



# OFFICE OF THE PROCUREMENT OMBUDSMAN



## Outreach Plan 2013–2014

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# Outreach Plan 2013–2014

## Introduction

### Definition of *outreach*

The Office of the Procurement Ombudsman's (OPO) outreach-related activities are aligned with the definition of "outreach" in the Communications Policy of the Government of Canada, and are focussed on enhancing awareness of OPO and its services. In the context of this Outreach Plan, Outreach is defined as:

- Using **marketing techniques** to enhance **awareness** of, and **access** to, OPO's **services** by all potential OPO **clients**.

In addition, by reaching out to clients and stakeholders, OPO wishes to obtain timely and useful feedback on procurement-related trends and issues.

### Background

In 2012-13, OPO commissioned a third-party formative evaluation of its activities to determine, *inter alia*, whether the office's mandate had been implemented as intended. The evaluation report stated: "[t]he degree of awareness of the OPO is high among the federal government procurement community, particularly in Ottawa, *but suppliers are less aware of the OPO*" (*emphasis added*). One key factor limiting supplier awareness is the fact that OPO was established relatively recently, 5 years ago, and creating awareness demands considerable time and resources given the large number of suppliers in Canada. The report recommended OPO undertake additional analysis to identify a communication strategy with which to maximize awareness of its services among suppliers. In response to this recommendation, OPO sought the expertise of a communications consultant, whose recommendations included the following:

- Develop an annual outreach plan;
- Identify the target clientele;
- Develop OPO's identity;
- Base outreach activities on a clearly defined identity and target clientele;
- Determine the internal resources needed to effectively carry out outreach activities;
- Focus outreach on:
  - opportunities involving supplier associations, chambers of commerce and federal organizations whose suppliers fall within the target clientele;
  - the development of communication products conveying positive, educational messages noting OPO successes; and
  - the use of social media and promotional items.

## Strategic Considerations

### Role of Outreach Plan

This plan supports OPO's Communications Strategy 2011–2014 in achieving the following key objective:

- ✓ **To promote the role, mandate and services of OPO**

To achieve this objective, and based on the recommendations of the communications consultant, this plan identifies and develops:

- OPO's target clientele;
- OPO's identity; and
- outreach activities to be undertaken in 2013–2014.

### OPO's target clientele

Several groups have an interest in OPO operations, including: Canadian suppliers, federal government procurement specialists, federal government program managers and executives, Parliamentarians, the media, and by extension the Canadian public.

This plan divides those impacted by OPO's operations into two main groups:

#### 1) OPO clients

- Canadian suppliers
  - Canadian companies supplying and wishing to supply goods or services to the federal government
- Supplier groups or associations (e.g. chambers of commerce; boards of trade; industry associations)

#### 2) OPO stakeholders

- Federal procurement community
  - Procurement specialists
  - Program managers and executives
  - Departmental procurement oversight committees
  - Deputy ministers and deputy heads
- Procurement organizations/associations
  - Groups with an interest in federal government procurement (e.g. Canadian Public Procurement Council [CPPC]; Canadian Institute for Procurement and Material Management [CIPMM]; Supply Chain Management Association [SCMA])
- Parliamentarians
  - Members of the Parliament of Canada and their staff

- Media / Canadian public
  - Individuals or groups interested in procurement who provide information to the public, and Canadians interested in procurement-related issues

## Focus on clients

The aforementioned communications consultant's report confirmed that OPO's outreach activities have, thus far, focused mainly on the federal procurement community. Henceforth, the office will primarily target those interested in providing goods and services to the federal government, namely Canadian suppliers. Although there are some activities in this plan geared toward OPO stakeholders (e.g. activities involving federal Parliamentarians), the purpose of reaching out to these stakeholders is to enable them to refer their clients (e.g. constituent suppliers) to OPO when issues or concerns related to federal procurement arise. All activities in this plan proceed with the distinction between OPO clients and stakeholders in mind.

## OPO's identity

The Collins English Dictionary defines "identity" as:

[t]he individual characteristics by which a person or thing is recognized

Establishing an identity is a critical success factor in outreach activities, as an organization's identity serves as a point of reference for its clients. To be effective, OPO's identity must allow Canadian suppliers to see themselves as the office's clientele, and believe they can benefit from OPO's activities and services.

OPO's identity must be simple, catchy and targeted. It is based on a small number of themes, consistent with each other, which allow clients to feel they can benefit from OPO's services. These themes include:

- Issues with federal contracts? Let us know... we can help!
- OPO helps resolve contract disputes
- OPO reviews contract complaints
- OPO shares information
- OPO is here to help!

## Action Plan

### Tools

OPO will use multiple communication tools to reach out to clients and to raise awareness of the office's mandate and services. Key tools to be used by OPO in conducting outreach activities are:

- **Promotional items**
  - Widely circulating promotional items to clients and stakeholders promotes OPO's identity and both publicizes and facilitates access to the office's mandate and services.
  - Promotional items include OPO magnets, screen cleaners, USB bracelets, pens, coffee cups, postcards, fact sheets and brochures.
- **Press releases and advertisements**
  - Press releases and publication of success stories advertise OPO's achievements, promote its services and cast a positive light on the office while cementing its identity in the minds of clients and stakeholders.
- **Social media**
  - Recognizing current trends in communication and outreach and reaching out to clients and stakeholders through the use of social media enables OPO to share information, obtain feedback, and provide target audiences with timely updates on the office's reports and activities.
  - Social media tools include the revised OPO web site and its interactive components, as well as the OPO Twitter account. This year, OPO plans to integrate additional social media platforms including LinkedIn and Facebook, webinar sessions and promotional videos.
- **Liaison**
  - Establishing and maintaining ongoing contact with clients and stakeholders allows OPO to reach those who can benefit from the office's services, while also helping OPO to stay abreast of the latest procurement-related developments.
  - Key organizations with whom OPO liaises include supplier groups such as chambers of commerce, boards of trade, industry associations, and the Canadian Federation of Independent Business [CFIB]; as well as stakeholders such as the CPPC, CIPMM and SCMA (mentioned above).
- **Media campaign**
  - Media campaigns (such as the use of short promotional videos) have a direct impact on promoting OPO's identity amongst clients, and allow the office to inform a wider audience about its work, successes and services.

- E-mail and conventional mail services

- E-mail and conventional mail enable OPO to circulate promotional materials to a large number of potential clients and stakeholders, thereby raising the office's profile, reinforcing its identity and facilitating access to its services. External service providers can be used for both conventional and E-mail distribution to contain costs and optimize the allocation of internal resources.

- Booths and Kiosks

- Operating booths at conferences and events promotes OPO's activities and services and allows the office to connect, face-to-face, with interested clients and stakeholders. The booth/ kiosk format also enables the office to obtain timely and useful feedback on procurement-related trends and issues.

- Presentations

- Making presentations locally, nationally and internationally enables OPO to reinforce its identity and increase visibility amongst pre-determined client or stakeholder groups. In addition, post-presentation discussions and Q&A sessions often provide valuable information that can be used in the context of environmental scanning or review topic selection.

- Town Hall Sessions

- Feedback indicates that the most useful two-way information exchanges occur at events where attendees are specifically there to engage with the Procurement Ombudsman or OPO staff.
- Unlike larger events where only a fraction of the audience may be interested in doing business with the federal government, Town Hall Sessions enable OPO to interact directly with Canadian suppliers interested in discussing federal procurement-related issues with the office.

## Resources

As noted by the communications consultant, different types of outreach activities require varying degrees of time, human and financial resource allocation. In other words, an unlimited budget combined with the availability of numerous staff dedicated to outreach activities would virtually guarantee success in implementing the objectives of this plan. The following list of activities takes into consideration the realistic limitations of having a finite number of staff and financial resources, yet tries to counterbalance these obstacles by involving as many OPO employees as possible, whenever possible, time and priorities permitting.

## Activities

The outreach activities listed below directly contribute to raising awareness of OPO amongst the office's potential clients and stakeholders, or increasing access to the office's services.

Tools	Action Item	Participant s	Due date
Promotional Items	1. Disseminate OPO promotional items during all outreach-related activities, e.g. magnets, screen cleaners, postcards, fact-sheets, pens, cups, brochures	CCM	Always
Press Releases and Advertisements	2. Circulate press releases to accompany OPO practice reviews, when recommended in Communications Support Plans (CSP)	CCM	As per CSP
	3. Circulate 4 additional press releases highlighting case studies or success stories regarding OPO activities		Aug. , Oct. '13, Jan., Mar. '14
	4. Send OPO information for inclusion in client and stakeholder newsletters on a quarterly basis	CCM	July, Oct. '13, Jan., Mar. '14
Social Media	5. Tweet about OPO news, events, activities and services on a (minimum) weekly basis	CCM	Weekly
	6. Expand OPO's social media presence to include vehicles such as Facebook, LinkedIn and YouTube.	CCM	July – Oct. '13
	7. Conduct 2 webinars on a subject of interest to potential clients interested of doing business with the Federal Government	CCM and SMEs	November 2013
Liaison	8. Contact all OPO clients and stakeholders to inform them of the release of all OPO reviews/ reports	CCM	With each report
	9. Contact targeted elements of OPO's clients and stakeholders when conducting specific OPO outreach activities (e.g. contact <i>supplier</i> associations when presenting or manning a booth at a supplier event)	CCM	With each event
	10. Request the inclusion of OPO's identity (e.g. contact info, Twitter and web links) on multiple client and stakeholder web sites (e.g. boards of trade, chambers of commerce, associations, departments, etc.).	CCM	August – September 2013
	11. Contact all federal departments, and the Department of Justice, and request the inclusion ADR clauses in all contractual documents	DPO	August 2013
	12. Contact Service Canada (again) and offer both OPO-related information and presentations on OPO services to front-line staff	CCM	July 2013
	13. Contact both Industry Canada (again) and provincial authorities responsible for the incorporation of new companies to request the presence of OPO's identity on their web sites	CCM	August 2013
	14. Contact public procurement social media "influencers" to leverage their large networks to promote OPO's services	CCM	August 2013
Media Campaign	15. Create a short promotional video(s) to be posted on OPO's website and YouTube. Circulate the video's link to all OPO's clients and stakeholders through e-mail	CCM	March 2014
E-mail and Conventional mail Services	16. Send promotional items and OPO's social media links through both e-mail and conventional mail to all OPO clients and stakeholders. Use external service providers (e.g. Canada Post mail service provider) where cost and resource effective.	CCM	Ongoing

Booths, Kiosks, Presentations and Town Hall Sessions	17. Launch an Annual Report Tour following publication of the 2012-13 OPO Annual Report, including: press release, circulating link to all clients and stakeholders, and scheduling Town Hall sessions (NCA & regions) to promote the Annual Report and obtain feedback from clients and stakeholders.	CCM	August – Oct. 2013
	18. Conduct 3 Town Hall sessions during 2013-14 inviting Canadian suppliers to discuss procurement-related issues and exchange information with OPO.	CCM	2013-14
	19. Conduct 3 regional visits by the Ombudsman during 2013-14, including leveraging activities (e.g. meetings with clients and stakeholders), to promote and raise awareness of OPO services	CCM	2013-14
	20. Conduct 3 regional visits by OPO staff during 2013-14, including leveraging activities (e.g. meetings with clients and stakeholders), to promote and raise awareness of OPO services	CCM	2013-14

## Town Hall Sessions and Regional Visits

Further to outreach activities #17 through #20 listed above, the following table identifies key Town Hall sessions and regional visits for 2013-14.

#	Date	Location	Description	Comments
1	Sept. 19-20, 2013	Kingston	ORSMEN	Ontario Region Small & Medium Enterprise Network (ORSMEN) event in Kingston to serve as the anchor, around which a Town Hall session with suppliers and additional meetings with clients/ stakeholders will be leveraged.
2	Sept. 25, 2013	Mississauga	SONO	Supplier Outreach Network of Ontario (SONO) event in Mississauga to serve as the anchor, around which a Town Hall session with suppliers and additional meetings with clients/ stakeholders will be leveraged.
3	Sept. 25-26, 2013	Calgary	SRC	Strategic Risk Council (SRC) meeting in Calgary to serve as the anchor, around which a Town Hall session with suppliers and additional meetings with clients/ stakeholders will be leveraged.
4	October 2013	Regina	Town Hall	Town Hall session in Regina to serve as the anchor for leveraged meetings with suppliers/ stakeholders.
5	Nov. 4-6, 2013	Nfld.	CPPC	CPPC Annual Forum in St-John's (Nfld.) to serve as the anchor, around which a Town Hall session with suppliers and additional meetings with clients/ stakeholders will be leveraged.
6	December 2013	Ottawa	Town Hall	Town Hall session in Ottawa with suppliers.
7	January 2014	Vancouver/ Victoria	Town Hall	Town Hall session in Vancouver to serve as the anchor for leveraged meetings with suppliers/ stakeholders.
8	February 2014	Montreal	Town Hall	Town Hall session in Montreal to serve as the anchor for leveraged meetings with suppliers/ stakeholders.