

1 DIRECT TESTIMONY OF PETER SORENSEN

2

3 **Q1.** *Please state your name, position and place of employment.*

4 **A.** **My name is Peter Sorensen. I own and operate PRP International, Inc. and**
5 **hold the position of President and Principal Consultant.**

6 **Q2.** *How long have you held that position?*

7 **A.** **Since August 1, 1997 (prior to July 2000, this firm operated as a sole**
8 **proprietorship – Sorensen & Associates).**

9 **Q3.** *What are your professional qualifications?*

10 **A.** **I have a Bachelor of Commerce degree. I am member of the Project**
11 **Management Institute. I have over 40 years of government and private**
12 **sector experience.**

13 **Q4.** *What experience have you had with the review of procurement bidding or*
14 *tendering processes for private companies, Crown Corporations or government?*

15 **A.** **Please see my CV attached as Schedule A for a full description of my**
16 **experience. A summary of the high points of my work involving Crown**
17 **Corporations and government is as follows:**

18 **I was or have been an:**

- 19 • **Executive in the federal government responsible for departmental**
20 **procurement and contracting policies and procedures (6 years –**
21 **Veterans Affairs Canada),**
- 22 • **Executive in the federal government responsible for government-wide**
23 **procurement and contracting operations in the field of information**
24 **technology, office products and systems (3 years – Supply & Services**
25 **Canada),**
- 26 • **Project Leader (federal) for the Confederation Bridge project during its**
27 **construction (4 years – Public Works & Government Services Canada),**
- 28 • **Advisor (consultant) on several government procurement files, e.g.,**
29 **Alternative Service Delivery in Justice Canada (Firearms), Human**
30 **Resources Development Canada, Canada Customs & Revenue Agency,**
31 **etc.,**
- 32 • **Fairness monitor/commissioner/independent process auditor-reviewer**
33 **(consultant) on several major files, e.g., Sale of Hwy 407, Hwy 407 East**

1 **Completion, Toronto Air Rail Link, Vancouver Convention Centre**
2 **Expansion, BC Hydro VI CFT.**

3 **Q5.** *Have you previously testified before this Commission or its predecessors?*

4 **A.** **No.**

5 **Q6.** *What role did you play in connection with the Call for Tenders for capacity and*
6 *associated energy supply for Vancouver Island?*

7 **A.** **I was retained by PwC as a subcontractor with the following**
8 **responsibilities:**

9 • **Providing advice and direction on the standard of fairness required by**
10 **PwC to fulfill its role as the Independent Reviewer,**

11 • **Participating as a member of Independent Reviewer team monitoring**
12 **and observing the interactions of the BC Hydro CFT team during the**
13 **entire CFT process,**

14 • **Serving as the back-up project director and day-to-day contact person**
15 **to BC Hydro,**

16 • **Administering the Independent Reviewer's working files, drafting**
17 **reports and participating in the Independent Reviewer team reviews,**
18 **deliberations and discussions.**

19 **Q7.** *Please describe the nature of your involvement in the CFT process from the time*
20 *you were initially retained through the completion of the process.*

21 **A.** **As noted in the response to the previous question, I had certain defined**
22 **roles in the process, including active monitoring and observing the BC**
23 **Hydro CFT Team meetings/activities, e.g.**

24 • **Project Management Office (the management and decision body for the**
25 **CFT),**

26 • **Process Support Committee (the development and administration of the**
27 **process management framework for th CFT),**

28 • **The respective evaluation committees (criteria development,**
29 **consideration of submissions and formulation of recommendations),**

30 • **Bidder workshops and site visits,**

31 • **Consultations with other regulated parties, e.g., Terasen, BCTC, and**

- 1 • The respective closing times for submissions, e.g., registration, pre-
2 qualification, and tenders.

3 As well, I integrated the IR Team fairness framework into the team's
4 approach and activities to provide a base for our observations and
5 findings. This framework is disclosed in the last report of the IR.

6 From an overall time perspective, my commitment was full time from
7 October 1, 2003 to October 21, 2004.

8 **Q8.** *BC Hydro employed a CFT process to acquire capacity on Vancouver Island*
9 *instead of a Request for Proposals ("RFP"). Are you able to comment on the*
10 *differences between the two approaches and the implication of those differences*
11 *in the context of this specific process?*

12 **A.** The differences in the two approaches are reflected in the specificness and
13 the availability of the scope requirement. What I mean by this is that a
14 tender call assumes the product or service is readily available and the
15 specifications and quality are known or proven within the target industry.
16 A tender call utilizes pre-established terms and conditions, e.g., in this
17 instance the promulgated Electricity Purchase Agreement is a condition for
18 the validity of the Tenders submitted. Accordingly, the competition is
19 normally based on lowest price with all other terms pre-determined.

20 The RFP approach more often reflects on securing differing solutions to
21 more complex problems or scope requirements. Bidders may be
22 encouraged to put forward innovative solutions within the general terms of
23 the procurement. The RFP usually implies some form of final negotiations
24 with a successful bidder, as some competitions only provide a "model
25 contract" in the RFP and others reference standard terms and conditions
26 that jurisdiction applies to their contracts. The competition is usually based
27 on the concept of best value, e.g., a combination of technical (solution)
28 merit, timing and price.

29 In terms of the VI CFT, BC Hydro determined that capacity and electricity
30 products/services were proven and readily available. BC Hydro's
31 requirements contained many "tender-like" specifics, e.g., BC Hydro was
32 required to go to the private sector for new products (ref. BC Government
33 Policy, November 2002), BC Hydro had the BCUC's decision on the
34 "framework" of requirements (ref. BCUC VIGP decision, September 8,
35 2003), and the scope and timing for the requirements were specific and in
36 the case of timing, urgent, in the context of having new and dependable
37 capacity available by November 2007. BC Hydro also had experience with
38 Tender calls and the provision of Electricity Purchase Agreements with the
39 private sector.

1 **The tender approach also responded best to the decision parameters for**
 2 **selecting winning tender(s), e.g., a most cost effective solution determined**
 3 **by a simplified Net Present Value model – therefore, a competition**
 4 **(assuming all mandatory criteria were met) based solely on price.**

5 **In my view a RFP approach for this requirement would have added more**
 6 **complexity to the evaluation methodology, e.g., how to assess innovative**
 7 **solutions and more time, as some form of final negotiations would be**
 8 **required to execute an EPA. If the base requirements as reflected in the**
 9 **BCUC decision were to be substantively attained, e.g., simplified decision**
 10 **model and capacity in service by November 2007, only a Tender approach**
 11 **would deliver more certainty to those requirements.**

12 **Q9.** *Are there portions of the Report on the CFT Process conducted by BC Hydro for*
 13 *which you had particular responsibility?*

14 **A.** **Appendix K contains four reports prepared by the Independent Reviewer**
 15 **with which I was directly involved. Although not filed as part of the Report,**
 16 **I was also involved with the letters that appear as Schedule C to Mr.**
 17 **Hodgson’s testimony.**

18 **Q10.** *Are there Information Request responses for which you had particular*
 19 *responsibility?*

20 **A.** **No. I was not involved in preparing IR responses.**

21 **Q11.** *The 4 reports that appear in Appendix K comment on the various stages of the*
 22 *CFT Process. Each of them reaches a conclusion with respect to impartiality,*
 23 *fairness, transparency and lack of bias in connection with each stage of the*
 24 *process. Are you able to provide any comparative comments on each stage of*
 25 *this process in the context of other procurement processes with which you have*
 26 *been involved?*

27 **A.** **At the outset, I believe it is important to distinguish the nature of the four**
 28 **descriptors used in the question. Impartiality, fairness and lack of bias, in**
 29 **my view, are attributes expected to be exhibited by individuals involved in**
 30 **a competitive process. Transparency is a form of disclosure by the**
 31 **organization conducting the competitive process.**

32 **Let me first deal with the latter, it is my view that this VI CFT designed in**
 33 **and followed through on a level of transparency that I have not witnessed**
 34 **in other procurements. Of particular note, is the full disclosure of all**
 35 **comments, questions and answers to the public on the website – other**
 36 **procurements, such disclosure is only to the bidders participating by**
 37 **purchase of the solicitation documents or by short listing of eligible**
 38 **bidders. With respect to the bidder workshops, attendance either**
 39 **mandatory or optional and restricted to eligible bidders is consistent with**
 40 **other procurements. Finally, in my view the penultimate expression of**

1 transparency by BC Hydro in this process was the disclosure of the
 2 evaluation model, e.g., the Tender Spreadsheet and the Portfolio
 3 Spreadsheet. I have not witnessed this level of disclosure in any other
 4 procurement.

5 With respect to the other attributes, there is little room for comparison as
 6 these are basic prerequisites for individuals to participate in a competitive
 7 process, i.e. the standard for impartiality, fairness and lack of bias has to
 8 exist from the outset of the process to the final determination. In this CFT,
 9 BC Hydro designed in and followed through on the process management
 10 structure and procedures to assure these attributes. For example, a key
 11 procedure to instilling and demonstrating these attributes is the severing
 12 of the bidder's identity when developing answers to bidder comments or
 13 questions, considering comments and requests for change to the
 14 preliminary form agreements, and deliberating on the recommendations
 15 from evaluation committees. Also, the use of conflict of interest disclosure
 16 and confidentiality was deployed, e.g., selecting evaluation committee
 17 members, restricting involvement with CFT policy and terms. These
 18 procedures and the resulting outcome in respect of these attributes are
 19 consistent with other procurements that I have been involved in from a
 20 fairness role.

21 **Q12.** *Are you able to draw any conclusions with respect to the competitiveness of the*
 22 *process from the quantity and nature of the pre-qualification submissions and*
 23 *final tenders bids that were received in response to the CFT?*

24 **A.** **For any organization conducting a competitive process, the challenge is to**
 25 **attract and retain bidders throughout the process.**

26 **Our reports conclude that the CFT produced and sustained a significant**
 27 **level of competitiveness, in terms of the numbers of pre-qualified bidders**
 28 **(14) and projects (22), and Tenders (6) and projects (10).**

29 **Also, several different generating technology options were submitted along**
 30 **with different size projects indicating that the process was attractive to a**
 31 **broad range of bidders.**

32 **Rich competitions such as that experienced here, generally produce the**
 33 **best "market price" for requirement.**

34 **Q13.** *During the course of the CFT process to what extent were you privy to internal*
 35 *BC Hydro discussion with respect to amendments to the CFT process,*
 36 *development of the pro forma Electricity purchase agreement or other matters*
 37 *that could have an impact on the conduct of the CFT process?*

38 **A.** **To assure an effective IR role, the IR team presented to the CFT team its**
 39 **fairness framework during the orientation phase. This framework provided**
 40 **the CFT team with what the IR considered its minimum requirements for**

1 process and behaviours. One of these requirements was being informed of
 2 CFT meetings and activities and provision of all documents. We adopted
 3 the position of being presented during all Project Management Office
 4 meetings and all deliberations dealing with bidder representations, e.g.,
 5 comments, workshops, etc.

6 I represented the IR team at substantively all of the deliberations of the CFT
 7 team as they dealt with requirements for amendments to the CFT process
 8 by way of Addenda, requirements for changes to the EPA, and process
 9 management changes. For example, when the Document Comment Forms
 10 were submitted by bidders in December 2003, I observed the deliberations
 11 of the comments by the CFT team which was appropriately represented by
 12 legal advisors, technical specialists, and management. During this
 13 particular activity, the CFT team dealt with each comment not knowing
 14 which registered bidder submitted the comment. In my view, deliberations
 15 focused on whether the comment and any requested change would
 16 adversely impact the objectives of the CFT (new, dependable capacity and
 17 associated energy) and/or the fairness objective for the process. Another
 18 event was the preparation of Addendum 10, which followed the suspension
 19 period following receipt of the BCUC letter of January 23, 2004. I reviewed
 20 the drafts of the Addendum, sought and discussed clarifications, and
 21 participated in the drafting of our Supplemental report of March 12, 2004.

22 **Q14.** *Did you encounter any evidence to suggest that BC Hydro in undertaking the*
 23 *design of the CFT made any attempt to accommodate or discourage any*
 24 *particular project based on its fuel type, owner, or other characteristic outside of*
 25 *BC Hydro's published requirements?*

26 **A.** **No, with the exception of nuclear power projects that were excluded from**
 27 **the outset.**

28 **Q15.** *Did you encounter any evidence to suggest that BC Hydro in revising the CFT*
 29 *over the course of the process made any attempt to accommodate or discourage*
 30 *any particular project based on its fuel type, owner, or other specific*
 31 *characteristic?*

32 **A.** **No. Of particular note, the IR team did reflect on the removal of the**
 33 **transmission deferral credit in our supplemental report (March 12, 2004).**

34 **Q16.** *Did you encounter any evidence to suggest that BC Hydro in reviewing the pre-*
 35 *qualifying submissions or the tenders made any attempt to accommodate or*
 36 *discourage any particular project based on its fuel type, owner, or other specific*
 37 *characteristic?*

38 **A.** **No. Our reports provide findings and conclusion on this matter.**

1 **Q17.** *Does this complete your direct testimony?*

2 **A.** **Yes.**

Sorenson Schedule A



PRP International, Inc.

Project
Risk
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RÉSUMÉ & CAREER PROFILE FOR PETER SORENSEN

PRP International, Inc. was incorporated on August 1, 2000 to better position the firm for the future. PRP International continues to serve the clients developed under Sorensen & Associates.

PRP International, Inc. offers consulting and advisory services to project environments, particularly, in the Public-Private Partnership (P3) project domain. Specific expertise is offered in project management, risk management, procurement management, including proposal development, review and evaluation, and contract/negotiation strategies.

PRP International, Inc. also specializes in the provision of Fairness Commissioner / Monitoring services for major transactions, e.g. infrastructure (road/bridge, rail, and convention centre), power sector, ASD services, etc.

PRP International, Inc. has primarily provided services within Canada since its inception but has set objectives for 2004-2007 to pursue and deliver services on an international basis with emphasis on services and knowledge transfer in the procurement / fairness commissioner domains.

Peter Sorensen owns and operates PRP International, Inc. Prior to forming Sorensen & Associates, in August 1997, Peter served for 31 years, in five Federal Government departments. His last 12 years were in the executive ranks of three departments.

During the past 7 years, Peter's consulting work includes being a sub-contractor to major consulting firms like PricewaterhouseCoopers LLP, Deloitte Touche Consulting LLP, IBM Business Consulting Services, and also, as a principal with his own firm.

EDUCATION

Peter Sorensen holds a Bachelor of Commerce, (1972) from Dalhousie University. He also graduated from the Federal Government's Career Assignment Program, Education and Assignment Phases, March 1981 to July 1985. In May 1993, Peter attended the Program For Public Executives, at Queen's

University.

Peter has also undertaken various training courses over the years, most notably:

- Effective Negotiation Course, 2000, Karrass, Phoenix, AZ;
- Contracting and Risk Management Course, 1998, PMI;
- Crisis Management in a Political Environment, Niagara Institute, 1985;
- Executive Assessments in an Assessment Centre, Public Service Commission, 1986;
- Law & Public Management, Canadian Centre Management Development, 1996-97; and
- RCMP Basic Training, Regina – 1964.

PROFESSIONAL DESIGNATIONS, AWARDS, and MEMBERSHIPS

In 1997, Peter and his project team were honoured through a number of industry, government and departmental awards for their performance on the Confederation Bridge project, including the Award of Excellence, given by the President of the Treasury Board of Canada, in 1998.

Peter is a member of the Project Management Institute (PMI).

He is also a member of the Canadian Council for Public-Private Partnerships; Vice-President of the PEI Division of the RCMP Veterans Association; and a Director of the Malpeque Development Corporation.

In October 2002, Peter was honoured as a Founding Partner of the Government in Technology Week (GTEC). GTEC is an annual showcase of public sector achievements (federal, provincial, territorial and municipal) in the effective exploitation of technology.

June 2003: Peter was appointed a member of the National Program Advisory Committee for the Canadian Firearms Centre which provides advice to the Minister of Public Safety and Emergency Preparedness and the program executive with the

view to continuous improvement of the firearms control program.

AREAS OF SPECIALIZATION

Peter provides expert advice and services for:

- public-private partnering initiatives,
- procurement and contracting strategies and processes (deal structures, business modelling and scope, and contract administration),
- process auditor/fairness commissioner / monitor,
- proposal development and management,
- proposal review and evaluation, e.g. red/gold team assessments, evaluation criteria development and training
- risk and contract management processes (contract reviews and resolution strategies), and
- project management.

In 1996 and 1998, Peter contributed to and participated in forums sponsored by the International Program on the Management of Engineering and Construction (IMEC), a syndicated research project sponsored by a number of Quebec based organizations that undertook to study up to 60 large scale projects (power, oil, transportation, water & sanitation) around the world.

MANAGEMENT & PROJECT EXPERIENCE

SELECTED *PRP International, Inc.* ENGAGEMENTS (as a Principal)

From October 2004 to present, Peter is engaged to provide advice on due diligence and project governance mechanisms to Transport Canada's role as a financial contributor to the Richmond-Airport-Vancouver Rapid Transit project (RAV), including providing advice to Infrastructure Canada on P3 policy framework for federal contribution agreements to projects like RAV.

From June to July 2004, Peter was engaged as the Fairness adviser for the Vancouver Convention Centre Expansion Project's Request for Proposal to select a firm to contractor for foundation pile driving and pre-construction services. Peter has assessed the RFP and evaluation criteria and observed the evaluation process. A final report was issued in July 2004.

From January to February 2004, Peter was engaged as the Fairness Commissioner for the Vancouver Convention Centre Expansion Project's Request for Proposal to select a firm to serve as the Construction Manager for the \$500 million plus project during the 4 year period commencing in March 2004. Peter has

assessed the RFP and evaluation criteria and observed the evaluation process. A final report was issued on February 20, 2004.

In May 2003, Peter was engaged to act as the Fairness Commissioner for the Air Rail Link between Toronto Lester B. Pearson Airport and Toronto Union Station, for Transport Canada. Peter monitored the development of the Request For Business Case and associated process framework and evaluation criteria and methodology. During September, he monitored the work of the evaluation committees and the development of recommendations on a successful Proponent. A final report was issued on October 14, 2003.

In November 2002 (a 1 month engagement), Peter provided advice to the Canadian Firearms Program (CEO, Canadian Firearms Centre) on a workaround plan for the Program and its new ASD contractor to deal with delays in new legislation and the delivery of ASD solution.

In October 2001, Peter developed and conducted a one-day workshop (77 attendees) on the basics of Public Private Partnerships (P3) projects for the Ontario provincial ministry of Tourism, Recreation and Culture.

In January 2001 (2-3 week assignment), for a major international consortium (British (Thames Water) & American (Bechtel Corp)), PRP provided a review of the Request For Qualification for a major municipal P3 city water treatment project in the US Southwest, including participating as a Red Team member is reviewing the consortium's Statement of Qualifications.

SELECTED *Sorensen & Associates* ENGAGEMENTS (as a Principal)

From October 2000 to January 2001, for the Office of the Auditor General of Canada, Peter served on the industry advisory panel to the AG's audit on Acquisition of Information Technology Goods and Services, Chapter 23 (2000), released February 6, 2001. Advice was provided on the objectives, scope, approach, findings and recommendations.

In May-June 2000, for an established Canadian analytical laboratory company, Peter provided advice and proposal development services for a major government contract opportunity.

For a major municipal P3 wastewater project (Halifax Water Works Group - one of the bidding consortia of

British, Canadian, American & Dutch firms), Peter provided expert advice on their responses to a request for interest that also sought industry advice on alternative project definitions, e.g. design-build or design-build-operate-maintain, etc. He also advised on drafts of the request for proposal to secure the best procurement strategies and processes, from the sponsoring organization. From June to October 2000, Peter served as the Proposal Manager and a strategic adviser, for this group's bid.

SELECTED MAJOR CONSULTING FIRM ASSIGNMENTS (as a sub-contractor to professional firms, e.g. *PricewaterhouseCoopers LLP, Deloitte Touche, etc.*)

From August to October 2004, Peter was engaged to facilitate workshops (6) and provide advice on the review of the Procurement Processes of P3 projects in British Columbia; a study sponsored by the Canadian Council for Public-Private Partnerships with the support of Partnerships BC.

In March 2004, Peter was engaged to co-develop and present a P3 training workshop to approximately 25 senior public servants in the Yukon government.

In August 2003 (to October 2004), Peter was engaged to provide expert fairness monitoring services to the PwC engagement with BC Hydro on a Call For Tender transaction for the Vancouver Island dependable capacity requirement (150MW-300MW new generation). This engagement involved the review of a competitive process for new, dependable power generation on Vancouver Island. All technologies were eligible including gas-fired, wind, hydro-electric, biomass, coal, etc. The winning project was a 252 MW gas-fired tolling plant.

In July 2003, Peter, as a sub-contractor with Promitus Solutions Limited (Ottawa), was awarded a supply arrangement with Human Resources Development Canada, as a procurement specialist to the major *Modernizing Service for Canadians* project. Peter is part of the strategic procurement advisory group (composed of 6 specialist from 4 firms) providing, as and when required, advice on major partnering and procurement initiatives.

From August 2002 to November 2002, for Canadian Manufacturers & Exporters (in concert with Atlantic Canada Opportunities Agency), PRP provided project management and coordination services for the matchmaking requirements of 40 companies attending a November 2002 trade mission to New York city.

From July to October, 2002, for Canada Customs and Revenue Agency, PRP provided procurement strategy advice to a major outsourcing initiative within the Agency.

From March to June 2002, for Treasury Board Secretariat, provided procurement and contracting advice on the development of an Internal Audit Guide for Procurement and Contracting in the Federal Government.

For Ontario SuperBuild Corporation (Nov 2001 – May 2002), Peter served as the Lead Independent Process Auditor on the sale transaction for Highway 407 East Completion – a new addition to the previously sold Highway 407. Since May 2002, this transaction is under review, by the Government of Ontario.

From December 2000 to May 2002, for the Canadian Firearms Centre, Peter served as a key procurement advisor on the PwC – CFC Procurement Blueprint Team, for a major Business Process Outsourcing project. He was actively involved in formulating the procurement strategy and plan, including developing sections of the Request For Proposal, e.g. business arrangement requirements (along the lines of the Federal Government's Benefit Driven Procurement approach) and the evaluation framework and criteria.

During January – April 2001, for Human Resources Development Canada, Peter participated, as the expert advisor, to a study on Software procurement practices, by the department. The study has assessed the approach taken across the department, the problems and issues; recommendations were made for improvement.

For Ontario Hydro Services Company (October 1999 to March 2000), Peter served as a senior team member of the Process Improvement engagement in the Supply Management Services Division, assessing, stabilizing and implementing sustainable best practices in the overall Supply Chain for the company. Peter advised and provided active coaching on Strategic Procurement functions, as well as, acting as the group's Manager for the company, pending staffing actions, for a full time manager.

For the Immigration and Refugee Board, Peter led a team in the conduct of risk management services for a major computer system project – the assignment included the identification, assessment, and development of controls and a risk management plan for the project office.

From June to August 1999, for Public Works & Government Services Canada Centre of Excellence (relating to Benefits Driven Procurement), Peter led a team on the study of best practices and benchmarks on risk management in the procurement and contracting domain.

From November 1998 to May 1999, for the Ontario Provincial Government (Ontario Privatization Secretariat), Peter provided expert advisory services (Principal level), as part of the firm's team that served as the Independent Process Consultant (Auditor / Scrutineer). The major (\$3.107 billion) sale transaction, i.e. the sale of Highway 407 Electronic Toll Route, to the private sector, included obligations to design-build-own-operate-maintain major additions to the existing toll road. The firm's services included advising and/or observing on the fairness, objectivity and completeness of the process documents and evaluation processes. These services resulted in a letter to the responsible Minister indicating that the competition was fairly conducted and that the winner was selected in accordance to the rules and processes approved for the transaction.

In 1998 (2-3 month assignment) for the Department of National Defence, Peter served as the expert project management advisor on an independent project performance review for a \$50 million project. A report card was prepared, for going forward to the Treasury Board, for Effective Project Approval and Phase II Funding.

In 1998 (2-3 month assignment), for the Nova Scotia Government, served on a senior review team responsible to conduct an independent review of the performance of government officials involved in a major file (Westray Mine Disaster). Duties included researching a public inquiry report, associated testimonies, and position descriptions; conducting sensitive interviews of officials associated with the situation; participating in the team integration of observations, evidence, assessments and recommendations; and drafting final reports.

From November 1997 to February 1998, for the British Columbia Transportation Financing Authority, Peter acted as the expert project advisor to a major bridge project through the development of a discussion paper on quality management regimes for the design-build-operate-maintain project, including assessment of risk and optional quality management systems for the implementation phase of the project.

SELECTED CANADIAN FEDERAL GOVERNMENT EXPERIENCE (as a Public Servant)

Project Leadership/Management Northumberland Strait Crossing Project Confederation Bridge

From December 1993 to August 1997, Peter served as the Project Leader of the \$1 billion Major Crown Project (the Northumberland Strait Crossing Project - Canada's first "private sector financing" initiative), during the design-construction and initial operating phases.

Directed the Government's project team of professional engineers, economist, biologist, seconded experts (legal, management consulting and financial) and administrative staff, in the achievement of the project's objectives with emphasis on the Government's monitoring, due diligence (public accountability) and contract administration responsibilities. His role included representing the Government and Department, on all matters pertaining to the project (including the re-development activities related to Borden-Carleton and Cape Tormentine). The following areas of public relations, Provincial and community interests (facilitated the transfer of federal lands to the two Provinces for re-development purposes), special interests, Fishers and Ferry Workers, and Canada-Developer Agreement interests were involved. Peter chaired the Operations Committee that was responsible for day-to-day stakeholder coordination and management, in the achievement of the project goal (a 13-kilometre bridge between Prince Edward Island and New Brunswick with a further 12-km of new highway linkages (a 25-km Trans Canada Highway addition)).

Peter established and directed the project monitoring and contract administration roles for the project with emphasis on sound risk management, including the requirements and services of contract management consulting and audit organizations, and contract legal agents. The project monitoring role included periodical reviews of the major functions, such as the independent engineer function, the project trustee function, the developer's systems, and the annual contract compliance reviews and due diligence functions. He also directed the litigation strategies and support, in respect of the Developer's Fisheries Compensation challenge and the judicial review appeals by the Friends of the Island group. The Government was successful in all its legal responses during 1994 - 1997. The bridge opened on schedule and met all the Government objectives relating to costs, risks, and benefits.

Procurement and Contracting

From January 1991 to December 1993, as Director General, Office Automation, Services & Information Systems, Supply and Services Canada, Peter directed the procurement, contracting and contract administration operations, associated with the acquisition of information technology (hardware, software, systems and services) and office products for all Federal departments and agencies. He managed with an annual budget of 195 full time staff and \$10.0 million. During the three-year period, Peter was responsible for some 35,000 procurement actions and contracts valued in excess of \$5.0 billion and 5 major crown (systems integration / development) projects valued in excess of \$600 million. He administered contract approval authority up to \$10 million. Contract approvals and recommendations were based on due process and proper review of legal, trade and procurement policies and risk considerations.

He also established and directed the major procurement innovation of Common Purpose Procurement (a no specification - no price competitive procurement process which seeks to maximize business and government business alliances to solve complex problems/opportunities with innovative procurement and financing arrangements). This initial approach is now known as Benefit Driven Procurement and major elements are applied in most P3 procurement processes.

OTHER CANADIAN FEDERAL GOVERNMENT EXPERIENCE (as a Public Servant)

Information Management and Information Technology Systems and Services

From July 1985 to January 1991, as Director General, Management Services, Veterans Affairs Canada, he directed and was responsible for the department's information management (over 400,000 active client files) and information systems (over 250,000 benefit cheques were issued monthly), administrative services and management consulting functions with an annual budget of 150 full time staff and \$14.0 million.

During 1986-1988, Peter represented the department on the Direct Deposit program (this program was led by DSS with Health & Welfare Canada and Veterans Affairs Canada the main participants). Peter served on the 3 member government steering committee and the government-industry coordination committee (the industry committee was made up of senior

executives from several financial institutions and the Canadian Payments Association).

Peter also directed the study of the procurement processes for information technology goods and services, as the Chairperson of the IT Working Group on IT Procurement, under the auspices of the Treasury Board Secretariat's Advisory Committee on Information Management (ACIM).

Other Government Positions (1964 – 1983):

- Peter trained and served as a police officer in the RCMP and was posted to "O" Division (southwestern Ontario), 1964-1969: on the Six Nations Indian reserve detachment; on race track supervision detail; and on national crime intelligence duties, enforcing the Criminal Code and other federal statutes.

TECHNICAL SKILLS

- Procurement and Contract Specialist
- Lecturer/ Coach/Facilitator
- Strategist and Process Advisor
- Fairness Commissioner / Process Auditor
- Project Manager
- Executive Manager
- Chief Information Officer

PUBLICATIONS/SPEAKING ENGAGEMENTS

Peter has:

- Co-authored the paper, *Benefit Driven Procurement, A Canadian Private Sector Experience*, Project Management Institute, Philadelphia, 1999.
- Authored the paper, *Adapting Project Oversight in Public-Private Partnering Projects*, Project Management Institute, California, 1998.
- Co-authored a paper on the *Canadian Approach to Pre-Race Testing*, presented at an International Symposium, in Ireland, in 1978.
- Authored or co-authored several trade and PricewaterhouseCoopers LLP publications' articles on risk management, major projects, etc. The Case Study *Ontario's Highway 407ETR Sale Transaction*, October 1999, is one example.

He has also provided presentations to various groups and associations dealing with the lessons learned on Public-Private Partnering projects.

SECURITY CLEARANCE

Peter holds a Federal Government security clearance of SECRET, valid through 2008.