for money	
Period:	September to October 2009 [2 months] - Please see project no **13** descriptions further below [Ref 2009–300A]	

Client:	Environment Canada - Office of Audit and Evaluation	More (+)
Mandate:	Operational Review – Efficiency of the Contracting Office	
Period:	April to May 2009 [2 months] - Please see project no **12** descriptions further below [Ref 2009–200]	

Client:	Natural Resources of Canada - Office of Audit and Evaluation	More (+)
Mandate:	Geo-Connection Grant and Contribution Program	
Period:	February to March 2009 [2 months] - Please see project no **11** descriptions further below [Ref 2009 – 100]	

Client:	PWGSC Office of Audit and Evaluation (OAE)	More (+)
Mandate:	Operational Review of procurement practices for Professional Services	
Period:	December 2008 to January 2009 [2 months] - Please see project no **10** descriptions further below [Ref 2008–400]	

Client:	Agriculture and Agri-Food Canada (AAFC) Human Resources Branch – Service Delivery	More (+)
Mandate:	Audit Plan Framework & Schedule	
Period:	October to November 2008 [2 months] - Please see project no **9** descriptions further below [Ref 2008–300]	

Client:	Bell Canada, Bell Sympatico	More (+)
Mandate:	Future Mode of Operation (FMO) – Design & Development	
Period:	May to September 2008 [5 months] - Please see project no **8** descriptions further below [Ref 2008–200]	

Client:	Ottawa University, Internal Audit Office	More (+)
Mandate:	Enterprise Resource Planning HR, Payroll and Finance – Design Process Map	
Period:	October 2006 to April 2008 [1 year and 6 months] - Please see project no **7** descriptions further below	

Client:	Heath Canada, Chief Financial Officer Branch	More (+)
Mandate:	Planning, Analysis and Reporting Division (PARD) – Business Process Review	
Period:	May to September 2006 [5 months] - Please see project no **6** descriptions further below	

Employment History:

Client:	Canada Post, Head Office, Operations Development	
Mandate 5:	Black Belt Six Sigma Program – Unaddressed Admail Services - May 2004 to February 2005 [10 months]	More (+)
Mandate 4:	Process Excellence – 15 Measurements Outcomes - December 2003 to April 2004 [5 months]	More (+)
Mandate 3:	Business Transformation – SAP Implementation – Take to Market - June to November 2003 [8 months]	More (+)
Mandate 2:	Internal Audit & Control Consulting Mandate - November 2001 to May 2003 [1 year and 7 months]	More (+)
Period:	November 2001 - May 2005 [3 years and 3 months] - Please see project no 2, 3, 4 and 5 descriptions further below	

Client:	Public Works and Government Services Canada,	More (+)
Mandate:	Head Office, Digital Simulation Laboratory	
Period:	May 1992 – October 2001 [9 years] - Please see project no 1.1, 1.2, 1.3 and 1.4 description further below	

Client:	Public Works Canada, Ottawa Region
Period:	1991 – 1992 - [1 year] - Please see appendix B for projects listing

Client:	Gauthier Guité Roy, Architects
Period:	1988 – 1991 - [3 years] - Please see appendix B for projects listing

Client:	Dorval & Fortin, Architects
Period:	1986– 1987 - [1 year] - Please see appendix B for projects listing

Client:	COPAC Experts-Conseils
Period:	1985 – 1986 - [1 year and 4 months] - Please see appendix B for projects listing

Client:	D'Anjou & Moisan, Architects
Period:	Summer 1983 - [4 months] - Please see appendix B for projects listing

Project no 62 summary

Project Name	Change Management Roadmap and Business Case Standardization
Client	National Research Council of Canada | CIO branch
Duration	February 2024 to July 2026 - [6 Months] [Delivery Based]
Project Description	**Component 1 | Change Management Roadmap:** Developed an Excel-based decision-support tool converting World Café pain points into a prioritized One Door roadmap supporting the reorganization of two groups under one CIO Branch. This delivered an IT solution for operational prioritization and organizational change planning. **Component 2 | Business Case Standardization:** Standardized Business Case, Executive Summary and Cost Estimate development through an NRC AI-assisted platform linking initiative definition, benefits, funding guidance and cost estimation. The platform helped improve consistency in how initiatives were prepared, reviewed and advanced for approval. This supported a BI-style solution for structured decision-making and executive reporting.
Scope and objective	**Component 1 – One Door roadmap:** Converted World Café pain points into structured action items, classified them by theme, scored benefits, assessed people/process/technology implementation challenges, and consolidated results into eleven anchor actions across three opportunity areas with dependency logic toward the One Door outcome. This included evaluation and selection considerations for technology solutions, frameworks and platform options. **Component 2 – Business Case standardization:** Standardized expectations for run, grow and transform IT investments, aligned guidance to maturity stages from Stage 0 Concept to Stage 3 Approval to Execute, and integrated funding logic, assumptions, cost-estimation principles and AI-assisted prompts. The scope also considered governance needs, review checkpoints, stakeholder adoption, and implementation readiness so that business case quality could improve over time. This addressed integration across business case content, funding data, cost-estimate inputs and reporting outputs.
Contribution of the proposed resource to the project	Built the Excel-based One Door analysis tool to transform stakeholder pain points into prioritized action items using benefit and implementation-challenge criteria. Applied AI-assisted analysis to classify actions, rationalize overlaps, support sequencing, and consolidate outputs into three opportunity areas, eleven anchor actions and visual dependency logic. This represented a practical IT solution supporting prioritization and change-management planning. Developed the standardized Business Case and Cost Estimate framework, including run/grow/transform classification, stage-based maturity guidance, funding guidance, cost-estimate assumptions, structured outputs and central dashboard concept. Designed the solution around a centralized Master Guidance mechanism so updates to guidance, assumptions and decision criteria could be applied consistently across in-flight Business Cases, reducing rework and improving alignment between initiative teams, finance inputs and executive reviewers. This included a BI-style platform approach for reporting, analysis and decision-making and integration logic across guidance, templates, assumptions and dashboard outputs. Clarified how cost-estimate detail, evidence, assumption maturity and governance expectations should increase through each stage to improve decision-readiness and executive consistency. The work also helped reduce variation in how initiatives were framed, compared and advanced for approval by giving teams a common structure for describing business need, value, risk, funding source, delivery readiness and implementation assumptions. The business case standardization efforts were positioned as a cloud-ready, platform-based decision-making approach, aligning guidance, cost-estimate inputs, assumptions, dashboards, and executive reporting into a repeatable structure suited to Microsoft 365-supported collaborative and governance environments.
Deliverables	**Component 1 – One Door roadmap and prioritization tool** • Excel-based One Door prioritization workbook converting World Café pain points into action items. • Theme classification, benefit scoring and people/process/technology challenge assessment to compare and prioritize initiatives, including technology solution, framework and platform considerations used to assess implementation feasibility. • Roadmap organized around three opportunity areas, eleven anchor actions, visual dependencies and a reusable change-management analysis tool. **Component 2 – Business Case, Executive Summary and Cost Estimate standardization** • Executive-level principles and guidance for Business Case and Cost Estimate development across run, grow and transform investments. • Standardized initiative package, including Business Case, funding guidance, cost-estimate model, stage-based framework and AI-assisted dashboard concept, supporting a Business Intelligence-style solution for structured reporting and executive decision support. • Centralized Master Guidance mechanism supporting consistent updates to new and/or "in-flight" Business Cases. • Adaptive guidance linking maturity stage to required analysis depth, evidence quality, assumption confidence, cost-estimate detail and governance expectations. • Integrated guidance, templates, funding inputs, cost-estimate assumptions and dashboard outputs into a repeatable structure, supporting integration across business case content, funding data, cost-estimate inputs and reporting outputs. **Cross-component outcome:** The combined outputs created a practical decision-support foundation linking stakeholder input, prioritization, business justification, cost confidence, funding alignment and executive reporting. This improved consistency, transparency and traceability across CIO Branch planning and helped teams compare initiatives using clearer evidence and common decision criteria.
Reference	National Research Council of Canada

Sandy Kyriakatos Chief Information Officer Telephone: 343-990-8088 email: Sandy.Kyriakatos@nrc.gc.ca	Renée Venne Chief Strategy Telephone: 613-293-8167 email: Renee.Venne@nrc.gc.ca	Michelle Larocque Strategic Analyst Telephone: 343-542-1656 email: Michelle.Larocque@nrc.gc.ca	Caroline Murphy Continuous Improvement Telephone: 709-273-7022 email: Caroline.murphy@nrc.gc.ca

Project Name	Data Centric Security - Metadata Requirements and Implementation Readiness
Client	Royal Canadian Mounted Police
Duration	September 2025 to February 2026 - [6 Months] [Delivery Based]
Project Description	This project supports RCMP and CORD3 Data Security activities by defining and documenting metadata requirements for controlled consistent and secure handling of digital information. It involved delivering information technology solutions to support secure metadata management, data classification and implementation readiness. The work focuses on clarifying required metadata elements, business rules, ownership, usage expectations and implementation considerations needed to improve discoverability, classification, retention, auditability and downstream integration across data-security processes.
Scope and objective	The scope of the project includes reviewing the metadata requirement report, consolidating functional and technical needs, identifying mandatory and optional metadata fields, and translating these needs into practical guidance for data security stakeholders. The objective is to produce a clear, implementable metadata baseline that supports secure information management, consistent reporting, compliance alignment, operational decision-making and future system integration. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support scalable implementation.
Contribution of the proposed resource to the project	The proposed resource contributed to the project by developing the MAPLE Interactive Assistance Modeling tool, a capability intended to support interactive analysis, modeling and interpretation of metadata requirements within the Data Centric Security context. This included conceiving, designing and implementing a Business Intelligence-style solution to support structured analysis, reporting and stakeholder decision-making. This work helped translate complex metadata and security requirements into a practical tool-supported approach for stakeholder review, requirement clarification and implementation planning. Contributes to cloud readiness by translating metadata, classification, retention, auditability, and reporting requirements into practical implementation guidance for the secure handling of information across applications, repositories, and future data security platforms. Key contributions included: • Designed and developed the MAPLE Interactive Assistance Modeling tool to support metadata requirement analysis and Data Centric Security decision support. • Structured tool functionality to help users explore metadata fields, relationships, business rules, assumptions and requirement dependencies. • Enabled interactive assistance for interpreting metadata requirements, identifying gaps and supporting stakeholder clarification. • Aligned the tool outputs with classification, retention, auditability, reporting and implementation-readiness needs, including integration considerations across multiple systems, applications and data sources. • Prepared the MAPLE tool concept and supporting material so it could be used by business, technical and governance stakeholders.
Deliverables	The deliverables include the following (but not limited to): • Consolidated metadata requirements summary, including required fields, definitions, purpose, usage notes and business-rule considerations. • Gap, assumption and clarification log to support stakeholder review and requirement validation. • Implementation-ready recommendations for metadata governance, quality controls, reporting, retention, classification and integration, including technology solution, framework and platform considerations for connecting metadata requirements with downstream systems and data sources.
Reference	CORD3 Innovation Inc. Glen Hendersen Chief Technology Officer (CTO) Telephone: 613-808-9979 email: Glen.Henderson@cord3inc.com Murray Toll Director of Delivery Telephone: 613-404-7987 email: murray.toll@Cord3Inc.com National Defence Headquarter DRDC Centre for Security Science Dr. Daniel Charlebois Cybersecurity / DRDC Scientist Telephone: 613-218-8796 email: DANIEL.CHARLEBOIS2@forces.gc.ca Royal Canadian Mounted Police Daniel Roy Telephone: 613-716-8268 email: Dan.Roy@rcmp-grc.gc.ca

Project Name	Automating Building Condition Assessment and Capital Planning Integration
Client	BGIS and Infrastructure Ontario (IO)
Duration	December 2024 to August 2025 - [9 Months] [Delivery Based]
Project Description	This project supported Infrastructure Ontario (IO) and its service provider BGIS in enhancing the end-to-end business process for Building Condition Assessment (BCA) reporting and Capital Planning during IO's implementation of a new Asset Management Information System (AMIS). Because AMIS was still under development and did not yet include several functions required for ARM team deliverables, the project addressed a significant operational challenge involving data extraction, integration, and reporting across AMIS and supporting systems such as RealSuite, RealProperty, RealCondition, Vault, PMWeb, and Kahua. The initiative focused on improving data integrity, process transparency, digital enablement, and field assessor efficiency through an automated internal tool that streamlined daily audit, integration, and reporting activities. It involved delivering information technology solutions that addressed operational needs and improved the reliability of field assessment information. The solution also established a foundation for a more robust platform to support collaboration with IO's new AMIS system and strengthen decision-making between IO and BGIS.
Scope and objective	The scope of the project included a comprehensive review and documentation of the BCA and Capital Planning process. • Map the workflow from data collection to report generation and system integration. • Evaluate the balance of preventive and detective controls. • Document data mapping between IO and BGIS systems. • Integrate reporting inputs from AMIS, RealSuite, RealProperty, RealCondition, Vault, PMWeb, and Kahua into a unified structure for report writers. • Develop a roadmap for digital tools to support seamless information exchange, including the evaluation and selection of appropriate technology solutions, frameworks, and platforms.
Contribution of the proposed resource to the project	**Business Process Review and Control Assessment.** Conducted a comprehensive review of the BCA and Capital Planning lifecycle, from documentation collection, site inspections, and condition observations to report generation, approvals, and system uploads. The work mapped the full workflow, assessed preventive and detective controls, identified manual hand-offs and control gaps, and highlighted opportunities to improve efficiency, accuracy, compliance, and data governance. **Data Mapping and Integration Documentation.** Developed the data mapping framework for AMIS, RealSuite, RealProperty, RealCondition, Vault, PMWeb, Kahua, and related IO data environments. The work clarified data sources, transformations, validation points, ownership, system responsibilities, and data dependencies, while establishing conventions for interaction between BGIS systems and IO databases such as ARCADIS. This supported integration solutions between multiple systems, applications, and data sources. **Digital Enablement Roadmap and ASSISTopus.** Created a roadmap for digital tools to support seamless information exchange between IO and BGIS, including functional requirements, integration points, and initiative prioritization based on impact, feasibility, and alignment with digital transformation goals. To address AMIS functionality gaps, developed ASSISTopus, a custom internal reporting tool that automates data extraction, integration, folder audits, file counts, data aggregation, and report preparation for report writers. ASSISTopus consolidates information from AMIS and supporting platforms into a unified report-writing format, supported by a scalable user interface, modular VBA infrastructure, Microsoft Copilot-assisted scripting, and an encrypted X drive Master File Structure with BBAR classification folders. This also supported Business Intelligence reporting, analysis, and decision-making. The contribution was recognized through a **Corporate Q3 Award** for Delivering Memorable Customer Service, acknowledging improved field assessor efficiency, reporting accuracy, innovation, team engagement, and stronger collaboration with IO, including the Ontario Provincial Police.
Deliverables	• A documented end-to-end business process for BCA and Capital Planning. • A comprehensive data mapping framework between IO and BGIS systems. • A strategic roadmap for digital tool development and integration, including recommended technology solutions, frameworks, and platform considerations). • ASSISTopus, a custom internal reporting tool that automated data extraction, integration, and preparation from AMIS and supporting platforms into a unified report-writing format. • A scalable digital file architecture on the X drive, including a Master File Structure with BBAR classification folders, to organize deliverables and support consistent collaboration. • A scalable user interface and modular VBA coding infrastructure designed to support future enhancement and broader adoption across similar teams or projects. • Automated VBA scripts and process improvements that enhanced field assessor efficiency, improved reporting accuracy, and supported future alignment with IO's AMIS system, while serving as an initial integration solution connecting multiple data sources and operational workflows. The solution significantly reduced the manual effort and time required to compile and integrate data from diverse sources, enabling the ARM team to meet deliverable timelines with improved accuracy and consistency. It enhanced collaboration across workstreams, clarified roles and responsibilities across IO and BGIS platforms, ensured alignment with both organizations' systems despite ongoing AMIS development, and created a scalable foundation for a more integrated, efficient, and sustainable digital reporting ecosystem.
Reference	David Hewitt BGIS - Senior Director Telephone: 416.554.3238 email: David.Hewitt@bgis.com Anita Ramalingam BGIS - Director Telephone: 647-215-1434 email: Anita.Ramalingam@bgis.com

Project Name	Grants and Contributions Transformation Initiative for International Assistance (GCTI)
Client	Global Affairs Canada (GAC)
Duration	February 2023 to July 2024 - [18 Months] [Delivery Based]
Project Description	GAC is replacing key components of its legacy Grants and Contributions management system to modernize international assistance program delivery. The initiative required business transformation expertise to streamline existing processes, prepare users for new ways of working, and support the transition to modern technology-enabled operations. The work addressed capacity and skill gaps within the project team by supporting process analysis, stakeholder engagement, solution design, testing readiness, and transformation planning across multiple G&C user groups and delivery streams. This involved delivering information technology solutions to support business transformation, process modernization and improved Grants and Contributions service delivery.
Scope and objective	The mandate managed a portfolio of initiatives addressing the needs of numerous G&C user groups, including external partners and GAC employees. The target technology platform was based on the Enterprise Grants and Contributions System led by Treasury Board of Canada Secretariat (TBS) and required integration with document management, contracting, finance, collaboration tools, and client portal components. The scope included establishing a process mapping methodology, documenting current and future-state business processes for MODUS G&C streams such as Calls, CFLI, Department Initiated, Institutional Support, RFPs, and Unsolicited Proposals, and supporting readiness for testing, adoption, and governance. This included evaluating and selecting technology solutions, frameworks and platform components required to support the transformation roadmap and future-state operating model.
Contribution of the proposed resource to the project	• Developed and deployed Design Thinking sessions, including Dry-Run and Soft Launch multidisciplinary teams, to improve Results-Based Management (RBM) for international assistance Grants and Contributions processes. • Applied human-centered Design Thinking across the transformation lifecycle, facilitated stakeholder sessions, captured lessons learned, and documented Proofs of Concept for senior management and G&C transformation stakeholders. • Managed mandate planning and delivery, including scope, schedule, quality, integration, risks, communications, resources, KPIs, progress reporting, transparency, and alignment across multidisciplinary delivery teams. • Reviewed and documented business processes, data governance, functional requirements, internal controls, UAT considerations, and technical needs for MODUS G&C processes such as Calls, CFLI, Department Initiated, Institutional Support, RFPs, and Unsolicited Proposals. • Oversaw Azure DevOps Kanban activities, including user stories, acceptance criteria, sprint organization, backlog tracking, user testing outcomes, readiness of built functions, and traceability between business needs and delivered features. This supported Business Intelligence-style monitoring, outcome analysis, and decision-making. • Supported integration planning across grants and contributions processes, document management, contracting, finance, collaboration tools, and client portal components, including dependencies between business workflows, technology components, and data sources. This included designing integration solutions between multiple systems, applications, and data sources. • Supported change readiness by translating workshop findings, user feedback, process gaps, and testing observations into actionable recommendations for governance, training, communications, adoption planning, and future-state implementation. • This modernization included the integration of cloud-based solutions, the documentation of information flows, their alignment with business processes and required controls, as well as consideration of user needs to facilitate adoption, support scalable digital service delivery, and foster the collaborative implementation of an innovative solution.
Deliverables	The deliverables include the following (but not limited to): • Design Thinking methodology, deployment strategy, facilitation materials, Mural/SharePoint workspaces, homework packages, session outputs, and lessons learned for Empathy, Define, Ideate, Prototype, and Test activities. • Strategic and tactical governance documentation, business process reengineering methodology, process maps, high-level presentations, monitoring dashboards, MIRO/VISIO materials, and senior-management briefing inputs for concurrent transformation initiatives. • Technology platform, process mapping, reporting, transformation management, UAT readiness, backlog tracking, and testing traceability support across G&C processes and related data sources. This included Business Intelligence-style dashboarding, technology platform considerations, and integration support across process mapping, reporting, and transformation management data sources. • Transformation outcomes included improved stakeholder alignment, clearer process ownership, stronger testing traceability, better delivery visibility, reusable facilitation methods, and a repeatable foundation for future G&C modernization work.
Reference	Antoine Julien Deputy Director Business Process Transformation (KXB) International Development Partnerships and Operations (KFM) Phone: 613.298.4574 email: antoine.julien@international.gc.ca Global Affairs Canada International Assistance Operations Bureau (KPD) 200 Promenade du Portage, Gatineau, Québec, K1A 0G4

Project Name	Formal business case: commercialization of thermal energy services in the National Capital Region (stage III)
Client	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)
Duration	September 2022 to January 2023 [5 Months] [Delivery Based]
Project Description	The Energy Services Acquisition Program (ESAP) undertake a review of its business structure to addresses concern that current organisation structure partially delivers some business results or meet the government's objectives. The purpose of this initiative is proactively response to an evolving environment: This work involved delivering information technology solutions to support business case analysis, energy-service commercialization planning and evidence-based decision-making. o The government is rationalizing its property holdings - Leading to an increase in building energy efficiency and a potential loss of connected buildings translating into a reduction ESAP's revenue base o Buildings privately owned are under a push to decarbonize, partially in response to Federal GHG emission reduction targets for leased facilities and other tenant expectations o The government is focusing on building decarbonization expanding ESAP's potential role and importance
Scope and objective	Based on the feasibility study developed in 2019 (see mandate 52), authorization to proceed with the development of a formal business case was delay due Coronavirus disease pandemic and re-organisation at the senior management of PSPC. Considering the favorable result of the previous assessment of the addressable market demand (see mandate 57), the purpose of the formal business case was to obtain an independent review from an external consultant and seek support from the central agencies being Privy Council Office, Treasury Board, Finance and Department of Justice. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support commercialization options, financial modelling and long-term implementation planning.
Contribution of the proposed resource to the project	The resource played a central role in supporting the formal business case by assessing organizational, financial, operational and technology options for commercializing low-carbon thermal energy services beyond the federal market. The work helped PSPC and ESAP define a practical path for expanding the District Energy System's potential client base while protecting long-term program sustainability, rate stability and alignment with federal decarbonization objectives. • Defined business needs, expected outcomes, decision drivers and strategic considerations through SWOT and PESTLE analysis, including the identification of market opportunities, implementation risks, governance constraints and external policy factors affecting commercialization. • Supported procurement planning, central-agency consultations, industry sounding activities and option analysis by preparing inputs, reviewing consultant material and helping translate technical, financial and policy considerations into business-case recommendations. • Assessed how DES services could contribute to building certification and energy-management requirements, including LEED v4, Green Globes and ISO 50001, and documented how district energy could support client decarbonization objectives and environmental-performance reporting. • Led the development of updated SWOT analysis, rate-modelling assumptions, financial simulations, service-agreement inputs and data-governance considerations to support the evaluation of alternative commercial structures and future client-service arrangements. • Developed dynamic rate and financial modelling tools to evaluate revenue impacts, cost-recovery requirements, rate sensitivity, customer expansion opportunities and long-term affordability under different commercialization scenarios. This represented a Business Intelligence-style solution for scenario analysis, rate simulation and management decision support. • Designed financial modelling simulations to test long-term sustainability across network-expansion scenarios, including assumptions related to new client connections, capital investment, operating costs, carbon-reduction benefits, revenue requirements and risk allocation. This involved conceiving, designing and implementing a Business Intelligence-style solution to support forecasting, scenario comparison and evidence-based investment decisions. • Facilitated the integration of current and prospective ESAP client energy profiles in GIS to support spatial analysis, customer identification, network expansion planning and comparison of business-case scenarios by designing integration solutions between multiple systems, applications and data sources, including energy profiles, financial models, rate models and GIS datasets.
Deliverables	• Participate to official presentation to PSPC senior management • Lead preliminary due diligence exploration with Canada Lands Corporation as potential crown corporation subsidiary. • This deliverable included technology solution, framework and platform considerations supporting organizational-option analysis and future implementation planning.
Reference	Tomasz Smetny-Sowa Senior Director Telephone: 613-736-2644 email: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca Patrick Girouard Project Director Telephone: 343-551-0990 email: Patrick.Girouard@tpsgc-pwgsc.gc.ca Energy Services Acquisition Program (ESAP) Public Services and Procurement Canada 2720 Riverside Drive, Ottawa, ON, K1A OS5

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summary

Project Name	Assessing addressable market expansion for low-carbon emission heating and cooling thermal energy	
Client	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)	
Duration	April 2022 to August 2022 [5 Months] [Delivery Based]	
Project Description	Support business case to extend ESAP offering beyond its exiting market segment limited to government entities. This involved delivering information technology solutions to support addressable market expansion analysis, energy-service planning and evidence-based decision-making.	
Scope and objective	Assess market demand for green thermal energy in the National Capital Region beyond conventional government owned buildings in the national capital region in closed proximity to ESAP modernized District Network. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support market assessment, demand analysis and future service expansion planning.	
Contribution of the proposed resource to the project	Participate to business development activities to assess addressable market expansion. This included conceiving, designing and implementing a Business Intelligence-style approach to analyze market opportunities, compare demand scenarios and support management decision-making. **District Network Expansion - Gatineau Downtown** Lead the development of 14 Building Survey Report to establish their respective individual energy profile to estimate the total heating and cooling peak demand and anticipate the overall reduction of GHG emission. This required designing integration solutions between multiple data sources, including building survey data, energy profiles, peak-demand estimates and emissions-reduction assumptions. This information was the foundation to develop a feasibility study for the construction of 4 Km of main distribution system of heating and cooling thermal energy, including lateral service connection to service 14 buildings located in downtown Gatineau. Additional survey of existing underground infrastructure and geotechnical analysis were also performed to support this study. The work supported technology solution, framework and platform considerations for future network expansion planning and integrated feasibility analysis. **District Network Expansion - Ottawa Downtown Expansion** Participate to preliminary studies of various secondary branch options to distribute ESAP's Thermal Energy Service in the Ottawa downtown core. Seven secondary distribution corridors were considered within the perimeter defined by Elgin, Laurier, Bay and along Wellington Street where currently ESAP's main underground distribution corridor is located. In this perimeter, 65 buildings were retained for a market sounding study. The sized of the building selected are above a Gross Floor Area (GFA) of 10,000 s.m which are the primary candidate to rationalizes the construction cost of lateral service connection to ESAP network. These 65 properties are owned by a mixed of Crown owned, Leased Purchase, Private owned with 60% leased space by Federal Government. A high-level energy profiles analysis of these 65 buildings, representing over 1,3 million s.m. of GFA, lead to an estimation of additional peak demand of 65 MW of Heating and 70 MW of Cooling. **Adisoke library - new connection to ESAP** Leading the preliminary study to identify the optimal location for an underground corridor to accommodate ESAP's secondary distribution to service Adisoke Library. The challenge of this mandate was to maximize used of public land and avoid potential interference with existing underground municipal and utilities infrastructures. The initial heating and cooling for construction will begin in the Fall 2024. Building full occupancy expected for Spring 2026. (Additional information: ADISOKE library connection to ESAP)	
Deliverables	Mentioned above, including information technology solution delivery, Business Intelligence-style market analysis, technology solution and platform considerations, and integration across market, building, energy and infrastructure data sources.	
Reference	Tomasz Smetny-Sowa Senior Director Telephone: 613-736-2644 email: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca	Energy Services Acquisition Program (ESAP) Public Services and Procurement Canada 2720 Riverside Drive, Ottawa, ON, K1A OS5

Project Name	Modernized Gatineau Energy Center – Schematic Design
Client	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)
Duration	April 2021 to March 2022 [12 Months] [Delivery Based]
Project Description	Development of Modernized Gatineau Energy Centre (MGEC) facility at the National Printing Bureau site to build an energy center of 30 MW heating and cooling to decarbonized ESAP's district energy network. The MGEC is providing thermal energy to more than 80 buildings in the National Capital Region. This involved delivering information technology solutions to support schematic design coordination, project approval analysis and evidence-based decision-making for a major energy infrastructure initiative.
Scope and objective	The construction of MGEC will provide fuel-switching to Hydro-Quebec electricity as the preferred carbon-neutral energy source, displacing natural gas as the primary heating energy source enabling ESAP operations to achieve 92% GHG emission reductions on a system basis by 2030. The objective of this mandate was to develop the Schematic Design package to seek approval from Treasury Board [i.e. Project Approval (PA) and Expenditure Authority (EA)] and the National Capital Commission (FLUDA). This mandate was under the leadership of the Deeper Greening Program (stage II) reporting to ESAP. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support design review, approval readiness, risk analysis and integrated project governance.
Contribution of the proposed resource to the project	Participated in design activities that led to the development of a viable Schematic Design package in collaboration with professionals from Innovate Energy (P3 partners). This included conceiving, designing and implementing a Business Intelligence-style approach to consolidate design inputs, investment analysis, Value for Money reporting, risk assessment and approval decision support. • Contribute and review Investment Analysis report • Contribute and review Value for Money (VFM) report • Contribute and review Risk Assessment Analysis • Support negotiation of temporary easement with property owners adjacent to the development site • Coordinate with PSPC's Geomatic team and Department of Justice to establish legal boundary of CEGEP Reboul • Finalize negotiation with CEGEP REBOUL's representative of temporary and permanent agreement. • Pursue communication to mitigate potential construction impact with existing Community Garden and other adjacent properties owners; and, • Review and provide comment on schematic design documentation package to ensure compliance with functional requirement. This required designing integration solutions between multiple systems, applications and data sources, including schematic design documentation, functional requirements, investment analysis, risk assessment and approval records. Contributed to the development of infrastructure projects such as the Gatineau Modernized Energy Center (MGEC), from initial land acquisition to final design review. This project demonstrates that the Government of Canada is leading by example in the context of climate change, by reducing greenhouse gas emissions by 92%. (Additional information: Video description of the Modernized Gatineau Energy Center). With the development the Gatineau Modernized Energy Center (MGEC), I also actively participated in the negotiation with Hydro-Québec to interconnect Hydro-Québec's Gamelin substation to the future ESAP's thermal energy center on Sacré-Cœur Boulevard with the design and construction of a 5 km underground electricity transmission line of 120 kilovolt (kV). Construction is expected to begin in winter 2024. Commissioning of this line is planned for fall 2024. (Additional information: Description of 5 km Underground line Hydro Quebec The MGEC is expected to be completed in 2025-2026, is a deeper greening project initiative under ESAP, which provides heating and cooling to more than 80 buildings in the National Capital Region Note: 95% of the activities described above were successfully conducted remotely post Coronavirus disease pandemic.
Deliverables	The Modernized Gatineau Energy Centre project was endorsed at the Investment Management Board in October 2021. Treasury Board approved the MGEC scope addition to the ESM Project and P3 contract on March 3, 2022. Project Approval (PA) and Expenditure Authority (EA) was granted without condition. The project also obtained the National Capital Commission's Federal Land Use and Design Approval of the Schematic Design. This deliverable reflected information technology solution delivery, Business Intelligence-style decision support, technology solution and platform considerations, and integration across design, approval, risk and governance data sources).
Reference	Tomasz Smetny-Sowa Senior Director Telephone: 613-736-2644 email: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca Energy Services Acquisition Program (ESAP) Public Services and Procurement Canada 2720 Riverside Drive, Ottawa, ON, K1A OS5
	More information about this project. News release, Oct 4, 2022 - Gatineau, Quebec Modernized Gatineau Energy Center – Schematic Design National Capital Commission

Project Name	Performance Audit – IT Governance	
Client	City of Levis – General Auditor of City of Lévis	
Duration	May 2021 to September 2021 [Delivery Based - part-time assignment]	
Project Description	Review the efficiency of the function in line with the needs of the City of Lévis are fulfilled with a global and integrated vision (development, operation, compatibility and integration of systems). Also ensure that network management are providing adequate data security and recovery plan. This involved delivering information technology solutions assessment support to evaluate IT governance, system integration, data security and operational resilience.	
Scope and objective	The development of the audit objective and evaluation criteria is based primarily on the COBIT 5 standard which applies to the governance and management of information technology. This included evaluating and selecting technology governance frameworks, control criteria and platform considerations to support the audit approach and assessment of IT management practices.	
Contribution of the proposed resource to the project	Preliminary study • Analysis of available repositories • Analysis of significant risks and the means put in place to promote control • Process description (if needed) including integration considerations across processes, systems, applications and data sources supporting the IT governance audit. • Objectives and scope of the audit • Carried out Primary and Secondary studies • Review Kanban board on Azure DevOps a sample of user stories and acceptance criteria, organize sprints, track the backlog, and evaluate user testing outcomes before releasing built functions. This supported a Business Intelligence-style approach to reviewing delivery progress, backlog information, testing outcomes and decision evidence. • Preliminary study report • Validation with managers • Audit strategy • Answers to questions from the Auditor General • Answers to questions from the quality controller (if required) Detailed review • Audit strategy carried out • Validation of facts and examples with managers • Findings arising from the audit	
Deliverables	Audit report • Audit report in accordance with Canadian Standard on Assurance Engagements (CSAE) 3001. The report reflected information technology solution assessment, Business Intelligence-style evidence analysis, technology governance framework considerations, and integration across IT systems, processes and data sources). • Review Manager Action Plan • Evidence to support the report • Answers to questions from the Auditor General • Answers to questions from the quality controller (if required)	
Reference	Yves Denis Auditor General Telephone (418) 835-8512 email: ydenis@ville.levis.qc.ca	Ville de Lévis Office of General Auditor – 9009, Boul. du Centre-Hospitalier, bureau 1 Lévis (Québec) G6X 1L4

Project Name	Modernized Gatineau Energy Center - Concept Design package
Client	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)
Duration	April 2020 to March 2021 [12 Months] [Delivery Based]
Project Description	Development of Modernized Gatineau Energy Centre (MGEC) facility at the National Printing Bureau site to build an energy center of 30 MW heating and cooling to decarbonized ESAP's district energy network. This involved delivering information technology solutions to support concept design coordination, stakeholder approval planning and evidence-based decision-making for a major energy infrastructure initiative.
Scope and objective	The construction of MGEC will provide fuel-switching to Hydro-Quebec electricity as the preferred carbon-neutral energy source, displacing natural gas as the primary heating energy source enabling National Capital Region District Energy Service operations to achieve 92% GHG emission reductions on a system basis by 2030. The objective was to develop a Concept Design package to seek approval from key stakeholder such as, but not limited to, the National Capital Commission, the City of Gatineau, the property owner in closed proximity to the development site and seek an agreement in principle by Treasury Board to further proceed to next Schematic Design Phase. This initiative was under the leadership of the Deeper Greening Program (stage II) reporting to ESAP. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support concept design review, approval readiness, stakeholder coordination and integrated project governance.
Contribution of the proposed resource to the project	Participate to the pre-design activities that leads to the development of a viable Concept Design package in collaboration with professional from Innovate Energy (P3 partners). This included conceiving, designing and implementing a Business Intelligence-style approach to consolidate design inputs, stakeholder issues, property constraints, approval requirements and decision evidence. • Review functional programming, Design principles • Identify key property owners adjacent to the development site • Participate and support Senior Director with the negotiation to secure adequate property boundary with 45 Sacre-Coeur representatives • Coordinate with PSPC's Geomatic team and Department of Justice to establish legal boundary with new civic address 83 Sacré-Coeur. This required integration considerations across geomatic data, legal boundary records, property information and project design documentation. • Review and modified initial negotiation strategy to settle temporary and permanent easement with CEGEP Reboul to secure underground distribution corridor from MGEC towards main distribution corridor leading to Mac Donald Cartier Bridge. • Establish communication channel to mitigate potential construction impact with existing Community Garden Review and provide comments: • Landscape Concept Drawings to ensure harmonious integration with existing urban fabric • Concept development is meeting key functional requirement • Review proposed architectural design to ensure harmonization with adjacent federal heritage property Note: 95% of the activities described above were successfully conducted remotely during Coronavirus disease pandemic.
Deliverables	The Concept Design of the Modernized Gatineau Energy Centre project was accepted by National Capital Commission and City of Gatineau (Comité consulatif d'urbanisme). And, due to the proximity of the development site with 45 Sacré-Coeur formerly known as the Printing Bureau by Federal Heritage Buildings Review Office (FHBRO). This deliverable reflected information technology solution delivery, Business Intelligence-style decision support, technology solution and platform considerations, and integration across design, property, geomatic, legal and approval data sources.
Reference	Tomasz Smetny-Sowa Senior Director Telephone: 613-736-2644 email: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca Energy Services Acquisition Program (ESAP) Public Services and Procurement Canada 2720 Riverside Drive Ottawa, ON, K1A OS5 More information about this project. News release June 9, 2022 - Gatineau, Quebec Construction set to begin on new energy centre in Gatineau Public Services and Procurement Canada

Project Name	SPF Underwriting Re-engineering – POLARIS Enhancement release 2
Client	Export Development Canada – Project and Structured Finance Group
Duration	April 2019 to March 2020 [Delivery Based] [12 Months]
Project Description	The Structured and Project Finance (SPF) Group is an integral part of the Corporation's strategy to maintain a CAD 1.5 billion annual net income stream. It has been and continues to be on a growth path. The group focuses on two broad types of transactions: 1- Large Scale Greenfield Project Financing – complex, customized, long lead time transactions. 2- Structured Brownfield/Greenfield Infrastructure Financing – complex, tighter turnaround transactions that nonetheless require significant due diligence review (e.g. M&A transactions, PPP's). Significant business growth and structural re-organization changes in recent years have caused the SPF group to run above full capacity (red) on a semi-consistent basis. To support EDC 2020 growth targets, the SPF Group needs to free up capacity within the team by processing transactions (Origination & Asset Management) more effectively or efficiently. This involved delivering information technology solutions to support underwriting re-engineering, asset management workflow enhancement and improved transaction-processing capacity.
Scope and objective	This mandate focused on leading business representatives to identify, prioritize and define functional requirements for additional POLARIS enhancements within an Agile delivery model. POLARIS is an end-to-end underwriting and asset-management platform delivered in a previous assignment (mandate 51). It enables underwriters to collaborate in real time, validate analysis coherence, perform due diligence, run sensitivity tests and assess risk ratings. The goal was to help the project manager, developers, business analysts, testers and SPF end users define requirements while fully leveraging configurable functions and adding enhancements without compromising POLARIS design principles. This included assessing technology solutions, frameworks and platform considerations for POLARIS enhancements, Agile delivery, configurable functions and future-state underwriting workflows.
Contribution of the proposed resource to the project	The resource supported POLARIS Release 2 by translating SPF underwriting and asset-management needs into functional requirements, priorities and testable outcomes, while keeping enhancements aligned with POLARIS design principles and SPF 2020 capacity objectives. • Defined business requirements and process changes for underwriting workflows, asset-management functions, collaboration and transaction efficiency. • Managed the Azure DevOps Kanban board, including user stories, acceptance criteria, sprint priorities, backlog tracking and testing review before release. This supported a Business Intelligence-style approach to monitoring delivery progress, analyzing backlog information, evaluating testing outcomes and supporting release decision-making. • Coached business leads on Agile participation, requirement validation and end-user representation. • Applied Agile delivery practices, including sprint planning, backlog refinement, issue resolution and user acceptance coordination. • Prepared project plans covering implementation approach, delivery sequence, controls and release readiness. • Tracked delivery, adoption, data-quality, testing and change-management risks and mitigation actions. • Tracked metrics and KPIs for progress, backlog completion, testing results and release readiness. • The mandate included business analysis, requirements documentation, internal-control considerations, user acceptance testing and technology enhancements for underwriting and asset-management workflows. It also involved designing integration solutions between multiple systems, applications and data sources, including POLARIS functionality, underwriting workflows, asset management processes, Azure DevOps delivery data and user acceptance testing evidence.
Deliverables	• Refined business requirements and processes for the 2020 POLARIS changes. • Managed Azure DevOps user stories, acceptance criteria, sprint priorities, backlog tracking and testing review. • Coached business leads supporting the POLARIS business role. • Applied Agile practices to support quality, budget and schedule objectives. • Prepared project plans and release-readiness material. • Maintained the risk-management plan and mitigation tracking. • Tracked project metrics and KPIs. • The deliverables reflected information technology solution delivery for POLARIS Release 2 enhancements, Business Intelligence-style project reporting and metrics analysis, technology solution and platform considerations for configurable enhancements, and integration across underwriting, asset management, project delivery and testing data sources.
Reference	Guillermo Freire Vice-President Project and Structure Finance Group. (613) 597-8612 | FGuillermo@edc.ca Export Development Canada 150 Slater Street Ottawa, Ontario | KIA 1K3

Project no 52 summary

Project Name	Feasibility Study: commercialization of thermal energy services in the National Capital Region (stage III)
Client	Public Services and Procurement Canada (PSPC) - Energy Services Acquisition Program (ESAP)
Duration	February to April 2019 [3 Months] [Delivery Based - part-time assignment]
Project Description	CONTEXT | Energy Services Acquisition Program (ESAP)/Energy Service Modernization (ESM) Project - This ambitious $1.8-billion initiative is modernizing energy centres in five locations, some of which date back almost a century, to provide heating and/or cooling for 80 buildings in the nation's capital, including Parliament. The upgrades will lower operating costs for taxpayers and help reduce the Canadian government's energy consumption and greenhouse gas emissions. This design- build-finance-operate P3 is set to reach substantial completion in 2025, followed by 30 years of operations and maintenance. The project is complex because it involves the private sector mitigating risks from federal and interprovincial brownfield construction, six years of interim operations during construction, as well as factoring in protections for heritage assets. It also has built in flexibility to potentially expand the modernized district energy system to other public and private buildings in the region. Review all the work completed by ESAP on the business model and share observations in a presentation to ESAP staff. Develop a feasibility study and strategy supporting various business models and recommended "best fit" organization structure to support the expansion of distribution of thermal energy to further reduce GHG emission in the National Capital Region. The proposed business model needs to strike a balance between expanding the distribution of the thermal energy to additional buildings to support local economic development and simultaneously offer a sustainable solution to reduce of GHG reduction by 30% by 2030. This involved delivering information technology solutions to support business model feasibility analysis, commercialization planning and evidence-based decision-making for thermal energy services.
Scope and objective	The purpose of this analysis is to identify gaps in the existing business structure and business model to allow commercialization of thermal energy beyond traditional building owned by governmental entities. This included evaluating and selecting appropriate technology solutions, frameworks and platform considerations to support business model comparison, commercialization options, feasibility analysis and implementation planning.
Contribution of the proposed resource to the project	Develop a feasibility analysis of various business models for ESAP to obtain the authorization to proceed with formal business (see mandate 58) case subject to support by central agencies and cabinet approval. This included conceiving, designing and implementing a Business Intelligence-style approach to compare business models, analyze feasibility criteria and support executive decision-making.
Deliverables	> Briefing package presentation on research completed to date on business models. > Evaluation criteria for comparing business models. > Preliminary evaluation of business models. > Carried out Primary and Secondary studies > Summary report on the evaluation workshop with stakeholders. > Perform a high-level Political, Economic, Sociological, Technological, Legal and Environmental (PESTLE) analysis > Document summarizing recommendations for additional analysis. > Produce a detailed report summarizing the results of all additional analysis. > Produce and executive summary report with rationale for the recommended business model; and > Produce a high-level implementation plan supporting the deployment of an organizational structure including Actions; Milestones; Responsibilities; Deliverables; and Overall timelines. This required integration considerations across business model options, evaluation criteria, feasibility findings, implementation actions, milestones and governance data sources. The deliverables reflected information technology solution support for feasibility analysis, Business Intelligence-style business model comparison and reporting, technology solution and platform considerations for commercialization planning, and integration across business model, evaluation, feasibility, implementation and governance data sources.
Reference	Tomasz Smetny-Sowa Senior Director Telephone: 613-736-2644 E-mail address: tomasz.smetny-sowa@tpsgc-pwgsc.gc.ca Energy Services Acquisition Program (ESAP) Public Services and Procurement Canada 2720 Riverside Drive Ottawa, ON K1A OS5

Project no 51 summary

Project Name	SPF Underwriting Re-engineering – POLARIS Enhancement release 1
Client	Export Development Canada – Project and Structured Finance Group
Duration	August 2018 to March 2019 [8 Months]
Project Description	The Structured and Project Finance (SPF) Group is an integral part of the Corporation's strategy to maintain a CAD 1.5 billion annual net income stream. It has been and continues to be on a growth path. The group focuses on two broad types of transactions: • Large Scale Greenfield Project Financing, complex, customized, long lead time transactions. • Structured Brownfield/Greenfield Infrastructure Financing complex, tighter turnaround transactions that nonetheless require significant due diligence review (e.g. M&A transactions, PPP's). Significant business growth and structural re-organization changes in recent years have caused the SPF group to run above full capacity (red) on a semi-consistent basis. To support EDC 2020 growth targets, the SPF Group needs to free up capacity within the team by processing transactions (Origination & Asset Management) more effectively or efficiently. This involved delivering information technology solutions to support underwriting re-engineering, asset management workflow enhancement and improved transaction-processing capacity.
Scope and objective	The focus of this mandate is to lead the business representative to identify, prioritize, define their functional business requirement to provide clear direction for the development of additional enhancement functionality to POLARIS in the context of an Agile project management model. POLARIS is an end-to-end Underwriting and Asset Management platform that was delivered in a previous assignment (see mandate 49). This collaborative platform is allowing underwriter to collaborate and validate coherence of their analysis in real-time as they are performing in parallel concurrently activities related to either due diligence analysis, executing sensitivity test against a financial modeling and/or assessing risk rating score. The goal of this short mandate was to assist all the team members composed of project manager, developers, business analysts, testers and SPF team member (end-user) to define their functional business requirements. The key challenge of this assignment was to leverage existing configurable functions and introduce additional functionalities that will not be compromised the initial design principles of POLARIS. This included evaluating and selecting technology solutions, frameworks and platform considerations to support POLARIS Release 1 enhancements, Agile delivery, configurable functions and future-state underwriting workflow requirements.
Contribution of the proposed resource to the project	• Primary role is to work with business team in effort to define and refine business requirements and processes to support 2019 Polaris changes. Additionally, supporting new business team leads in terms of coaching and mentoring to be equip them to handle Polaris business lead role into the future • Oversee the Kanban board on Azure DevOps. Define user stories and acceptance criteria, organize sprints, track the backlog, and evaluate user testing outcomes before releasing built functions. This supported a Business Intelligence-style approach to monitoring delivery progress, analyzing backlog information, evaluating testing outcomes and supporting release decision-making. • Applying Agile software development to project management processes throughout the project's lifecycle to achieve quality, budget and schedule targets. • Developing and presenting to the project committee a project plans that details how the project will be implemented. • Developing, maintaining, and monitoring the project risk management plan. • Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. • This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. It also involved designing integration solutions between multiple systems, applications and data sources, including POLARIS functionality, underwriting workflows, asset management processes, Azure DevOps delivery data and user acceptance testing evidence.
Deliverables	• Delivery of POLARIS - Release 1 enhancement on time and on budget. • Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. • Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. • Producing project documents including a) Project implementation plans; and b) Project charters. The deliverables reflected information technology solution delivery for POLARIS Release 1 enhancements, Business Intelligence-style project reporting and metrics analysis, technology solution and platform considerations for configurable enhancements), and integration across underwriting, asset management, project delivery and testing data sources.
Reference	Sven List Vice-President Structured and Project Finance Group Export Development Canada (613) 598-6872 | SList@edc.ca 150 Slater Street, Ottawa, Ontario | KIA 1K3 Carl Burlock Senior Vice President Financing & International Growth Capital Export Development Canada (613) 598-3087 – 1754 | CBurlock@edc.ca 150 Slater Street, Ottawa, Ontario | KIA 1K3

Project no 50 summary

Project Name	Review of On-Boarding and Off-Boarding Program
Client	Natural Resources of Canada - CMSS On boarding/Off boarding program launch
Duration	March 2018 [Delivery based ~ 1 months]
Project Description	The outcome of this mandate is to provide Corporate Management Services Sector (CMSS) strategic advice to validate how the On-boarding and Off-boarding Program could be potentially adapted to meet CMSS objectives. This involved delivering information technology solutions assessment support to improve program monitoring, workflow adaptation and decision-making for on-boarding and off-boarding activities.
Scope and objective	The purpose of this analysis is to identify gaps in the existing generic program. This included evaluating and selecting technology solutions, frameworks and platform considerations to support gap analysis, interactive monitoring, process mapping and adaptive program implementation.
Contribution of the proposed resource to the project	> Review existing documentation related to On-Boarding Program. > Review data analysis of the Quarterly non-mandatory Survey of Q3 2017-18. This supported a Business Intelligence-style approach to analyzing survey results, identifying trends and informing program recommendations. > Obtained high level information from interview session with HR representative. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. It also required designing integration solutions between multiple systems, applications and data sources, including survey data, HR interview input, process maps, monitoring activities and program recommendations.
Deliverables	> Provide recommendation of this mandate is to give the CMSS strategic advice to validate how the On-boarding and Off-boarding Program could be potentially adapted to meet CMSS objectives. > Provide recommendation to implement an Interactive Monitoring activity related to On-Boarding and Off-Boarding > Provide recommendation to document a RACI related Process Map related to On-Boarding and Off-Boarding > Provide recommendation to implement an Adaptive On-Boarding and Off-Boarding plan based on Employee Profile and NRCAN Sectors to apply a more representative timeline > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. > Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. > Producing project documents including a) Project implementation plans; and b) Project charters > Monitoring project risks and indicating when risk mitigation strategies identified in the risk register were required. The deliverables reflected information technology solution assessment support, Business Intelligence-style monitoring and analysis, technology solution and platform considerations for program monitoring and process mapping, and integration across survey, HR, process, monitoring and project risk data sources.
Reference	Dominique Boily Senior Director, Planning and Operations Branch Telephone: 343-292-6988 E-mail address: Dominique.Boily@canada.ca Sarah Cameron Policy Analyst, Planning and Operations Branch Telephone: 343-292-8162 E-mail address: Sarah.cameron@canada.ca Natural Resources Canada 580 Booth Street, Ottawa, ON K1A OE4

Project Name	Process re-engineering & development new end-to-end underwriting & asset management platform - POLARIS
Client	Export Development Canada, Structured and Project Finance Group
Duration	January to July 2018 [7 Months]
Project Description	The Structured and Project Finance (SPF) Group is an integral part of the Corporation's strategy to maintain a CAD 1.5 billion annual net income stream. It has been and continues to be on a growth path. The group focuses on two broad types of transactions: (1) Large Scale Greenfield Project Financing – complex, customized, long lead time transactions. (2) Structured Brownfield/Greenfield Infrastructure Financing – complex, tighter turnaround transactions that nonetheless require significant due diligence review (e.g. M&A transactions, PPP's). This involved delivering information technology solutions to support underwriting re-engineering, asset management workflow enhancement and improved transaction-processing capacity).
Scope and objective	Significant business growth and structural re-organization changes in recent years have caused the SPF group to run above full capacity (red) on a semi-consistent basis. To support EDC 2020 growth targets, the SPF Group needs to free up capacity within the team by processing transactions (Origination & Asset Management) more effectively or efficiently. This mandate is the phase 2 of the SPF re-engineering Underwriting Process Project. The Proof of Concept developed in the previous phase 1 (see mandate 48) was used to socialize and demonstrate the process automation concept, elicit feedback and obtain support for moving forward for this Phase 2. In this Phase, the objective is to implement an optimized end-to-end SPF underwriting processes supporting a transaction from its Origination up to Asset Management. Also, develop and deploy a single integration application platform providing guidance to the SPF underwriters in their due diligence and risk analysis functions in conjunction with applicable risk rating modeling. Guidance is supported by customizable cataloging library system, which is collection of due diligence consideration based on SPF team members body of knowledge. Also, due diligence considerations are corroborated against comparable Moody's or Standard & Poor's risk rating questions and interim score. This is allowing underwriter to collaborate and validate coherence of their analysis in real-time as they are performing concurrently activities in parallel related to either due diligence analysis, executing sensitivity test against a financial modeling and/or assessing risk rating score. This included evaluating and selecting technology solutions, frameworks and platform considerations to support POLARIS enhancements, Agile delivery, configurable functions and future-state underwriting workflow requirements.
Contribution of the proposed resource to the project	Develop a software application platform to support the SPF underwriters in their due diligence and risk analysis functions by: • Consolidating unstructured information access in single location • Providing a standardized approach recognizing asset class specificities • Quality assurance controls imbedded ensuring process completeness • Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis • Credit package link to Risk Rating Model (i.e. Standard & Poor's or Moody's) • Providing in context on-line guidance instruction to support analysis. • Applying Agile software development to project management processes throughout the project's lifecycle to achieve quality, budget and schedule targets. • Developing project implementation plans and seeking approval of the implementation plan by the steering committee's • Developing and monitoring the project risk management plan. Developing and tracking key performance indicators project metrics to ensure satisfactory progress. This supported a Business Intelligence-style approach to monitoring project performance, analyzing delivery metrics and supporting management decision-making.
Deliverables	3 key fundamental elements are introduced to the SPF Due Diligence process: • Create a new "single source information platform" to allow collaboration and support production of SPF deliverable. • Create standardization through the creation of an "on team" catalogue. • Propose implementation of preventive action at the data governance to assess data maturity and address the data integrity weaknesses. • Enable the usage of the existing Standard & Poor's or Moody's Risk Rating Model tool "in tandem "against any specific assessment considerations. Reduce overall touch time on underwriting activities by an average of 20%, without compromising the quality of the analysis, to allow team members to achieve work-life balance and allowing the SPF group to reach its growth objectives. Development and successful adoption of a SPF tool that integrates the risk rating methodology and the streamlined underwriting process. • Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. • Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. • Producing project documents including a) Project implementation plans; and b) Project charters • Monitoring project risks and indicating when risk mitigation strategies identified in the risk • Oversee the Kanban board on Azure DevOps. Define user stories and acceptance criteria, organize sprints, track the backlog, and evaluate user testing outcomes before releasing built functions. • This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. It also involved designing integration solutions between multiple systems, applications and data sources, including POLARIS functionality, underwriting workflows, asset management processes, risk rating models, Azure DevOps delivery data and user acceptance testing evidence. The deliverables reflected information technology solution delivery for POLARIS enhancements, Business Intelligence-style project reporting and metrics analysis, technology solution and platform considerations for configurable enhancements, and integration across underwriting, asset management, project delivery, risk rating and testing data sources).

Reference	Sven List Vice-President - Structured and Project Finance Group (613) 598-6872 email: SList@edc.ca	Carl Burlock Senior Vice President - Financing & International Growth Capital (613) 598-3087 – 1754 email: CBurlock@edc.ca	Export Development Canada 150 Slater Street, Ottawa, Ontario KIA 1K3

Project Name	Process Analysis, Process Map & Information Mapping to support Business Transformation
Client	Export Development Canada | Financing & International Growth Capital | Insurance & Working Capital Solutions
Duration	January to December 2017 [12 Months]
Project Description	As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (FIGC) Group and Insurance & Working Capital Solutions (IWS) of EDC is executing a business transformation from its current organizational structure based on multiple database system into a modernized consolidated IT Solution. This involved delivering information technology solutions to support business transformation, process modernization and consolidation of multiple database systems into a modernized IT solution.
Scope and objective	The Primary objective is support various transformational initiative such as: 3 Line of Defense (3LD) Asset Management function moving from 2nd to 1st line of defense, Integration of Guarantee (IFG) and Insurance (CIB) products , Investment upfront underwriting process to be supported with e-Front software and finally revamping of Structured Project Finance (SPF) end-to-end process to consolidate Credit Package unstructured data with Standard & Poor's SPF Risk Rating Model and Asset Management & Monitoring Activities. The Secondary objective of this mandate is to enhanced underlying system and governance to ensure the sustainability of over 130 Current Process Map to support on-going Process Improvement Initiative driven either by Continuous Initiative or Digital Delivery model for FIGC or IWS. This included evaluating and selecting technology solutions, frameworks and platform considerations to support e-Front integration, process mapping governance, digital delivery and future-state business transformation requirements.
Contribution of the proposed resource to the project	Support adjustment or completed re-design of business process with consideration of organizational role and responsibility (RACI), Preventive and Detective Control and technological support system (Develop Prototype and Proof of Concept – Phase 1 SPF). Established a sustainable process mapping and process analytic system recognized as an effective "world class" Value Stream System integration by independent Shingo Institute. Process Analytic "drill down" searching algorithm provide ability to identify Business Owner, Activities and/or Decision Control point including upstream or downstream dependencies. Functionalities linked to problem-solving systems, is supporting systemically thinking and simulation to avoid negative impact, prior to the deployment of successful process enhancement. Applying Agile software development to project management processes throughout the project's lifecycle to achieve quality, budget and schedule targets. Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. This included conceiving, designing and implementing Business Intelligence-style process analytics to support drill-down analysis, KPI monitoring, dependency identification, simulation and management decision-making. It also required designing integration solutions between multiple systems, applications and data sources, including process maps, FileMaker, Visio, SharePoint, DataStar, e-Front, risk rating models, user acceptance testing evidence and project performance metrics.
Deliverables	• Asset Management and Risk Rating [Project 3LD] and Process adaptation for transfer date to SPF, IFD and CABL. • Support Technological Impact Assessment to apply DOA by F&I VP in FACT (might impact MBC and AMA) • Functional Business Requirements for F&I [Project Target Operating Model] and identified & Document Functional Business Requirement to support F&I Future State. • Risk Rating Process Optimization [Project PF Risk Rating] of SPF (Project Finance) • Governance – Documentation Methodology to support standardization of F&I [Project CoE 2.0] • Support Optimization of Governance of Process Maps, Guide, Template & Control Sheet to encourage standardization • Preventive and Detective control to support 1st and 2nd line of defense • Interpret Process Analytics for transformation [Project CoE 2.0], detect CI patterns, guide consistent problem resolution, and identify pre/post transformation KPIs. This represented a Business Intelligence-style solution for process analytics, KPI comparison, pattern detection and decision support. • Support information integrity of Process Map, Analytics & CI [Project CoE 2.0], including data architecture for Visio | DataStar | File Maker | SharePoint | This reflected integration across multiple systems, applications and data sources supporting process analytics, documentation governance and continuous improvement. • Identify Typical Transactional to support simulation by potential Vendor solution (MBC, AMA, PEO, ACBS, FACT, C3) • Power point presentation will be produced to synthesize and communicate to various audience from manager to senior management level. • Amalgamate information into suitable EDC formats to communicate activities, processes and document life cycles. • Propose implementation of corrective action at the data governance and management level to assess data maturity and address the data integrity weaknesses. • Reinforce and simplify Sibyl sustainability through end-to-end documentation system enhancements across people, process and technology, from Visio authoring and quality controls to governed SharePoint publication and automatic linkage with process maps. • Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. • Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. • Producing project documents including a) Project implementation plans; and b) Project charters • Monitoring project risks and indicating when risk mitigation strategies identified in the risk • Oversee Azure DevOps Kanban boards, user stories, acceptance criteria, sprints, backlog tracking and user testing outcomes. The deliverables reflected information technology solution delivery for business transformation and process modernization, Business Intelligence-style process analytics and project reporting, technology solution and platform considerations for consolidated IT modernization, and integration across process maps, analytics, governance, delivery, testing and documentation data sources.
Reference	Carl Burlock Senior Vice President, Financing & International Growth Capital (613) 598-3087 – 1754 | CBurlock@edc.ca Justine Hendricks Vice-President, Financing and Investments Group (613) 598-6872 | JHendricks@edc.ca Export Development Canada 150 Slater Street, Ottawa, Ontario KIA 1K3

Project Name	Grant and Contribution Agreements Management - Process Mapping, Roles and Responsibilities
Client	Natural Resources of Canada - Office Energy Research and Development (OERD)
Duration	September 2016 to March 2017 [Delivery based ~ 2 months]
Project Description	The Office Energy Research and Development (OERD) is currently undergoing a significant influx of new C-Base programs, from the Green Infrastructure Initiative, the pan-Canadian Framework on Climate Change and the Clean Technology Innovation. These programs will soon result in managing a series of new Grants and Contributions (G&Cs) agreements. This involved delivering information technology solutions assessment support to improve process mapping, role clarity, data governance and decision-making for Grants and Contributions management.
Scope and objective	To come with an as efficient as possible process as new programs are being designed, OERD wants to clarify the R&R of all key players in the management of G&Cs agreements. Increased clarity in the R&R distribution will allows for increased efficiencies, better benchmarking, and more accurate costing of level of efforts required to manage future G&Cs programs. This included evaluating and selecting technology solutions, frameworks and platform considerations to support process mapping, benchmarking, data governance, effort costing and future program management requirements.
Contribution of the proposed resource to the project	> Inventory and mapping of current distribution of the R&R involved in managing G&Cs agreements in OERD. > A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. > Identification of consistencies and inconsistencies in the distribution of R&R and organization of the work involved in managing G&Cs agreements. > Identification of area for increased efficiencies and recommendations on how best organize the work and assign R&R in the management of G&Cs agreements, based on benchmarking with some OGD recognized for their best practices in this area; and, > As a subset, a very high-level assessment of current compliance with the GoC Finance Administration Act (FAA), the GoC Policy on Transfer Payments and the NRCan Guide on G&Cs. > Benchmark with some OGD recognized for best practices in the management of G&Cs > Assess at a very high-level consistency with related legislation and regulation governing G&Cs, and propose additional approval steps > Propose/recommend solutions to solve inconsistencies and area for increased efficiencies in the R&R and organization of the work involved in managing G&Cs agreements > Prepare and submit to contract authorities (ESTP Director and Finance and Commerce Manager) a draft report. > Meet with contract authority and APDs for presenting the draft report, receive comments, discuss findings and recommendations > Prepare the final report to submit findings and recommendations on the objectives of the engagement > Developing and presenting to the project committee a project plans that details how the project will be implemented. > Developing, maintaining, and monitoring the project risk management plan. > Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. This supported a Business Intelligence-style approach to KPI monitoring, progress tracking, benchmarking analysis and management decision-making. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. It also required designing integration solutions between multiple systems, applications and data sources, including process maps, R&R inventories, interview summaries, data maturity findings, governance recommendations, project metrics and reporting outputs.
Deliverables	> Prepare high level interview guide/grid and conduct approximately 18 interviews with respondents identified. Prepare reporting notes on each interview and Interviews summary report. A brief report, in draft mode, documenting the following (mainly in graphics/tables) and proving recommendations: (a) Consolidate and map the inventory of current R&R responsibilities in managing G&Cs agreements in OERD. (b) Identification of consistencies, inconsistencies and area for increased efficiencies in the organization of the work and assignment of R&R in managing G&Cs agreements; (c) Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility.(d) Recommendations on how best organize the work and assign R&R in the management of G&Cs agreements, based on benchmarking with some OGD recognized for their best practices in this area; (e) A final report incorporating the review and comments of the contract authority, the General Director and ESTP Director, supported by the APDs and the Finance and Commerce Manager. Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. Producing project documents including a) Project implementation plans; and b) Project charters. The deliverables reflected information technology solution assessment support for G&C process mapping and data governance, Business Intelligence-style reporting, benchmarking and KPI analysis, technology solution and platform considerations for process mapping and program management, and integration across R&R inventories, interview data, process maps, data governance findings, recommendations and project reporting data sources.
Reference	Marc Wickham Director, Office Energy Research and Development, **Email:** marc.wickham@nrcan-rncan.gc.ca **Telephone:** (613) 614-6430 Natural Resources Canada 580 Booth Street, Floor 14th Ottawa, Ontario K1A 0E4 . Canada

Project Name	Process Analysis Methodology, Process Map & Information Mapping to support Continuous Improvement and Business Transformation
Client	Export Development Canada - Financing and Investment Group
Duration	January to December 2016 [12 Months]
Project Description	Access to credit is vital for companies of all sizes. As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (F&I) Group of EDC is planning a business transformation from its current multiple database system into a modernized consolidated IT Solution. This involved delivering information technology solutions to support business transformation, process modernization and consolidation of multiple database systems into a modernized IT solution.
Scope and objective	The primary objective of this mandate is to harmonize 105 the Current Process Map and obtain an official sign-off of the respective 5 Process Owner at Vice-President level of F&I. Develop the Process Analytic approach to support scoring of any Continuous Improvement (CI) initiative that might impact either the People, Process or Technology of any current process Map. Develop a database structure on FileMaker to support self-serve scoring model and provide perpetual visibility on any information related to Current Process to any EDC employee involve in Financing and Investments transaction to support Canadian export. Develop an online training material to support the e learning of the Process Mapping methodology necessary to read and understand the process map documentation. This included evaluating and selecting technology solutions, frameworks and platform considerations to support process mapping, self-serve scoring, FileMaker database design, online training and future-state process analytics requirements.
Contribution of the proposed resource to the project	Develop the Process Analytic approach to support scoring of any Continuous Improvement (CI) initiative that might impact either the People, Process or Technology of any current process Map. Develop a database structure named Sibyl (on FileMaker) to support self-serve scoring model and provide perpetual visibility on any information related to Current Process to any EDC employee involve in Financing and Investments transaction to support Canadian export. Develop an online training material to support the e learning of the Process Mapping methodology necessary to read and understand the process map documentation. Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. This included conceiving, designing and implementing a Business Intelligence-style process analytics solution to support CI scoring, self-serve analysis, KPI monitoring, reporting visibility and management decision-making. It also required designing integration solutions between multiple systems, applications and data sources, including process maps, Sibyl/FileMaker, DataStar, Visio, project metrics, risk information and reporting outputs.
Deliverables	Key deliverables in development and completion of 105 F&I Current Business Processes: > Documentation of Data Profiling in DataStar and Visio in EDC QAC environment > Support development of Visual Basic code to automate Process Mapping Documentation on Visio > Support development of database without compromising data integrity on FileMaker platform as part of the technology solution and platform considerations supporting process analytics and data governance. > Process Mapping of 105 F&I (Workflow and Narrative) Sign-off by 5 different Vice-President > Preparation and delivery of complete self-serve solution to score CI > Complete final review of Current Process for Loan, Guarantee and Investment Product with EDC executive from Senior VP, VP and Director level > Complete Documentation Working session with Loan Service for Guarantee Product. > Identify data management weaknesses and propose corrective actions to improve data maturity and integrity through clear data governance roles and responsibilities. This supported information technology solution delivery for data governance and data integrity improvement. Current Processes delivered for the Financing group: > Business Development (BD) > Asset Management (AM) > International Foreign Directorate (IFD) > Validating Supporting and Contractual Doc inventory > Delegation of Authority including review 1st Line of Defense (DOA) with CABL Subject Matter Expert and Legal > Loan Product - Review the application of Delegation of Authority - Appendix C1, C2 and C5 Report project progress throughout the project life cycle. Define project scope, timeline, integration, quality, risk and cost in the project charter; produce implementation plans and charters; and monitor risks and mitigation actions. > Analyze business needs and document technical functional requirements, internal controls and user acceptance testing to deliver a quality technology solution. This reflected integration across business requirements, controls, testing evidence, process documentation and solution delivery data sources. > Oversee Azure DevOps Kanban boards, user stories, acceptance criteria, sprints, backlog tracking and user testing outcomes. The deliverables reflected information technology solution delivery for process modernization and data governance, Business Intelligence-style process analytics, CI scoring and KPI reporting, technology solution and platform considerations for FileMaker, DataStar, Visio and online training, and integration across process maps, database structures, documentation, project metrics, risk information and testing evidence.

Reference	Justine Hendricks Vice-President Financing and Investments Group (613) 598-6872 JHendricks@edc.ca	Carl Burlock Senior Vice President Financing & International Growth Capital (613) 598-3087 – 1754 CBurlock@edc.ca	Export Development Canada 150 Slater Street Ottawa, Ontario | KIA 1K3

Project Name	Coaching to support TeamMate Implementation
Client	Department of Finance - Audit and Evaluation Branch
Duration	December 2015 [Delivery Based - Part Time ~ 1 month]
Project Description	> Provide coaching to one Finance representative and 2 potential TeamMate users. > Recommend best approach to implement adequate IT infrastructure (Testing and Production) support configuration, testing, training and eventual deployment in production > Provide high-level documentation to support coordination of IT resources between Finance Department and Shared Services.
Scope and objective	> Recommend implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Proposed quality assurance methodology to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Exchanged best practice with Other Federal Internal Audit to identified opportunity to increase for partnership in the development of customized report. > Provide documentation covering configuration and other technical requirements for the implementation.
Contribution of the proposed resource to the project	> Provide a documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate. > Mandate was interrupted due to unavailability of internal capacity from client's Information Technology sector.
Deliverables	See above
Reference	Linda Sanders Interim Chief Audit and Evaluation Executive Internal Audit Department of Finance of Canada, Internal Audit and Evaluation 90 Elgin, Ottawa, Ontario

Project Name	Coaching to support TeamMate Implementation
Client	Canadian Food Agency of Canada - Audit and Evaluation Branch
Duration	November 2015 to February 2016 [Delivery Based - Part Time ~ 1 month]
Project Description	> Provide coaching to TeamMate Champion with the deployment of ~8 users TeamMate licenses. > Proposed optimal terminology and configuration in the context of a practice Federal Government practice environment. > Initiated Base Configuration and developed importation file strategy in both official language > Recommend best templates audit procedure and work paper from Office of Controller General > Coordinate and facilitated execution of Pilot Project and training session > Facilitate documentation of business process to facilitate follow-up on Management Action Plan activities between the Office of Audit and Evaluation and Management.
Scope and objective	> Recommend implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Applied quality assurance test to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Exchanged best practice with Other Federal Internal Audit to identified opportunity to increase for partnership in the development of customized report. > Initiated and tested TeamAdm configuration of Global Hierarchy with an excel file importation approach > Recommend extraction of residual risk from RBAP to be incorporated in a Risk Library in TeamStore > Documented the configuration and other technical requirements for the implementation.
Contribution of the proposed resource to the project	> Updated Timeline of the presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamRisk initiation, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and completion of TeamRisk >> Coordinated and tested creation of Testing and Production Server Environment >> Planned and executed Simulation Pilot Project in Testing Environment > Recommend installation of TeamMate R10.4 to is integrated to Window 7 desktop application to maximize integration of MS Office 2010 > Integrated information gathered from TBS, Shared Services Canada functional requirements in TeamAdm configuration profile. > Initiated TeamAdm configuration of the Global Hierarchy (Org Structure, Program Alignment Architecture and Policies), Terminology, Category, Teammate policies, User Account > Recommend integration of Risk Based Audit Framework in a Risk Library in TeamStore > Recommend project simulation with key users in the Testing Environment before migrating to Production Environment > Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Develop a complete documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate.
Deliverables	See above
Reference	Karen Crawford Byron Director Internal Audit Canadian Food Inspection Agency 59 Camelot Drive, Floor 2 W, Room 134, Ottawa, Ontario K1A 0Y9 613-773-7806

Project Name	Process and Information mapping expansion to Business Development and Asset Management Group - Current State		
Client	Export Development Canada - Financing and Investment Group		
Duration	September to December 2015 [4 Months]		
Project Description	Access to credit is vital for companies of all sizes. As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (F&I) Group of EDC is planning a business transformation from its current multiple database system into a modernized consolidated IT Solution.		
Scope and objective	The primary objective of this mandate is to apply the proposed 7 steps roadmap approach to support the definition of the data profiling, data modeling, data migration and data retention in the context of the development of a new technological platform that will be supporting the Financing and Investments product and service in the context of the Alpha Project. This mandate will focus on the International Foreign Directorate (IFD), Investment and Equity, Project Finance and previous Current Business Process developed in previous mandate.		
Contribution of the proposed resource to the project	Business processes supporting the Financing and Investments activities, and its administration will be developed, mapped and signed off by business owner. Related Tables and Data Fields were documented in DataStar with the pertinent data profiling attributes. The specific functional business requirements were identified and validated with the key Business / Data Owner. Business rule requirements were documented. > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project.		
Deliverables	The key deliverable currently in development for CABL Underwriter process: > Documentation of Data Profiling in DataStar and Visio (100%) in EDC QAC environment > Data Modeling Prototype Specification for new documentation platform (100%) > Process Mapping of CABL (Workflow and Narrative) (100%) Ready for Sign-off > Process Mapping of IFG (Workflow only) Work Session no 2 > Preparation and delivery of Interim Demonstration how CI can be develop based on CABL Current Process Map to EDC executive from Senior VP, VP and Director level > Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. Using Visio and Excel, deliver approved process maps signed off by the stream lead. Includes clarifying the processes, identifying owners, control points, pain points, data ownership, and linking processes to customer journey moments of truth for Transaction processes within IFD, IFG, Investments, SPF, Asset Mgmt., BD and Finance. Processes will be delivered for Financing group for the following groups: > Business Development (BD) > Asset Management (AM) > International Foreign Directorate (IFD) > Validating Supporting and Contractual Doc inventory > Delegation of Authority –First Line of Defense > Review 1st Line of Defense (DOA) with CABL Subject Matter Expert and Legal > CABL - Review and follow-up of application of DOA Appendix C1 Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. Producing project documents including a) Project implementation plans; and b) Project charters Monitoring project risks and indicating when risk mitigation strategies identified in the risk > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.		
Reference	Justine Hendricks Vice-President Financing and Investments Group (613) 598-6872 JHendricks@edc.ca	Carl Burlock Senior Vice President Financing & International Growth Capital (613) 598-3087 – 1754 CBurlock@edc.ca	Export Development Canada 150 Slater Street Ottawa, Ontario | KIA 1K3

Project Name	Coaching to support TeamMate Implementation
Client	Statistic Canada - Audit and Evaluation Branch
Duration	June 2015 to March 2018 [Delivery Based - Part Time ~ 15 days]
Project Description	> Provide coaching to TeamMate Champion with the deployment of ~15 users TeamMate licenses. > Proposed optimal terminology and configuration in the context of a practice Federal Government practice environment. > Initiated Base Configuration and developed importation file strategy in both official language > Recommend best templates audit procedure and work paper from Office of Controller General > Coordinate and facilitated execution of Pilot Project and training session > Facilitate documentation of business process to facilitate follow-up on Management Action Plan activities between the Office of Audit and Evaluation and Management.
Scope and objective	> Recommend implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Applied quality assurance test to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Exchanged best practice with Other Federal Internal Audit to identified opportunity to increase for partnership in the development of customized report. > Initiated and tested TeamAdm configuration of Global Hierarchy with an excel file importation approach > Recommend extraction of residual risk from RBAP to be incorporated in a Risk Library in TeamStore > Documented the configuration and other technical requirements for the implementation.
Contribution of the proposed resource to the project	> Updated Timeline of the presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamRisk initiation, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and completion of TeamRisk >> Coordinated and tested creation of Testing and Production Server Environment >> Planned and executed Simulation Pilot Project in Testing Environment > Recommend installation of TeamMate R10.4 to is integrated to Window 7 desktop application to maximize integration of MS Office 2010 > Carried out Primary and Secondary studies > Integrated information gathered from TBS, Shared Services Canada functional requirements in TeamAdm configuration profile. > Initiated TeamAdm configuration of the Global Hierarchy (Org Structure, Program Alignment Architecture and Policies), Terminology, Category, Teammate policies, User Account > Recommend integration of Risk Based Audit Framework in a Risk Library in TeamStore > Recommend project simulation with key users in the Testing Environment before migrating to Production Environment > Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Develop a complete documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate.
Deliverables	See above
Reference	Patrice Prud'homme Chief Audit Executive Statistic Canada 150 Tunney's Pasture Driveway Ottawa ON K1A 0T6 Canada Telephone: 613-951-1062 | E-mail: Patrice.Prud'homme@statcan.gc.ca

Project Name	Process and Data mapping expansion to Finance and Investment Group - Current State
Client	Export Development Canada - Financing and Investment Group
Duration	April to August 2015 [5 Months]
Project Description	Access to credit is vital for companies of all sizes. As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (F&I) Group of EDC is planning a business transformation from it is current multiple database system into a modernized consolidated IT Solution.
Scope and objective	The primary objective of this mandate is to apply the proposed 7 steps roadmap approach to support the definition of the data profiling, data modeling, data migration and data retention in the context of the development of a new technological platform that will be supporting the Financing and Investments product and service in the context of the Alpha Project (formerly named Loan and Value Stream project). This mandate will focus on two Direct Lending or Syndicated Lending products applicable to the financing of Supplier and Foreign Buyer which are under the authority of the CABL team and the Commercial Market team
Contribution of the proposed resource to the project	Business processes supporting the Financing and Investments activities, and its administration will be developed, mapped and signed off by business owner. Related Tables and Data Fields were documented in DataStar with the pertinent data profiling attributes. The specific functional business requirements were identified and validated with the key Business / Data Owner. Business rule requirements were documented. Some of these specifications were: > Current Process Mapping to establish, Data Ownership, Internal and/or external control and Segregation of duties > Key Data Architecture Specification to ensure Data Integrity, to support Data migration and/or Retention strategy Real-time interface between proposed software solution and other active system > Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. > Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Deliverables	The key deliverable currently in development for CABL Underwriter process: > Documentation of Data Profiling in DataStar and Visio (100%) in EDC QAC environment > Data Modeling Prototype Specification for new documentation platform (100%) > Process Mapping of CABL (Workflow and Narrative) (100%) Ready for Sign-off > Process Mapping of IFG (Workflow only) Work Session no 2 > Preparation and delivery of Interim Demonstration how CI can be develop based on CABL Current Process Map to EDC executive from Senior VP, VP and Director level > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. Producing project documents including a) Project implementation plans; and b) Project charters Monitoring project risks and indicating when risk mitigation strategies identified in the risk
Reference	Justine Hendricks Vice-President, Financing and Investments Group Export Development Canada (613) 598-6872 | JHendricks@edc.ca 150 Slater Street Ottawa, Ontario | KIA 1K3

Project Name	Coaching to support TeamMate Implementation	
Client	Environment Canada - Office of Audit and Evaluation	
Duration	December 2014 to May 2015 [Delivery Based - Part Time ~ 1mth]	
Project Description	> Provide coaching to TeamMate Champion with the deployment of ~10 users TeamMate licenses. > Proposed optimal terminology and configuration in the context of a practice Federal Government practice environment. > Initiated Base Configuration and developed importation file strategy in both official language > Recommend best templates audit procedure and work paper from Office of Controller General > Coordinate and facilitated execution of Pilot Project and training session > Facilitate documentation of business process to facilitate follow-up on Management Action Plan activities between the Office of Audit and Evaluation and Management.	
Scope and objective	> Recommend implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Applied quality assurance test to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Carried out Primary and Secondary studies > Exchanged best practice with Other Federal Internal Audit to identified opportunity to increase for partnership in the development of customized report. > Initiated and tested TeamAdm configuration of Global Hierarchy with an excel file importation approach > Recommend extraction of residual risk from RBAP to be incorporated in a Risk Library in TeamStore > Documented the configuration and other technical requirements for the implementation.	
Contribution of the proposed resource to the project	> Updated Timeline of the presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamRisk, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and completion of TeamRisk >> Coordinated and tested creation of Testing and Production Server Environment >> Planned and executed Simulation Pilot Project in Testing Environment > Recommend installation of TeamMate R10.4 to is integrated to Window 7 desktop application to maximize integration of MS Office 2010 > Integrated information gathered from TBS, Shared Services Canada functional requirements in TeamAdm configuration profile. > Initiated TeamAdm configuration of the Global Hierarchy (Org Structure, Program Alignment Architecture and Policies), Terminology, Category, Teammate policies, User Account > Recommend integration of Risk Based Audit Framework in a Risk Library in TeamStore > Recommend project simulation with key users in the Testing Environment before migrating to Production Environment > Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Develop and implemented “end to end “simulation demonstrating how to Draft and revise audit material within TeamMate EWP in accordance with International Standards (IIA) > Develop a complete documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate.	
Deliverables	The key deliverable from this assignment were: > Process Mapping (Workflow and Narrative) > Documentation of Data Profiling in DataStar > Data Migration and Retention Strategy Report > Data Modeling Specification for new platform	
Reference	Stella Line Cousineau Interim Director (819) 923-2906	Sophie Lalonde Manager 200 boul. Sacré-Cœur, 12ième étage Gatineau (Québec), K1A 0H3 (819) 938-3543

Project Name	Roadmap application – Finance and Investment Group - CABL Process and Information mapping - Current State
Client	Export Development Canada - Financing and Investment Group
Duration	January to March 2015 [3 Months]
Project Description	Access to credit is vital for companies of all sizes. As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (F&I) Group of EDC is planning a business transformation from it is current multiple database system into a modernized consolidated IT Solution.
Scope and objective	In the context of the Loan and Value Stream project, the scope of this mandate was to focus the application of roadmap applicable to the products and/or services under the Corporate Asset Backed Lending (CABL) Group that are currently supported by the Medium- and Long-Term Financial Services Business Centre Application (MBC). Recognizing that Export Development Canada is offering various Financial and Investment products under the following 3 categories being: 1. Financing Products 1.1 - Export Guarantee Program (EGP) 1.2 - Direct lending or Syndicated Lending for: 1.2.1 - Supplier Financing 1.2.2 - Foreign Buyer Financing 1.2.3 - Project Financing 1.3 - Investments (direct equity and funds)
Contribution of the proposed resource to the project	Business processes supporting the Financing and Investments activities, and its administration will be developed, mapped and signed off by business owner. Related Tables and Data Fields were documented in DataStar with the pertinent data profiling attributes. The specific functional business requirements were identified and validated with the key Business / Data Owner. Business rule requirements were documented. Some of these specifications were: > Current Process Mapping to establish, Data Ownership, Internal and/or external control. and Segregation of duties > Key Data Architecture Specification to ensure Data Integrity, to support Data migration and/or Retention strategy Real-time interface between proposed software solution and other active system > Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. > Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Deliverables	The key deliverable from this assignment were: > Process Mapping (Workflow and Narrative) > Documentation of Data Profiling in DataStar > Data Migration and Retention Strategy Report > Data Modeling Specification for new platform > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. Producing project documents including a) Project implementation plans; and b) Project charters. Monitoring project risks and indicating when risk mitigation strategies identified in the risk
Reference	Justine Hendricks Vice-President Financing and Investments Group Export Development Canada (613) 598-6872 | JHendricks@edc.ca 150 Slater Street Ottawa, Ontario | KIA 1K3

Project Name	High-level Roadmap Data Profiling, Modeling, Migration and Retention
Client	Export Development Canada - Financing and Investment Group
Duration	December 2014 [Delivery based ~ 1 month]
Project Description	Access to credit is vital for companies of all sizes. As a crown corporation, Export Development Canada (EDC) plays an important role in helping Canadian companies access credit and protect themselves against a variety of risks. The Finance and Investment (F&I) Group of EDC is planning a business transformation from it is current multiple database system into a modernized consolidated IT Solution.
Scope and objective	The Objective of this mandate was to provide the EDC a Road Map to support the production of processes related to the support of the Finance and Investment (F&I) Group activities and its administration. After being reviewed for consistency with the legislation and regulation governing the (F&I) Group activities, current processes related to these activities. Also based on the key activities identified, a Role and Responsibility matrix identifying the Business & data ownership was cover. Considering the importance of this initiative, the specific functional business requirements were identified and validate with the key stakeholder. These functional business requirements were considered in 7 steps of the proposed roadmap covering the following points: Step 1 | Scope in - Scope out Step 2 | Establish Data Value Step 3 | Validate Ownership Step 4 | Document Data Definition Step 5 | Evaluate Internal Control (ex. COBIT Audit Framework) Step 6 | Select Data Migration Plan Step 7 | Integrate Data Retention Policies
Contribution of the proposed resource to the project	> Production of preliminary report including an inventory of the existing key process and stakeholder currently involved in the day-to-day operation of the activities F&I. A Role and Responsibilities Matrix being the foundation for the documentation of business ownership validation process. > Production of draft report mapping containing a set of the current processes including key Internal Control point necessary to ensure that F&I requirements are met, including mandatory key financial and legal requirements. Validation of key data element and identification of business & data owner was documented. Workflow illustrating Main Processes, and any sub-processes were also included. Each activity and decision point were cross-reference to a narrative or business rule. Internal controls were also qualified as Preventive or Detective. > A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	A final Road Map to support the production mapping the complete set of the existing requirements and proposed processes to ensure that the F&I requirements are met, including mandatory key financial and legal tracking requirements. With assistance of business data owner, identification and validation of internal or external key data integrity control will be documented. This Road Map was design to support future simulation transformation scenario. It is expected these simulations will used to allow the potential vendor to demonstrate their capacity to deliver software that will provide an end-to-end solution including Data Migration from legacy system. > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. > Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. > Producing project documents including a) Project implementation plans; and b) Project charters > Monitoring project risks and indicating when risk mitigation strategies identified in the risk > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Reference	Justine Hendricks Vice-President Financing and Investments Group Export Development Canada (613) 598-6872 | JHendricks@edc.ca 150 Slater Street Ottawa, Ontario | KIA 1K3

Project Name	Coaching to support TeamMate Implementation
Client	Canadian Dairy Commission - Internal Audit
Duration	September 2014 to November 2014 [Delivery Based - Part Time ~ 1mth]
Project Description	> Provide coaching to TeamMate Champion with the deployment of 10 users TeamMate licenses. > Proposed optimal terminology and configuration in the context of a practice Federal Government practice environment. > Initiated Base Configuration and developed importation file strategy in both official language > Recommend best templates audit procedure and work paper from Office of Controller General > Coordinate and facilitated execution of Pilot Project and training session > Facilitate documentation of business process to facilitate follow-up on Management Action Plan activities between the Office of Audit and Evaluation and Management.
Scope and objective	> Recommend implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Applied quality assurance test to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Exchanged best practice with Other Federal Internal Audit to identified opportunity to increase for partnership in the development of customized report. > Initiated and tested TeamAdm configuration of Global Hierarchy with an excel file importation approach > Recommend extraction of residual risk from RBAP to be incorporated in a Risk Library in TeamStore > Documented the configuration and other technical requirements for the implementation.
Contribution of the proposed resource to the project	> Updated Timeline of the presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamRisk initiation, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and completion of TeamRisk >> Coordinated and tested creation of Testing and Production Server Environment >> Planned and executed Simulation Pilot Project in Testing Environment > Recommend installation of TeamMate R10.4 to is integrated to Window 7 desktop application to maximize integration of MS Office 2010 > Integrated information gathered from TBS, Shared Services Canada functional requirements in TeamAdm configuration profile. > Initiated TeamAdm configuration of the Global Hierarchy (Org Structure, Program Alignment Architecture and Policies), Terminology, Category, Teammate policies, User Account > Recommend integration of Risk Based Audit Framework in a Risk Library in TeamStore > Carried out Primary and Secondary studies > Recommend project simulation with key users in the Testing Environment before migrating to Production Environment > Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Develop and implemented “end to end “simulation demonstrating how to Draft and revise audit material within TeamMate EWP in accordance with International Standards (IIA) > Develop a complete documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate.
Deliverables	See above
Reference	Hossein Behzadi B. Comm., CIA Director of Audit and Evaluation Canadian Dairy Commission Phone: 613-222-2468 Bldg. 55, 960 Carling Avenue Ottawa, Ontario K1A 0Z2

Project Name	ESRF Processes Review and Mapping
Client	Natural Resources of Canada - Environmental Studies Research Funds
Duration	July to October 2014 [Delivery based ~ 2 months]
Project Description	The Environmental Studies Research Fund (ESRF) is currently undergoing a significant change in the way studies will be financially support in the future. The new ESRF process calls for the use of Funding Agreements and broad call for proposals instead of procurement to select and fund studies. As the ESRF is undergoing these changes, it is desirable to scrutinize the whole set of processes involve in the operations of the ESRF Secretariat, hosted in the Office of Energy Research and Development of Natural Resources Canada, to validate their alignment with the legislated and regulated requirements and to improve their efficiency.
Scope and objective	The Objective of this work is to provide the Office of Energy Research and Development, which is hosting the ESRF Secretariat, a review and of its processes related to the support of the ESRF Management Board and its administration of the ESRF funds. After being reviewed for consistency with the legislation, regulation and bylaws governing ESRF, the processes related to the ESRF should be simplified, if possible, and mapped.
Contribution of the proposed resource to the project	A preliminary report mapping the responsibilities of the different parties involved in the management of the ESRF, including the Ministers, the ESRF Management Board, the Administrator of the ESRF SPAs and the ESRF Secretariat. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. A draft report mapping the complete set of ESRF requirements and proposed processes to ensure that the ESRF requirements are met, including the financial tracking requirements. A final report mapping the complete set of ESRF requirements and proposed processes to ensure that the ESRF requirements are met, including the financial tracking requirements. Whenever possible, processes that simplify the ESRF administration for the ESRF Secretariat will be proposed. > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. > Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Deliverables	The key deliverable from this assignment will be a report documenting the “Recommended OERD process map for the support of the ESRF Management Board and the financial tracking and reporting of the ESRF funds”. > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. > Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. > Producing project documents including a) Project implementation plans; and b) Project charters > Monitoring project risks and indicating when risk mitigation strategies identified in the risk
Reference	Yannick Beaudoin Science Program Policy Officer, Natural Resources Canada 580 Booth Street, Floor 14th Ottawa, Ontario K1A 0E4 Canada 613-992-1131

Project Name	TeamMate configuration and deployment strategy – Phase 2	
Client	Shared Services Canada, Audit and Evaluation Office	
Duration	November 2013 to December 2014 [12 months]	
Project Description	> Lead and managed the deployment of 40 users TeamMate licenses. > Proposed optimal terminology and configuration in the context of a practice Federal Government practice environment. > Initiated Base Configuration and developed importation file strategy in both official language > Retrieved best templates audit procedure and work paper from Office of Controller General > Planned and facilitated execution of Pilot Project and training session > Developed and documented business process to facilitate follow-up on Management Action Plan activities between the Office of Audit and Evaluation and Management.	
Scope and objective	> Update implementation schedule for each TeamMate module > Coordinated with IT support installation of TeamMate server and desktop application version. > Applied quality assurance test to ensure alignment of TeamMate desktop office application in conjunction with Window 7, MS office 2007 and MS Office 2010 to maximized integration. > Maintained constant coordination with Treasury Board Secretariat TeamMate champion to ensure cohesive implementation approach. > Exchanged best practice with Environment Canada Internal Audit office to identified opportunity to increase for partnership in the development of customized report. > Initiated and tested TeamAdm configuration of Global Hierarchy with an excel file importation approach > Extracted residual risk from RBAP to be incorporated in a Risk Library in TeamStore > Documented the configuration and other technical requirements for the implementation.	
Contribution of the proposed resource to the project	> Updated Timeline of the presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and TeamRisk >> Coordinated and tested creation of Testing and Production Server Environment >> Planned and executed Simulation Pilot Project in Testing Environment > Validated installation of TeamMate R10.4 to is integrated to Window 7 desktop application to maximize integration of MS Office 2010 > Integrated information gathered from TBS, Environment Canada and SSC functional requirements in TeamAdm configuration profile. > Initiated TeamAdm configuration of the Global Hierarchy (Org Structure, Program Alignment Architecture and Policies), Terminology, Category, Teammate policies, User Account > Extracted residual risk from Risk Based Audit Framework to be incorporated in a Risk Library in TeamStore > Simulated 4 projects with 14 users in the Testing Environment before migrating to Production Environment 40 TeamMate User > Phase 1B – Execute Deployment of TeamAdm, TeamCentral, TeamEWP and TeamStore module. > Develop and implemented "end to end "simulation demonstrating how to Draft and revise audit material within TeamMate EWP in accordance with International Standards (IIA) > Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Develop a complete documentation package (Guide, Configuration Grid and supporting Presentation material) explaining how to configure and apply some customization in accordance with International Standards (IIA) without compromising the information flow between each TeamMate module (Team Central, EWP, TeamAdm, TeamRisk initiation, TeamCentral, Team EWP, TeamStore. Please note that TeamSchedule and TeamTec Module was planned for a subsequent mandate, therefore it was out-of-scope for this mandate.	
Deliverables	See above	
Reference	Yves Genest, Chief Audit and Evaluation Executive. 613-262-2505 Paul Zind, Manager. Professional Practice, 613-262-2505	Shared Services Canada, Audit and Evaluation Office 427 Laurier Avenue West PO Box 9808, Station T CSC Ottawa, Ontario K1G 4A8 Canada

Project Name	Quality Assurance plan to support evaluation of Documentation Imaging Solution
Client	Public Works & Government Services Canada, Accounting, Banking and Compensation Branch
Duration	Mid-January to Mid-April 2014 [3 months]
Project Description	Provided to the Document Imaging Solutions Center (DISC), which is part of Cheque Redemption and Control Directorate of Accounting under the Accounting Banking and Compensation Branch of PWGSC
Scope and objective	The purpose of this requirement is to provide consulting service to assist the Document Imaging Solutions Center (DISC), for the evaluation of Imaging Request for Proposal (Imaging RFP) for the imaging of documents. The purpose of this requirement is to develop the evaluation criteria for this Imaging RFP requires the review and ranking of the Quality Assurance plan and related sampling plan. The evaluation criteria will be designed to support a fair and consistent evaluation process of the respondent to the Imaging RFP
Contribution of the proposed resource to the project	Before Posting of RFP > Evaluate the proposals with respect specific criteria > Determine the statistical parameters associated with the MIL 105E sampling methodology based on the population (to be provided by client) and sample sizes > Recommend appropriate wording of the evaluation criteria for the quality assurance plan After Posting of RFP > Review the sampling plan submitted and determined the sampling parameters used in that plan (and where relevant, their consistency with statements in the plan), such as confidence level, precision, interval etc. > Review the quality assurance plans submitted and make a recommendation as to the ranking of the quality assurance plans submitted against the identified criteria > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. > Developing and presenting to the project committee a project plans that details how the project will be implemented. > Developing, maintaining, and monitoring the project risk management plan. > Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project.
Deliverables	Document the recommendations and conclusions with appropriate supporting documentation and calculation. > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. > Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. > Producing project documents including a) Project implementation plans; and b) Project charters > Monitoring project risks and indicating when risk mitigation strategies identified in the risk
Reference	Jane Longchamps Procurement Oversight Manager (819) 956-2917

Project Name	Special Advisor to Chief Financial Officer to support IT Implementation	
Client	Professional Institute of the Public Service of Canada, National Office	
Duration	Mid-October 2013 to Mid-January 2014 [3 months]	
Project Description	PIPSC encourages member's participation to attend authorized meetings by paying their expenses and compensatory salary to: > Streamline the submission and approval process for travel expenses and compensatory salary for both members and executives; and, > Minimize use of PIPSC financial resources by rationalizing operational, travel and expenses without compromising meeting outcome. The 3 top 3 priorities for travel management were to: > Improve processes by increasing the consistency of the application of the policies and minimize miss-interpretation, > Generate Savings in increasing compliance to travel policy by taking advantage of corporate deals for accommodation and advanced flight or train booking rebate. > Improve user experience in facilitating data entry for initial travel request by providing on-line guidance to encourage early on-line booking > Provide policy driven guidance to accelerate travel claim preparation and reduce delay due to none-compliant expense requests > Accelerate Travel & Expense Claim revision time and approval process > Send friendly reminders to travelers for un-submitted Travel & Expense Claims	
Scope and objective	> Develop a strategy to validate if critical recommendations are implemented to address. System Readiness Assessment & General Computer (IT) Control identified and viewed by Deloitte > Confirmed eClaim's Business Process and Business Cycle Controls are incorporated application design > Review, develop and document Business Rule based on PIPCS Travel and Compensation Policies and/or practices >Develop a User Acceptance Quality Assurance Testing Result Framework. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. > Validate eClaim Workflow process by performing a Joint Application Design Review Session to validate proposed User Acceptance Quality Assurance > eClaim characteristics by establishing existing baseline information related to eClaim transaction volume and value > Establish Schedule roll-out Timeline	
Contribution of the proposed resource to the project	Identification of potential Acceptance Testing strategy to: > Validate alignment of Business Rules with travel and salary compensatory policies > Validate business rule effectiveness > Validate alignment of Business Cycle with workflow key internal controls (trigger points) > Provide assurance that Deloitte's concerns are addressed by: > Find supporting evidence that controls are embed in eClaim; and, > Alternatively identified if other form of mitigation measure is in place with compensatory controls > This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. > Developing and presenting to the project committee a project plans that details how the project will be implemented. Developing, maintaining, and monitoring the project risk management plan. > This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.	
Deliverables	See above > Reporting progress of the project on an ongoing basis and at scheduled points in the project life cycle. Defining project parameters such as project scope, timeline, integration, quality, risk, and cost within the project charter. Producing project documents including a) Project implementation plans; and b) Project charters. Monitoring project risks and indicating when risk mitigation strategies identified in the risk management plan need to be executed.	
Reference	Denis Bourguignon, MBA, CGA Chief Financial Officer Phone: 613-228-6310	Professional Institute of the Public Service of Canada National Office 450 Tremblay Road Ottawa, Ontario K1G 3J8 Canada

Project Name	TeamMate configuration and deployment strategy – Phase 1	
Client	Shared Services Canada, Audit and Evaluation Office	
Duration	July to August 2013 [2 months]	
Project Description	> Developed strategy for the deployment of 40 users TeamMate licenses. > Research potential optimal configuration in the context of a practice Federal Government practice environment. > Researched Base Configuration and developed importation file strategy in both official language > Identified potential templates reference of audit procedure template and work paper	
Scope and objective	> Reviewed and proposed implementation schedule for each TeamMate module > Assessed alignment of server and desktop application version planned to be installed. > Assessed and recommended alignment of desktop office application to be used in conjunction with TeamMate to maximize integration with MS Office. > Carried out Primary and Secondary studies. > Initiate communication with Treasury Board Secretariat TeamMate champion to ensure cohesive implementation approach. > Interface with Environment Canada Internal Audit office to benefit from the lessons learned from their recent implementation > Document TeamAdm configuration from other department regarding excel file importation strategy	
Contribution of the proposed resource to the project	> 40 Users – Planning Deployment of TeamAdm, TeamCentral, TeamEWP and TeamStore module. > Prepared a presentation package of the proposed deployment strategy >> Phase 1- Focusing on TeamAdm, TeamCentral, Team EWP and TeamStore >> Phase 2- TeamSchedule, TeamTec and TeamRisk > Recommended creation of Testing and Production Server Environment > Recommended software version installation of TeamMate R10.3 to maximized TeamMate solution > Recommended acceleration of deployment of Window 7 desktop application to maximized integration of Office Software and TeamMate > Consolidated information gathers from TBS and Environment Canada TeamAdm configuration profile. > Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. > Demonstrate how to draft and revise audit material within TeamMate EWP in accordance with International Standards (IIA)	
Deliverables	See above	
Reference	Yves Genest, Chief Audit and Evaluation Executive. Audit and Evaluation Office 427 Laurier Avenue West PO Box 9808, Station T CSC Ottawa, Ontario K1G 4A8 Canada 613-262-2505	Zind, Manager. Professional Practice, Shared Services Canada 427 Laurier Avenue West PO Box 9808, Station T CSC Ottawa, Ontario K1G 4A8 Canada 613-262-2505

Project no 31

summary

Project Name	PWGSC Building Condition Report Monitoring Asset
Client	Public Works & Government Services Canada, Real Property Division
Duration	January to June 2013 [6 months]
Project Description	Provide professional consulting services to the Professional & Technical Services Directorate, NCA Operations Sector, Real Property Branch, Public Works and Government Services of Canada.
Scope and objective	The Building Condition Report (BCR) process overhaul has been implemented to address the PWGSC Crown-Owned, AFD managed and Lease Purchased assets in the National Capital Area. This mandate focus on the review the BCR via their components. The goal of this mandate was to make BCR readily accessible and manageable by stakeholders to support effective decision making.
Dollar Value	~ $ 500M over ~181 Assets Construction Planning Projects for NCA region
Contribution of the proposed resource to the project	Based on PWGSC existing Asset Database, a BCR Quality Assurance Production module was developed in a single consolidated database of BCR reports. As BCR was developed in 4 stages (33%, 66%, 99% and Final version) to capture reviewer's comments from each CoE discipline expert recorded with each specific report. In summary, it is expected that the BCR Quality Assurance Production module would provide the following functionalities: > BCR Term of Reference checklist validated " in scope " or " out of scope " with justification reference to supporting document (inspection report) > Quality Assurance reviewer noted by discipline (Architecture, Structural, Mechanical & Electrical) with reference to specific BCR technical component > Reporting module providing a consistent and uniforms report format of all the reviewer comments for the benefit of the BCR consultant and the Property Facility Manager > A Monitoring Progress Status of the BCR Production Report accessible to multiple parties via web-based platform. > Identify data management weakness and propose corrective action to increase data integrity supporting a rigorous data governance structure supported by clear role and responsibility. > Pre-selected report type was available on a "Dashboard" Graphic User Interface type > This mandate is supporting business process transformation.
Deliverables	See above
Reference	Dextor Edwards, Architect. Public Works & Government Services Canada, Real Property Division, Project Manager - CMA - RPT 4 340 Albert Street, Constitution Square 10th floor, Ottawa, Ontario K1A-0S5 (819) 775-4907

Project Name	Structural Podiums and Cladding Review Program - Validation and Investigation of Priority NCA Assets
Client	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services (P&T), Centre of Expertise
Duration	April 2012 to September 2013 [18 months]
Project Description	Provide professional consulting services to the Professional & Technical Services Directorate, NCA Operations Sector, Real Property Branch, Public Works and Government Services of Canada.
Scope and objective	The first phase of a program to review the condition of parking garages, structural podiums and building cladding of PWGSC Crown-Owned and Lease Purchase assets in the National Capital Area was undertaken by PWGSC from January to May 2012. The program also included a review of the building condition monitoring process currently in place at PWGSC to monitor the condition of these building components. A management action plan delivered as part of this first phase identified key findings and recommendations related mainly to the need for improvements to internal document management, technical review, and the need to further review high-priority assets. The NCA Professional and Technical Services office of Public Works and Government Services Canada provide guidance, direction and oversight in the delivery of projects for real property teams, within the NCA Operations Sector
Dollar Value	~ $ 500M over ~181 Assets Construction Planning Projects for NCA region
Contribution of the proposed resource to the project	Developed and implemented a work plan and high-level schedule and budget to complete Phase 2 of this program. Recommend the best organizational team model for implementation. Review existing Oracle data architecture, supervised data extraction applies data cleansing strategy before report production. Updated the asset database prototype developed in Phase 1, to record and manage the results of the validation and investigation review process. The database is to include a risk-based review mechanism for prioritizing assets. Identified, prepared, distributed and assigned work packages to team members (internal personnel and other consultants) responsible for validating and investigating priority assets. Developed and implemented the asset data developed in Phase 1 to produce searchable component-specific inventories for parking garages, podiums and cladding. Inventories are to include key information on each one of these building components. Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. Reviewed the NCA assets Portfolio Strategy developed by Owner Investor for the NCA 2012. Reviewed stakeholder roles and responsibilities (i.e. process map) in the context of end-to-end building monitoring process. Prepared communication package from Phase 1 finding to other PWGSC stakeholders (Asset and Facility Management Services (AFMS/OSS), Business Resource Management (BRM), Owner Investor (OI), and P&TS). Assisted working groups involved in related initiatives (i.e. BCR TOR, new AFD contract, Asset-Based Records Management). Participated and prepared material for coordination meetings and briefings to stakeholders. This mandate requires expertise in assessment of organizational role and responsibility.
Deliverables	See above
Reference	Yvan Desmarais, Eng. Public Services and Procurement Canada, Real Property Division, (formerly: Public Works & Government Services Canada) Senior Director Terrasses de la Chaudière 613-219-9323 Yvan.Desmarais@tpsgc-pwgsc.gc.ca

Project no 29

summary

Project Name	Audit of Procurement Activities
Client	National Capital Commission – Audit and Corporate Ethics
Duration	July to September 2012 [3 months]
Project Description	Provide advice and guidance to the Internal Audit team at the planning, examination and reporting phase of the audit of procurement service for goods and general services, including major capital, construction, landscape and professional services.
Scope and objective	The goal of the audit is to assess whether NCC procurement practices allow for a fair and competitive process to acquire goods and services. The objectives of this audit were to: • Determined whether the existing procurement practices aim at getting best value. • A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. • Determined if management receives sufficient and appropriate information on procurement activities. • Identified procurement trends (i.e., contract and standing offer arrangements (SOAs) awards, acquisition card purchases, frequency and magnitude of change orders).
Dollar Value	NCC contracts for a wide array of goods and general services, including major capital, construction, landscape and professional services. The majority of NCC contracts are under $25K. During 2011, there were 236 contracts which were awarded for a total of $47.9 million ($54.6 million in 2010).
Contribution of the proposed resource to the project	Conducted a review of goods and services acquired by the NCC would be based on a fair and competitive process (e.g., appropriate use of sole source as a contracting method, appropriate use of change orders). Identified the best procurement practices in compliance to the NCC procurement set of policies. Assessed if management had adequate key performance indictors to measure best value from its procurement activities. Also performed Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis to determine whether the existing procurement practices aim at getting best value. Determined whether management receives sufficient and appropriate information on procurement activities. Identify procurement statistics and trends (i.e., purchase orders, competitive and non-competitive contract and SOAs awards, frequency and magnitude of change orders, acquisition card purchases and petty cash purchases). Assisted in the development and implementation of validation scripts in IDEA to support data mining for the procurement activities for continuous auditing and exception reporting. Assisted the analysis of the result produced from IDEA data mining scripts. Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility.
Deliverables	See above
Reference	Jacques Côté, Auditor National Capital Commission – Audit and Corporate Ethics (613) 239-5590

Project no 28

summary

Project Name	Assessment Vertical Transportation Devices Program
Client	Public Works & Government Services Canada, Real Property Division, Operational Support Services (OSS), Mechanical / Vertical Transportation
Duration	April 2012 to March 2013 [12 months]
Project Description	Consultation service to provided professional service to consolidate all the Vertical Transportation assessment under a single database to facilitate the maintenance of all the device located in all the various region across Canada that are under the management of Public Works and Government Services of Canada.
Scope and objective	To ensure that the Utilities Management Services of PWGSC have accurate and complete information to management to manage the Maintenance Contract of 989 vertical Transportation devices of the criteria that will be requiring the implementation of the corrective action process of the database to ensure full completion of the management of the Contract Maintenance for the vertical transportation. Also, to ensure the optimum performance of the existing contract maintenance, a monitoring system will be developed to support the Goods Receipt administrative business processes as per FAA section 34.
Dollar Value	Contract Maintenance volume of $ 40M for ~ 1000 Vertical Transportation Device.
Contribution of the proposed resource to the project	Prepared a Contract Maintenance Monitoring Process Map (workflow). Developed a Contract Maintenance Monitoring Process Database Interface. Implemented a Prototype the Contract Maintenance Monitoring Web user interface. Converted and uploaded the existing Contract Maintenance Monitoring information from Excel to Database. Updated the Security Profile Interface to managed access to either the consolidated Device Assessment module or Contract Maintenance Module (Filemaker database). Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. Participated and prepared material for the coordination meetings to maintain open communication between the Vertical Transportation Specialist and the Building Managers to enhance client satisfaction. Support business process transformation and provide assessment of the current organizational role and responsibility within the Operational Support Services Mechanical and Vertical Transportation group.
Deliverables	Collected, tested and consolidated the assessment of 989 vertical transportation device across Canada located in 263 buildings managed by 235 separate contract maintenance agreement awarded to approximately 14 different maintenance contractor companies. The assessment identified 7,850 maintenance actions item, 1,036 reparation actions estimated at $3.6M and finally, 3,012 modernization actions estimated at $41,6M for all the 989 devices located across Canada.
Reference	Dave Ventura Public Works & Government Services Canada Operational Support Services (OSS), Mechanical / Vertical Transportation Utilities Management Services 400 Coopers Street – 6th floor (819) 775-4088 (613) 868-4649

Project no 27

summary

Project Name	Parking Garage and Structural Podiums Business Process Mapping and Development of a Structural Performance and Rehabilitation Monitoring System
Client	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services (P&T), Centre of Expertise
Duration	January to March 2012 [3 months]
Project Description	Provide professional consulting services to the Professional & Technical Services Directorate, NCA Operations Sector, Real Property Branch, Public Works and Government Services of Canada.
Scope and objective	To ensure the structural integrity and performance of PWGSC Crown-Owned and Lease-Purchase parking garages and structural podiums (and potentially cladding and other deteriorating elements of buildings), develop and implement a monitoring system supported by a documented internal business process.
Dollar Value	The National Capital Area Professional and Technical Services office of Public Works and Government Services Canada provide guidance, direction and oversight in the delivery of projects for real property teams, within the National Capital Area Operations Sector (annual project volume of $1.6 Billion).
Contribution of the proposed resource to the project	Prepared a High-level Business Process Map (workflow). Reviewed the existing building condition monitoring process to identify deficiencies and areas for improvement. Reviewed existing maintenance and inspection processes with a view to compliance to standards and best practices. Reviewed existing systems for maintaining asset-based data including conditions of parking garages and building envelop. Prepared a Management Action Plan. Prepared a Parking Garage and Structural Podium Condition and Maintenance database. Review existing Oracle data architecture, supervised data extraction applies data cleansing strategy before report production. Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility Applied readiness testing to ensure the validity, completeness and accuracy. Reviewed and recommended the necessary updates to the secure web site structure (Protected B). Participated and prepared material for coordination meetings and briefings to stakeholders as required.
Deliverables	See above
Reference	Yvan Desmarais, Eng. Public Services and Procurement Canada, Real Property Division, (formerly: Public Works & Government Services Canada) Senior Director Terrasses de la Chaudière 613-219-9323 Yvan.Desmarais@tpsgc-pwgsc.gc.ca

Project Name	Benchmarking study of procurement in 5 departments.	
Client	Environment Canada - Office of Audit and Evaluation	
Duration	January to April 2012 [4 months]	
Project Description	The delivery of procurement activities is highly centralized at Environment Canada: for example, the delegated authority to sign contracts rests with procurement officers, not with managers. Environment Canada is considering changing its present delivery model and would like to understand and other delivery models existing in similar organizations.	
Scope and objective	Using a combination of interviews, document review, process mapping and other forms of inquiry, analyze the different models existing in 5 organizations; RCMP and four other departments, preferably in following ones: Natural Resources Canada, Fisheries and Ocean, Health Canada, and Agriculture Canada as well as Environment Canada.	
Dollar Value	Environment Canada manages around 13,000 contracts a year for a total value of close to $200 million (2009-2010 figures).	
Contribution of the proposed resource to the project	Prepared an analysis of the organization in terms of number of positions and classification levels plus overall volumes of work. Prepared a description of each type of procurement activity (such as LPOs, PWGSC Contracts, departmental contacts, standing offers, supply arrangements, temporary help, task authorization). Prepared a description, for each procurement vehicle, including each contracting delegation of authority. Carried out Primary and Secondary studies. Review each procurement vehicle to identify internal controls in place, such as policies, monitoring, reporting. Used strengths and weaknesses of the model to compare pros and cons of each procurement vehicle. Audit supporting documentation was maintained and cross-referenced in EWP TeamMate module. TeamCentral was used to coordinate the updating, reviewing and sign-off process. Recurring Interview Note procedure were incorporated to further enhanced TeamStore configuration. These templates were disseminated though TeamStore as best practice for another audit. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. Draft and revise audit material within TeamMate EWP in accordance with International Standards (IIA)	
Deliverables	See above	
Reference	Stella Line Cousineau Senior Auditor (819) 923-2906	Jean Leclerc Director (819) 994-7736

Project no 25

summary

Project Name	Professional and Technical Services Classification documentation structure system aligned to Internal business process
Client	Public Works & Government Services Canada, Real Property Division, Professional & Technical Services (P&T), Centre of Expertise
Duration	August 2011 to February 2012 [7 months]
Project Description	The National Capital Area Professional and Technical Services office of Public Works and Government Services Canada provide guidance, direction and oversight in the delivery of projects for real property teams, within the National Capital Area Operations Sector. The purpose of this mandate was to ensure the optimum performance of the existing internal control within the folder classification structure for Human Resources and Administrative documentation.
Scope and objective	- Work in conjunction with the Director or Professional and Technical Services, the Senior Advisor will be responsible for assessing and developing a folder classification structure and documentation system aligned to internal business process applicable to Professional & Technical Services (including applicable administrative sub processes). - Validate the operability of the proposed folder classification structure documentation, a prototype will be tested with a representative sample of documentation typically used by Professional and Technical Services.
Dollar Value	Annual project volume of $1.6 Billion
Contribution of the proposed resource to the project	Prepared a High-level Business Process Map (workflow). Identified Key Control Document and prepared a various option Classification Structure. Developed exception reports that will be designed to monitor the adherence to classification structure and produced progress status dashboard report. Carried out Primary and Secondary studies. Participated and prepare material for the coordination meetings with stakeholder and process business owner to enhance operability of the proposed classification structure. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	A High-level Business Process Map (workflow) • Listing of Key Control Document including sample • Few Classification Folder Documentation Structure • Final Classification Folder Documentation Structure (Shared Drive, EDRM and/or Oproma) • Exception monitoring reports • Adherence to classification structure; and progress status dashboard report • Agenda and meeting minutes
Reference	Veronica Silva (Retired) can be reach at (613) 219-8008 A/Regional Director Public Works and Government Services Canada Professional and Technical Services Telephone: 613-219-8008 | email: veronica.silva@tpsgc-pwgsc.gc.ca

Project Name	Map Registry Operational Events Vertical Transportation on Site Visit Engineering Assessment.
Client	Public Works & Government Services Canada, Real Property Division, Operational Support Services (OSS), Mechanical / Vertical Transportation
Duration	April 2011 to March 2012 [12 months]
Project Description	Performed a reviewed and analyzed the current Management Action Plans for the On-Site Visit Engineering Assessment. Make necessary updates and upgrades to the plans to ensure its readability and completeness. Develop and implement a comprehensive electronic On-Site Assessment Sheet. Develop and implement a secure web site (protected B) to managed and monitored at the national level multiple on site assessment.
Scope and objective	As per Technical Standards & Safety Authority (TSSA): • Standardized of the risk analysis processes to detect potential critical maintenance issues over 600 vertical transportation devices of the National Capital Region. • Identified and developed a high-level strategy to ensure consistency of the information gathering process of multiple on-site visit assessment perform by multiple engineering firm for high-risk elevator. • With the collaboration of the Vertical Transportation Specialist, develop an on-site assessment electronic grid that was developed, tested and deployed for implementation across Canada. • With the collaboration of a third parties engineering firm, test a proposed a workflow of the on-site assessment process. Based on the result of this test, modify the workflow to accommodate the engineer.
Dollar Value	~ $ 50M over ~100 Maintenance Contracts for average of 25 years for 600 devices for National Capital Region
Contribution of the proposed resource to the project	Lead the development of prototype and deploy of the final version of: • An on-site assessment electronic grid • Assessment Step by Step process "Workflow" on a Secured website • Provided coaching to PWGSC employee to facilitate the production of assessment sheet and creation of the 3 interdependent Excel Flat File. • Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	Delivered: • An on-site assessment electronic grid • Assessment Step by Step process "Workflow" on a Secured website • Coaching documentation to support knowledge transfer.
Reference	Marcel Blanchard Manager Public Works & Government Services Canada, Real Property Division, Operational Support Services, Mechanical / Vertical Transportation 819-775-4094

Project no 23

summary

Project Name	Management Action Plan (MAP) report, analysis and continuous update
Client	Public Works & Government Services Canada, Real Property Division, Operational Support Services, Maintenance & Operational Assurance Services
Duration	October - December 2011 [3 months]
Project Description	Perform a review and analysis of the current Management Action Plan developed following the Cliff Plant incident. Suggest and implement necessary improvement and updates to the plan to ensure its accuracy and completeness is meeting Senior Management expected requirements.
Scope and objective	Analyzed the Management Action Plan. Rewrote or upgrade the existing MAP to meet the requirements of the department and maintain supporting documents. Identified minimum standard requirements or provide alternative solution to address any shortcomings. Identified trends, or gaps in the MAP and correct to ensure the department is audit ready. Identified any standards that should be used and implement. Participated in weekly MAP meetings
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	Submitted a draft Management Action Plan at 80% completion for review and comments. Submitted the completed Management Action Plan and an approach to be used in the maintaining of the integrity of the documentation on an electronic and/or hardcopy format. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	• Management Action Plan • Gather all supporting documents • Background information as required • Background information on decisions as required
Reference	Jim Albers Manager Public Works & Government Services Canada, Real Property Division, Operational Support Services, Maintenance & Operational Assurance Services 819-775-4142

Project Name	International Travelling Activities Audit
Client	Public Health Agency of Canada (PHAC), Audit Service Division
Duration	January to March 2011 [3 months]
Project Description	The Public Health Agency of Canada (PHAC) was created within the federal Health Portfolio to deliver on the Government of Canada's commitment to help protect the health and safety of all Canadians and to increase its focus on public health. The purpose of this audit was to review the governance framework of PHAC international activities, including international travels.
Scope and objective	Systems and practices related to international activities against relevant policies, protocols and mandates. Assess whether international activities are effective, efficient, and timely executed. Assess whether PHAC support services for international activities are effective and responsive
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	In collaboration with two other senior auditors: Collaborated to the following three elements of this mandate throughout the conduct phase up to the debriefing session with senior management. <u>Part 1- Interview session:</u> Lead a series of interviews with key employees involved with the international activities Developed and implemented interactive audit tools comprised of key elements that support that implementation of the audit plan as per the IIA Standards. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. These tools were used to consolidate and summarize key strengths, weaknesses and areas for improvement that were identified from each interview session. Reports produced from these tools were used to support weekly progress reports for management of the Audit Service Division and perform the brainstorming session. <u>Part 2- Reviewed stewardship practice:</u> Assessed effectiveness of the internal control during the financial review was to assess the effectiveness of the internal controls when international activities were performed. Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. Developed a judgmental sample of 188 international travels to assess the degree of compliance to PWGSC's procurement policies and the Financial Administration Act requirements. <u>Part 3- Brainstorming Session - Identified key observations & recommendations:</u> Participated to a series of brainstorming sessions. Identified key observations, developed and summarized key recommendations for senior management. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	Report was available once the external audit committee had approved its release on the PHAC's web site.
Reference	Christian Asselin Chief Audit Executive, Audit Services Division (613) 948-3249

Project Name	Accelerated Infrastructure Program (IAP) Advisory and Multi-Phases Consulting mandate
Client	Public Works and Government Services Canada, Real Property Division
Duration	August 2010 - June 2011 [11 months]
Project Description	This mandate involving the reviews of IAP architectural and engineering projects for the NCA region comprised two parts. Part 1: Consultation mandate - At the inception of the Accelerated Infrastructure Program, lead and managed a multi-phase operational and financial review to advise senior management. Developed phase 1 of the audit plan including an advisory component and conducted the preliminary survey. Part 2: Audit mandate - Reviewed the management accountability framework and reporting capabilities of the Accelerated Infrastructure Program. Prepared audit objectives, audit criteria, performed documentation review and conducted interviews with key stakeholders. Assessed risks and identified internal control weaknesses pertinent to service delivery, procurement, human resources, technology, partnership and other areas. Communicated internal audit concerns and followed up on adequacy of the corrective measures.
Scope and objective	The goal of this audit was to provide reasonable assurance that business processes are adequately designed and implemented to manage the Accelerated Infrastructure Program. More specifically, this review for on the aspect of Cost Management; Schedule Management; Scope Management; Procurement; Quality Management; Risk Management; Management of Technical challenges. Review provides recommendation to senior management regarding financial and costing project cost estimates, business plans including Treasury Board Submissions. Review and provide recommendation for projects resources requirement and anticipated acquisition costs, operation and maintenance costs and both recurring and non-recurring costs.
Dollar Value	~ $ 1Billion over ~ 300 Construction Projects across the country
Contribution of the proposed resource to the project	Part 1: Consultation mandate – Planning - Provided and Documented a series of facilitation session to key members of PWGSC's real property team to established key objectives and element of the program design. Lead a preliminary review-to-review program organizational strategic planning and adequacy of the program design to fulfill program requirement. Advised senior management about the initial observation for potential improvement in response to six-risk area identified in a preliminary risk assessment. Submitted a strategic plan to support the implementation of corrective action. Produced a strategic plan based on a risk management framework, which leads to the development of a few mitigation strategies to facilitate the implementation of the program design. In complement to some of the mitigation strategies a series of informal coaching session were performed with management during the mandate. Part 2: Consultation mandate – Implementation - Lead and managed the audit throughout the key audit process from the conduct stage to the debriefing of the preliminary report to Senior Management. Developed and used key audit tools to sufficiently and adequately support the findings of this audit as per the IIA Standards. Used a risk management framework, to identify a series of audits criteria to be part of the audit tool to ensure the application of the audit plan throughout the mandate. Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. Audit criteria were developed in accordance with the Institute of Internal Auditors and were also aligned with a typical PWGSC's National Project Management System. On a regular basis, prepared a series of progress report presentations and delivered during weekly briefing session to senior management during this mandate. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on PWGSC web site.
Reference	Veronica Silva (Retired) can be reach at (613) 219-8008 Public Works and Government Services Canada Professional and Technical Services Telephone: 819-956-8648, email: veronica.silva@tpsgc-pwgsc.gc.ca

Project Name	Audit of Crisis and Emergency Communications – H1N1
Client	Public Health Agency of Canada (PHAC)
Duration	July to September 2010 [3 months]
Project Description	The Public Health Agency of Canada (PHAC) was created within the federal Health Portfolio to deliver on the Government of Canada's commitment to help protect the health and safety of all Canadians and to increase its focus on public health. Events like the Listeriosis, H1N1 outbreaks and the increasing likelihood of widespread pandemic disease outbreaks due to globalization demonstrated the need for Canada to have a national point of focus for public health issues. Within this context, the Audit Services Division undertook an Audit of Crisis and Emergency Communications. Crisis and Emergency Communication efforts within the Communication Directorate of PHAC were undertaken under overarching guidance provided by the Privy Council Office (PCO) as per Treasury Board Secretariat's Communications Policy. It should be noted that this audit did not focus on Public Safety Canada (PSC) responsibilities for the application of the Emergencies Management Act and the Federal Emergency Response Plan.
Scope and objective	Reviewed systems and practices related to crisis and emergency communications against relevant policies, protocols and mandates. Assessed whether crisis and emergency communications activities are effective, efficient, timely fashion. Assessed whether PHAC support services in the delivery of crisis and emergency communications are effective and responsive.
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	In collaboration with two other senior auditors, collaborated to the following three elements of this mandate throughout the conduct phase up to the debriefing session with senior management. Part 1: Interview session: Participated in a series of interviews with key employees involved with the Communication Crisis activities. Developed and implemented interactive audit tools comprised of key elements that support that implementation of the audit plan as per the IIA Standards. These tools were used to consolidate and summarize key strengths, weaknesses and areas for improvement that were identified from each interview session. These tools were used to support weekly progress reports for management of the Audit Service Division and perform the brainstorming session. Part 2: Review stewardship practice: The purpose of the financial review was to assess the effectiveness of the internal controls during the performance of the contractual agreements used the H1N1 crisis. Based on judgmental sample, conducted a review of over 70 contracts and invoices to assess the degree of compliance to PWGSC's procurement policies and the Financial Administration Act requirements. Part 3: Brainstorming Session - Identify key observations & recommendations: Participated to a series of brainstorming sessions, which identified key observations and developed and summarized key recommendations for senior management. - This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.
Deliverables	Results will be available once the external audit committee has been debriefed and the report has been approved for release on the PHAC's web site.
Reference	Christian Asselin Chief Audit Executive, Audit Services Division (613) 948-3249

Project Name	Literature Review for the Policy on Internal Audit	
Client	Treasury Board of Canada Secretariat (TBS), Policy, Methodologies Platforms, Guides and Tools	
Duration	April 2010 to May 2010 [2 months]	
Project Description	TBS is mandated to provide advice and guidance to the Internal Audit community in the federal government. TBS is responsible for the development and evaluation of the implementation of the latest Policy on Internal Audit (PIA). Based on approximately 250 documents produced over the last ten years, logistical and methodological support was provided to TBS employees to complete a literature review. Carried out Primary and Secondary studies. This documentation was related to policies, reports and other benchmarking material pertinent to the upcoming evaluation of the Policy on Internal Audit. Based on recognized internal audit professional practices, the literature review was complemented by an electronic database designed to facilitate specific information retrieval.	
Scope and objective	The goal of this mandate is to provide adequate documentation to the team that will perform the evaluation of the policy for internal audit.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	In consultation with the client, lead the development and the implementation of the Literature Review supported by an audit tool designed to be aligned with the generic audit process as per the standard recognized by the Institute of Internal Auditors. Prepared a series of progress report presentations and delivered them during briefing session with senior management. Coached and trained management to allow them to be able to update the literature review if required.	
Deliverables	Training manual and training sessions were completed to ensure sufficient knowledge transfer to adequately manage and leverage the literature review.	
Reference	Tim Flaherty Director (613) 946-4561 tim.flaherty@tbs-sct.gc.ca	Yvon Roy Audit Manager (613) 957-9654

Project Name	Grant & Contribution monitoring program for the Centre of Expertise of the Contracting, Grants & Contributions Policy	
Client	Natural Resources of Canada	
Duration	February 2010 to June 2010 [5 months]	
Project Description	Transfer payment (grant and contribution) programs at Natural Resources Canada (NRCan) represent approximately represents approximately 50% of total departmental spending. These funding programs are critical to the achievement of federal objectives in sustainable development and use of Canada's natural resources. Based on a statistical approach, a monitoring strategy was development and implemented to provide reasonable assurance that all the programs are manage as per Treasury Board Term and Condition and in compliance with NRCan policies within the boundaries of the Financial Administration Act.	
Scope and objective	The goal of this initiative is to provide reasonable assurance to senior management that Grant and Contribution agreement are managed in agreement with the TBS Terms and Conditions, NRCan policies and FAA requirements by developing a Multi-Year Risk Based Audit Planning.	
Dollar Value	~ $ 450M over ~1,500 agreements for 2009/2010	
Contribution of the proposed resource to the project	Provided and documented a series of facilitation session to key members of the Centre of Expertise to established and agreed on mandate objectives. In consultation with the client, lead the developed a strategic plan to facilitate the communication and implementation of a monitoring program for NRCan's transfer payment. Developed audit procedure and criteria aligned with Treasury Board's management accountability framework and risk management framework. Developed a series of mitigation strategies were introduced to facilitate the implementation of the monitoring program with day-to-day NRCan's operation. Provided a series of informal coaching session to management in complement to some of the mitigation strategies. Review existing Oracle data architecture, supervised data extraction applies data cleansing strategy before report production. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Monitored and reported on mandate progress, with an interactive audit tool that was developed and implemented to ensure adherence to the audit process during the application of the monitoring program. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. Assisted in the development and implementation of electronic spreadsheet to support the continuous monitoring and production of exception report for the management of the grant and contribution activities. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. > Developing and presenting to the project committee a project plans that details how the project will be implemented. > Developing, maintaining, and monitoring the project risk management plan. > Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project.	
Deliverables	Methodology and auditing tools were understood and applied by the resources of the Centre of Expertise's to pursue the application of the monitoring program. The monitoring program provides to performed monthly, quarterly and annually testing procedures including a sampling calculator toolkit.	
Reference	Chris Szwarc Director (613) 995-2191	Kim Beckert Manager (613) 947-9528

Project Name	Global Partnership Program (GPP) administered by the Major Program Bureau (IGX)	
Client	Foreign Affairs and International Trade Canada, Internal Audit Division (ZBD) Chief Audit Executive Bureau	
Duration	January 2010 to February 2010 [2 months]	
Project Description	GPP is implementing projects in Russia and other countries of the former Soviet Union to reduce the threat posed by weapons and materials of mass destruction to Canadians. The GPP has been allocated a budget of approximately $100 million each year for a ten-year period. The purpose of the audit is to determine the effectiveness of the management control framework by reviewing the governance structure, operational capacity and the budget, project and risk management including the compliance to the Treasury Board Transfer Payment Policy, the Financial Administration Act and the Terms and Conditions of its Program. Prepare a process control map of project cycle as per the GPP's Project Management Framework indicating all internal controls in narrative and workflow format. Review Treasury Board submissions, perform data analysis, conduct a preliminary interview and participate in the risk assessment analysis.	
Scope and objective	The goal of this mandate is to provide reasonable assurance that business processes are appropriate to deliver the GPP program.	
Dollar Value	~ $ 1B over 5 years	
Contribution of the proposed resource to the project	Provided and documented a facilitation session to key members of the Audit Executive Office to established and agreed on audit objectives. Developed a strategic plan at the planning stage. Participated to debriefing session following the conduct phase. Conducted a series of interview with GPP's senior management and debriefed senior management on the result of the preliminary survey. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards, which facilitated the application of the audit plan throughout the mandate. Developed audit criteria based on a risk management framework, which lead to the development of mitigation strategies to facilitate the delivery of the mandate. For this specific mandate, Political, Economic, Sociological, Technological, Legal and Environmental (PESTLE) analysis was also conducted. Provided a series of coaching session were performed with management to complement to some of the mitigation strategies. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on DFAIT's web site.	
Reference	Yves Vaillancourt Chief Audit Executive (613) 943-4743	Annam Ganesan Audit Manager 819-956-8588

Project no 16

summary

Project Name	Seized Property Management Directorate (SPMD)	
Client	Public Works and Government Services Canada, Office of Audit and Evaluation (OAE)	
Duration	December 2009 to March 2010 [4 months]	
Project Description	SPMD is managing assets seized or restrained under Canada's Proceeds of Crime legislation. The objectives of the Seized Property Management Program are to provide consultative services to law enforcement agencies in relation to assets seized or restrained; to safeguard the assets; to dispose of them when the Courts declare forfeiture; and to share the proceeds of the disposition. Based on Treasury Board's core management control, the audit objectives are focusing on the governance structure, the operational capacity, SPMD's policies, procedures and controls to safeguard the seized or restrained assets including adequacy of the risk management framework and reporting mechanisms to assist senior management in the decision-making process.	
Scope and objective	The goal of this audit was to provide reasonable assurance that SPMD's business processes are adequate to manage and protect seized asset under their custody as part of Multi-Year Risk Based Audit Planning.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Lead and managed the audit throughout the key audit process from the conduct stage to the debriefing of the preliminary report to Senior Management. Based on the observations found, developed and updated the strategic plan for the implementation of the conduct phase. Provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. Developed the audit criteria based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of the mandate. In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. Developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards which facilitated the application of the audit plan throughout the mandate and adequately support the findings of this audit as per the IIA Standards. Using a risk management framework identified a series of audits criteria to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on PWGSC's web site.	
Reference	Linda Anglin Chief Audit Executive (819) 956-2971	Marc Simard Acting Director (819) 956-2973

Project Name	Monitoring program of procurement of services	
Client	Public Works and Government Services Canada Accounting, Banking and Compensation Branch	
Duration	October to November 2009 [2 months]	
Project Description	Provided assistance to a new procurement oversight function to develop a monitoring program based on risk assessment from recent audits. This function interfaces with either Materiel Management (MM) or Acquisitions Branch (AB) to participate in the process of RFP content, SOW, risk assessments, privacy assessments, initiation of contract amendments, issuance of TAs, and the contract administration activities such as invoice reviews, payment approvals, reporting.	
Scope and objective	The objectives of the monitoring program are to increase the consistency and quality of procurement of service to ABCB functions.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Provided and documented a few facilitation sessions to key members of the ABCB to establish and agreed on key objectives of the monitoring program. In consultation with the client, lead the development a strategic plan to facilitate the communication and implementation of a monitoring program for ABCB. This program includes a series of audit process criteria aligned with Treasury Board's management accountability framework and risk management framework. The monitoring criteria were based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the implementation of the monitoring program. Developed the audit criteria based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of a monitoring program for ABCB. In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. Developed and implemented an interactive monitoring tool to facilitate the application of the monitoring of the ABCB process. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.	
Deliverables	Methodology and tools were understood and applied by the resources of the ABCB's to pursue the application of the monitoring program. The monitoring program provides to performed monthly, quarterly and annually testing procedures including a sampling calculator toolkit. This material will also be communicated through a web based as well as information sessions for branch employees.	
Reference	Steve Lacelle Director PWGSC - Banking Arrangements Directorate (819) 956-2917	Jane Longchamps Procurement Oversight Manager (819) 956-2917

Project Name	Accelerated Infrastructure Program – Advisory and Multi-Phases Audit mandate	
Client	Natural Resources of Canada - Office of Audit Branch	
Duration	June to August 2009 [3 months]	
Project Description	This mandate involving the reviews of IAP architectural and engineering projects for the NRCAN comprised two parts as part of Multi-Year Risk Based Audit Planning. Part 1: Consultation mandate - At the inception of the Accelerated Infrastructure Program, lead and managed a multi-phase operational and financial review to advise senior management. Developed phase 1 of the audit plan including an advisory component and conducted the preliminary survey. Part 2: Audit mandate - Reviewed the management accountability framework and reporting capabilities of the Accelerated Infrastructure Program. Prepared audit objectives, audit criteria, performed documentation review and conducted interviews with key stakeholders. Assessed risks and identified internal control weaknesses pertinent to service delivery, procurement, human resources, technology, partnership and other areas. Communicated internal audit concerns and followed up on adequacy of the corrective measures.	
Scope and objective	The goal of this audit was to provide reasonable assurance that business processes are adequately designed and implemented to manage the Accelerated Infrastructure Program. More specifically, this review for on the aspect of Cost Management; Schedule Management; Scope Management; Procurement; Quality Management; Risk Management; Management of Technical challenges. Review provides recommendation to senior management regarding financial and costing project cost estimates, business plans including Treasury Board Submissions. Review and provide recommendation for projects resources requirement and anticipated acquisition costs, operation and maintenance costs and both recurring and non-recurring costs.	
Dollar Value	~ $ 84M over ~150 Construction Projects across Canada	
Contribution of the proposed resource to the project	Part 1: Consultation mandate - Provided and documented a few facilitation sessions to key members of NRCan's real property team to establish key objectives and element of the program design. Lead a preliminary review to review program organizational strategic planning and adequacy of the program design to fulfill program requirement. Advised senior management about the initial observation for potential improvement in response to six risk area identify in a preliminary risk assessment. Submitted a strategic plan to support the implementation of corrective action. Also performed Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Lead the development of a mitigation strategies to facilitate the implementation of the strategic plan based on the strategic plan was based a risk management framework. In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. Part 2: Audit mandate - Lead and managed the audit throughout the key audit process from the conduct stage to the debriefing of the preliminary report to Senior Management. Developed and used key audit tools to sufficiently and adequately support the findings of this audit as per the IIA Standards. Carried out Primary and Secondary studies. Using a risk management framework, a series of audits criteria were identified to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. Audit criteria were developed in accordance with the Institute of Internal Auditors and were also aligned with a typical PWGSC's National Project Management System. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. Audit Program was incorporated into TeamMate EWP and aligned to specific Organization, Risk and Internal Control areas. Audit supporting documentation was maintained and cross-referenced in EWP TeamMate module. TeamCentral was used to coordinate the updating, reviewing and sign-off process. The EWP module was also used to raise exception/issue supported by findings with recommendation that were available for further review in TeamCentral. Recurring Interview Note, Sampling Calculator and Manual Testing procedure were incorporated to further enhanced TeamStore configuration. These templates were disseminated though TeamStore as best practice for another audit. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on NRCan's web site.	
Reference	Joe Freamo, Chief Audit Executive (613) 996-4940	Anne-Marie Muldoon, Manager, Management Accountability Framework (613) 947-0376

Project no 13

summary

Project Name	International Travel Audit – Compliance and value for money	
Client	Natural Resources of Canada - Office of Audit Branch	
Duration	September to October 2009 [2 months]	
Project Description	Lead and managed an operational and financial audit related to international travel activities. Completed the audit plan and procedures, determined size of the statistical random sample and developed selection methodology of the judgmental sample. Supervised and performed the conduct phase with the assistance of other junior auditors. Identified observations and/or findings; determined causes, assessed impact and formulated conclusions and recommendations to effectively communicate the audit results to senior management.	
Scope and objective	The goal of this audit was to provide reasonable assurance that international travel expenses are committed and spend in compliance within Treasury Board and NRCan travel policies.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Lead and managed the audit throughout the key audit process from the planning stage to the debriefing of the report to Senior Management. Based on the observations found: - Responsible for the development and update of the strategic plan for the implementation of the conduct phase. - Provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. - Developed the audit criteria based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of the mandate. - In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. - Developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards which facilitated: o The application of the audit plan throughout the mandate; and, o Adequately support the findings of this audit as per the IIA Standards. - Using a risk management framework identified a series of audits criteria to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. - Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. - Audit Program was incorporated into TeamMate EWP and aligned to specific Organization, Risk and Internal Control Area. Audit supporting documentation was maintained and cross-referenced in EWP TeamMate module. TeamCentral was used to coordinate the updating, reviewing and sign-off process. The EWP module was also used to raise exception/issue supported by findings with recommendation that were available for further review in TeamCentral. Recurring Interview Note, Sampling Calculator and Manual Testing procedure were incorporated to further enhanced TeamStore configuration. These templates were disseminated though TeamStore as best practice for another audit. TeamMate TEC was also used to record time to track mandate progress status. - This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on NRCAN's web site.	
Reference	Joe Freamo Chief Audit Executive (613) 996-4940	Cesar Quintao Manager, Financial Audit (613) 996-8916

Project Name	Operational Review – Efficiency of the Contracting Office	
Client	Environment Canada - Office of Audit and Evaluation	
Duration	April to May 2009 [2 months]	
Project Description	Perform a performance review audit of the contracting process and propose opportunities for improvement. Based upon preliminary planning and risk assessment process, the scope of the audit was to cover a part of the contracting life cycle, from procurement requirements definition, solicitation and evaluation activities to final contract award. The final part of the contracting life cycle, contract administration and contract closure would not be included.	
Scope and objective	The goal of this audit was to provide to assess the level of efficiency of the service provided by the contracting office.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Lead and managed the audit process from the initial planning to the reporting stage. Participated to the presentation of the report to the senior management and external committee member. Based on the observations found, responsible for the development and update of the strategic plan for the implementation of the conduct phase. Provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. The audit criteria were based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. Review existing Oracle data architecture (Merlin), supervised data extraction applies data cleansing strategy before report production. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards which facilitated: o The application of the audit plan throughout the mandate; and, o Adequately support the findings of this audit as per the IIA Standards. - Using a risk management framework identified a series of audits criteria to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. - Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. - Audit Program was incorporated into TeamMate EWP and aligned to specific Organization, Risk and Internal Control Area. Audit supporting documentation was maintained and cross-referenced in EWP TeamMate module. TeamCentral was used to coordinate the updating, reviewing and sign-off process. The EWP module was also used to raise exception/issue supported by findings with recommendation that were available for further review in TeamCentral. Recurring Interview Note, Sampling Calculator and Manual Testing procedure were incorporated to further enhanced TeamStore configuration. These templates were disseminated though TeamStore as best practice for another audit. - This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on Environment Canada's web site.	
Reference	Jean Leclerc Director (819) 994-7736	Stella Line Cousineau Senior Auditor (819) 923-2906

Project Name	Geo-Connection Grant and Contribution Program | Management Accountability Framework	
Client	Natural Resources of Canada - Office of Audit and Evaluation	
Duration	February to March 2009 [2 months]	
Project Description	Lead and manage an operational and management accountability framework assurance and financial audits related to the grant and contribution for the GeoConnection Program. Develop and conduct preliminary survey, audit plan, procedures and audit result sheet. Formulate findings, conclusions and recommendations to effectively communicate the audit result.	
Scope and objective	The goal of this audit was to provide to assess the level of efficiency of the service provided by the contracting office.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Lead and managed the audit throughout the key audit process from the conduct stage to the debriefing of the preliminary report to Senior Management. Based on the observations found: - Responsible for the development and update of the strategic plan for the implementation of the conduct phase. - Provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. - Developed the audit criteria based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of the mandate. - In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. - Developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards which facilitated: o The application of the audit plan throughout the mandate; and, o Adequately support the findings of this audit as per the IIA Standards. - Using a risk management framework identified a series of audits criteria to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. - Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. - Audit Program was incorporated into TeamMate EWP and aligned to specific Organization, Risk and Internal Control Area. Audit supporting documentation was maintained and cross-referenced in EWP TeamMate module. TeamCentral was used to coordinate the updating, reviewing and sign-off process. The EWP module was also used to raise exception/issue supported by findings with recommendation that were available for further review in TeamCentral. Recurring Interview Note, Sampling Calculator and Manual Testing procedure were incorporated to further enhanced TeamStore configuration. These templates were disseminated though TeamStore as best practice for another audit. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. - This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on NRCan's web site.	
Reference	Joe Freamo, Chief Audit Executive (613) 996-4940	Anne-Marie Muldoon, Manager, (613) 947-0376

Project Name	Operational Review of procurement practices for Professional Services	
Client	PWGSC Office of Audit and Evaluation (OAE)	
Duration	December 2008 to January 2009 [2 months]	
Project Description	Examine and report the appropriateness of the internal controls of PWGSC's Real Property Services on specific requirements and contractual management clauses and conditions for professional services. Review was conducted as an Internal Audit, and results were documented according to the Treasury Board Internal Audit Policy and Internal Auditing Standards for the Government of Canada. Based on the relative risks of the audit findings, a series of recommendations were developed to assist OAE to prepare a supporting document for the participation of the Deputy Minister to a parliamentary committee review.	
Scope and objective	The goal of this audit was to provide to assess the level of efficiency of the service provided by the contracting office.	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	- Developed an audit plan criterion were developed in accordance with the standard recognized by the Institute of Internal Auditors. Based on a risk management framework, lead the development of the audit criteria to facilitate the delivery of the mandate. - In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. - Carried out Primary and Secondary studies - Using a risk management framework identified a series of audits criteria to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate which was aligned with the Corporate Risk Assessment Framework. - Responsible for the development and update of the strategic plan for the implementation of the conduct phase. Provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. - Aligned the audit criteria with PWGSC's National Project Management System. - Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. - Prepared and presented the result of this review to Senior Management. - This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Results were available once the external audit committee has been debriefing and report has been approved for publication release on PWGSC's web site.	
Reference	Linda Anglin Chief Audit Executive (819) 956-2971	Leslie James Director (819) 956-2994

Project Name	Audit Plan Framework & Schedule	
Client	Agriculture and Agri-Food Canada (AAFC) Human Resources Branch – Organizational Effectiveness and Compensation	
Duration	October 2008 to November 2008 [2 months]	
Project Description	Developed the audit framework to monitor proactively the staffing processes. Consideration was given to the upcoming Public Service Commission Audit to ensure adequate alignment between their PSC's strategy and the AAFC's operational requirements.	
Scope and objective	The objectives of the monitoring program are to increase the consistency and quality of the staffing activities	
Dollar Value	Information available withheld with client	
Contribution of the proposed resource to the project	Provided and documented a few facilitation sessions to key members of the AFFC to establish and agreed on key objectives of the monitoring program. Carried out Primary and Secondary studies. Also performed Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. In consultation with the client, Lead the development of a strategic plan to facilitate the communication and implementation of a monitoring program for AFFC. This program includes a series of audit process criteria aligned with Treasury Board's management accountability framework and risk management framework. The monitoring criteria were based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the implementation of the monitoring program. In complement to some of the mitigation strategies, delivered a series of informal coaching session to management. Developed and implemented interactive monitoring tools to sufficiently and adequately support the adherence to the audit process during the application of the monitoring program. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility.	
Deliverables	Methodology and tools are understood and applied by AAFC's resources to pursue the implementation of the monitoring program	
Reference	Jason McGuire Project Manager (613) 759-7829	Michael Morin Senior Director (613) 694-2578

Project Name	Future Mode of Operation (FMO) – Design & Development
Client	Bell Canada – Sympatico
Duration	May 2008 to September 2008 [5 months]
Project Description	Review of the Management Information Systems infrastructure for the Consumer Internet Service Provider. Managed the Business Requirement Definition and System Requirement Specification phases of the Revenue Journalization and Management Reporting business stream of the Financial Management Office Program for Bell Sympatico.
Scope and objective	One of the main objectives of the mandate was to migrate from manual journalizing entries to semi-automatic entries to meet recent Sarbanes-Oxley requirements. Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility.
Dollar Value	~ $8M
Contribution of the proposed resource to the project	Responsible for the project management of the project management of the development of an application solution. Provided and documented a few facilitation sessions to key members of the Financial Management Office to establish and agreed on key objectives of the design & development initiative. In consultation with the client, lead the development a strategic plan to facilitate the communication and implementation of the design & development (including AMDOCS) initiative for Bell Canada Sympatico. This program includes a series of system requirements criteria aligned with Bell Sympatico business objectives. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework Few mitigation strategies where develop to manage the residual risk that had been identified during the risk assessment phase of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. Developed and implemented interactive monitoring tools to sufficiently and adequately support the business process during the design and development of the solution. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. > Developing and presenting to the project committee a project plans that details how the project will be implemented. > Developing, maintaining, and monitoring the project risk management plan. > Developing and tracking project metrics such as key performance indicators to ensure satisfactory progress of project.
Deliverables	The development of the business definition and system requirement specifications was completed.
Reference	Josh Glover Formerly Director at Bell Today Release Manager at Release Manager at MD Physician Services Inc Tel: General Number (613) 722-7688

Project no 7

summary

Project Name	Enterprise Resource Planning HR, Payroll and Finance – Design Process Map
Client	Ottawa University, Internal Audit Office
Duration	October 2006 to April 2008 [18 months]
Project Description	Oversee the process mapping of the University of Ottawa's Human Resource, Payroll and Finance department. Review current activities, interview process owners, design and document of the future business processes leading to a preliminary risk-assessment. In addition, this initiative is subject to further review from the Internal and External Auditor with respect to specific control objectives.
Scope and objective	The objective of this project was to develop and implement a Multi-Year Risk Based Audit Planning for the Enterprise Resources Planning (ERP) Solution for Human Resource, Payroll and Finance department of the University of Ottawa's.
Dollar Value	~ $ 12M project to be implemented over two years
Contribution of the proposed resource to the project	Responsible for the development and documentation of the business process mapping (including internal control) and the quality assurance of the solution before the solution before its deployment. Provided and documented facilitation session throughout this mandate to key manager of Ottawa University to establish and agreed on key business process and internal control. In consultation with the client, lead the development a strategic plan to facilitate the communication and implementation of the design & development initiative for Ottawa University. This program includes a series of system requirements criteria aligned with Ottawa University business objectives. Few mitigation strategies where develop to manage the residual risk that had been identified during the risk assessment phase of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. Propose implementation of corrective action at the data governance and management level to address the data integrity weaknesses. Finally, an interactive monitoring tool have been developed and implemented to ensure adherence to the business process during the design and development of the solution. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Deliverables	The objective of this mandate was successfully achieved. Business process and internal control were documented and identified. Quality assurance model was successfully applied, and some corrective actions were taken before the deployment of the solution.
Reference	Johanne Beausoleil Director (613) 745-8387 (Working today as Chief Auditor of city of Gatineau, Internal Audit Office)

Project Name	Planning, Analysis and Reporting Division (PARD) – Business Process Review
Client	Heath Canada, Chief Financial Officer Branch
Duration	May 2006 to September 2006 [5 months]
Project Description	This multi-facetted operational review led to the development of a strategy to streamline the related processes. The objective was to improve the synchronization of paper and electronic documentation / information within a secure environment.
Scope and objective	Reviewed, assessed and developed a corporate information technology strategy for PARD to manage the Treasury Board submission information management system.
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	Responsible for the development and documentation of the business process mapping (including internal control). Provided and documented facilitation session throughout this mandate to key manager of Heath Canada to establish and agreed on key business process and internal control aligned with corporate framework. In consultation with the client, lead the development a strategic plan to streamline the process of managing Treasury Board Submission. This mandate includes a series of system requirements criteria aligned with Health Canada objectives. Few mitigation strategies where develop to manage the residual risk that had been identified during the risk assessment phase of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. Finally, an interactive monitoring tool have been developed and implemented to ensure adherence to the business process during the design and development of the solution. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management. This mandate is supporting business process transformation, and it requires expertise in assessment of organizational role and responsibility. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution.
Deliverables	A corporate information technology strategy to manage the Treasury Board submission information management system was developed and communicated to senior management.
Reference	Dino Testa Director (613) 946-5210 Working today at Commission for Public Complaints Against the RCMP

Project no 5

summary

Project Name	Black Belt Six Sigma Program – Unaddressed Admail Services
Client	Canada Post, Head Office, Operations Development
Duration	May 2004 to February 2005 [10 months]
Project Description	During a Six Sigma Black Belt training program, this methodology was applied to assist the process mapping of the Unaddressed Mail Service (track a mailing) which has significantly improve the monitoring capabilities of this service.
Scope and objective	With the Six Sigma methodology, measure key performance indicator to identify are of improvement for the Unaddressed Mail Service (track a mailing) which has significantly improve the monitoring capabilities of this service.
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	Responsible for the development and documentation of the business process mapping (including internal control) of key performance indicator control for the Unaddressed Admail Service business process. Provided and documented facilitation session throughout this mandate to key manager of Canada Post to establish and agreed on key business process and performance indicator. Identify data management weakness and propose implementation of corrective action to assess data maturity and improve the data integrity support by a rigorous data governance structure with clear role and responsibility. In consultation with the client, I lead the developed a strategic plan to streamline the business process of Unaddressed Admail Services. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. Few mitigation strategies where develop to manage the residual risk that had been identified during the risk assessment phase of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. Finally, an interactive monitoring tool have been developed and implemented to ensure adherence to the business process during the design and development of the solution. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management.
Deliverables	Methodology of measurement of key performance indicator was applied.
Reference:	Contact is retired

Project no 4

summary

Project Name	Process Excellence – 15 Measurements Outcomes
Client	Canada Post, Head Office, Operations Development
Duration	December 2003 to April 2004 [5 months]
Project Description	Measurements formed an integral part of the Canada Post Scorecard. This project supported decision-makers across Canada by making available monthly updates on performance against corporate goals
Scope and objective	Supervised the development and implementation of 15 metric measurements to support Canada Post's operational processes
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	Responsible for the coordination of the development, testing and deployment of a collaborative intranet website which substantially improved communication among 60 executive stakeholders across Canada. Facilitation sessions were provided and documented throughout this mandate to key manager of Canada Post to establish and agreed on key metric measurement, performance indicator and selection of the supporting technological solution. In consultation with the client, I lead the developed a strategic plan to streamline the development and implementation of the metric measurement. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. Few mitigation strategies where develop to manage the residual risk that had been identified during the risk assessment phase of the mandate. In complement to some of the mitigation strategies a series of informal coaching session were performed with management. This mandate required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. Finally, an interactive monitoring tool have been developed and implemented to ensure adherence to the business process during the design and development of the solution. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management.
Deliverables	Successfully coordinated the development, testing and deployment of a collaborative intranet website which substantially improved communication among 60 executive stakeholders across Canada. This first-ever system facilitated the sharing of information and the development of corporate metric measurements. This new resource also increased individual accountability by creating a collaborative environment. Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility.
Reference:	Contact is retired

Project no 3

summary

Project Name	Business Transformation – SAP Implementation - Take to Market
Client	Canada Post, Head Office, Operations Development
Duration	May to November 2003 [7 months]
Project Description	Developed a corporate communication plan strategy for the employees and customers of Canada Post. This SAP fast-track information and training initiative served two key processes. It introduced the new electronic shipping tool and online business center functionality for the Unaddressed Admail™ Services. It also helped refine proposed functionality to meet customer expectations and needs.
Scope and objective	Introduced the new electronic shipping tool and online business center functionality for the Unaddressed Admail™ Services
Dollar Value	~ $ 60M for the implementation of SAP Event Manager
Contribution of the proposed resource to the project	Facilitation sessions were provided and documented throughout this mandate to key managers of Canada Post to establish and agree on key metric measurements, performance indicators and selection of the supporting technological solution. An organizational plan strategy was developed to ensure that Customers and Canada Post's employees would be appropriately knowledgeable and prepared to leverage to enhancement of the functionality in the electronic shipping tool and online business centre for the Unaddressed Admail™ Services. To ensure that the proposed functionality was meeting customer expectations, I was leading a pilot project with some key customers across Canada. To monitor the result of the pilot project, an audit tool was developed and implemented. A risk management framework was used to support this consulting mandate which was aligned with the Corporate Risk Assessment Framework. Before the insertion of the pilot project, a series of operational risks were identified, and adequate mitigation strategies were proposed to minimize the residual risk. In complement to some of the mitigation strategies, a series of informal coaching sessions were performed with management. Identify data management weaknesses and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear roles and responsibilities. Finally, an interactive monitoring tool has been developed and implemented to ensure adherence to the business process during the solution's design and development. I prepared and delivered a series of progress report presentations during weekly briefing sessions with senior management. This solution required the integration of Fujitsu's handheld barcode code scanner and the business application SAP Event Management to enable real-time end-to-end business process visibility through delivery status. This information was feeding a business online allowing Unaddressed Admail™ Services clients to autonomously monitor the progress of the delivery status.
Deliverables	This resulted in a series of successful pilot programs, which ensured a smooth deployment to over 3,000 customers across Canada.
Reference:	Contact is retired

Project no 2

summary

Project Name	Internal Audit
Client	Canada Post, Head Office, Operations Development
Duration	November 2001 to May 2003 [1 year and 7 months]
Project Description	Internal Audit Mandate: Planned, developed, conducted, analyzed and produced detail and summary report for a series of audit mandates. These mandates were aligned to the IIA methodology and were conducted within the corporate policies and procedures. The strategic importance of many these engagements required the development and presentation of briefing documentation to the senior management level. • Language of Service - Audit - November to mid-December 2001 (Participate in the Conduct phase only) • 1990 Greenhouse Gasses Baseline Estimate - December to June 2002 Developed the initial Greenhouse Gas Emission baseline for the Kyoto protocol requirements. • Compliance with North American Free Trade Agreement – July to December 2002 • Key Performance Indicator Sell and Serve – November to December 2002 • SAP Release 3 Process Design Review - January to March 2003 • Exception Payment and Done Deals - January to February 2003 • Special Examination – Planning phase - February to May 2003 Identify outstanding issues from Special Exam (1998/99), prepare presentation for the Audit Committee, and negotiate some of the contractual clauses with the Consultant to facilitate the management of the project for both parties. • Assist the implementation of Audit Automation (Information Management) Control Consulting Mandate: • Disability Income Protection Program - Control Consulting Report: Planned and conducted a comprehensive corporate audit to assess the long-term viability of the Disability Income Protection Program. The report submitted to CPC executives focused on the significant causes of cost increases of this program. • Control Risk Assessment (November 2001 to December 2002): Participate to the facilitation and production of the reports for area of the corporation.
Scope and objective	I planned, developed, conducted, analyzed and produced detail and summary report for a series audits and control consulting mandate.
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	The proposed resources lead and manage the audit process of a series of audit mandate from the planning to the reporting stage. The resource was also invited to participate to the presentation of the report to the senior management and external committee member. Based on the observations found, I was responsible for the development and update of the strategic plan for the implementation of the conduct phase. I provided and documented a few facilitation sessions to key members of the Office of Audit and Evaluation to review observations/findings and agreed on audit plan adjustment. Identify data management weakness and propose implementation of corrective action to improve the data integrity support by a rigorous data governance structure with clear role and responsibility. A risk management framework was used to support to plan each audit and performed the Corporate Risk Assessment. I facilitate and contribute to the production of a risk assessment of Canada Post Corporation and subsidiaries strategic plan. I co-lead a series of facilitation session with senior management to review potential risk and assess their potential severity against key element of the COCO framework. The audit criteria were based on a risk management framework, which lead to the development of a few mitigation strategies to facilitate the delivery of the mandate. I developed and implemented interactive audit tools to sufficiently and adequately support key element of the audit plan as per the IIA Standards, which facilitated the application of the audit plan throughout the mandate. I developed and used key interactive audit tools (ACL and audit automation) to sufficiently and adequately support the findings of this audit as per the IIA Standards. Using a risk management framework, a series of audits criteria were identified to be part of the audit tool that was used to ensure the application of the audit plan throughout the mandate. Prepared and delivered a series of progress report presentations during weekly briefing session to senior management.
Deliverables	Each mandate results in a detailed and summary report that was respectively presented to management and senior management. Each reports contained a series of recommendations followed by management's action plan.
Reference:	Contact is retired

Project no 1

summary

Company Name:	Public Works and Government Services Canada, Head Office, Digital Simulation Laboratory (DSL)
Years:	May 1992 – October 2001 [9 years] - Please see project no 1.1, 1.2, 1.3 and 1.4 description further below
Roles and Functions:	Founded and led the Digital Simulation Laboratory (DSL) to support the development of architectural and engineering projects through applied research. DSL's contributions to significant technological developments have had a positive impact on Public Works and Government Services Canada on the national and international scenes. The cornerstone of this success story was based on strong leadership, significant individual contribution and rigorous application of a cost-recovery model without neglecting a customer service orientation. Over a 10-year period has demonstrated the ability to lead, establish partnerships and apply strategic thinking and decision making to deliver over 100 projects. Responsible for the management and integration of various IT fields, such as web, IT infrastructure, telecommunications, GIS, systems development and support maintenance services. These mandates required the analysis of business needs leading to the documentation of technical functional requirements considering internal controls allowing the integration of user acceptance testing to deliver a high-quality technological solution. Some of the projects produced from 1992 to 2001 are described below a complete project listing is available at: Architectural and Engineering project listing from 1986 to 2001
Contribution of the proposed resource to the project	During the 9 years that I was leading DSL, I had to wrote and developed a series of organizational strategic plan to be seek and successfully be granted operation funding for the benefit of the Digital Simulation Laboratory. In 1992, I wrote a business case to seek approval of $375K to start a new service of visualization based on cost recovery model at PWGSC. Furthermore until 2001, a series of strategic plan were developed and submitted on an annual basis to establish new strategy plan for DSL and report achievement of the previous year. Also, the integration of DSL service was designed to be integrated in a typical PWGSC project management live cycle. Potential operational risk was identified, and consequently adequate mitigation strategy were proposed to minimize the residual risk.

Project no 1.1

Project	Simulation Parliament Hill, 3D information management – Ottawa
Client	Public Works and Government Services Canada, Head Office, Digital Simulation Laboratory
Duration	1997 to 2000 [~ 3 years]
Project Description	Planned and developed a strategy to support a 12 year, $250M renovation project of Parliament Hill through Digital Simulation. Developed the mid and long-term digital technology strategies to support the technical and financial requirements of Parliament Hill's business objectives.
Scope and objective	Supervised the applied research, development and production of a photorealistic 3D model of Parliament Hill. Produced and supported a series of renovation proposals, which help accelerate the approval process.
Dollar Value	~ From $ 300K to $1,2M annual operating budget
Contribution of the proposed resource to the project	Furthermore, a series of strategic plan were developed and submitted on an annual basis to establish new strategy plan for DSL and report achievement of the previous year.
Deliverables	The application of the latest digital technology has proven to be beneficial to accelerate the approval of multiple renovation projects on the Hill. To name a few, it was instrumental to pursuer the development and approval of the renovation of the West Block, Parliament Library, CBUS project and long-term development plan for the hill. Also, the integration of the potential used of the consolidated 3D model was based on a typical PWGSC project management live cycle. Potential operational risk was identified and therefore appropriate mitigation strategy were developed to minimize the residual risk. This innovative approach was also has been recognized for its innovative characteristic by the national media.
Reference	Contact is retired

Project no 1.2

Client	Consolidation National Capital 3D model – Ottawa
	Public Works and Government Services Canada, Head Office, Digital Simulation Laboratory
Duration	1999 [~ 9 months]
Project Description	Consolidation of all the 3D model of the city structures of the Ottawa and Hull core area into a single digital model. Based on common technical characteristic, the 3D model originally developed by Toronto University for the benefit of the National Capital Commission and the 3D model of the Parliament Hill of produced by PWGSC were identified as good candidate for a consolidation initiative.
Scope and objective	One of the objectives was to ensure the integrity of a single 3D model source of the city structures of the Ottawa and Hull core area. The second goal was to provided 3D modeling service at lower operational cost. In 1999, negotiated and successfully concluded an agreement with the National Capital Commission to consolidate into a single 3D model the existing 3D volumetric database (originally developed by Toronto University). This agreement provided at a lower cost a complete 3D computerized model of the city structures of the Ottawa and Hull core area.
Dollar Value	Saving of ~$200K per year
Contribution of the proposed resource to the project	I wrote and developed the organizational strategic plan to facilitate the agreement between three parties (NCC, Toronto University and PWGSC) to consolidate all the 3D model. I conducted a series of debriefing session with senior official at Toronto University and National Capital commission to communicate the proposed agreement. In order of reflecting all parties interest, PWGSC's strategic plan accordingly was updated. Also, the integration of the potential used of the consolidated 3D model was based on a typical PWGSC project management live cycle. Potential legal and operational risk were identified, and therefore mitigation strategies were developed and were embed in the agreement.
Deliverables	In 1999, an agreement with the National Capital Commission and Toronto University was successfully reached to consolidate all the city structures of the Ottawa and Hull core area into a single 3D model.
Reference	Contact is retired

Project no 1.3

Client	Canada Embassy in Berlin - Architectural Competition – Germany
	Public Works and Government Services Canada, Head Office, Digital Simulation Laboratory
Duration	1997 – 1998 [~ 2 years]
Project Description	Researched marketed, negotiated, developed and supervised the implementation an innovative strategy to support an international architectural competition for the new Canadian embassy in Berlin. Based on GIS database in Berlin, a two-fold strategy included 3D modeling of the city to assist the selected firms to develop their proposals. Modelling of five proposals generated a series of rendering, physical models and sun and shadow analysis. This initiative facilitated non-biased decision-making by an international jury.
Scope and objective	Development and implement, within a typical PWGSC project management live cycle, the integration of an architectural international competition supported by the latest digital technology.
Dollar Value	~ Estimated construction cost $ 80M
Contribution of the proposed resource to the project	Wrote and developed the organizational strategic plan to facilitate the implementation of this proposed innovative approach. Has regularly debriefed senior management, to report project progress and, accordingly to feedback received, made appropriate adjustment.
Deliverables	With the assistance of a 3D digital model, an international jury was capable to review five anonymous proposals without the intervention of additional external resources, which could have potentially compromised their independence.
Reference	Contact is retired

Project no 1.4

Client	Web Site – Explore the Hill, Parliament Hill, Ottawa
	Public Works and Government Services Canada, Head Office, Digital Simulation Laboratory
Duration	1997 [~ 1 year]
Project Description	Develop and implement a state-of-the-art website of the Parliament Hill.
Scope and objective	Coordinated the development of an original and cutting-edge website of Parliament Hill. Of the goal of this mandate was to provide an immersive environment to the web user that enrich their experience of the visit. Finally, a special consideration was also given to ensure universal access without compromising the quality of the product.
Dollar Value	Information available withheld with client
Contribution of the proposed resource to the project	Wrote and developed a strategic plan to facilitate the implementation of this proposed innovative approach. Debriefed senior management, to report project progress and, if applicable, update strategic plan accordingly to the feedback received. Francis Pelletier received the "Exemplary Service" Deputy-Minister's award for his contribution to this project.
Deliverables	At its introduction, this web site was visited on average 2 million time per year.
Reference	Contact is retired

Note:
The following pages are providing a listing of my participation to multiple architectural or engineering projects in the period of 1986 to 2001

Project	Location	Year	Construction cost (~ $ M)	Client	Mandate Description (1) New Building (2) Renovation (3) Restoration (4) Special project	Project activity (1) Support Design Team (2) Conduct Special Analysis (3) Coordinate Applied Research	Business development	Project Management	Applied Research	Public Relation
Architecture										
Cegep de Charlesbourg	Québec	1986	$15	Ministère de l'éducation du Québec	Development Project (3)	Participation to design and construction documentation (1)		✓		
Agrandissement du musée du Québec	Québec	1986	$15	Corporation musée du Québec	Development Project (3)	Participation to design and construction documentation (1)		✓		
Restauration du Parlement de Québec	Québec	1987	$10	Gouvernement du Québec	Development Project (3)	Participation to design and construction documentation (1)		✓		
Atrium de Charlesbourg	Québec	1988	$10	Gouvernement du Québec	Development Project (2)	Participation to design and construction documentation (1)		✓		
l'Hôpital des Îles-de-la-Madeleine	Québec	1988	$25	Gouvernement du Québec	Development Project (1)	Participation to design and construction documentation (1)		✓		
Siège social de la SSQ groupe financier	Québec	1989	$40	SSQ groupe financier	Development Project (1) (2)	Participation to design and construction documentation (1)		✓		
Langevin Block	Ottawa	1992	N/A	Prime Minister Office	Development In-fill study (1)	Participation to project development (1)	✓	✓		
École Navale, Québec	Québec	1992	$45	Department of National Defense	Development project (1) (2)	Support Architectural prime consultant and DND Internal service (1) (3)	✓	✓	✓	✓
Military base New building	Valcartier	1993	$45	Department of National Defense	Development Phases 5 yrs sequencing (1)	Support Project development (1) (2)	✓	✓		
École Navale, Rimouski	Rimouski	1993	$15	Department of National Defense	Wind and Snow analysis (1)	Support Mc Gill university and DND Internal service (1) (2) (3)	✓	✓	✓	
École Navale, Chicoutimi	Chicoutimi	1993	$15	Department of National Defense	Wind and Snow analysis (2)	Support Mc Gill university and DND Internal service (1) (2) (3)	✓	✓	✓	
Canadian Space Agency	St-Hubert	1993	$120	Canadian Space Agency	Landscape study (1)	Support Architectural prime consultant and PWGSC Internal service (1) (3)	✓	✓	✓	
Naval Reserve, Charlottetown	Charlottetown	1994	$15	Department of National Defense	Development project (1)	Support DND Internal service (1)	✓	✓		✓
Centre des congrès	Québec	1994	$80	Société Immobilière du Québec (SIQ)	Development project (1)	Support SIQ Internal service (1) (2) (3)	✓	✓	✓	✓
Governor General residence	Québec	1994	N/A	Governor General office	Development project (3)	Support GG office Internal service (1) (3)	✓	✓	✓	
National Archive, HQ	Ottawa	1996	$7	National Archives of Canada	Development project (2)	Support to Architectural prime consultant (1) (3)	✓	✓	✓	

Project	Location	Year	Construction cost (~ $ M)	Client	Mandate Description (1) New Building (2) Renovation (3) Restoration (4) Special project	Project activity (1) Support Design Team (2) Conduct Special Analysis (3) Coordinate Applied Research	Business development	Project Management	Applied Research	Public Relation
Architecture										
Proposal Olympic Winter Games 2002	Québec	1994	$12	Canadian Olympic Committee	International proposal (4)	Support Canadian Olympic Committee (3)	✓		✓	
High Commission compound	Kuala Lumpur Malaysia	1995	N/A	Department of Foreign Affairs & international Trade	Development project (1)	Support to DFAIT internal services (1)	✓	✓		
Canadian United Nations Geneva	Switzerland	1995	N/A	Department of Foreign Affairs & international Trade	Proposal Development (1)	Support to DFAIT internal services (1) (2)	✓	✓		
Parliament Hill East Block	Ottawa	1995	N/A	Public Works Government Service	Preliminary Study (3)	Prototyping Digital Photorealistic Model (2) (3)	✓		✓	
Aboriginal Website	Worldwide Web	1996	N/A	Canadian Tourism Commission	Project development (4)	Virtual site 120 Canadian aboriginal site (2) (3)	✓	✓	✓	✓
Confederation & Justice Building	Ottawa	1996	N/A	Public Works Government Service	Proposed link (1)	Support to PWGSC internal services (1)	✓	✓		
Bank of Montreal	Ottawa	1996	N/A	Public Works Government Service	Restoration proposal (1)	Support to PWGSC internal services (1) (2) (3)	✓	✓	✓	
Parliament Hill Precinct buildings	Ottawa	1996	$400	Public Works Government Service	Photorealistic Modeling database (3)	Support to PWGSC internal services (1) (3)	✓	✓	✓	
NRC Redevelopment program	Ottawa	1996	N/A	Natural Resource of Canada	Redevelopment program (1)	Support NRC and Treasury Board (1)	✓	✓		✓
Canadian embassy in Berlin	Berlin, Germany	1997	$100	Department of Foreign Affairs & international Trade	Development project (1) (2)	Support to International Architectural selection Jury (1) (2)	✓	✓	✓	✓
Centre Block Underground Services	Ottawa	1997	N/A	Public Works Government Service	New addition (1)	Support PWGSC internal services (1) (2)	✓	✓		✓
Federal Election coverage	Ottawa	1997	N/A	Canadian Broadcast Corporation	Architectural model Adaptation (4)	Support CBC election coverage (2)	✓	✓		✓
Canadian Tourism industry CTX web site	Worldwide Web	1997	N/A	Canadian Tourism Commission	Development project (4)	Support CTC to manage 60,000 industries	✓	✓	✓	
Space optimization strategies	Ottawa	1997	N/A	Public Works Government Service	Development Project (2)	Support PWGSC internal services (1) (2)	✓	✓		✓
Parliament Hill Security strategies	Ottawa	1997	N/A	Public Works Government Service	Development Project (4)	Support to PWGSC internal services (1) (3)	✓	✓	✓	
Parliament Hill West Block	Ottawa	1997	N/A	Public Works Government Service	Development Project (1) (3)	Support Architectural prime consultant (1) (2) (3)	✓	✓	✓	✓

Project	Location	Year	Construction cost (~ $ M)	Client	Mandate Description (1) New Building (2) Renovation (3) Restoration (4) Special project	Project activity (1) Support Design Team (2) Conduct Special Analysis (3) Coordinate Applied Research	Business development	Project Management	Applied Research	Public Relation
Architecture										
West Memorial	Ottawa	1997	N/A	Public Works Government Service	Development Project (1) (3)	Support Architectural prime consultant (1) (2) (3)	✓	✓	✓	✓
Canada Place	Worldwide Web	1998	N/A	Canadian Heritage	Development Project (4)	Support Canadian Heritage (1) (2) (3)	✓	✓	✓	✓
Parliament Hill Famous Five	Ottawa	1998	N/A	Public Works Government Service	Landscaping modeling (4)	Support PWGSC internal services (1) (2) (3)	✓	✓	✓	✓
Parliament Hill Library	Ottawa	1998	N/A	Public Works Government Service	Interior lighting interior modeling (3)	Support Architectural prime consultant (1) (2) (3)	✓	✓	✓	✓
Virtual tour Canada	Ottawa	1998	N/A	Canadian Tourism Commission	VRML application (e.g. Google earth) (4)	Support to CTC internal services (2) (3)	✓		✓	
Parliament Hill Landscaping strategies	Ottawa	1999	N/A	Public Works Government Service	Development Project 3D landscaping (4)	Support PWGSC internal services (1) (3)	✓		✓	
Parliament Hill Central Block	Ottawa	1999	N/A	Public Works Government Service	Development Project Volumetric modeling (3)	Support PWGSC internal services (1) (2) (3)	✓	✓	✓	
Parliament Hill Library	Ottawa	1999	N/A	Public Works Government Service	Interior lighting simulation (3) (4)	Support PWGSC internal services (1) (2) (3)	✓	✓	✓	✓
Cumberland building Relocation	Ottawa	1999	N/A	Public Works Government Service	Communication building relocation	Support to PWGSC internal services	✓	✓	✓	✓
Portrait Museum	Ottawa	1999	N/A	National Archives of Canada	Development project (3)	Support to Architectural prime consultant (1)	✓	✓		✓
Hanover Universal Exhibition	Hanover, Germany	2000	N/A	Foreign Affairs & international Trade – Heritage Canada	Interactive Multimedia 'Kanada Haus' virtual tour (4)	Support DFAIT and Heritage Canada (2) (3)	✓	✓	✓	✓
Explore the Hill web site	Worldwide Web	2000	N/A	Public Works Government Service	Development project (4)	Support PWGSC internal services (2) (3)	✓	✓	✓	✓
Lasalle Academy	Ottawa	2000	N/A	Public Works Government Service	Development project (1)	Support Architectural prime consultant (1)	✓	✓		
Complexes Guy-Favreau	Montréal	2000	$2	Public Works Government Services	Space optimization (4)	Support PWGSC internal services (1) (2) (3)	✓	✓	✓	✓
Canada Post eSimulator	Ottawa	2000	N/A	Canada Post corporation	Interactive 3D training module (4)	Support Canada Post Internal services (1) (2) (3)	✓	✓	✓	✓

Project	Location	Year	Construction cost (~ $ M)	Client	Mandate Description (1) New Building (2) Renovation (3) Restoration (4) Special project	Project activity (1) Support Design Team (2) Conduct Special Analysis (3) Coordinate Applied Research	Business development	Project Management	Applied Research	Public Relation
Architecture										
Lester B. Person building	Ottawa	2001	$10	Project development	Renovation project (2)	Support PWGSC internal services (1)	✓	✓		✓
Parliament Hill Library	Ottawa	2001	N/A	Public Works Government Service	3D stereo lithographic modeling (3)	Support PWGSC internal services (1) (2) (3)	✓	✓	✓	✓
Knowledge Center	Hull	2001	N/A	Canadian Heritage	Interactive 3D training module (4)	Support Canadian Heritage (1) (2) (3)	✓	✓	✓	✓
Parliament Hill Bank Street Building	Ottawa	2001	N/A	Public Works Government Service	Development Project (1)	Support PWGSC internal services (1)	✓	✓		✓
Tunney's Pasture	Ottawa	2001	N/A	Public Works Government Service	Development Project (2)	Support PWGSC internal services (1)	✓	✓	✓	✓
Urban Design										
Alexandria Bridge	Ottawa	2001	N/A	Public Works Government Services	Restoration Project (3) (4)	Support PWGSC internal services (1) (2)	✓	✓		✓
Parliament Hill Long term Vision & Plan	Ottawa	2001	N/A	Public Works Government Service	Development Project (4)	Support PWGSC internal services (1) (2)	✓	✓		✓
Boulevard urbain McConnell Laramé	Gatineau	2000	N/A	Ministère du Transport Québec	Development project (4)	Support Engineering prime consultant (1) (2) (3)	✓	✓	✓	✓
Confederation Boulevard	Ottawa	1999	N/A	National Capital Commission	Development project (4)	Support PWGSC & NCC internal services (1) (2) (3)	✓	✓	✓	✓
3D Database urban model	Ottawa	1999	N/A	National Capital Commission	Development project (4)	Support PWGSC & NCC internal services (1) (2) (3)	✓	✓	✓	✓
Sparks Street Press Building	Ottawa	1996	N/A	Public Works Government Services	Development In-fill study (4)	Support to PWGSC internal services (1) (3)	✓	✓	✓	✓
Confederation Bridge	Northumberland Strait	1995	$840	Public Works Government Services	Support Research & monitoring program (4)	Support PWGSC internal services (1) (2)	✓			✓

Project	Location	Year	Construction cost (~ $ M)	Client	Mandate Description (1) New Building (2) Renovation (3) Restoration (4) Special project	Project activity (1) Support Design Team (2) Conduct Special Analysis (3) Coordinate Applied Research	Business development	Project Management	Applied Research	Public Relation
Engineering										
Promotional publication	Rivière-du-Loup	1985	N|A	COPAC	Development project (4)	Support engineering team publication 35 yrs anniversary (1)		✓		✓
Ferry Installation RDL St-Siméon	Rivière-du-Loup	1985	N|A	Public Works Government Services	Development project (4)	Support engineering team project development (1)		✓		
Wastewater treatment Plant	Rivière-du-Loup	1985	N|A	Société assainissement des eaux	Development project (5)	Support engineering team project development (1)		✓		
Gros Cacouna Port facility	Gros-Cacouna	1985	N|A	Public Works Government Services	Storage area construction survey (4)	Support PWGSC Construction phase (1)		✓		