

**deirdre\_cfa@icloud.com**

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**From:** Miranda Yu <Miranda.Yu@tpsgc-pwgsc.gc.ca>  
**Sent:** June 20, 2017 8:06 AM  
**To:** Deirdre Moore  
**Subject:** RE: Form submission from: Contact Us

Excellent, thank you. The only issue with that route is that 25K becomes the upper limit. I will continue to explore other options as well.

Thanks,  
Miranda

**From:** Deirdre Moore [mailto:Deirdre@cceh.ca]  
**Sent:** June-20-17 8:45 AM  
**To:** Miranda Yu <Miranda.Yu@tpsgc-pwgsc.gc.ca>  
**Subject:** Fwd: Form submission from: Contact Us

Just an FYI ...

Sent from my iPhone

Begin forwarded message:

**From:** "ProServices (TPSGC/PWGSC)" <TPSGC.ProServices.PWGSC@tpsgc-pwgsc.gc.ca>  
**Date:** June 20, 2017 at 7:52:28 AM EDT  
**To:** "Deirdre@cceh.ca" <Deirdre@cceh.ca>  
**Subject:** RE: Form submission from: Contact Us

Good morning

If you are an existing supplier under ProServices and your Supply Arrangement is still active, the client may do a sole source contract to you if the requirement is below 25K that is including all taxes, travel and living if applicable, any options and any amendments anticipated. Please have the client contact ProServices for further details.

Denise St-Clair Du-Perré

Agente d'approvisionnement.  
Division des services professionnels en ligne (ZT)  
[denise.st-clair@pwgsc-tpsgc.gc.ca](mailto:denise.st-clair@pwgsc-tpsgc.gc.ca) / Tél: 873-469-3911

Supply Officer  
Online Professional Services Division (ZT)  
[denise.st-clair@pwgsc-tpsgc.gc.ca](mailto:denise.st-clair@pwgsc-tpsgc.gc.ca) / Tel: 873-469-3911

-----Original Message-----

From: BPME Client - OSME Client

Sent: June-19-17 6:06 PM

To: ProServices (TPSGC/PWGSC) <[TPSGC.ProServices.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.ProServices.PWGSC@tpsgc-pwgsc.gc.ca)>

Subject: FW: Form submission from: Contact Us

For your reply please

-----Original Message-----

From: Buy and Sell [<mailto:buyandsell@buyandsell.gc.ca>]

Sent: June-19-17 10:01 AM

To: BPME Client - OSME Client <[BPMEClient.OSMEClient@tpsgc-pwgsc.gc.ca](mailto:BPMEClient.OSMEClient@tpsgc-pwgsc.gc.ca)>

Subject: Form submission from: Contact Us

Submitted on Monday, June 19, 2017 - 10:01 Submitted by user: Anonymous Submitted values are:

Subject: Process for hiring using Sole Source status Comments and Questions:  
Good morning.

My business is AdvisorOnTrack Inc. GSIN Code R019BF and it is listed as a ProServices supplier.

Does this mean that I am qualified to be sole sourced for a contract under \$25,000? If so, what process would the buyer follow?

Thank you  
Deirdre Moore

[Deirdre@cceh.ca](mailto:Deirdre@cceh.ca)

Name: Deirdre Moore

Title: President

Organization: AdvisorOnTrack Inc.

Email address: Please provide if you would like a response. (Please use this email format, if applicable: [user@example.com](mailto:user@example.com)): [deirdre@cceh.ca](mailto:deirdre@cceh.ca)

Telephone: 613-791-1451

View the results of the submission here: <https://buyandsell.gc.ca/node/2284/submission/14898>

Application for 2016 Q4

CNSC contract in

area of expertise.

<p>The proposed resource must qualify as a Senior Business Process Consultant with a <u>minimum of 95 points</u>.</p> <p><b>Relevant Education to the Consultant Category</b></p> <p>University (PhD, Graduate, Undergraduate, degree): <b>35 pts</b></p> <p>College or CEGEP Diploma/Certificate: 25 pts</p> <p><b>Professional Certification</b></p> <p>Relevant Professional Certification: <b>15 pts</b></p> <p><b>Relevant Experience in Consultant Category</b></p> <p>≥10 yrs: 120+ months — <b>60 pts</b></p> <p><b>Resource specific requirements:</b></p> <ul style="list-style-type: none"><li>• Knowledge of the FreeBalance procurement module</li><li>• Knowledge of Government of Canada Financial Reporting, specifically Proactive Disclosure, soon to be Open Data Initiative</li><li>• <b>Advanced knowledge of Microsoft Excel</b></li></ul>	<p><u>Education</u></p> <p>Ms. Moore holds a current and valid professional designation. She is a Chartered Financial Analyst, CFA Institute (1995) as per her Education listed in her CV. In addition, she holds an Honours Bachelor of Business Administration (Finance/Economics) from Wilfrid Laurier University, Waterloo (1991). Further, she holds a secondary school diploma from Oakwood Collegiate of Oakville (1987).</p> <p><u>Experience</u></p> <p>Ms. Moore exceeds the experience requirements of a Senior Business Process Consultant with <b>over 25 years of professional work experience acquired since 1991</b>. Below highlights in detail over 10 years of directly-related experience providing expert advisory services in business process improvement. Please refer to the following projects/assignments in her CV.</p> <ol style="list-style-type: none"><li>1. The Ottawa Hospital Process Improvement/Process Documentation/Financial Reporting June 2016 – December 2016 / 6 months</li><li>2. Mandeville Private Client Inc. Process Improvement/Financial Reporting April 2016 – May 2016 / 2 months</li><li>3. Carleton University Process Improvement/Financial Reporting March 2015 – October 2015 / 6 months</li><li>4. The Royal Life Saving Society Canada Process Improvement/Financial Reporting September 2012 – November 2012 / 2 months</li><li>5. CIBC Wood Gundy Process Improvement/Financial Reporting September 2006 – November 2008 / 25 months</li><li>6. Public Health Agency of Canada Process Improvement/Financial Reporting* February 2005 – August 2005 / 6 months *sub-contractor</li></ol>
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		<p>7. CIBC Wood Gundy Process Improvement/Financial Reporting January 2003 – January 2005 / 25 months</p> <p>8. National Bank Financial Process Improvement/Financial Reporting September 2001 – November 2002 / 14 months</p> <p>9. City of Ottawa October 1994 – September 1995 / 12 months Financial Analysis/Process Improvement/Financial Reporting</p> <p>10. MD Financial Financial Analysis/Process Improvement/Financial Reporting/Report Automation September 1992 – September 1994 / 25 months</p>
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### 1.0 **Background**

The government proactively discloses information on contracts over \$10,000, grants and contributions over \$25,000. The proactive disclosure of contracts reflects broader government commitments to transparency and strengthened accountability within the public sector originally announced in Budget 2004. Departments report their contracting data on their departmental websites. Proactive Disclosure reporting is currently published by GC organizations on their existing web pages. In support of the transition to Canada.ca, as well as Canada's Open Government commitments, the Information Management and Open Government Secretariat have developed a central publishing platform for Proactive Disclosure reporting. By December 2016, departmental websites will be consolidated under the Canada.ca domain and departmental proactive disclosure sites will cease to exist and all departments will need to adopt the new reporting process by December 2016. The CNSC requires the services of a Business Process Consultant to assist with the migration to Open Data contract proactive disclosure and ensure that deadlines are met.

### 2.0 **Objectives**

Contract reporting is to occur on a quarterly basis, corresponding to the government fiscal year quarters. Work with Financial Systems and Contracting to be ready for Open Data reporting for the next proactive disclosure on January 31, 2017.

### 3.0 **Scope of Work**

- Review Q2 quarterly sample data provided by the CNSC Financial Systems Group (FSG) to ensure it meets Open Data requirements and liaise with FSG to adjust data as necessary.



- Contact Treasury Board Open Data representatives and CNSC Information Management Technology Division (IMTD) to identify the process for posting the quarterly data, work with Contracting to identify any revisions required to the CNSC President quarterly data approval process and document/map-out both processes.
- Work with Treasury Board Open Data representatives in relation to the testing phase
- Assist Contracting with making any manual modifications and additions to the data and document accordingly.
- Liaise with CNSC internal stakeholders (Contracting, IMTD, FSG) as required.

#### **4.0 Tasks to be Performed**

##### **9.5 Business Process Consultant**

###### **Standard Duties**

- Reviewing existing work processes
- Analyzing existing business processes, identifying opportunities for process improvements
- Mapping existing processes and developing and mapping recommended new processes, changes
- Analyzing business functional requirements to identify information, procedures and decision flows
- Providing advice in defining new requirements and opportunities for applying efficient and effective solutions
- Providing advice in developing and integrating process and information models between processes to eliminate information and process redundancies
- Identifying, recommending and planning new processes
- Providing advice on and/or assisting in implementing new processes
- Identifying the required modifications to the automated processes
- Documenting workflow
- Using business, workflow and organizational tools

###### **Specific Duties**

- Document the new process
- Find, develop and propose efficiencies in the process
- Document the required steps
- Analyse current Contract Review Committee (CRC) reporting requirements and map out how the change to Open Data will affect the reports we currently generate
- Work with Financial Systems to come-up with new pivot tables to meet for CRC reporting requirements that derive from Open Data reports
- Document/map out the entire CRC reporting process using Open Data
- Develop reporting for CRC requirements
- Review the document in conjunction with the data provided and liaise with FSG for any further data extracts
- Contact Treasury Board & IMTD about the process for posting
- Contact Treasury Board about testing
- Make all manual modification/additions to the data
- Test posting the document to test environment (if available)

- Advise FSG on testing status

## 5.0 Deliverables

### 5.1 Start-up Meeting

Date: Within a week of contract award

Location: The CNSC Head Office, Ottawa

Purpose: To discuss and clarify the proposed approach, work plan and schedule to ensure achievement of the contract objectives. The contractor shall make a presentation with the above purpose in mind.

### 5.2 Progress Meetings

Dates: Bi-weekly or as required

Location(s): Teleconference

Purpose: To assess the degree to which the agreed project objectives are being achieved as planned and thus to facilitate timely adjustments (if necessary) to ensure the project success.

### 5.3 Validation of Data Posting in Test Environment

Due Date: December 12, 2016

Copies: One electronic copy via email to the Project Authority

Format and style requirements: To be specified by the Project Authority. The font Times New Roman 12 is to be used.

### 5.4 Final Report

Due Date: December 20, 2016

Copies: One electronic copy via email to the Project Authority

## Deirdre Moore

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**From:** Deirdre Moore <dmoore@advisorontrack.com>  
**Sent:** Thursday, May 28, 2015 11:53 AM  
**To:** 'anne@stevensonandwhite.com'  
**Subject:** Follow-up: Screen shot of applications submitted

Hi Anne. It was a real pleasure to meet you this morning! I wish I could have had a bear-wrestling story for you. I'll try to think of a juicy story for you for next time!

Below, is a screen shot of most, if not all, of the c.v.'s I've submitted this year. If your client is the NAC, I definitely did try to get in there. Regarding an updated c.v., I am hoping Monday is ok. I've got a huge deadline at Carleton that will consume me now until I get the report out the door.

Thank you so very much for taking the time to meet with me. By all means, please let me know if there is anything else I can do to facilitate next steps.  
Deirdre.

- ☒ Deirdre Moore CV20150527 SandW, Bus Support Analyst
- ☒ Deirdre Moore CV20150520 SI Systems, Process Analyst
- ☒ Deirdre Moore CV20150506 CCAC, BI Partner
- ☒ Deirdre Moore CV20150430 SandW, Mgr RandA
- ☒ Deirdre Moore CV20150430 Myticas, P-P Business Analyst
- ☒ Deirdre Moore CV20150424 eTeam Honeywell
- ☒ Deirdre Moore CV20150423 NAC
- ☒ Deirdre Moore CV20150423 ICAD
- ☒ Deirdre Moore CV20150423 Assoc Faculties Medicine
- ☒ Deirdre Moore CV20150421 Windmill
- ☒ Deirdre Moore CV20150421 Quantum
- ☒ Deirdre Moore CV20150421 CMHC, Senior Financial Analyst
- ☒ Deirdre Moore CV20150329 CMHC, Analyst-Financial Reporting
- ☒ Deirdre Moore CV20150225 SandW, Reporting Analysis
- ☒ Deirdre Moore CV20150225 SandW, Mgr of Reporting and Analysis...
- ☒ Deirdre Moore CV20150220 VCAN - Business Consultant
- ☒ Deirdre Moore CV20150220 SandW, Eco Analyst
- ☒ Deirdre Moore CV20150220 Brookfield, SFA
- ☒ Deirdre Moore CV20150219 - Mint
- ☒ Deirdre Moore CV20150219 - CCC
- ☒ Deirdre Moore CV20150218 BOC
- ☒ Deirdre Moore CV20150218 - Mint
- ☒ Deirdre Moore CV201504 ProSlide
- ☒ Deirdre Moore CV201504 Minto
- ☒ Deirdre Moore CV201504 Lowe-Martin
- ☒ Deirdre Moore CV201504 CLV Group
- ☒ Deirdre Moore CV201503 Finance Officer, Ottawa Catholic School ...
- ☒ Deirdre Moore CV201502 LoweMartinGroup
- ☒ Deirdre Moore CV201502 Lannick, Financial Analysis
- ☒ Deirdre Moore CV201502 JDU, Forecast Analyst
- ☒ Deirdre Moore CV2015 Teramach
- ☒ Deirdre Moore CV2015 PrecisionERP
- ☒ Deirdre Moore CV2015 NAV Canada
- ☒ Deirdre Moore CV2015 Excel, Financial Analysis
- ☒ Deirdre Moore CV2015 CSIS
- ☒ Deirdre Moore CV2015 CMHC, Financial Analysis
- ☒ Deirdre Moore CV2015 CMHC
- ☒ Deirdre Moore CV2015 CDIC

Deirdre Moore, CFA  
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