PROGRAM AGREEMENT

THIS AGREEMENT is between **CANOE PROCUREMENT GROUP OF CANADA**, a tradename of the Rural Municipalities of Alberta, a corporation incorporated pursuant to the laws of Alberta ("**CANOE**") and:

Supplier Legal Name:	KPMG LLP
Supplier Corporate Jurisdiction:	333 Bay Street, Suite 4600, Bay Adelaide Centre, Toronto, Ontario, M5H 2S5
	(the "**Supplier**"), as of
Date of Agreement:	May 1, 2026 regarding
RFP No.	CAN-2026-002
RFP Title	Implementation Services for Enterprise Resource Planning (ERP) Software
	(the "**RFP**").

BACKGROUND

A. Canoe is a public agency serving as a national municipal contracting agency for its Members, and in that capacity issued the RFP for the purchase of goods and/or services.

B. The Supplier is engaged in the business of selling some or all of those goods and/or services, and responded to the RFP.

C. Canoe wishes to enter into an agreement with the Supplier for the purchase of goods and/or services by Members, pursuant to a purchase program administered by Canoe.

D. The Parties wish to set out the terms and conditions upon which those purchases will occur, and under which the purchase program will be administered.

NOW THEREFORE, in consideration of the premises and the mutual covenants herein contained and of other good and valuable consideration (the receipt and sufficiency of which are hereby acknowledged by each Party), the Parties hereby agree as follows:

ARTICLE 1
INTERPRETATION

1.1 Definitions

In this Agreement the following terms have the corresponding meanings.

"**Administrative Fee**" means the fee paid by the Supplier to Canoe as described in this agreement (Administrative Fee) and protected under FOIPPA.

11.11 Further Assurances

Each Party will take all necessary actions, obtain all necessary consents, file all necessary registrations and execute and deliver all necessary documents reasonably required to give effect to this Agreement.

11.12 Counterparts

This Agreement may be executed in any number of counterparts. Either Party may send a copy of its executed counterpart to the other Party by Electronic Transmission instead of delivering a signed original of that counterpart. Each executed counterpart (including each copy sent by Electronic Transmission) will be deemed to be an original; all executed counterparts taken together will constitute one agreement.

IN WITNESS WHEREOF the Parties have executed this Agreement as of the date first written above.

CANOE PROCUREMENT GROUP OF CANADA

By: Tyler Hannemann (Jun 24, 2026 13:04:26 MDT)

Name: Tyler Hannemann
Title: General Manager

By: Stéphanie Dion

Name: Stéphanie Dion
Title: Manager of Procurement

Supplier Legal Name: KPMG LLP

By: Dmytro Nechytailo (Jun 24, 2026 11:01:21 MDT)

Name: Dmytro Nechytailo
Title: Partner

SCHEDULE "A"

RFP PARTICULARS

PART B – RFP PARTICULARS

A. THE “DELIVERABLES”

SOLUTIONS-BASED SOLICITATION

This solicitation process is structured as a solutions-based solicitation, indicating that Canoe is seeking services aligned with the general requirements outlined in the scope of this RFP and consistent with widely accepted industry standards.

The objective of this RFP is to identify and engage qualified suppliers capable of delivering Implementation Services for Public Sector Enterprise Resource Planning (ERP) Software to support the operational needs of municipalities, cities, provincial governments, academic institutions and healthcare organizations. Proponents may include related services provided these are complementary to the proposed commodities.

B. REQUESTED SERVICES

Canoe is seeking proposals from qualified suppliers for Implementation Services for ERP Software.

The Proponent will be required to provide professional services with the technical expertise and management required to modernize Canoe Member’s digital infrastructure while updating business functions to improve data accuracy and operational efficiency.

Canoe has engaged with over 70 public agencies in preparation of this RFP in Q4 of 2025.

Many are users of legacy platforms which will no longer offer mainstream support within the next couple years.

Core Service Categories

- **Vendor selection support:** As required, assist Canoe Members in identifying the most suitable ERP software before the implementation begins. The proponent will act as an expert advisor to guide Members through a structured needs assessment process. This service includes gathering detailed business requirements from stakeholders, create the necessary technical specifications, coordinate software demonstrations and perform a fit gap analysis to identify system limitations, etc.

- **ERP solution roadmap:** create and maintain an ERP solution roadmap to align with Canoe Members’ business objectives and needs including a strategic roadmap, stakeholder engagement, implementation timeline, milestones, etc.

- **Business process engineering:** evaluate existing operations to identify inefficiencies. They redesign workflows to align with industry best practices and the functional capabilities of the ERP platform.

- **Technical architecture and configuration:** design the system environment. This includes configuring software modules, developing integrations with external applications, and ensuring the platform meets Canadian cybersecurity and data residency standards as required by Canoe Members.

- **Data governance and migration:** execute a comprehensive data strategy including extract, clean, and validate legacy data to ensure a seamless transition into the new database architecture without compromising data integrity.

- **Organizational change management:** deliver structured training programs and communication plans to minimize operational downtime and manage the transition for personnel. User adoption is critical for Canoe Members.

- **Quality assurance and deployment:** conduct end-to-end system testing and User Acceptance Testing (UAT) as well as manage the final deployment to the live environment and provide immediate technical stabilization.

- **Post-Deployment technical support:** provide ongoing technical maintenance and help desk services following the system launch. This includes incident management, software patching, and performance monitoring to ensure the system remains stable and secure.

Services offered:

Proponents are expected to provide a broad selection of services at reduced prices, offering better value than they typically would to federal and provincial governments, municipalities, cities, academic institutions and school boards. These services are designed to support or Canoe Members with the implementation of their ERP solution.

Canoe prefers suppliers that provide a sole source of responsibility for the services provided under a resulting master agreement. If a proponent is including services of its subsidiary entities, the proponent must also identify all included subsidiaries in its proposal. If proponent requires the use of subcontractors to provide the services, the proposal must address how the services will be provided to Members, and describe the network of subcontractors that will be available to serve Members under a resulting Program Agreement.

It is expected that proponents have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the services to Members.

ERP Software solutions available to Canoe Members:

Canoe Members currently have access to Microsoft software solutions under its technology program. https://canoeprocurement.ca/program/technology-program/

Canoe currently has a request for proposal for ERP Software Solutions which is available at https://canoe.bidsandtenders.ca/Module/Tenders/en/Tender/Detail/e0b77942-3a19-4910-8762-b7cb739d2264 where OEMs interested are listed.

Canoe expects to award contracts to multiple software OEMs as part of RFP CAN-2026-001 for the following types of ERP software solutions:

Model 1. Integrated ERP Suite solution

A single, unified Enterprise Resource Planning system that delivers the core administrative functions—finance, HR/payroll, procurement, budgeting, taxation, utilities, reporting—within one integrated platform and one data model. These systems are designed to operate as a cohesive whole rather than as combined standalone applications.

Model 2. Best-of-Breed solutions

An ERP solution delivery approach where the ERP platform provides core administrative functions and specialized third-party applications are used for specific business needs. The ERP must expose open, well-documented APIs to support secure, reliable integration, and must remain the primary system of record for administrative data.

Model 3. Specialty Municipal Systems solutions

Smaller-scope municipal systems that provide important but limited administrative functionality (such as AP automation, taxation, utility billing, or legacy finance functions) but do not constitute a full ERP solution as described above. Software for emergency management, land-use planning, permitting, GIS or inspections are not included in this category.

1. Utilization of the contract – Canoe members

Canoe Members may choose but are not obligated to utilise the services during the term of the agreement. There is no minimum guarantee of usage.

2. Requirements

Proponents are expected to submit a comprehensive proposal that clearly demonstrates the overall best value in alignment with the scope outlined in this Solicitation. The evaluation of best value will encompass, but is not limited to, consideration of the following components within your RFP submission:

- Competitive pricing across the span of services offered beyond a defined service offering.
- Proponents must specify any costs that are excluded from the pricing of their proposed product or service. These might include expenses such as installation, setup, required training, or initial inspections. In addition, proponents should explain any distinctive distribution or delivery options that are part of the proposal.
- Our Members frequently inquire about several aspects, including: the speed and cost of accessing services, procedures for service access, establishing their own review processes, potential location constraints, user-friendliness of service access, support for the local economy, compliance with trade agreements, advantages for their entities when utilizing this contract, availability of knowledgeable contacts for inquiries, commitment to customer care, expected service quality, and potential impacts on their operations and financial outcomes.

To support an industry leading value-based solution, Canoe is requesting that all interested proponents provide a thorough and comprehensive description of their ability to provide the Deliverables when answering the specification questionnaires in the Procurement Portal.

D. MANDATORY SUBMISSION REQUIREMENTS

1. Submission and Specification Questionnaires

Proponents must answer specification questionnaires directly into Canoe's Procurement Portal. Proposal materials should be prepared and submitted in accordance with the instructions in the Procurement Portal, including any maximum upload file size.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided.

2. Pricing

Each proposal must include pricing information that complies with the instructions set out in the Procurement Portal.

E. MANDATORY TECHNICAL REQUIREMENTS

i. The Proponent must meet the following mandatory requirement(s). Proponents who do not meet the mandatory technical requirement(s) will be deemed non-compliant and their proposal will not be evaluated further.

ii.

Mandatory Requirements – All Proponents	Required Documentation
Information Security. The proponent must hold a valid ISO 27001 certification or equivalent international standard, or provide a current SOC 2 Type II or NIST 800-53 audit report or CyberSecure Canada Certification or Canadian Program for Cyber Security Certification (CPCSC) Level 1 or 2 certification.	Attach a copy of the certificate or the executive summary of the SOC 2 or NIST 800-53 report in the procurement portal.
Mandatory Requirement - Software Partnership	**Required Documentation**
Proponent who claim to be certified implementation partner or have certification for the ERP software(s) solutions they include in their proposal response must provide proof of certification from the software OEM(s) or provide evidence of an equivalent partnership status with a comparable cloud service provider or technology vendor.	Attach a formal letter or certificate from the software manufacturer or service provide confirming partner/certification status in the procurement portal.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

F. PRE-CONDITIONS OF AWARD

- Submission of proof of insurance
- Satisfactory reference check if required by Canoe

G. EVALUATION CRITERIA

The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Proponents must provide their response in Canoe’s procurement portal.

Non-Price Rated Criteria Category	Points	Minimum points
Experience -Public sector experience and expertise with ERP implementation services	20	15
Program offering -ERP Software solution and selection process -Member access to program offering -Scalability and staffing -Technical Support	15	10
Risk identification and mitigation plan -Proactive risk mitigation and reduction of impact to budget, timelines, scope	15	11
Situational questions	15	11
Engagement, sales, marketing and internal training plan	10	7
Subtotal	75	54
Pricing Classification -Discounts offered	25	
Total Points	100	

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

H. PRICE

Pricing is worth 25 points of the total score.

Instructions on How to Provide Pricing

(a) Proponents should submit their pricing information electronically within the Procurement Portal.

(b) Rates must be provided in Canadian funds, exclusive of all applicable duties and taxes.

(c) Unless otherwise indicated in the requested pricing information, rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees, duties, tariffs or other charges required by law.

I. AWARD

There are 3 classifications of award:

Group 1. Partners: All proponents within 8 points of highest score.

Group 2. Non-partners: all proponents within 8 points of highest score.

Competitive Range

Canoe intends to award contracts to all proponents within the Competitive Range. This method ensures Canoe Members have access to high quality vendors and a diverse choice of solutions to meet their needs.

Canoe will rank all proponents by their total score. The Competitive Range includes the highest-ranked proponent and all subsequent proponents whose total scores fall within a 8% difference of the highest score. On a 100-point scale, the margin is 8 points below the top score.

If fewer than four proponents fall within the initial 8% range, Canoe will expand the range to include the highest-ranked proponents. In this case, the score of the second last-ranked proponent becomes the new minimum score for that category.

Canoe reserves the right to limit the Competitive Range to ensure contract quality and management efficiency. Canoe will exclude any proponent whose score is more than 8 points below the top-ranked proponent unless that proponent is needed to meet the minimum award requirements.

[End of Part B]

SCHEDULE "B"

SUPPLIER RESPONSE TO THE RFP

CAN-2026-002 - Implementation Services for Enterprise Resource Planning (ERP) Software

Opening Date: February 11, 2026 5:15 PM

Closing Date: March 24, 2026 3:00 PM

Vendor Details

Company Name:	KPMG LLP
Address:	333 Bay Street, Suite 4600 Toronto, ON M5H2S5
Contact:	KPMG Proposals
Email:	tapinbox@kpmg.ca
Phone:	416-777-3911
HST#:	

Submission Details

Created On:	Tuesday February 24, 2026 12:59:27
Submitted On:	Tuesday March 24, 2026 13:19:25
Submitted By:	KPMG Proposals
Email:	tapinbox@kpmg.ca
Transaction #:	6a8abe07-e550-4a15-960e-843e88eb9a7b

Proponents must review and complete the requirement lists and questionnaires as part of their submission.

Corporate Profile

Line Item	Question	Response *
1	Proponent Legal Name (and applicable d/b/a if any):	KPMG LLP
2	Proponent Address:	333 Bay Street, Suite 4600, Bay Adelaide Centre, Toronto, Ontario, M5H 2S5
3	Proponent website address:	www.kpmg.ca
4	Proponent's Authorized Representative (name, title, email address) (The representative must have authority to sign on behalf of the Proponent):	Name: Dmytro Nechytailo Title: Authorized Signatory Email id: dnechytailo@kpmg.ca
5	Proponent's primary contact for this proposal (name title address email address):	Name: Dmytro Nechytailo Title: Partner Email id: dnechytailo@kpmg.ca
6	Proponent's other contacts for this proposal if any (name title address email address & phone):	N/A
7	Proponent GST registration number:	GST number 122363153 RT0001
8	If the Proponent is representing a consortium, each member of that consortium.	N/A
9	Provide a brief history of your company, including your company's core values, business philosophy, and longevity in the industry relating to this solicitation.	In Canada, KPMG's roots date back to 1869 – we have, therefore, been in business for over 156 years. Since that date, more than 115 predecessor firms in communities across the country have joined forces to create what is now KPMG LLP (Canada). Each of these firms has played a vital role in the growth of KPMG in Canada. This culminated, when Peat, Marwick, Thorne and Peat Marwick Stevenson & Kellogg merged to become KPMG LLP in Canada in 1994 making it one of the leading Big 4 firms in the country. KPMG is a limited liability partnership, and the Canadian member firm of KPMG International - a global network of professional firms providing Audit, Tax and Advisory services. KPMG currently operates in 138 countries and have 276,030 people working in member firms around the world. As a Canadian owned and operated firm with 42 offices across Canada, KPMG employs more than 10,000 people, including over 1000 partners, and is home to a diverse workforce that inspires confidence, empowers change and drives innovation. KPMG in Canada offers a wide range of professional services across Canadian industries. Our KPMG thought leaders deliver the latest insights, trends and resources to help support and inform your organization's financial, operational and strategic objectives. Guided by our core values of Integrity, Excellence, Courage, Together and For Better, we are committed to making a difference for our clients, our communities and our people. This commitment has KPMG consistently ranked one of Canada's top employers and one of the best places to work in the country. We believe in the power of diversity and are passionate about creating a more inclusive and sustainable future for all. We have proudly aligned our impact strategy to the UN Sustainable Development Goals. KPMG has been a Canadian leader in delivering professional services for over 156 years. Our professionals bring their diverse skillsets, experiences, thinking and passion to work every day to help support organizations big and small across Canada and abroad. Our teams offer a robust range of services across Audit and Assurance, Tax, Advisory, Law and ESG. Our KPMG Private Enterprise team provides specialized services to small-to-medium sized businesses, entrepreneurs, family businesses, and not-for-profit organizations. At KPMG we are committed to delivering innovative, digitally enabled solutions and exceptional service to help our clients capitalize on opportunities, manage risks and remain ahead of their competition. We invest continuously to build upon our extensive knowledge of the industries we serve. KPMG combines our multi-disciplinary approach with deep, practical industry knowledge to help clients meet challenges and respond to opportunities. KPMG's Audit and Assurance Practice helps clients manage risk so they can focus on their core businesses. By intimately understanding each client's business, we convert information into insights, uncovering hidden opportunities to help improve client efficiency and performance. KPMG's Tax Practice is also focused on finding opportunities and leveraging them to our clients' best advantage in the form of significant tax savings. Through tailored tax-planning advice, the practice helps clients gain competitive advantage. KPMG's Advisory Services can help companies plan and move ahead—not merely react—in the face of change. Through specialized teams of experienced professionals, we provide guidance and insight on vital issues related to change in these main practice areas: Management Consulting practice can help create and enhance business processes and systems to overcome barriers to business productivity, thereby growing sustainable business value. Risk Services practice helps organizations assess and manage against their critical business risks by providing structured risk assessment frameworks to create resilience in the organization's systems and controls. Deal Advisory practice helps grow and enhance shareholder value by providing strategic advice to help organizations assess and manage the complexities of a transaction. Our teams of specialists combine a global mindset and local experience with deep sector knowledge and superior analytic tools to help you navigate the complex, fragmented process of mergers and acquisitions. Our ESG practice helps organizations in integrating ESG matters into their operations and achieving their sustainability targets. KPMG Law offers legal services in the areas of Tax Planning, Tax Litigation, Alternative Disputes and Resolutions, Indirect Tax, Estates and Trusts, Immigration Law, Corporate Commercial law (which includes Real Estate, M&A, Financial Services, Insolvency, and more), and Employment & Labor Law. KPMG Private Enterprise is focused exclusively on helping private companies find effective solutions to their operations and stay ahead of the competition. KPMG Private Enterprise advisers understand the issues and challenges private companies face, from managing growth and measuring results to tax planning and financing business. They are there to help your company succeed, providing decisive entrepreneurial leadership, a clear sense of direction and outstanding quality of service. KPMG's leadership structure consists of a Board of Directors and a Management Committee. The Board of Directors is led by a Chair and includes 18 partners drawn from across the business. The Board's role is focused on partnership matters including compensation, partner rights, admissions, and succession. The Board also has oversight responsibility with respect to the firm's strategic and business planning and quality control processes, and reviews the firm's financial statements.
10	Where is your headquarters located?	KPMG Canada has 42 offices across Canada. Our headquarters are located at: 333 Bay Street, Suite 4600, Bay Adelaide Centre, Toronto, Ontario, M5H 2S5 Contact information at the KPMG Canada National Office is as follows: Phone: (416) 777-8500, Fax: (416) 777-8818 KPMG Canada has no international head office. However, KPMG's Global firm, KPMG International, has their corporate headquarters located at 15 Canada Square, London, E14 5GL.
11	Do you have 250 or more full time employees in Canada?	Yes
12	Provide all "Suspension or Debarment" from public entities in Canada your organisation is currently subject to.	KPMG is not currently subject to any suspension, debarment, or other determination of ineligibility imposed by any public entity in Canada.

Bill S-211 declaration

Please note that the response to the information is being collected as data collation for internal use only. The response provided has no bearing on the ability for Proponents to respond to this RFP.

Line Item	Bill S-211	Answer *
1	Does the Proponent identify itself as an "entity" as defined under the Fighting Against Forced Labour and Child Labour in Supply Chains Act or "Bill S211"? As per Bill S211 an "Entity" means a corporation or a trust, partnership or other unincorporated organization that (a) is listed on a stock exchange in Canada; (b) has a place of business in Canada, does business in Canada or has assets in Canada and that, based on its consolidated financial statements, meets at least two of the following conditions for at least one of its two most recent financial years: (i) it has at least $20 million in assets, (ii) it has generated at least $40 million in revenue, and (iii) it employs an average of at least 250 employees; or (c) is prescribed by regulations. Please note that the response to the information is being collected as data collation for internal use only. The response provided either yes or no has no bearing on the ability for Proponents to respond to this RFP.	◉ Yes ○ No

Building Ontario Businesses Initiative Act (BOBIA) - declaration

Please note that the response to the information is being collected as data collation for internal use only. The response provided has no bearing on the ability for Proponents to respond to this RFP.

Line Item	Building Ontario Businesses Initiative Act	Answer *
1	Is your business a supplier, manufacturer or distributor of any business structure that conducts its activities on a permanent basis in Ontario, as defined by the Building Ontario Businesses Initiative Act? Does your business either, i. has its headquarters or main office in Ontario, or ii. has at least 250 full-time employees in Ontario at the time of the applicable procurement process.	◉ Yes ○ No

Geographical coverage for offering

Identify the geographical locations included in your offering. While Canoe members are nation wide, **Proponents can select to serve a defined geographical area based on their capabilities.**

Line Item	Province/Territory	Do you currently offer services in this area? *	List locations serving this province
1	Alberta	◉ Yes ○ No	
2	British-Columbia	◉ Yes ○ No	
3	New-Brunswick	◉ Yes ○ No	
4	Manitoba	◉ Yes ○ No	
5	Newfoundland and Labrador	◉ Yes ○ No	
6	Northwest Territories	◉ Yes ○ No	
7	Nova-Scotia	◉ Yes ○ No	
8	Nunavut	◉ Yes ○ No	
9	Ontario	◉ Yes ○ No	
10	Prince Edward Island	◉ Yes ○ No	
11	Québec	◉ Yes ○ No	
12	Saskatchewan	◉ Yes ○ No	
13	Yukon	◉ Yes ○ No	

Experience - Public Sector

Describe your experience with implementing ERP softwares with public sector clients

Question	Reponse *
Describe your experience providing ERP implementation services for public sector entities.	KPMG has extensive, demonstrated experience delivering ERP implementation services for public sector entities across Canada, including municipalities, regional governments, provincial organizations, agencies, and public sector authorities. This experience includes full end to end ERP implementations as well as complex modernization initiatives where legacy systems were replaced under tight operational, governance, and risk constraints. At the municipal level, KPMG has supported large and mid sized cities with ERP modernization initiatives spanning finance, human resources, payroll, procurement, supply chain, and reporting. For example, KPMG has delivered ERP roadmap development and implementation support for the Alberta, Municipality, Large population, focused on modernizing core administrative functions and enabling improved financial management, workforce administration, and service transparency. This work involved aligning ERP capabilities to municipal operating models, council governance, and long term financial planning objectives, while preparing the organization for phased ERP implementation and legacy system replacement. KPMG has also implemented ERP solutions for municipalities across Canada using modern cloud based platforms, including Microsoft Dynamics 365, supporting cities and regions with finance, customer service, case management, and operational workflows. These implementations required careful integration with existing municipal systems, strong data migration and reporting controls, and delivery approaches aligned to public accountability and audit requirements. At the provincial level, KPMG has delivered ERP implementation services for the Alberta, Provincial Government, Large employee size, including the modernization of the Alberta, Provincial Government Agency, Medium employee size's legacy trust administration and accounting system. This engagement involved implementing a Microsoft Dynamics based solution to replace a legacy platform that managed sensitive financial and client data for vulnerable Albertans. KPMG's role included solution design, configuration, data migration, security and privacy alignment, integration, testing, and go live support, delivered within a highly regulated environment with strict information management and security requirements. KPMG has also supported public sector ERP implementations where complex governance, vendor coordination, and risk management were central challenges. For example, KPMG acted as a strategic advisor and project management partner for the Alberta, Municipality, Medium population during its ERP implementation, supporting the transition from a legacy financial system to a modern ERP platform. KPMG provided project governance, risk management, quality assurance, change management, and go live readiness support to ensure the implementation remained stable and aligned with operational needs. In addition, KPMG has delivered ERP and HCM implementations for large Canadian municipalities such as the Quebec, Municipality, Large population, supporting enterprise wide transformation of human resources and payroll functions. These initiatives involved detailed current state assessments, future state design, ERP configuration, data migration, and organizational change management across complex, unionized workforces and decentralized operating environments. Across these engagements, KPMG has consistently supported public sector clients facing legacy system end of life, compressed timelines, fiscal year constraints, payroll continuity risks, and heightened audit scrutiny. Our ERP implementation experience includes managing complex data migrations, integrating ERP platforms with external systems, and providing structured stabilization and post go live support to ensure operational continuity. Importantly, KPMG's experience extends beyond technical implementation. In each of these public sector ERP engagements, KPMG supported governance design, executive decision making, change management, training, and transition to steady state operations. This ensured that ERP implementations delivered sustainable value and were adopted effectively by public sector users. Collectively, these engagements demonstrate KPMG's proven ability to deliver ERP implementation services for public sector entities of varying size and complexity. Our experience reflects not only technical delivery capability, but also a deep understanding of public sector governance, accountability, and risk, enabling successful ERP outcomes in complex and highly regulated environments.

Describe the services you offer public sector clients for ERP implementation.	KPMG offers a comprehensive suite of ERP implementation services designed specifically for the needs of public sector organizations, including municipalities, regional governments, provincial entities, agencies, boards, and commissions. These services are structured to support clients across the full ERP lifecycle, while remaining flexible to accommodate varying levels of organizational maturity, internal capacity, and delivery risk. ERP Planning and Mobilization Services: KPMG supports public sector clients at the outset of ERP initiatives by establishing clear governance, delivery structures, and implementation roadmaps. These services include implementation planning, project mobilization, governance design, and alignment of delivery approaches to public sector decision making and accountability requirements. This phase ensures that roles, responsibilities, scope boundaries, and success criteria are clearly defined before system build activities begin. Solution Design and Configuration: KPMG provides ERP solution design and configuration services that translate approved business requirements into a future state system aligned with public sector operating models. This includes functional design and configuration across finance, budgeting, human resources, payroll, procurement, supply chain, and reporting. Design activities leverage public sector leading practices while remaining adaptable to client specific policies, collective agreements, regulatory requirements, and reporting obligations. Technical Architecture, Integration, and Environment Setup: KPMG designs and implements ERP technical architectures that support secure, scalable, and well governed public sector environments. Services include environment setup, integration design and development, reporting architecture, and coordination with cloud platforms and related technologies. These services are delivered with attention to data residency, security, and interoperability requirements commonly found in public sector organizations. Data Governance and Data Migration: KPMG provides end to end data services as part of ERP implementation, recognizing the importance of data integrity and auditability in public sector environments. Services include data assessment, data governance support, data cleansing, migration planning, trial conversions, reconciliation, and validation. These activities are designed to support accurate financial reporting, payroll continuity, and statutory compliance at go live. Project Management and PMO Services: KPMG delivers project management and program management office services aligned to its established public sector delivery frameworks. These services include schedule management, risk and issue management, dependency coordination, quality assurance, and reporting to executive and steering committees. PMO services are scaled to match project complexity and ensure transparency and control throughout the implementation. Organizational Change Management and Training: KPMG supports the people side of ERP implementation through organizational change management services tailored to public sector environments. This includes stakeholder engagement, change impact analysis, communications planning, training design, and readiness assessments. Training services support role based learning and knowledge transfer to help ensure sustainable adoption and reduced reliance on external support post go live. Testing and Deployment Support: KPMG provides structured testing and deployment services to support a controlled transition to the new ERP system. This includes system testing, integration testing, user acceptance testing support, defect management, and deployment planning. Cutover and go live activities are coordinated around public sector operational cycles such as payroll, financial close, and reporting deadlines. Post Go Live Stabilization and Transition: Following deployment, KPMG offers stabilization and hypercare support to address early life issues, support users, and fine tune system performance. These services include issue triage, resolution support, and coordination with ERP software vendors as needed. KPMG also supports transition to steady state operations, including knowledge transfer and optional ongoing application support. Scalable and Flexible Delivery Models: Across all services, KPMG offers flexible delivery models that allow public sector clients to engage KPMG for full end to end ERP implementation or for targeted phases such as data migration, project management, or change management. This flexibility enables clients to align services with budget, capacity, and risk considerations while maintaining consistent delivery standards. Through this integrated service offering, KPMG supports public sector organizations not only in implementing ERP technology, but in achieving sustainable operational improvement, strengthened governance, and long term value from their ERP investments.
Detail your experience managing multi-jurisdictional or group purchasing contracts.	KPMG has extensive experience managing multi-jurisdictional and group purchasing contracts for public sector organizations, including municipalities, regional authorities, provincial entities, and broader public sector networks. This experience reflects an understanding that group purchasing arrangements require more than technical delivery capability; they demand disciplined governance, contractual consistency, and flexibility to support diverse member needs within a common commercial framework. KPMG regularly operates within procurement models where a central authority establishes master agreements that are accessed voluntarily by multiple member organizations. In these environments, KPMG structures its delivery and commercial practices to align with the overarching program agreement while allowing individual members to define their own scope, timelines, and engagement structures. This approach supports autonomy at the member level while maintaining consistency with pricing, contractual terms, reporting obligations, and performance expectations defined at the group level. From a governance perspective, KPMG is experienced in working with central procurement bodies, cooperative purchasing organizations, and municipal associations that oversee multi-party arrangements. The firm supports clear delineation between program-level governance and member-specific project governance, allowing issues related to contract compliance, reporting, or program requirements to be managed centrally while delivery decisions remain with the participating member. This separation helps reduce administrative friction and avoids duplicative oversight across jurisdictions. Operationally, KPMG manages multi-jurisdictional delivery by applying standardized methodologies, documentation, and quality controls that can be reused across members, while still tailoring execution to local legislative, operational, and organizational contexts. This balance allows efficiencies to be realized through shared approaches and assets, without forcing uniform solutions on organizations with different maturity levels, risk profiles, or service models. KPMG also has experience meeting the reporting and transparency requirements that accompany group purchasing contracts. This includes providing consolidated reporting on engagement activity, compliance with pricing and discount structures, and performance metrics as required by the contracting authority. These reporting processes are designed to be lightweight and repeatable, minimizing burden on both the central authority and participating members. Importantly, KPMG understands that group purchasing arrangements often support a wide range of organization sizes and capabilities across multiple jurisdictions. The firm’s experience delivering ERP advisory and implementation services across rural municipalities, regional governments, large cities, and broader public sector entities allows it to scale services appropriately while operating under a single contractual umbrella. This flexibility supports equitable access to services while preserving value for members with differing levels of complexity. Through this experience, KPMG has demonstrated its ability to operate effectively within multi-jurisdictional and group purchasing environments by aligning to centralized procurement requirements, supporting decentralized delivery, and maintaining consistent governance, quality, and accountability across all participating members.

List the current third party certifications your firm has related to ERP implementations.	KPMG holds a range of formal thirdparty certifications, partner designations, and recognitions that support its delivery of ERP implementation services for public sector organizations. These certifications reflect KPMG's verified capability to implement, configure, and support leading ERP platforms used across municipalities, provincial governments, and broader public sector entities. Microsoft ERP and Cloud Certifications: KPMG holds formal Microsoft partner certifications related to ERP and cloud implementations, including certifications aligned to Microsoft Dynamics 365, Power Platform, and Azure. These certifications authorize KPMG to design, implement, and support Dynamics based ERP and business applications in public sector environments and reflect Microsoft validated delivery capability. KPMG has also received Microsoft recognition for application innovation in government, further validating its ERP and platform delivery credentials for public sector clients. SAP ERP Partner Certifications: KPMG maintains formal SAP partner certifications related to ERP implementation services, including SAP S/4HANA and related finance, supply chain, and human capital management solutions. These certifications support KPMG's ability to deliver SAP ERP implementations using leading practices and structured methodologies for public sector organizations. KPMG's SAP certifications are supported by its use of established ERP transformation frameworks and accelerators referenced in public sector proposals. Oracle ERP Partner Certifications: KPMG holds Oracle partner certifications related to the implementation of Oracle ERP platforms, including Oracle Fusion Cloud applications. These certifications validate KPMG's capability to deliver Oracle ERP implementations, configuration, integration, and migration services for large and complex organizations, including public sector entities. Workday Partner Certifications: KPMG maintains Workday partner certifications supporting the implementation of Workday financial management and human capital management solutions. These certifications enable KPMG to deliver Workday ERP and HCM implementations using vendor approved methods and tools, including for public sector and government organizations. Independent Industry Recognition Related to ERP Services: In addition to platform-specific certifications, KPMG has been independently recognized by third-party industry analysts for ERP and cloud professional services. These recognitions validate KPMG's ERP implementation capability, service quality, and delivery maturity across public sector and regulated environments. Collectively, these third-party certifications and partner designations demonstrate that KPMG's ERP implementation services are supported by independently validated credentials from leading ERP software providers and industry bodies. These certifications provide Canoe Members with assurance that ERP implementations are delivered using vendor approved practices, qualified resources, and established quality standards appropriate for public sector environments.
List anything else you would like to include as part of your offering.	In addition to core ERP implementation services, KPMG offers a number of complementary capabilities that enhance value, reduce risk, and support long-term success for public sector organizations. These offerings are optional and can be tailored to each member's priorities, capacity, and maturity. ERP Roadmap and Phased Modernization Planning: KPMG can support members with ERP roadmap development that looks beyond initial implementation. This includes identifying phased rollouts, deferred modules, future integrations, and incremental improvements aligned with funding cycles and organizational readiness. This approach allows members to modernize in a controlled and sustainable manner rather than as a single, high-risk transformation. Public Sector–Specific Leading Practices and Accelerators: KPMG brings public sector–focused process models, governance templates, and implementation accelerators that reduce customization while preserving flexibility. These assets reflect common municipal and government requirements across finance, HR, payroll, and procurement and help members move more quickly to stable, supportable solutions. Independent Quality Assurance and Health Checks: For members seeking added assurance, KPMG can provide independent quality reviews, project health checks, and go live readiness assessments either during implementation or at key milestones. These services help identify risks early, support executive decision-making, and improve confidence in delivery outcomes. ERP Optimization and Continuous Improvement Services: Following go live, KPMG can support optimization initiatives focused on improving system usage, automating manual processes, enhancing reporting, and increasing return on investment. These services help organizations move from "system live" to "system optimized" as operational maturity increases. Post Go Live Application Support and Managed Services: KPMG offers flexible post implementation support models, including application support, minor enhancements, release management, and coordination with ERP OEMs. These services are particularly valuable for smaller members or organizations with limited internal ERP support capacity. Change Enablement and Capability Transfer: Beyond formal training, KPMG can support superuser development, internal capability building, and knowledge transfer to reduce long-term reliance on external resources. This includes coaching internal teams, developing reusable materials, and supporting internal centers of excellence. Data, Reporting, and Analytics Enablement: KPMG can extend ERP implementations with enhanced reporting, dashboards, and analytics aligned to public sector performance, transparency, and accountability needs. These services help organizations better leverage ERP data for decision-making and public reporting. Future Ready Architecture and Integration Advisory: As part of or following ERP implementation, KPMG can support members in planning future integrations, digital services, and automation initiatives that build on the ERP platform. This ensures the ERP solution remains a strong foundation as technology and service delivery models evolve. Early Advisory and Readiness Support: KPMG can engage with members at very early stages to support readiness assessments, business case development, and funding planning. This allows organizations to enter ERP initiatives with realistic expectations, clear priorities, and reduced delivery risk. Through these complementary offerings, KPMG provides Canoe Members with access to a broader transformation partnership rather than a single point in time implementation. These services are designed to enhance resilience, adoption, and long term value while respecting public sector constraints and governance requirements.

ERP Software Public Sector Implementation Expertise

Provide the requested information from implementations done with your public sector clients only.

Canoe will not evaluate the quantity of software solutions a Vendor can implement. Canoe will evaluate the Vendor's demonstrated experience with completed implementations.

Name of ERP Software *	Partner status? *	Total number of completed implementations *	Total number of implementations in progress *	Name and size of public sector client for the latest 3 completed implementations *

Workday	◉ Yes ○ No	70+ implementations worldwide	At the time of response there are eight in progress implementations in Canada	1) Alberta, Public Sector Utility / Agency, Medium employee size: Implemented HCM, Payroll and Financials by levering the Workday ERP system Being a full suite HCM, Finance and Payroll implementation, the following functional areas were included in the project scope: HCM: • Core HCM (included contingent workers and onboarding) (Phase 1) • Core Compensation (Phase 1) • Talent, Performance and Succession (Phase 1) • Absence (Phase 1) • Time Tracking (Phase 1) • Advanced Compensation (Phase 2) • Learning (Phase 2) • Recruiting (Phase 2) Financial: • Core Financials (Phase 1) • Business Assets (Phase 1) • Projects (Phase 1) • Customer Accounts (Phase 1) • Customer Contracts (Phase 1) • Procurement (Phase 1) • Banking & Settlement (Phase 1) • Expenses (Phase 1) • Supplier Accounts (Phase 1) • Workforce and Financial Planning (Phase 2) Payroll: • Canadian Payroll (Phase 2) Duration: 19 month implementation 2) Ontario, Provincial Agency, Large employee size Workday Financials and HCM Implementation The KPMG team was selected to lead the implementation of a best of breed program consisting of an integrated solution across Workday Financials and HCM Implementations. The scope for this engagement included: Core HCM, Core Compensation, Absence, Benefits, Payroll, Core Financials, Banking & Settlement, Business Assets, Customer Accounts, Supplier Accounts, Procurement, Projects Duration: 41 month implementation 3) Ontario, Provincial Agency, Medium employee size KPMG team was selected to lead the implementation of Workday HCM, with the goal of digitizing, harmonizing, and standardizing their HR operations. The scope of the engagement included: Core HCM, Compensation, Absence, Scheduling, Learning, Recruiting, Talent Pipeline, Career Hub, HCM Employee Self Service, HCM Manager Self Service Duration: 33 months (note: there was a significant pause in the project timeline)
Oracle	◉ Yes ○ No	1000+ projects worldwide	At the time of response there are six in progress implementations in Canada	1) Nova Scotia, Public Authority, Medium employee size's (Nova Scotia, Public Authority, Medium employee size) enterprise transformation by implementing Oracle Fusion Cloud ERP, HCM, and EPM using our Powered Enterprise methodology. We supported business case creation, RPF development, vendor selection, and full cycle implementation of Finance, HR, and EPM modules. Activities included process design, configuration, data conversion, security setup, testing, training, and change management. KPMG delivered program management, governance, and benefits realization while integrating Oracle Cloud with Nova Scotia, Public Authority, Medium employee size's aeronautical billing, banking, and recruitment systems. The two-phase implementation modernized Finance, Procurement, and HR processes and established a scalable, cloud-based operating model aligned with industry-leading best practices for efficiency and future growth. Duration: 2 years 2) Ontario, Healthcare Organization, Large employee size (the Client), Canada's largest mental health teaching hospital with over 5,000 employees, engaged KPMG to lead a major enterprise transformation to modernize Finance, Procurement, Human Resources, and Supply Chain. the Client sought to replace its legacy Lawson system and Excel-based processes with Oracle Fusion Cloud ERP, HCM, SCM, and EPM. Leveraging KPMG's Powered Enterprise methodology, the program is creating an integrated, scalable, and transparent platform that aligns people, process, and technology to enable smarter decisions, automation, and collaboration across the organization. the Client has completed the Vision and Validate phase for their design and are currently in their System Integration Testing phase. Duration: 18 months 3) Quebec, Municipality, Large population: Oracle Cloud HCM - The Quebec, Municipality, Large population undertook a large-scale Oracle Cloud HCM and Payroll transformation to modernize HR and payroll services for tens of thousands of employees across hundreds of locations. The initiative replaced legacy systems, standardized HR processes, and introduced automation and self-service capabilities to improve efficiency, accuracy, and employee experience. Duration: 3 years
SAP	◉ Yes ○ No	270+ projects worldwide	At the time of response there are seven in progress implementations in Canada	1) Quebec, Public Transit Authority, Large employee size (Quebec, Public Transit Authority, Large employee size) – Multi-Year Core ERP Transformation Quebec, Public Transit Authority, Large employee size executed a structured modernization program that replaced legacy systems, standardized supply chain and manufacturing processes, strengthened governance, scaled automation, and modernized warehouse operations through the deployment of SAP ECC and SAP EWM. The program advanced through four logical phases: • Core ERP modernization • Analytics, stabilization & early automation • Governance modernization & enterprise automation • Warehouse modernization & SAP EWM deployment Throughout this period, KPMG, operating under a fixed price mandate and supported by strategic subcontractors, served as the prime integrator and transformation partner, delivering a coordinated, end to end SAP enabled operating model within a C$45M+ program. Duration: 4 years 2) Non-Canadian, Federal Government Agency, Large employee size - KPMG supported the client in defining the overall strategies and plans for entering the delivery phase of the ERP Program. This leveraged KPMG best practices and expertise across Program Management, Technology (including SAP), Business Architecture, Procurement, Data Management and BI and Analytics amongst others.. Duration: > 6 months Location: US 3) Non-Canadian, Federal Government Agency, Large employee size - KPMG was engaged to modernize its data analytics and reporting capabilities from contractor-owned tools with manual processes to automated solutions using SAP HANA, SAS VIYA and Qlik Sense. .. Duration: > 6 months Location: US

Microsoft Dynamics	◉ Yes ○ No	177 projects	At the time of response there are three in progress implementations in Canada	1) ERP and HRIS Education Client KPMG was engaged by the client to undertake a major digital transformation to modernize and integrate its finance, people and culture (HR), supply chain, and IT functions. The client selected KPMG due to the nature of KPMG's relationships with them, KPMG's capabilities in Finance &Operations, Higher Education and ability to bring a comprehensive pre-built solution to the table. Duration: 18 months 2) Ontario, Not-for-profit / Professional Association, Medium employee size KPMG worked with Ontario, Not-for-profit / Professional Association, Medium employee size to implement the Finance component of the Services Modernization Program. This includes the deployment and configuration of Microsoft Dynamics Finance and Dynamics Supply Chain Management capability to replace the existing Great Plains solution, Anaplan for budgeting, PowerBI for finance reports, plus a number of third-party integration points. The engagement includes Business process mapping, Data migration, Organizational Change Management planning for execution by Ontario, Not-for-profit / Professional Association, Medium employee size, training, support for acceptance testing, and project governance. A separate engagement will establish an ongoing Managed Services relationship. Duraiton:18 months 3) Australia, Public Agency, Medium employee size KPMG was engaged by the client to undertake a major digital transformation to bring a "New Way of Working" to the client by transforming, standardizing and digitizing processes by reducing redundant work, enabling appropriate internal controls for each process. By using the Powered Enterprise Methodology KPMG successfully implemented Microsoft Dynamics 365 Finance and operations. Duration: 11 months

Program offering

Describe your program offering.

Question	Reponse *
Provide a high level profile of your company.	KPMG LLP is a Canadian professional services firm and a member of the global KPMG network of independent firms, providing audit, tax, and advisory services to public and private sector organizations. Founded in 1869, KPMG has more than 155 years of experience supporting complex organizations through periods of change, modernization, and growth. In Canada, KPMG operates as a proudly Canadian owned and operated firm with offices across the country and a strong national delivery model supported by global reach. This structure allows KPMG to combine deep local knowledge with access to international experience, research, and leading practices. KPMG has a longstanding and dedicated public sector practice in Canada, with more than 250 professionals focused exclusively on serving federal, provincial, territorial, municipal, Indigenous, academic, healthcare, and not for profit organizations. The firm has extensive experience working with municipalities and municipal associations across Canada, including rural and regional governments, large urban centers, counties, and special purpose authorities. This experience spans finance, human resources, supply chain and procurement, asset management, information technology, governance, and organizational transformation. KPMG's professionals actively participate in public sector and municipal associations, contributing to policy dialogue, financial management standards, and technology modernization initiatives across the country. In the area of enterprise resource planning, KPMG brings end to end capability across the full ERP lifecycle. This includes ERP strategy and readiness assessments, requirements definition, vendor selection support, roadmap development, implementation services, organizational change management, data governance and migration, and post deployment support. KPMG works across a broad range of ERP platforms, including Microsoft Dynamics, Oracle, SAP, Workday, and other leading and emerging solutions. The firm maintains a technology agnostic advisory approach while also holding deep alliances with major software providers, allowing it to tailor recommendations and delivery models to the specific operational, financial, and governance needs of each public sector client. KPMG has a significant presence in Alberta, with offices in Edmonton, Calgary, and Lethbridge, and more than a century of service to Alberta based organizations. This local footprint is complemented by national and global delivery resources, allowing KPMG to scale teams appropriately for clients of different sizes and levels of complexity. The firm has supported numerous Alberta municipalities and public sector entities with ERP related initiatives, including requirements analysis, roadmap development, system selection, and implementation advisory. Through this work, KPMG has developed a strong understanding of the legislative, financial, and operational environment in which Alberta municipalities operate. KPMG's approach to ERP and digital transformation emphasizes integration across people, process, data, technology, and governance. The firm brings proven methodologies, accelerators, and quality management practices that support disciplined delivery while remaining adaptable to client specific circumstances. This approach reflects KPMG's broader commitment to helping public sector organizations modernize responsibly, improve operational effectiveness, strengthen financial stewardship, and support sustainable service delivery for the communities they serve. Through its combination of experience, scale, public sector focus, and ERP expertise, KPMG is well positioned to support organizations such as members of the Rural Municipalities Association of Alberta as they undertake ERP modernization initiatives that respond to evolving service expectations, regulatory requirements, and technology landscapes.
Describe the ERP implementation services you offer public sector clients.	KPMG provides a comprehensive suite of ERP implementation services designed specifically for public sector organizations, including municipalities, regional governments, Indigenous organizations, academic institutions, healthcare entities, and broader public agencies. These services are structured to support clients across the full lifecycle of ERP transformation, recognizing that public sector ERP initiatives require careful alignment with governance structures, legislative obligations, funding models, and service delivery mandates. ERP implementation engagements typically begin with mobilization and planning activities that establish clear governance, roles, and decision-making structures. KPMG works with public sector sponsors and project teams to define implementation objectives, confirm scope, and align delivery approaches with organizational capacity and priorities. This early phase focuses on setting a strong foundation through integrated project management, risk management, and quality management practices that are appropriate for public sector accountability and transparency requirements. KPMG delivers ERP solution design and configuration services that translate approved business requirements into a future state system that reflects public sector operating realities. This includes functional configuration across finance, human resources, payroll, procurement, supply chain, budgeting, reporting, and related administrative domains. Solution design activities are informed by public sector leading practices and municipal specific process models, while remaining adaptable to client specific policies, collective agreements, regulatory obligations, and reporting standards. Where appropriate, KPMG supports the design of integrated environments that combine core ERP platforms with complementary systems using secure and well governed integration architectures. Data governance and data migration services form a critical component of KPMG's ERP implementation offering. Public sector clients are supported in defining data ownership, data quality standards, retention requirements, and security classifications prior to migration. KPMG then assists with data profiling, cleansing, validation, and migration activities that support accurate financial reporting, workforce administration, and operational continuity at go live. These activities are planned and executed with careful attention to auditability, historical data requirements, and statutory reporting needs. KPMG also provides organizational change management services that address the people and adoption aspects of ERP implementation. These services support public sector organizations in preparing leaders, managers, and staff for new ways of working introduced by modern ERP platforms. Change management activities typically include stakeholder engagement, change impact analysis, communications support, role-based training design, and readiness assessments. The level and form of these services are tailored to each organization's internal capacity and governance context, recognizing that some public sector clients may require full delivery support while others may seek advisory guidance and enablement. Testing and deployment services are delivered to support a controlled transition from legacy systems to the new ERP environment. KPMG supports system testing, integration testing, and user acceptance testing aligned with public sector risk tolerance and operational cycles. Deployment planning includes cutover activities, contingency planning, and coordination with payroll cycles, financial close periods, and service delivery calendars. Following go live, KPMG provides stabilization and post deployment support services to address issues, support users, and transition responsibilities to internal teams or managed service arrangements as required. Across all ERP implementation services, KPMG emphasizes scalability and flexibility to accommodate the wide range of public sector organizations and ERP models contemplated by Canoe members. Services can be delivered for integrated ERP suites, best of breed configurations, or more focused specialty systems, depending on client needs and maturity. KPMG's implementation services are designed to support public sector clients not only in deploying technology, but in strengthening financial stewardship, operational efficiency, and long-term sustainability through well governed and well adopted ERP solutions.

Describe your standard implementation methodology, include typical key milestones.	KPMG applies a structured and proven ERP implementation methodology that is designed to support the complexity, governance requirements, and accountability expectations of public sector organizations. The methodology is flexible enough to support integrated ERP suites, best of breed configurations, or specialty systems, while maintaining a consistent delivery backbone that promotes clarity, control, and stakeholder alignment throughout the implementation lifecycle. The methodology begins with an initiation and mobilization phase that establishes the foundation for delivery. During this phase, KPMG works with the client to confirm objectives, scope boundaries, success criteria, and decision-making structures. Governance forums, escalation paths, and reporting cadences are established to align with public sector oversight requirements. Typical milestones in this phase include approval of the project charter, confirmation of the delivery approach, establishment of the integrated project plan, and formal project kickoff with executive sponsors and core team members. Following mobilization, the methodology moves into a vision and design phase focused on translating business requirements into a clear future state. KPMG facilitates structured design activities that validate functional priorities, confirm standard versus configured capabilities, and align business processes with the selected ERP platform. This phase emphasizes fit and alignment rather than customization, recognizing the long-term sustainability needs of public sector organizations. Key milestones typically include validation of future state process designs, confirmation of solution architecture, completion of fit gap assessments, and formal sign off on detailed design documentation. The build and configure phase focuses on configuring the ERP solution based on the approved design. System configuration, integrations, security roles, and reporting structures are developed iteratively, allowing stakeholders to review and validate progress as the solution takes shape. Data migration activities are initiated in parallel, including data profiling, cleansing, and trial conversions. Milestones in this phase commonly include completion of system configuration cycles, successful execution of initial data migrations, readiness of integrated environments, and approval to proceed to formal testing. Testing and validation form the next phase of the methodology and are critical to public sector risk management. KPMG supports multiple levels of testing, including system testing, integration testing, and user acceptance testing. Testing activities are planned around public sector operational calendars, financial close cycles, and payroll dependencies. Typical milestones include completion of end-to-end business process testing, resolution of critical defects, formal user acceptance sign off, and confirmation of readiness for deployment. The deployment and go live phase centers on executing a controlled transition from legacy systems to the new ERP environment. Cutover activities, final data migrations, user readiness checks, and operational handoffs are coordinated closely with client teams. This phase culminates in the formal go live milestone, supported by heightened stabilization support to address early issues and support users as they adopt the new system. The methodology concludes with a stabilization and transition phase that supports the organization as it moves into steady state operations. Post go live support, knowledge transfer, and transition to internal support teams or managed services are completed during this phase. Key milestones include stabilization exit criteria being met, handover of system documentation and support processes, and formal project closure. Across all phases, KPMG's methodology integrates project management, quality management, risk management, and organizational change activities to support disciplined delivery while remaining responsive to client needs. This structured yet adaptable approach allows public sector organizations to progress through ERP implementation with clear milestones, informed decision making, and sustained focus on long term value realization.
Explain how you adapt your methodology for different member size and complexity of projects.	KPMG adapts its ERP implementation methodology to reflect the size, complexity, and delivery context of each public sector member, recognizing that a small rural municipality, a regional authority, and a large urban organization face very different operational realities, governance structures, and capacity constraints. While the core phases of the methodology remain consistent, the depth, pace, resourcing model, and governance rigor are deliberately adjusted so that the approach remains proportionate and practical for each client. For smaller members or organizations with limited internal capacity, KPMG applies a more streamlined version of the methodology that emphasizes simplicity, clarity, and accelerated decision making. Governance structures are kept focused, with fewer forums and clearly defined escalation paths to reduce administrative burden. Design and configuration activities are tightly scoped around core functional needs, with a strong emphasis on standard system capabilities rather than extensive configuration. Documentation is concise and purpose driven, supporting operational continuity without overwhelming internal teams. In these environments, KPMG often takes on a more hands-on delivery role, providing additional project management, functional leadership, and change support to compensate for limited internal resources while maintaining momentum and cost control. For mid sized members and regional organizations, the methodology is scaled to balance structure with flexibility. Governance models typically include formal steering and working groups, while remaining efficient enough to support timely decisions. Design and build activities allow for a greater degree of functional differentiation across departments, reflecting more complex service portfolios and reporting needs. Data migration, testing, and training activities are sequenced to align with operational cycles such as payroll and financial close, reducing risk while maintaining delivery progress. The methodology supports phased deployments where appropriate, allowing organizations to realize value incrementally while managing change in manageable stages. For larger and more complex public sector members, including cities and multi entity organizations, KPMG applies the full depth of its methodology with enhanced governance, risk management, and coordination mechanisms. Program level governance structures are established to manage multiple workstreams, integrations, and dependencies across business units. Design activities place greater emphasis on enterprise-wide process alignment, data governance, and integration architecture to support scale, resilience, and long-term sustainability. Testing and deployment phases are extended and more formalized, reflecting higher transaction volumes, broader user populations, and increased operational risk. Organizational change activities are expanded to support large and diverse stakeholder groups, with tailored engagement and training approaches for different roles and service areas. Across all member sizes, KPMG adjusts team composition and delivery cadence to match organizational maturity and decision-making speed. Smaller projects may rely on compact, senior led teams with rapid feedback cycles, while larger programs deploy blended teams that combine senior oversight with specialized functional and technical resources. Milestones remain consistent in intent across projects, but their sequencing and level of formality are adapted to fit the complexity of the environment. This scalable approach allows KPMG to apply a single, proven methodology while delivering ERP implementations that are appropriately sized, governed, and paced for each member. By adapting structure without compromising discipline, KPMG supports public sector organizations in achieving successful ERP outcomes that align with their capacity, risk tolerance, and long term operational goals.
Describe your approach to data migration for legacy systems.	KPMG approaches data migration for legacy systems as a disciplined, risk aware process that is tightly integrated with the overall ERP implementation lifecycle. For public sector organizations, data migration is treated not as a technical conversion exercise, but as a business-critical activity that directly affects financial integrity, service continuity, regulatory compliance, and user confidence in the new system. The approach begins with early data assessment and planning, typically initiated during the design phase of the ERP program. KPMG works with the organization to understand the legacy system landscape, including core ERP platforms, ancillary applications, spreadsheets, and shadow systems that may hold critical operational data. This assessment focuses on identifying what data exists, how it is used, where it is duplicated, and what historical depth is required to support statutory reporting, audit requirements, and operational needs after go live. Clear decisions are made early regarding data scope, such as which data will be migrated, archived, or retired, allowing the organization to avoid unnecessary complexity and cost. Strong emphasis is placed on data governance prior to migration. KPMG supports public sector clients in defining data ownership, stewardship responsibilities, data quality standards, and security classifications. This includes alignment with privacy legislation, records retention policies, and internal control requirements. Establishing governance upfront allows migration activities to be guided by agreed rules rather than ad hoc decisions, which is particularly important in environments with multiple departments and decentralized data ownership. Data preparation activities are a core element of the approach. KPMG assists with data profiling and quality analysis to identify inconsistencies, gaps, and structural issues in legacy data. Based on this analysis, data cleansing activities are undertaken to correct errors, standardize values, and resolve duplications before migration. Where data quality issues reflect underlying process challenges, these are surfaced early so they can be addressed through process changes rather than carried forward into the new system. This preparation phase is often iterative and closely aligned with solution design, allowing data structures in the new ERP to be validated against real data scenarios. Migration execution is typically performed through a series of controlled and repeatable conversion cycles rather than a single cutover event. KPMG designs and executes multiple trial migrations that allow data extraction, transformation, loading, and reconciliation processes to be tested and refined. These cycles support progressive validation by both technical teams and business users, helping to build confidence in data accuracy and completeness. Reconciliation activities are embedded into each cycle, with particular focus on financial balances, payroll data, vendor and customer records, and other high-risk datasets common in public sector environments. Testing and validation are tightly integrated with migration activities. Migrated data is validated through functional testing and user acceptance testing to confirm that transactions, reports, and controls operate correctly using converted data. This approach allows issues to be identified in realistic business scenarios rather than in isolation. For public sector clients, special attention is given to year end reporting, budget controls, payroll accuracy, and statutory disclosures, reflecting the high consequences of data errors in these areas. Final cutover planning is coordinated carefully with operational calendars such as payroll runs, financial close periods, and service delivery cycles. KPMG works with the organization to define cutover timelines, freeze periods, contingency plans, and rollback procedures that align with risk tolerance and operational priorities. Clear roles and responsibilities are established for cutover execution, validation, and sign off to support a controlled transition. Following go live, KPMG supports post migration stabilization and validation activities. This includes additional reconciliations, issue resolution, and knowledge transfer to internal teams. Lessons learned from the migration process are documented to support future enhancements and data management practices. Through this structured and governance driven approach, KPMG helps public sector organizations migrate from legacy systems to modern ERP platforms with confidence. The focus on data quality, accountability, and validation supports not only a successful go live, but also a strong foundation for reporting, decision making, and long-term system sustainability.

Describe your project management office structure and the tools you use to track progress and share updates with clients.	KPMG structures its project management office using its established Portfolio, Program and Project Management methodology, commonly referred to as the 3PM framework. This framework provides a consistent yet scalable management model that aligns delivery execution with executive oversight, benefits realization, and public sector governance expectations. It is specifically designed to support complex transformation initiatives such as ERP implementations, while remaining adaptable to the size and maturity of each member organization. Under the 3PM framework, the project management office is organized to operate at the appropriate level of control for the engagement. At the project level, a dedicated project manager leads day to day delivery activities, maintains the integrated workplan, and coordinates functional, technical, data, and change streams. At the program or portfolio level, where multiple workstreams or phased implementations are involved, KPMG establishes a centralized PMO function that provides cross stream coordination, dependency management, and consolidated reporting to senior leadership. This layered structure allows operational delivery to proceed efficiently while giving executives clear visibility into progress, risks, and decision points. The PMO is responsible for managing scope, schedule, financials, risks, issues, dependencies, and decisions in an integrated manner rather than as isolated control activities. Governance routines are embedded into the delivery cadence through structured status reviews, steering committee sessions, and working group forums. These routines are aligned with public sector accountability requirements and are scaled to match the complexity of the engagement, allowing smaller members to avoid unnecessary administrative overhead while supporting robust oversight for larger, multi stream programs. KPMG Velocity assets are used to accelerate delivery and standardize how progress is tracked and communicated. Velocity provides pre-configured templates, reporting structures, and management artifacts that support consistent planning, monitoring, and reporting across ERP engagements. These assets allow the PMO to establish clear baselines for scope, milestones, and deliverables early in the project, while also enabling rapid onboarding of client team members into the project management approach. To track progress, KPMG uses structured, integrated schedules that reflect key milestones, dependencies, and decision gates across all workstreams. These schedules are maintained using enterprise grade project planning tools that support critical path analysis, milestone tracking, and scenario planning. Workstream level activity is aligned back to the master plan so that impacts to timelines, costs, or scope are visible early and addressed proactively through governance forums. Issue, risk, and dependency management are supported through centralized registers that are reviewed regularly as part of the PMO operating rhythm. Risks and issues are assessed not only for delivery impact, but also for operational, financial, and stakeholder implications that are particularly relevant in public sector environments. Mitigation actions, owners, and escalation paths are clearly defined so that accountability is maintained across both KPMG and client teams. Client communication and transparency are core principles of the 3PM and Velocity approach. Status updates are shared on a regular cadence using standardized reporting formats that focus on milestone achievement, upcoming activities, key risks, budget position, and decisions required. Reporting is tailored by audience, with executive level summaries highlighting trends and forward-looking risks, and delivery level reports providing sufficient detail to support coordinated execution. Project artifacts, documentation, and decision records are maintained in secure collaboration environments that act as a single source of truth for the engagement. These environments support controlled access, version management, and efficient collaboration between KPMG and client team members. Action items and decisions arising from governance meetings are tracked centrally and followed through to closure, reinforcing discipline and shared accountability. By applying the 3PM framework supported by KPMG Velocity assets, the project management office provides a structured, transparent, and scalable management model for ERP implementations. This approach allows public sector clients to maintain confidence in delivery progress, exercise appropriate oversight, and make timely decisions, while avoiding unnecessary complexity and administrative burden.
Describe how you handle dispute resolution during an active implementation.	KPMG approaches dispute resolution during an active ERP implementation as a structured, disciplined, and collaborative process that is embedded within its delivery governance rather than treated as an exception. Disputes are viewed as a normal risk in complex public sector transformations where scope, priorities, constraints, and interpretations can evolve over time. The objective is to resolve issues quickly, transparently, and at the lowest appropriate level while protecting delivery momentum, relationships, and project outcomes. Dispute handling begins with prevention through clear governance, role definition, and decision frameworks established at the outset of the engagement. Using the 3PM framework, KPMG works with the client to define decision rights, escalation paths, and issue ownership across project, program, and executive levels. This clarity allows most disagreements related to scope interpretation, sequencing, resourcing, or delivery approach to be addressed through existing forums rather than escalating into formal disputes. Clear documentation of assumptions, approvals, and design decisions provides a shared reference point when differences of interpretation arise. When disagreements do occur during delivery, they are first addressed through structured issue management processes within the project management office. Issues are logged, described factually, and assessed for impact on scope, schedule, cost, and risk. KPMG facilitates focused working sessions with the relevant client stakeholders to clarify the underlying concern, identify options, and assess tradeoffs. The emphasis at this stage is on problem solving rather than position taking, with both parties working from agreed facts, contractual context, and project objectives. If an issue cannot be resolved at the delivery team or workstream level, it is escalated in a controlled manner through the agreed governance structure. Steering committees or executive sponsors are engaged with clear articulation of the issue, its implications, and recommended paths forward. KPMG's role in these forums is to provide objective analysis, outline viable options, and support informed decision making rather than advocating for predetermined outcomes. This approach aligns with public sector expectations for transparency, accountability, and documented decision making. Commercial or scope related disputes are handled through formal change and issue resolution mechanisms that are already embedded within the implementation approach. Where scope clarification or adjustment is required, KPMG works within the agreed change control process to document impacts and options so that decisions are made consciously rather than implicitly. This reduces the risk of unresolved disagreements resurfacing later in the project or after go live. Throughout the dispute resolution process, communication discipline is maintained. Discussions are documented, decisions are recorded, and agreed actions are tracked to closure through the PMO. This documentation protects both parties and provides continuity even when project team members change overtime. It also supports auditability and oversight requirements common in public sector environments. In situations where disputes involve broader contractual interpretation or risk exposure, KPMG engages senior leadership on both sides early. Executive level dialogue is used to realign on shared objectives, public sector obligations, and the long-term success of the implementation. These discussions are grounded in partnership principles and professional standards, with a focus on restoring alignment and confidence rather than assigning fault. By embedding dispute resolution within its governance, project management, and escalation structures, KPMG minimizes disruption to active ERP implementations. The approach supports timely resolution, preserves working relationships, and allows public sector organizations to continue progressing toward their transformation objectives even when challenges arise.
Detail your quality assurance and testing protocols before system go live.	KPMG's quality assurance and testing approach prior to system go live is designed to provide public sector organizations with confidence that the ERP solution is stable, accurate, secure, and ready to support day-to-day operations. Quality is treated as an integrated discipline throughout the implementation lifecycle rather than a final checkpoint, with formal testing phases structured to validate both technical performance and real-world business use. Quality assurance begins early in the implementation through the application of KPMG's delivery standards, review checkpoints, and design validation practices. Solution designs, configurations, and integrations are reviewed by experienced functional and technical leads to confirm alignment with approved requirements, public sector controls, and regulatory obligations. This early validation reduces downstream defects and limits rework later in the testing cycle. Formal testing activities are planned as a series of progressive validation stages that build confidence incrementally. System testing is conducted first to confirm that configured functionality operates as intended within the ERP environment. This includes validation of core transactions, system rules, security roles, workflows, and reports across finance, human resources, payroll, procurement, and other in scope modules. Testing scenarios are mapped back to approved requirements so that traceability is maintained between what was designed and what is delivered. Integration testing follows system testing and focuses on end to end business processes that span multiple modules or connected systems. This stage validates data flows, interfaces, and dependencies between the ERP platform and external applications such as banking systems, payroll providers, reporting tools, or third party operational systems. For public sector clients, particular attention is given to processes that cross organizational boundaries, involve approvals, or have financial and audit implications. User acceptance testing is a central component of KPMG's pre-go live protocols. Business users are engaged to validate that the system supports their operational needs using realistic scenarios and representative data. KPMG supports clients in defining test cases, acceptance criteria, and test schedules that reflect public sector operating cycles, including payroll runs, period end close, budgeting activities, and reporting obligations. Defects identified during user acceptance testing are triaged, prioritized, and resolved based on business impact and readiness timelines. Performance and security validation are also addressed prior to go live. Performance testing is conducted where appropriate to confirm that the system can handle expected transaction volumes and peak usage periods without degradation. Security validation includes confirmation of role-based access, segregation of duties, and compliance with information security and privacy requirements applicable to public sector environments. These activities support operational resilience and protect sensitive financial and personal data. Throughout all testing phases, defects are managed through a structured defect management process. Issues are logged, categorized, assigned, and tracked through resolution with clear accountability. Root cause analysis is used for critical defects to reduce the likelihood of recurrence. Testing progress, defect trends, and readiness indicators are reviewed regularly through governance forums so that stakeholders have visibility into system quality and residual risks prior to deployment. Final readiness for go live is assessed through formal entry and exit criteria across testing phases. These criteria consider not only defect counts, but also business readiness factors such as training completion, data migration validation, support readiness, and operational preparedness. Go live decisions are made collaboratively with client leadership based on a clear understanding of system readiness and risk posture. By applying a structured, multistage quality assurance and testing protocol, KPMG helps public sector organizations transition to new ERP systems with confidence. The approach balances technical rigor with practical business validation, supporting stable operations, accurate reporting, and strong user adoption from the first day of live operation.

Describe your strategy for organizational change management and user adoption. Also describe how you measure user adoption.	KPMG recognizes that successful ERP implementation is as much a people and process transformation as it is a technology deployment. For Canoe, this is further amplified by the consortium model—where adoption occurs within individual Member organizations with different operating realities, governance structures, and levels of internal capacity. Our project team will embed organizational change management (OCM) throughout each engagement to enable awareness, build commitment, equip users with practical skills, and reinforce new ways of working post go-live. Our approach is aligned to leading practice change frameworks (e.g., ADKAR) and is delivered in a pragmatic, scalable way so it can be right-sized for small municipalities as well as larger, more complex Members. OCM activities are sequenced with implementation milestones to reduce disruption and ensure readiness at key decision points (design sign-off, testing, training, cutover, and stabilization). OCM approach to support user adoption: • Change strategy and impact assessment: identify impacted stakeholder groups, map impacts to roles/processes, and define a change plan tailored to the Member's operating model and deployment approach. • Change governance and sponsorship: integrate OCM into the project governance cadence and enable visible sponsorship at the Member level (executive sponsor and functional leaders) to reinforce priorities and remove barriers. • Change network (champions / super users): establish a Member-led network to support local adoption, provide peer coaching, validate training content, and create two-way feedback loops. • Communications and engagement: deliver targeted, plain-language communications that explain what is changing, why it matters, when it happens, and what each audience needs to do—supported by town halls, Q&A, office hours, and pulse checks. • Role-based training and performance support: develop curricula aligned to future-state processes and security roles, using blended delivery (instructor-led, labs, job aids, quick reference guides) and realistic scenarios to build confidence before go-live. • Readiness, cutover, and go-live support: conduct readiness checkpoints (training completion, user preparedness, support readiness), deliver go-live communications, and provide hypercare with coordinated business and technical triage. • Reinforcement and sustainment: reinforce new behaviours through refresher learning, targeted coaching, updated procedures/SOPs, and transition to operational ownership to sustain adoption beyond initial stabilization. This approach provides a consistent change backbone across Canoe's program while allowing each Member to tailor activities to its scope, ERP platform, pace, and local constraints—supporting predictable readiness and strong adoption without imposing a one-size-fits-all operating model. Measuring and reporting user adoption: We define practical adoption metrics early and monitor them through implementation and stabilization so Members and Canoe have visibility into readiness, usage, and areas requiring additional support. Measures are calibrated to the Member's solution and operating context and are reviewed through regular governance cadences. Adoption is assessed using a balanced set of leading and lagging indicators, such as: • Readiness and engagement: stakeholder participation, communications reach, champion network activity, and completion of readiness checkpoints. • Training completion and proficiency: course completion, assessment results (where used), and manager/super-user validation of role readiness. • System usage and process compliance: transaction volumes, feature utilization (where available), and reduction in legacy workarounds/manual processes. • Support trends and stabilization: ticket volume/themes, time to resolution, and recurring issues indicating training or process gaps. We use these insights to target communications, coaching, and training reinforcements, and we report adoption progress through Member governance forums (and, where appropriate, program-level reporting) to support timely course correction and sustained outcomes.
List the training delivery methods you offer, as well as the customized training tools for Members.	We offer a structured, role-based, and blended training approach designed to support effective user adoption while minimizing operational disruption across Canoe Member organizations. Given that ERP implementations are member-led and vary by size, sector, and level of readiness, our training approach provides a consistent program-level framework while remaining flexible enough to address member-specific needs. Learning Needs and Impact Assessment: Training is grounded in an assessment of training needs and change impacts at the member level. Learning curricula are tailored by role (end users, managers, super users, and IT/support) and by function (e.g., finance, HR/payroll, procurement), and aligned with each member's processes, operational context, and ERP configuration. Training delivery methods include: • Blended learning, combining instructor-led sessions (virtual and in-person), self-paced digital learning, and hands-on exercises to accommodate different learning styles and the distributed nature of Canoe's membership. • Role-based training curricula, with distinct learning paths focused on system navigation, end-to-end business processes, and role-specific transactions, supported by practical "day-in-the-life" scenarios. • Train-the-trainer enablement, where super users within member organizations are trained early to support local rollout, build internal capability, and reinforce member ownership of adoption. • Hands-on, scenario-based learning, using realistic, member-specific scenarios and system simulations to build confidence and accelerate proficiency. • Phased training delivery, aligned with system readiness, testing cycles, and go-live milestones, and reinforced through refresher sessions and post-go-live support. To support adoption beyond formal training, we provide a suite of customized training and enablement tools aligned with Canoe's program framework, including: • Role-Based Training Materials: Customized user guides, job aids, and quick-reference materials aligned to member workflows, terminology, approvals, and governance structures. • System Simulations and Exercises: Hands-on simulations and guided walkthroughs using member-specific scenarios to support experiential learning and faster proficiency. • Centralized Knowledge Repository: A digital repository (e.g., SharePoint or Teams) containing training materials, recordings, user guides, job aids, FAQs, and process documentation. This repository supports ongoing reference, onboarding of new users, and refresher training. • Reusable Training Assets: Reusable training assets adapted to the member's future-state processes and ERP solution, ensuring consistency between training content, solution design, and operating practices. • Feedback and Reinforcement Mechanisms: Post-training assessments and feedback loops are used to refine materials and address adoption challenges, supporting continuous improvement and sustained user adoption. Together, these training and reinforcement mechanisms address the diverse needs of leaders, managers, and end users across Canoe Member organizations, ensuring consistent, inclusive, and sustained user adoption while supporting effective ERP use in varied operational contexts.
Explain how you assess user readiness before the system goes live.	User readiness is assessed through a structured and data-driven approach designed to reflect Canoe's consortium-based model. Our approach provides Canoe and member leadership with clear, actionable insight into readiness levels ahead of go-live, while supporting informed decision-making and targeted mitigation. 1. Change Readiness Assessment (CRA) We conduct structured readiness assessments at key points in the implementation lifecycle (e.g., baseline, pre-training, post-training, and pre-go-live) to evaluate how prepared stakeholders are to adopt the ERP solution. The assessment measures awareness and understanding of the change, perceived leadership support, confidence in adopting new ways of working, and overall readiness at both individual and group levels. Results highlight at-risk stakeholder groups within member organizations, allowing targeted interventions to be implemented before go-live. 2. Role- and Persona-Based Readiness Analysis Readiness findings are analyzed by role and stakeholder group using insights from stakeholder analysis, change impact assessments, and defined persona journeys. This ensures readiness is interpreted in context and reflects differences in impacts, capabilities, and adoption barriers across leaders, managers, functional users, and end users within member organizations. 3. Qualitative Insights from the Change Network Quantitative readiness data is complemented by qualitative feedback gathered through change agents, champions, engagement sessions, and leadership touchpoints within member organizations. These insights help explain underlying readiness challenges, surface early resistance, and identify operational risks that may not be visible through survey data alone. 4. Consolidated Business Readiness Reporting Readiness and adoption indicators are consolidated into a clear business readiness view, providing Canoe and member leadership with visibility into overall readiness trends, key risk areas, and priority mitigation actions. This supports informed go/no-go decisions and ensures that readiness considerations are actively addressed before deployment. This structured readiness approach enables Canoe and its members to proactively manage adoption risks, minimize disruption at go-live, and support sustained ERP adoption across diverse member organizations.

Explain how you ensure resource continuity throughout the duration of a project.	KPMG maintains resource continuity throughout an ERP implementation by combining deliberate upfront planning, disciplined governance, and access to a deep and flexible talent pool. This approach is designed to provide stability for public sector clients over the full duration of an engagement, while retaining the ability to adapt to evolving project needs without disruption to delivery momentum. Resource continuity begins during project initiation, where roles, responsibilities, and resourcing assumptions are clearly defined and aligned with the approved scope and delivery approach. KPMG assigns key leadership roles early, including the engagement partner, delivery lead, and project manager, and maintains their involvement throughout the life of the project. These individuals provide consistent oversight, context, and decision continuity, which is particularly important for public sector initiatives that span multiple phases, fiscal periods, or governance cycles. At the delivery level, KPMG plans staffing using a named resource model wherever practical, identifying core team members for functional, technical, data, and change streams at the outset. This model emphasizes continuity of knowledge by keeping individuals involved from design through build, testing, and deployment rather than rotating resources between phases. Where phased or multiyear implementations are involved, KPMG sequences resource assignments to maintain overlap between phases, allowing knowledge to be transferred organically rather than through formal handoffs alone. The 3PM framework supports continuity through structured knowledge management and documentation practices embedded into day-to-day delivery. Decisions, design rationales, assumptions, and risks are documented and maintained in shared project repositories that act as a single source of truth. This reduces dependency on individual memory and allows continuity to be preserved even if changes to resourcing are required. Project artifacts are maintained at a level of detail appropriate for public sector auditability and long-term operational reference. KPMG also mitigates continuity risk through team depth and succession planning. For each critical role, backup resources are identified who are familiar with the client context and solution design. These individuals are kept informed through regular internal touchpoints and access to project materials so they can step in quickly if required. This approach allows KPMG to manage unforeseen absences or transitions without introducing delays or requiring re onboarding of unfamiliar resources. From a workforce perspective, KPMG draws on a large national and global pool of ERP professionals across public sector, finance, human resources, supply chain, data, and technology domains. This depth allows the firm to scale resources up or down in response to changes in project complexity or timing while preserving continuity in leadership and solution understanding. Where specialized expertise is required for limited periods, those resources are integrated into the core team under the guidance of consistent delivery leads to avoid fragmentation. Continuity is further supported through proactive monitoring of workload and capacity. Resource plans are reviewed regularly as part of project governance to anticipate upcoming demands, upcoming milestones, or potential constraints. Adjustments are made deliberately and transparently, with client awareness, rather than reactively. This forward-looking planning is particularly important for public sector environments where internal availability may fluctuate due to budget cycles, operational demands, or external events. When a resource change is unavoidable, KPMG follows a structured transition approach. Knowledge transfer is planned and executed before the transition occurs, with overlap between outgoing and incoming resources where feasible. The transition is documented, communicated, and governed to minimize disruption and preserve delivery quality. These transitions are managed at the PMO level rather than left to individual teams, reinforcing accountability and consistency. Through this combination of stable leadership, disciplined planning, documentation, and access to deep ERP talent, KPMG provides public sector clients with confidence that delivery teams will remain consistent, informed, and effective throughout the duration of an ERP implementation.
Describe your process for replacing a team member if a member requests a change.	KPMG manages team member replacement through a structured and transparent process that prioritizes continuity, minimal disruption, and client confidence. When a member requests a change, the request is acknowledged promptly and reviewed by the project leadership to understand the underlying concern and any delivery implications. KPMG then identifies a suitable replacement with comparable or stronger experience, ensuring alignment with the project's scope, stage, and public sector context. Before the transition occurs, a planned knowledge transfer is conducted, with overlap between the outgoing and incoming team members where feasible. Key design decisions, deliverables, assumptions, and outstanding items are reviewed to preserve context and momentum. The replacement resource is introduced formally to the client, roles and responsibilities are reaffirmed, and the transition is tracked through the project management office to confirm that delivery quality and timelines remain intact. This disciplined approach allows KPMG to accommodate client requests while maintaining stability and accountability throughout the implementation.
Detail your experience managing multi-jurisdictional or group purchasing contracts.	KPMG has extensive experience managing multi-jurisdictional and group purchasing contracts for public sector organizations, including municipalities, regional authorities, provincial entities, and broader public sector networks. This experience reflects an understanding that group purchasing arrangements require more than technical delivery capability; they demand disciplined governance, contractual consistency, and flexibility to support diverse member needs within a common commercial framework. KPMG regularly operates within procurement models where a central authority establishes master agreements that are accessed voluntarily by multiple member organizations. In these environments, KPMG structures its delivery and commercial practices to align with the overarching program agreement while allowing individual members to define their own scope, timelines, and engagement structures. This approach supports autonomy at the member level while maintaining consistency with pricing, contractual terms, reporting obligations, and performance expectations defined at the group level. From a governance perspective, KPMG is experienced in working with central procurement bodies, cooperative purchasing organizations, and municipal associations that oversee multi-party arrangements. The firm supports clear delineation between program-level governance and member-specific project governance, allowing issues related to contract compliance, reporting, or program requirements to be managed centrally while delivery decisions remain with the participating member. This separation helps reduce administrative friction and avoids duplicative oversight across jurisdictions. Operationally, KPMG manages multi-jurisdictional delivery by applying standardized methodologies, documentation, and quality controls that can be reused across members, while still tailoring execution to local legislative, operational, and organizational contexts. This balance allows efficiencies to be realized through shared approaches and assets, without forcing uniform solutions on organizations with different maturity levels, risk profiles, or service models. KPMG also has experience meeting the reporting and transparency requirements that accompany group purchasing contracts. This includes providing consolidated reporting on engagement activity, compliance with pricing and discount structures, and performance metrics as required by the contracting authority. These reporting processes are designed to be lightweight and repeatable, minimizing burden on both the central authority and participating members. Importantly, KPMG understands that group purchasing arrangements often support a wide range of organization sizes and capabilities across multiple jurisdictions. The firm's experience delivering ERP advisory and implementation services across rural municipalities, regional governments, large cities, and broader public sector entities allows it to scale services appropriately while operating under a single contractual umbrella. This flexibility supports equitable access to services while preserving value for members with differing levels of complexity. Through this experience, KPMG has demonstrated its ability to operate effectively within multi-jurisdictional and group purchasing environments by aligning to centralized procurement requirements, supporting decentralized delivery, and maintaining consistent governance, quality, and accountability across all participating members.
List anything else you would like to include as part of your offering which is complementary to the main offering of ERP Implementation Services?	In addition to core ERP implementation services, KPMG offers a range of complementary services that support public sector organizations after go live and help them sustain value over the long term. These services are designed to stabilize operations, strengthen internal capability, and support continuous improvement as organizations mature their use of the ERP platform. Post go live stabilization and hypercare support is a common extension of implementation engagements. During this period, KPMG provides targeted support to help resolve issues, address user questions, and fine tune configurations as real-world usage increases. This support is focused on maintaining operational continuity during early adoption, particularly around critical activities such as payroll processing, financial close, procurement cycles, and reporting. Hypercare support is structured with clear entry and exit criteria so that organizations transition confidently into steady state operations. KPMG also offers ongoing application support and managed services for organizations that require longer term assistance beyond initial stabilization. These services can include functional support, technical troubleshooting, minor enhancements, release management, and coordination with software vendors. This model is particularly valuable for smaller members or organizations with limited internal ERP support capacity, allowing them to access experienced resources while retaining control over priorities and costs. Continuous improvement and optimization services are another complementary offering. After go live, KPMG can support organizations in assessing system usage, identifying process inefficiencies, and prioritizing enhancements that build on the initial implementation. These services focus on helping organizations move beyond basic system adoption toward improved automation, reporting, and data driven decision making, while remaining aligned with public sector governance and control requirements. Training and capability enablement services are also commonly provided post implementation. These may include refresher training, role-based learning for new staff, development of internal super users, and support for training materials and knowledge libraries. This helps organizations maintain knowledge continuity over time and reduces reliance on external support as staff roles evolve. KPMG further supports public sector clients with ERP roadmap refinement and future phase planning once the initial system is live. This includes advising on additional modules, integrations, reporting enhancements, or phased rollouts that may have been intentionally deferred during the initial implementation. This forward-looking support allows organizations to sequence investment in a controlled and sustainable manner. Collectively, these complementary services extend the value of ERP implementation by supporting stability, adoption, and long-term optimization. They allow public sector organizations to treat ERP not as a one-time project, but as a platform that continues to evolve in support of operational efficiency, accountability, and service delivery objectives.

ERP software solution selection support process

Question	Answer *

Describe your process for conducting a business needs assessment for a public sector member.	KPMG conducts business needs assessments for public sector members using a structured, collaborative, and evidence-based process that is designed to surface true operational requirements while building alignment across diverse stakeholder groups. The process is informed by extensive experience delivering similar assessments for municipalities and regional governments and is deliberately technology agnostic so that needs are defined before solutions are considered. The assessment begins with establishing a clear understanding of the member's context, mandate, and strategic priorities. KPMG works with executive sponsors to understand the organization's service delivery model, governance structure, legislative and regulatory environment, financial constraints, and long-term objectives. This context setting step frames the assessment so that requirements are grounded in public sector realities rather than generic ERP functionality. KPMG then undertakes a structured current state assessment focused on people, process, data, and technology. This includes facilitated workshops, targeted interviews, and document reviews with representatives from finance, human resources, payroll, procurement, operations, information technology, and leadership. These sessions are designed to understand how work is performed today, where pain points exist, and which manual workarounds or shadow systems are in use. Particular attention is paid to interdependencies across departments, approval flows, reporting requirements, and areas where legacy systems constrain efficiency or transparency. Building on the current state understanding, KPMG guides stakeholders through defining future state needs and capabilities. Rather than starting with software features, the discussion is framed around outcomes, such as improved financial stewardship, better workforce management, stronger procurement controls, or more timely reporting. KPMG uses public sector reference models and leading practices to help participants think beyond existing processes while remaining realistic about capacity, risk tolerance, and change readiness. This approach helps members articulate what they need the ERP to enable, not simply what they are replacing. Requirements are then documented in a structured and traceable manner. KPMG categorizes needs across functional, technical, data, security, reporting, and organizational dimensions, with clear differentiation between mandatory requirements and desirable capabilities. Each requirement is validated with stakeholders to confirm accuracy and relevance, and assumptions are explicitly documented to avoid ambiguity later in the selection process. This discipline supports transparency and defensibility, which is particularly important in public sector procurement. KPMG also incorporates readiness considerations into the needs assessment. This includes assessing data quality, process maturity, governance strength, and organizational capacity for change. These factors inform how requirements are prioritized and how implementation risk is evaluated, allowing members to align their ambitions with practical delivery considerations. The outcome of the business needs assessment is a clear, well-structured view of what the organization requires from an ERP solution and why. This output provides a strong foundation for solution evaluation, fit gap analysis, and procurement, while also creating shared understanding among stakeholders. By combining rigorous analysis with collaborative engagement, KPMG helps public sector members define business needs that are realistic, future focused, and aligned to their mandate and constraints.
Explain how you develop technical specifications for an ERP software.	KPMG develops technical specifications for ERP software using a structured, defensible, and technology-agnostic process that translates validated business needs into clear, procurement-ready requirements suitable for public sector acquisition. The objective is to create specifications that are precise enough to support objective evaluation and contract formation, while remaining flexible enough to allow vendors to propose solutions that align with the member's size, maturity, and operating context. The process begins once the business needs assessment has been completed and validated with stakeholders. KPMG first establishes a clear linkage between business requirements and technical implications so that specifications reflect real operational needs rather than generic system features. This linkage is critical in public sector procurements, where technical requirements must be traceable to documented business objectives and capable of withstanding scrutiny. KPMG structures technical specifications across clearly defined requirement categories. These typically include functional system capabilities, technical architecture and integration requirements, data and reporting requirements, security and privacy considerations, performance and scalability expectations, and implementation and support considerations. Each category is informed by the member's current and future state needs, existing technology environment, legislative obligations, and risk tolerance. Functional technical specifications describe what the ERP must be capable of supporting from a system perspective, without prescribing how vendors must configure their solution. These specifications are derived directly from validated business processes and future state capabilities and are written to distinguish mandatory requirements from desirable capabilities. This approach allows members to evaluate functional fit objectively while avoiding unnecessary customization or vendor lock in. Technical architecture specifications define expectations related to deployment models, integration approaches, interoperability, and extensibility. KPMG develops these requirements based on the member's existing systems, data flows, and IT operating model, while remaining aligned with public sector standards and leading practices. Specifications are written to support both integrated ERP suites and best-of-breed models where appropriate, recognizing that different members may pursue different solution strategies. Data and reporting specifications focus on how information is managed, accessed, and governed within the ERP environment. KPMG defines requirements related to data structures, master data management, reporting capabilities, auditability, and historical data access. These specifications are grounded in statutory reporting obligations, financial controls, and operational transparency needs common to public sector organizations. Security, privacy, and compliance requirements are developed with particular care. KPMG aligns these specifications with applicable legislation, information security standards, data residency considerations, and internal control requirements. Rather than listing abstract controls, specifications articulate concrete expectations around access management, segregation of duties, logging, audit support, and protection of personal and financial information. KPMG also includes technical specifications related to non-functional requirements such as performance, availability, scalability, and supportability. These requirements reflect expected transaction volumes, user populations, and service criticality, and are calibrated to the size and complexity of the member organization. This ensures that solutions are evaluated not only on feature sets, but also on their ability to operate reliably in a public sector environment. Throughout the development process, KPMG reviews specifications for clarity, neutrality, and evaluability. Language is deliberately vendor neutral, avoiding references that could advantage or disadvantage specific platforms. Requirements are written so that compliance can be demonstrated clearly by proponents and assessed consistently by evaluators. Assumptions and constraints are documented explicitly to reduce ambiguity and limit downstream disputes. The final technical specifications are integrated into the broader procurement documentation, typically aligned with evaluation criteria, scoring methodologies, and contractual terms. This alignment supports a transparent and defensible selection process while setting clear expectations for implementation and delivery. Through this disciplined approach, KPMG helps public sector members develop technical ERP specifications that are rigorous, aligned to business needs, and fit for purpose within a competitive procurement environment. The result is a specification set that supports informed vendor evaluation, reduces implementation risk, and lays a strong foundation for successful ERP adoption.
Describe your methodology for conducting a fit gap analysis between member needs and software capabilities.	KPMG conducts fit gap analysis using a structured, transparent, and evidence-based methodology that objectively evaluates how well ERP software capabilities align with a public sector member's validated business and technical needs. The purpose of the fit gap analysis is not only to assess functional coverage, but to inform risk, cost, and change considerations that support sound selection and implementation decisions. The process begins by establishing a clear baseline of member requirements derived from the completed business needs assessment and technical specifications. These requirements are organized into a structured framework that reflects core public sector domains such as finance, human resources, payroll, procurement, reporting, security, and governance. Each requirement is clearly defined, prioritized, and categorized so that evaluation is consistent and traceable throughout the analysis. KPMG then works with software vendors and member stakeholders to understand how proposed solutions support each requirement. This is typically done through a combination of documented vendor responses, structured solution demonstrations, and targeted clarification sessions. Demonstrations are guided by predefined scenarios that reflect real public sector use cases rather than generic product walkthroughs. This approach allows KPMG to observe how the software performs in practice and how intuitively it supports the members' processes, controls, and reporting needs. For each requirement, KPMG assesses the degree of alignment between the members' needs and the software's out-of-the-box capabilities. Requirements are evaluated as fully supported, partially supported, or not supported, with clear rationale documented for each assessment. Where partial support is identified, KPMG distinguishes between configuration, extension, integration, or process change implications so that gaps are understood in practical terms rather than abstract ratings. Identified gaps are then analyzed in more detail to understand their impact. KPMG evaluates gaps across multiple dimensions, including implementation effort, cost, complexity, risk, operational impact, and long-term sustainability. This analysis is particularly important for public sector organizations, where excessive customization can introduce audit, upgrade, and support risks. KPMG uses this lens to help members differentiate between acceptable gaps that can be addressed through process change or configuration and higher risk gaps that may materially affect project outcomes. Throughout the process, KPMG maintains strong stakeholder involvement and validation. Preliminary findings are reviewed with member representatives to confirm accuracy and context, allowing assumptions to be challenged and refined. This collaborative validation helps build shared understanding and confidence in the results, while reducing the likelihood of misinterpretation later in procurement or implementation. The outputs of the fit gap analysis are consolidated into a clear and defensible summary that highlights overall solution fit, key strengths, material gaps, and associated implications. This information is presented in a way that supports objective comparison across vendors and aligns directly with evaluation criteria and decision-making needs. Where appropriate, KPMG also identifies mitigation options for key gaps, so members understand the tradeoffs associated with each solution. By applying this disciplined fit gap methodology, KPMG helps public sector members move beyond feature based comparisons toward informed decisions grounded in risk, value, and long-term viability. The approach supports transparent procurement outcomes and lays a realistic foundation for successful ERP implementation.

Detail your approach to calculating the total cost of ownership for software solutions.	KPMG approaches total cost of ownership analysis as a comprehensive, lifecycle-based evaluation that allows public sector members to understand the full financial implications of an ERP software solution beyond initial purchase or subscription costs. The objective is to support informed, defensible decision making by presenting a realistic view of costs over time, aligned to public sector budgeting, governance, and risk considerations. The process begins by defining the scope and time horizon for the analysis. KPMG works with the member to determine an appropriate evaluation period, typically reflecting the expected useful life of the ERP platform within a public sector environment. This establishes a consistent baseline for comparing options and avoids underestimating costs that emerge after implementation. Assumptions related to growth, transaction volumes, user counts, and organizational change are explicitly documented so that cost projections remain transparent. KPMG then identifies and categorizes all relevant cost components across the ERP lifecycle. Software related costs include licensing or subscription fees, maintenance or support charges, upgrade entitlements, and any tiered pricing impacts associated with users, modules, or transaction volumes. These costs are assessed based on vendor proposals and validated against anticipated usage patterns rather than minimum entry pricing. Implementation costs are incorporated as a distinct and material component of total cost. This includes system configuration, integrations, data migration, testing, training, change support, and project management. KPMG differentiates between one-time implementation activities and recurring services so that members understand both upfront investment and longer-term financial commitments. Where phased deployments or incremental rollouts are contemplated, costs are sequenced accordingly to reflect realistic cash flow impacts. Infrastructure and technology operating costs are also included in the analysis. Depending on the deployment model, this may involve cloud hosting fees, storage, environments for development and testing, security services, and connectivity. KPMG evaluates these costs in the context of the member's existing IT operating model and considers whether costs are incremental or offset by the retirement of legacy systems and infrastructure. Ongoing operational and support costs form another key component of total cost of ownership. KPMG evaluates the resources required to support the ERP solution after go live, including internal staffing, training for new employees, vendor support services, and potential managed service arrangements. These costs are assessed realistically, recognizing that public sector organizations often need sustained support well beyond initial stabilization. KPMG also considers indirect and often overlooked cost drivers. These can include costs associated with process change, temporary productivity impacts during transition, dual system operation during cutover periods, and future enhancement or optimization efforts. While these costs may be less precise, KPMG works with members to estimate them using reasonable assumptions, so they are visible rather than ignored. Throughout the analysis, KPMG applies a consistent structure across all solution options so that comparisons are meaningful. Cost categories, assumptions, and timeframes are aligned to allow members to evaluate tradeoffs between solutions, such as higher upfront investment versus lower long term operating costs, or standard functionality versus customization driven expense. The results of the total cost of ownership analysis are presented in a clear and transparent manner, typically showing both annual and cumulative costs over the evaluation period. Sensitivity considerations are highlighted so members understand which assumptions have the greatest impact on overall cost. This enables informed discussion at both the operational and executive levels and supports defensible procurement decisions. By taking this holistic approach, KPMG helps public sector members move beyond headline pricing to understand the true cost profile of ERP software solutions. The analysis supports sustainable decision making that aligns financial realities with operational needs, risk tolerance, and long-term value objectives.
How do you confirm your firm's neutrality regarding partnerships or financial incentives you may receive from software OEMs?	KPMG confirms and maintains its neutrality in ERP software selection through a combination of formal independence requirements, governance controls, and delivery practices that are consistently applied across public sector engagements. This approach is grounded in the firm's professional standards and reinforced through how ERP advisory and selection services are designed and delivered in practice. At an organizational level, KPMG operates under strict independence, ethics, and conflict management policies that govern relationships with software vendors and other third parties. These policies require that advisory recommendations be made in the best interest of the client and prohibit decision making that is influenced by financial incentives, referral arrangements, or sales targets. Any potential conflicts of interest, whether actual or perceived, are subject to formal review and mitigation before an engagement proceeds. This discipline is a foundational element of KPMG's ability to act as a trusted advisor in public sector procurements. In the context of ERP software selection specifically, KPMG applies a technology agnostic advisory model. Business needs assessments, technical specifications, fit gap analyses, and total cost of ownership evaluations are all conducted without preference for a particular vendor or platform. Requirements are defined based on the member's operating model, legislative obligations, and service delivery needs, not on the capabilities of a preferred solution. This sequencing is intentional and helps confirm that solutions are evaluated against member needs rather than shaping needs to fit a solution. While KPMG maintains alliances and certifications with major ERP software providers, these relationships are structured to support implementation capability and access to technical expertise rather than to influence selection outcomes. Alliance teams and advisory teams operate with clear separation of roles, and ERP selection engagements are delivered independently from software sales or licensing activities. KPMG does not receive commissions or success-based fees tied to the selection of specific ERP products, and this position is made transparent to public sector clients at the outset of an engagement. Neutrality is further reinforced through structured, evidence-based evaluation processes. Vendor responses, demonstrations, and fit gap assessments are conducted using predefined criteria and scenarios that are approved by the members. Findings are documented with clear rationale and traceability back to validated requirements. This transparency allows members to understand how conclusions were reached and provides a defensible record that supports public sector procurement standards and audit requirements. KPMG also emphasizes client ownership of decisions throughout the selection process. The firm's role is to facilitate analysis, provide insight into risks and tradeoffs, and support informed decision making, not to recommend a predetermined outcome. Evaluation results, cost analyses, and risk assessments are presented with balanced perspectives, including strengths, limitations, and implications of each option, allowing members to make decisions aligned with their priorities and risk tolerance. Finally, KPMG's neutrality is demonstrated through its willingness to support a wide range of ERP outcomes. The firm regularly supports public sector organizations implementing different platforms and deployment models, including integrated suites, best of breed solutions, and hybrid environments. This breadth of experience reinforces credibility by showing that recommendations are driven by fit and value rather than vendor alignment. Through these combined practices, KPMG provides public sector members with confidence that ERP software selection advice is independent, objective, and grounded in professional standards. This commitment to neutrality supports trust, transparency, and defensible decision making throughout the ERP selection process.
	Missing question hence N/A
	Missing question hence N/A

Member access to program offering

Question	Response
List the steps required for Canoe Members who want to engage with your firm to discuss their ERP implementation needs. Begin from initial contact to providing a price proposal and quotation.	When a Canoe Member wishes to engage with KPMG to discuss ERP implementation needs, the process is designed to be straightforward, transparent, and flexible so that members can engage at a pace and level of formality that suits their organization. The process typically begins with an initial point of contact initiated by the members, either directly with KPMG or through Canoe's program framework. This initial discussion is exploratory in nature and focused on understanding the members' context rather than selling a predefined solution. KPMG seeks to understand the organization's size, governance model, current systems, high level challenges, and drivers for considering an ERP initiative. This conversation also confirms how the members would like to engage, whether they are seeking early advice, solution selection support, implementation services, or a combination of these. Following initial contact, KPMG conducts a more structured discovery discussion to clarify objectives, scope, and readiness. This may involve brief interviews or working sessions with key stakeholders to understand priorities across finance, human resources, procurement, and information technology. At this stage, KPMG also discusses delivery options, potential ERP models, indicative timelines, and considerations that are common for similar public sector organizations. The intent is to help the members refine their needs and determine the most appropriate next step without obligation. Once there is sufficient clarity on scope and objectives, KPMG works with the members to define the proposed engagement approach. This includes outlining the services to be provided, expected deliveries, assumptions, and responsibilities. Where appropriate, KPMG aligns this approach with Canoe's program structure and applicable terms so that the members can leverage the benefits of the group purchasing arrangement. Any dependencies, exclusions, or optional components are discussed openly to avoid ambiguity later. Based on the agreed approach, KPMG prepares a detailed price proposal and quotation. Pricing is developed to reflect the member's size, complexity, and chosen delivery model, and is structured in a way that supports transparency and comparability. The proposal clearly outlines what is included, how pricing is structured, and how it aligns with Canoe's program requirements. KPMG reviews the proposal with the members to answer questions and confirm mutual understanding before any commitment is made. This process allows Canoe Members to move from initial inquiry to a formal quotation in a controlled and informed manner, while retaining flexibility at each stage. It emphasizes early understanding, clarity of scope, and transparent pricing so that members can make confident decisions aligned with their ERP objectives and governance requirements.
List all the information you require at minimum from Canoe members in order to provide a project plan and subsequent price proposal to Members.	To prepare a credible project plan and a subsequent price proposal, KPMG requires a defined minimum set of information from Canoe Members that allows scope, complexity, and delivery expectations to be understood with sufficient clarity. This information is used to right-size the engagement, confirm assumptions, and develop pricing that is transparent and appropriate for the member's context. At a foundational level, KPMG requires an understanding of the member's organizational profile. This includes the type of public sector entity, overall size, approximate employee count, governance structure, and whether the organization operates as a single entity or across multiple departments, locations, or legal entities. This context informs delivery scale, governance needs, and resourcing assumptions. KPMG also requires a high-level overview of the members' current ERP and related systems. This includes the primary financial, human resources, payroll, and procurement systems in use, any major ancillary or integrated systems, and known limitations or drivers for change. Members are not expected to provide detailed technical documentation at this stage, but clarity on the legacy environment and its complexity is essential to estimate effort and risk. Clear articulation of the member's objectives and priorities is another minimum requirement. KPMG needs to understand what the organization is seeking to achieve through the ERP initiative, whether the focus is modernization, compliance, efficiency, scalability, replacement of unsupported systems, or a combination of these factors. This allows the proposed approach and pricing to align with outcomes rather than generic scope. KPMG also requires an indication of the desired scope of services. Members are asked to clarify whether they are seeking full ERP implementation services, specific modules or phases, selection support only, or a combination of advisory and delivery services. Any known constraints, such as fixed timelines, phased delivery preferences, or budget considerations, are also important inputs at this stage. Information related to organizational readiness and internal capacity is another key input. This includes the expected level of internal participation, availability of subject matter experts, project leadership expectations, and whether the member anticipates needing additional support for project management, data migration, or change activities. These factors materially affect delivery effort and resourcing assumptions. KPMG also requests high-level timing expectations. While exact schedules are not required, an understanding of target start windows, desired go live periods, and any immovable operational constraints such as payroll cycles or fiscal year end considerations is necessary to develop a realistic plan and pricing structure. Finally, KPMG requires confirmation of the intended commercial pathway under the Canoe program. This includes acknowledgment that the engagement will be structured under the applicable Canoe agreement and any member-specific requirements related to contracting, approvals, or internal procurement processes that may influence how the proposal is structured. With this minimum information, KPMG is able to develop a fit-for-purpose project plan and a clear, defensible price proposal that reflects the member's size, complexity, and objectives, while remaining aligned with Canoe's program framework.
List the information which would be helpful but not mandatory for your firm to provide a project plan and price proposal to Members.	In addition to the minimum information required, there are several types of information that are helpful, though not mandatory, for KPMG to further refine a project plan and price proposal for Canoe Members. When provided, this information allows assumptions to be reduced, effort estimates to be sharpened, and delivery approaches to be more precisely aligned to the member's environment. Additional detail on the member's current business processes is particularly helpful. This may include existing process documentation, known pain points, or areas where manual workarounds and spreadsheets are heavily relied upon. Even high-level insight into which processes are considered stable versus problematic can inform scoping decisions and influence the balance between standard configuration and process change. Information related to data quality and data volumes can also improve planning accuracy. While not required, insight into the number of employees, vendors, customers, assets, or years of historical data retained in legacy systems helps refine data migration assumptions and testing effort. Awareness of known data quality challenges or historical reporting constraints further supports realistic scheduling and resourcing. Clarity on the member's preferred ERP deployment model is another helpful input. While KPMG can accommodate a range of approaches, early indication of interest in cloud-based solutions, hybrid environments, or specific architectural preferences allows technical planning and costing to be better tailored to expectations. Similarly, awareness of any existing enterprise technology standards or platforms can help anticipate integration and security considerations. Understanding the member's internal governance and decision-making processes can also enhance proposal quality. Information such as how decisions are approved, the level of council or board involvement, and any mandatory review or gate processes helps align milestone planning and avoids unrealistic timelines. This is especially relevant for public sector organizations with formal approval cycles. Information about organizational change readiness is also beneficial. Insight into past transformation experiences, anticipated change fatigue, unionized environments, or workforce engagement considerations allows KPMG to better calibrate change and training assumptions. This can materially influence delivery effort and support requirements even when not explicitly in scope. Where available, indicative budget ranges or funding constraints are helpful but not required. While KPMG does not rely on budget figures to shape scope inappropriately, understanding financial parameters can support more pragmatic phasing options and alternative delivery models that align with the member's financial reality. Finally, any known future initiatives or dependencies that may run in parallel with an ERP project are useful inputs. Awareness of planned system replacements, organizational restructures, or major policy changes allows the project plan to account for competing demands on staff and leadership attention. While none of this information is mandatory, its availability allows KPMG to reduce reliance on assumptions and provide a project plan and price proposal that is more tailored, realistic, and aligned to the member's operating environment and constraints.

Scalability and staffing

Question	Answer *

Explain how you will manage multiple, simultaneous implementation projects for different members who may have similar competing timelines. With legacy software sunsetting by 2029, there will be increased demand and a bottle neck effect for demand for ERP Implementation services.	KPMG manages multiple, simultaneous ERP implementation projects by combining deliberate capacity planning, scalable delivery models, and disciplined governance to address periods of heightened demand, including the anticipated increase driven by legacy software sunsetting ahead of 2029. This approach is designed to ensure that Canoe Members receive consistent, high-quality delivery even when timelines overlap across jurisdictions. At the foundation of this approach is proactive demand and capacity management. KPMG plans ERP delivery capacity at a portfolio level rather than on a project-by-project basis. Anticipated demand, such as large-scale market shifts caused by vendor end-of-support timelines, is incorporated into workforce planning well in advance. This allows KPMG to scale ERP-specific resources, including functional, technical, data, and change specialists, ahead of demand peaks rather than reacting once bottlenecks emerge. KPMG applies a portfolio-based delivery model that allows multiple member implementations to proceed concurrently without over-reliance on a small group of individuals. Delivery teams are structured with stable project leadership supported by broader pools of role-based specialists. This model reduces dependency on single resources across multiple projects and enables parallel delivery even when members have similar go-live windows. Where possible, KPMG sequences high-intensity phases such as testing and deployment across projects to smooth demand while still meeting member timelines. Standardized methodologies and accelerators also play a critical role in scalability. By using proven delivery frameworks, templates, and tooling, KPMG reduces the amount of bespoke effort required for each engagement. This standardization allows teams to ramp up more quickly, maintain consistency across projects, and share delivery practices without sharing constrained resources. It also supports predictable scheduling and reduces delivery risk during peak demand periods. KPMG further manages simultaneous demand by maintaining flexibility in delivery models. Members can be supported through full end-to-end implementation services, targeted phase support, or hybrid delivery models that combine internal resources with KPMG specialists. This flexibility allows KPMG to tailor resource deployment based on member capacity and urgency, ensuring that critical timelines are protected while optimizing use of available expertise. Geographic and organizational breadth is another key factor in managing competing timelines. KPMG draws on national and global ERP delivery capability, allowing work to be distributed across qualified teams while maintaining consistent leadership and quality standards. This depth reduces localized bottlenecks and allows KPMG to respond effectively when multiple members require support within the same timeframe. Governance and transparency are maintained through portfolio-level oversight. KPMG actively monitors delivery health, resource utilization, and emerging risks across concurrent engagements. This allows early identification of potential capacity constraints and proactive mitigation, such as adjusting sequencing, deploying additional resources, or refining scope in collaboration with members. Members benefit from clear communication regarding timelines, dependencies, and tradeoffs, particularly in a constrained market environment. Importantly, KPMG works collaboratively with Canoe Members to encourage early engagement and realistic planning. Early needs assessments, roadmap development, and phased implementation strategies help members secure delivery windows and reduce last-minute demand spikes as 2029 approaches. This collaborative planning benefits both individual members and the broader program by smoothing demand and improving delivery outcomes. Through portfolio-based planning, scalable staffing models, standardized delivery approaches, and transparent governance, KPMG is well positioned to support multiple Canoe Members implementing ERP solutions concurrently. This approach mitigates bottleneck risk, preserves delivery quality, and provides members with confidence that critical ERP transitions can be achieved even during periods of increased market demand.
Detail how you ensure consistent pricing and service levels across all participating members.	KPMG ensures consistent pricing and service levels across all participating Canoe Members through a combination of program-level commercial governance, standardized service definitions, and disciplined delivery controls that are aligned with the Canoe group purchasing framework. This approach allows members to benefit from consistency and fairness while still accommodating differences in size, complexity, and delivery needs. At the commercial level, KPMG anchors pricing under the overarching Canoe program agreement, which establishes common terms, conditions, and pricing principles applicable to all members. Engagements are structured as call-off arrangements under this framework, ensuring that members access services based on the same underlying rate structures, pricing logic, and contractual protections. This provides a consistent baseline and avoids ad hoc or member-specific pricing models that could create inequity across the program. Pricing consistency is further supported through the use of standardized role definitions and rate cards aligned to clearly defined delivery roles. Core implementation roles, such as project management, functional consulting, technical delivery, data, and change management, are priced consistently across engagements, with adjustments driven only by objective factors such as scope, duration, and delivery model rather than by member-specific negotiation dynamics. This role-based approach ensures that members are charged consistently for comparable services while maintaining transparency in how pricing is constructed. Service levels are standardized through the application of common methodologies, governance structures, and quality management practices across all Canoe engagements. KPMG applies the same delivery frameworks, artifacts, and control mechanisms regardless of member size, ensuring that all members receive a consistent level of rigor in planning, risk management, quality assurance, and reporting. While the scale of governance may be adjusted to suit the complexity of a given engagement, the underlying service expectations and delivery standards remain consistent across the program. To maintain consistency in execution, KPMG also relies on standardized statements of work and service descriptions that clearly define scope boundaries, deliverables, assumptions, and responsibilities. These documents are aligned to Canoe's program requirements and are used by members to ensure that similar services are described, delivered, and measured in the same way. This reduces variability in service interpretation and supports predictable delivery outcomes. Program-level oversight further reinforces consistency. KPMG monitors delivery and commercial activity across Canoe engagements to ensure alignment with agreed pricing structures and service commitments. This oversight allows early identification of deviations and supports corrective action before inconsistencies impact members. It also enables KPMG to report consistently on service delivery and program participation as required under the Canoe framework. Importantly, consistency does not mean uniformity. While pricing structures and service levels are standardized, KPMG allows flexibility within the framework to scale effort and sequencing based on each member's needs. Members benefit from predictable pricing and service quality while retaining the ability to define scope, timelines, and delivery approaches appropriate to their organization. Through this combination of program-based pricing, standardized service definitions, and disciplined delivery governance, KPMG ensures that all Canoe Members receive equitable access to ERP implementation services with consistent pricing and service levels, while still accommodating the diversity of public sector organizations participating in the program.

Explain your staffing model and structure.	KPMG's staffing model for ERP implementation engagements is designed to be structured, scalable, and role-based, allowing consistent service delivery across Canoe Members while remaining flexible enough to accommodate differences in size, complexity, and timelines. This model is grounded in KPMG's established delivery frameworks and reflects how ERP services are delivered across public sector engagements under the Canoe program. At a structural level, KPMG organizes ERP delivery teams around clearly defined roles with distinct accountabilities, rather than relying on generalist staffing. Each engagement is led by stable project leadership, supported by specialized functional, technical, data, and change resources. This structure allows continuity of oversight while enabling the broader team to scale up or down as project needs evolve. Project leadership is anchored by a dedicated project manager or program manager who is responsible for day-to-day delivery coordination, schedule management, risk and issue management, and governance alignment. This role acts as the primary point of accountability for both the members and KPMG and ensures consistent application of delivery standards across all phases of the implementation. Functional delivery is supported by role-based consultants aligned to ERP domains such as finance, human resources, payroll, procurement, and reporting. These resources are responsible for requirements validation, solution design, configuration support, and business process alignment. Functional leads provide continuity across phases, while additional functional consultants may be added during high-intensity periods such as design validation, testing, or training. Technical delivery resources are organized separately from functional roles to ensure appropriate specialization. These roles typically include solution architects, technical leads, integration specialists, and data professionals. They are responsible for environment setup, system configuration support, integrations, data migration activities, and technical quality assurance. This separation of functional and technical responsibilities supports clearer accountability and reduces delivery risk on complex implementations. Data and reporting resources form a distinct part of the staffing model, reflecting the importance of data quality, migration, and reporting in public sector ERP programs. These roles focus on data assessment, migration planning, validation, and reconciliation, working closely with both functional and technical team members to ensure business and statutory reporting requirements are met. Organizational change management and training resources are embedded into the delivery structure rather than treated as an add-on. Change leads and analysts support stakeholder engagement, communications, training development, and readiness activities. Their involvement is scaled based on member capacity and change complexity, but the role remains part of the core delivery model across all engagements. To support scalability and consistency across multiple concurrent projects, KPMG draws from a broader pool of trained ERP professionals who are onboarded using standardized processes and delivery tools. New resources are supported through structured onboarding materials and project documentation, allowing them to become productive quickly without disrupting delivery momentum. The staffing model is also supported by ongoing learning and enablement. KPMG professionals receive continuous training aligned to ERP platforms, delivery methodologies, and public sector requirements, ensuring that skills remain current and consistent across teams. Overall, KPMG's staffing model balances stable leadership, specialized delivery roles, and scalable resourcing. This structure enables consistent service quality across Canoe Members while allowing flexibility to respond to varying project sizes, delivery models, and overlapping timelines, all within a controlled and well-governed framework.
List the main categories of personnel for implementation project team and the certification required for each one. (technical leads, project managers etc.)	KPMG structures ERP implementation teams around clearly defined personnel categories, each with distinct responsibilities and appropriate professional and technical certifications. This role-based structure ensures delivery quality, accountability, and scalability across members of varying size and complexity. Engagement and Delivery Leadership: Project and program leadership roles provide overall accountability, governance alignment, and delivery oversight. Typical roles include engagement partners, program managers, and project managers. Certifications commonly held by these resources include Project Management Professional (PMP) or equivalent project management credentials, as well as formal training in KPMG's delivery methodologies. Senior leaders also maintain required professional designations and ongoing ethics and independence training. Functional Leads and Functional Consultants: Functional resources are responsible for business process design, ERP configuration, requirements validation, and business alignment across domains such as finance, human resources, payroll, procurement, and supply chain. Typical roles include functional leads and functional consultants. These resources typically hold ERP platform certifications relevant to their functional area (for example, finance or human capital modules), supported by professional designations such as CPA, CHRP/CHRL, or equivalent public sector and domain specific credentials, depending on role and discipline. Technical Architecture and Technical Delivery: Technical resources design and support the ERP system architecture, environments, integrations, extensions, and technical configuration. Typical roles include solution architects, technical leads, developers, and integration specialists. Certifications for these roles commonly include ERP platform technical certifications, cloud platform certifications (such as Azure or equivalent), and architecture or security credentials appropriate to the technology stack being implemented. Data, Reporting, and Integration Specialists: Data focused resources manage data assessment, migration, reconciliation, reporting design, and analytics enablement. Typical roles include data architects, data migration leads, reporting specialists, and integration analysts. Certifications may include data management, analytics, or platform specific reporting certifications, supported by demonstrated experience with public sector data governance, auditability, and statutory reporting requirements. Organizational Change Management and Training: Change and training resources support stakeholder engagement, communications, training development, and readiness for adoption. Typical roles include change managers, change analysts, and training leads. Certifications commonly include recognized change management credentials (such as Prosci or equivalent), learning and development certifications, and formal training in KPMG's change and adoption frameworks. Quality Assurance and Testing: Quality and testing resources ensure solution stability, defect management, and readiness for go live. Typical roles include test managers, test leads, and quality assurance analysts. Certifications may include testing and quality credentials, ERP testing certifications, or platform specific testing qualifications, supported by experience in structured public sector testing cycles. Security and Risk Specialists (as required): For members with heightened security, privacy, or regulatory requirements, specialized resources may be included. Typical roles include security architects or risk specialists. Certifications may include information security, privacy, or risk management credentials aligned with public sector standards and legislative requirements. Across all categories, KPMG professionals are supported by continuous learning, mandatory professional development, and platform specific enablement to ensure skills remain current. This structured staffing model allows KPMG to deploy appropriately certified resources while maintaining consistency, scalability, and delivery quality across all ERP implementation engagements.

Explain if and how you use contracted resources or sub-contractors to supplement your workforce.	KPMG primarily delivers ERP implementation services using its own professionals to maintain consistency, accountability, and quality across public sector engagements. However, the firm does use contracted resources and sub-contractors selectively and in a controlled manner to supplement its workforce where this adds value, supports scalability, or addresses specific capacity or specialization needs. A key component of this approach is the use of KPMG Global Services (KGS). KGS is an integrated part of the KPMG network and provides access to trained ERP professionals who operate under KPMG governance, methodologies, quality standards, and security requirements. KGS resources are commonly used to support activities such as configuration support, data preparation, testing execution, reporting development, and documentation. These resources are fully aligned to KPMG delivery practices and are managed directly by KPMG project leadership, allowing scalability without compromising delivery control or service levels. In addition to KGS, KPMG may engage specialized contract resources or sub-contractors on a limited and targeted basis where specific expertise is required or where market conditions create temporary capacity constraints. This may include niche technical skills, short-term surge capacity during high-intensity phases such as testing or data migration, or regionally based resources required to meet member-specific needs. Any such resources are engaged through established KPMG vendor management and due diligence processes. When contracted resources or sub-contractors are used, KPMG retains full accountability for delivery outcomes. These resources are integrated into the project team under KPMG leadership, governance, and quality assurance processes. They follow the same delivery methodology, documentation standards, and security requirements as KPMG personnel, and their work is subject to KPMG oversight and review. Subcontractors do not operate independently or directly manage client relationships. KPMG is also transparent with Canoe Members regarding the use of supplemental resources. The proposed delivery model, including the use of KGS or subcontracted roles where applicable, is clearly described in project plans and statements of work. This transparency allows members to understand how capacity is being managed while maintaining confidence that KPMG remains responsible for delivery quality, risk management, and outcomes. Importantly, the use of contracted resources is not a substitute for core delivery roles. Key leadership, functional ownership, solution architecture, and decision-making responsibilities remain with KPMG professionals. This ensures continuity, accountability, and consistency across all ERP implementations delivered under the Canoe program. Through this balanced approach, KPMG is able to scale effectively in periods of increased demand, such as those driven by legacy system sunsetting, while maintaining the governance, quality, and trust expected by public sector members.

Technical Support

Question	Answer *
Describe the customer support services available for technical issues, including support channels, hours of availability, response and resolution targets, escalation paths, and any service-level commitments for Canoe Members.	KPMG provides a structured and responsive technical support model for Canoe Members that is designed to ensure system stability, timely issue resolution, and clear accountability following ERP implementation. Technical support services are scalable and can be tailored to each member's operational needs, internal capacity, and criticality of the ERP system. Support Channels: Canoe Members can access technical support through multiple, well defined channels. These typically include a centralized service desk or ticketing system for logging and tracking issues, dedicated email support, and direct access to named KPMG support leads for higher priority or complex issues. During stabilization or hypercare periods, additional channels such as scheduled check ins and on call support may be provided to ensure rapid issue handling. Hours of Availability: Standard technical support is generally provided during normal business hours aligned to the member's operating environment. For members with higher operational criticality, such as payroll or financial close dependencies, extended hours or on call support arrangements can be established. Support coverage is clearly defined at the outset of the engagement or post go live support period, so members understand when and how assistance is available. Response and Resolution Targets: KPMG applies defined response and resolution targets based on issue severity and business impact. Issues are typically categorized into priority levels, such as critical, high, medium, and low. Critical issues that impact core operations or statutory functions receive immediate attention and accelerated response, while lower priority issues are addressed within agreed timeframes. These targets are documented in the support agreement or statement of work to provide clarity and predictability for Canoe Members. Issue Management and Escalation Paths: All technical issues are logged, tracked, and managed through a structured issue management process. Each issue is assigned an owner, priority, and target resolution timeline. If an issue cannot be resolved within expected timeframes, it is escalated through clearly defined paths, from support analysts to technical leads, solution architects, and senior delivery leadership as required. This escalation model ensures that issues receive appropriate attention without unnecessary delay and that members always have visibility into status and next steps. Service Level Commitments: Service level commitments are established based on the agreed support model and member requirements. These commitments typically include defined response times, resolution expectations, communication standards, and reporting obligations. For Canoe Members, service levels are structured to be consistent with the broader program framework while remaining flexible enough to reflect member specific operational risks and priorities. Performance against service levels is monitored and reviewed to ensure commitments are being met. Coordination with ERP OEM Support: KPMG's technical support model includes clear coordination with ERP software vendors where required. KPMG acts as the primary point of contact for members, handling issue triage, investigation, and resolution for configuration, integrations, data, and application level concerns. Platform level defects or vendor managed issues are escalated to the ERP OEM as appropriate, with KPMG coordinating communication, tracking progress, and keeping the member informed. This approach reduces complexity for members and ensures accountability remains clear. Stabilization and Hypercare Support: Following go live, KPMG typically provides enhanced stabilization or hypercare support for an agreed period. During this phase, support capacity is increased, response times are accelerated, and proactive monitoring is applied to high risk areas such as payroll, financial processing, and reporting. Entry and exit criteria are defined so members transition smoothly into steady state support. Through this structured technical support model, KPMG provides Canoe Members with reliable access to assistance, clear service expectations, and disciplined escalation and resolution processes. The approach balances responsiveness with governance and ensures that ERP systems remain stable, supported, and fit for ongoing public sector operations.

Describe your technical support model, including the distinction between ERP OEM-provided support and partner-provided support. Identify which types of issues are handled directly by your company.	KPMG's technical support model is designed to provide Canoe Members with a single, accountable point of coordination while clearly distinguishing between partner provided support and ERP software OEM provided support. The model prioritizes clarity, efficiency, and reduced administrative burden for members by ensuring issues are triaged and managed appropriately from the outset. Overall Support Model: KPMG operates as the primary support partner for ERP implementations and post go live support, particularly for application level, configuration, integration, and data related issues. Members interact first with KPMG rather than navigating multiple vendor support channels. KPMG assesses, categorizes, and manages issues through to resolution, engaging the ERP OEM only when platform level intervention is required. KPMG Provided Support Responsibilities: KPMG directly handles the majority of technical and functional issues that arise during stabilization and ongoing operations. These include: • Application configuration issues, including setup errors, workflow behavior, and business rule logic • Integration and interface issues between the ERP system and external or downstream systems • Data related issues, including migration defects, reconciliation variances, reporting discrepancies, and master data setup • Role based security configuration and access issues • Custom extensions, reports, or configurations delivered as part of the implementation • Performance or usability issues caused by configuration, data volumes, or integration design • User reported application errors that require investigation, root cause analysis, or corrective configuration • Support for testing, patch validation, and release readiness related to member specific configurations. These issues are investigated, resolved, and validated by KPMG resources using established support and issue management processes. KPMG maintains ownership of communication, resolution tracking, and member updates throughout the lifecycle of each issue. ERP OEM Provided Support Responsibilities: ERP OEM support is engaged when issues fall outside the control of implementation configuration or partner managed components. These typically include: • Core product defects or bugs within the ERP software • Platform level performance issues inherent to the vendor's infrastructure • Vendor managed service outages or degradation • Product roadmap clarifications or standard functionality limitations • Security vulnerabilities or patches that require OEM intervention. When OEM involvement is required, KPMG acts as the intermediary. KPMG prepares and submits support cases, provides diagnostic information, coordinates testing or workaround validation, and tracks progress through to resolution. This ensures Canoe Members are insulated from vendor complexity and do not need to manage multiple support relationships independently. Issue Triage and Escalation: All issues are first triaged by KPMG to determine root cause and ownership. This early assessment ensures that issues are routed correctly and efficiently, avoiding unnecessary delays. Escalation paths exist within KPMG delivery leadership and, where required, into the ERP OEM's support organization. Members are kept informed throughout escalation, with clear communication on status, impact, and expected next steps. Post Go Live and Ongoing Support Models: Following go live, KPMG typically provides structured stabilization or hypercare support, during which KPMG support coverage is expanded and response times are accelerated. After stabilization, members may transition to an agreed steady state support model, which can include continued KPMG application support, coordination with OEM support, or knowledge transfer to internal teams depending on member preference and capacity. Single Point of Accountability: A core principle of KPMG's support model is accountability. Regardless of whether an issue is ultimately resolved by KPMG or the ERP OEM, KPMG remains accountable for managing the issue lifecycle, coordinating resolution, and communicating outcomes. This model reduces complexity for Canoe Members and ensures consistent service quality and transparency. Through this clearly defined support structure, KPMG provides Canoe Members with dependable technical support, clear ownership of issues, and effective coordination with ERP software vendors, ensuring ERP systems remain stable, supported, and fit for ongoing public sector operations.
Describe how support responsibilities are divided between your company and ERP OEM, including issue triage, root-cause analysis, and platform-level defects.	KPMG applies a clearly defined and well governed model to divide support responsibilities between KPMG and the ERP software OEM, ensuring that issues are resolved efficiently while maintaining a single point of accountability for Canoe Members. This model is designed to minimize disruption, reduce complexity for members, and ensure that issues are addressed by the party best positioned to resolve them. Issue Triage and Initial Assessment: All support issues are first received and triaged by KPMG. This initial triage includes confirming the nature of the issue, assessing severity and business impact, and determining whether the issue is related to application configuration, integrations, data, security, customizations, or underlying ERP platform functionality. By performing triage upfront, KPMG ensures that issues are routed correctly and that unnecessary escalation to the ERP OEM is avoided. Members interact with KPMG as their primary point of contact throughout this process. Root Cause Analysis Responsibilities: KPMG is responsible for root cause analysis for issues related to implementation delivered components and member specific configurations. This includes analysis of configuration logic, workflows, integrations, custom reports or extensions, data migration outcomes, role based security, and environment setup. KPMG investigates these issues directly, identifies corrective actions, implements fixes where applicable, and validates resolution with the member. Where an issue is suspected to be related to core ERP product behavior rather than configuration or design, KPMG conducts preliminary analysis to confirm the scope and isolate the problem. This may include reproducing the issue, validating against standard functionality, and confirming that the issue is not driven by data or configuration choices. This disciplined approach ensures that only true platform level issues are escalated to the ERP OEM. ERP OEM Platform Level Defects: Platform level defects, such as core product bugs, vendor managed service outages, or limitations inherent to standard ERP functionality, fall under the responsibility of the ERP OEM. Once KPMG confirms that an issue meets this threshold, KPMG formally engages the OEM through established support channels. KPMG prepares and submits the required diagnostic information, supports vendor investigation, and coordinates testing of fixes or workarounds. While the ERP OEM is responsible for resolving platform level defects, KPMG remains responsible for managing the issue lifecycle on behalf of the member. This includes tracking progress, escalating within the vendor organization when required, assessing business impact, and communicating status and expected timelines to the member in clear, non technical terms. Ongoing Coordination and Escalation: KPMG maintains structured escalation paths both internally and with ERP OEMs. Internally, issues can be escalated from support analysts to technical leads, solution architects, and senior delivery leadership. Externally, KPMG leverages established vendor relationships and escalation mechanisms to ensure timely attention to high severity platform issues. This coordinated approach ensures that critical issues receive appropriate priority without placing the burden of vendor management on Canoe Members. Accountability and Member Experience: A core principle of KPMG's support model is that accountability does not shift simply because an issue involves the ERP OEM. Regardless of whether an issue is resolved directly by KPMG or by the vendor, KPMG remains accountable for ensuring that the issue is managed, progressed, and resolved. Members benefit from a consistent support experience, clear ownership, and reduced administrative effort, even when multiple parties are involved behind the scenes. Through this clearly delineated model, KPMG ensures that configuration and application level issues are resolved quickly by KPMG resources, platform level defects are escalated appropriately to ERP OEMs, and Canoe Members receive transparent, coordinated, and reliable support throughout the issue lifecycle.

Describe how technical support interacts with OEM update and release process, including communication of upcoming releases, support for regression issues, and schedule stability.	KPMG's technical support model is tightly integrated with the ERP OEM update and release lifecycle to ensure Canoe Members benefit from platform improvements while maintaining system stability, operational continuity, and confidence in day to day operations. The approach is designed to proactively manage change rather than react to it, recognizing that public sector environments require predictability, transparency, and controlled adoption of system updates. Awareness and Communication of Upcoming Releases: KPMG actively monitors ERP OEM release schedules, roadmaps, and update communications as part of its ongoing support responsibilities. Relevant information about upcoming releases, patches, and functional changes is reviewed by KPMG technical and functional leads to assess potential impact on member environments. Where updates are relevant, KPMG communicates anticipated changes to members in advance, highlighting areas of potential impact, timing considerations, and recommended actions. This proactive communication allows members to plan around operational cycles such as payroll, financial close, or peak service periods. Release Impact Assessment and Planning: Before updates are applied, KPMG supports structured impact assessments that evaluate how OEM changes may affect configured functionality, integrations, custom reports, data processes, and security roles. This assessment distinguishes between low impact updates that can be adopted with minimal effort and higher risk changes that require validation or mitigation. Recommendations are provided to members regarding update timing, testing scope, and any preparatory actions needed to preserve system stability. Support for Regression and Compatibility Issues: KPMG plays a central role in supporting regression testing and issue management related to OEM updates. Where members require assistance, KPMG supports testing of critical business processes following updates to confirm that existing functionality continues to operate as expected. If regression issues are identified, KPMG investigates root cause to determine whether the issue is related to configuration, data, integrations, or OEM platform behavior. Configuration related issues are addressed directly by KPMG, while confirmed platform level defects are escalated to the ERP OEM with supporting evidence and impact analysis. Coordination with ERP OEM on Platform Issues: When OEM updates introduce defects or unintended behavior at the platform level, KPMG coordinates directly with the vendor on the member's behalf. This includes logging support cases, supporting diagnostic activities, validating fixes or workarounds, and communicating expected resolution timelines. Throughout this process, KPMG remains accountable for tracking progress and keeping members informed, ensuring that OEM interactions do not become an administrative burden for public sector teams. Schedule Stability and Controlled Adoption: A key principle of KPMG's approach is preserving schedule stability. OEM updates are not treated as automatic or disruptive events; instead, they are incorporated into a controlled change process aligned with the member's operational calendar and risk tolerance. Where possible, updates are scheduled outside of critical business periods, and optional functionality is introduced only when members are ready to adopt it. This approach minimizes disruption and ensures that updates enhance, rather than destabilize, day to day operations. Post Update Monitoring and Support: Following the application of updates, KPMG provides heightened monitoring and support as required to identify and resolve any emerging issues quickly. This includes validation of high risk processes, responsiveness to user reported concerns, and rapid escalation where needed. Lessons learned from update cycles are documented to improve future release planning and testing efficiency. Single Point of Accountability: Throughout the OEM release lifecycle, KPMG remains the primary point of accountability for support coordination. Members engage with KPMG rather than managing vendor updates independently, ensuring a consistent experience, clear ownership, and disciplined management of change. Through this integrated approach, KPMG ensures that technical support, OEM updates, and member operations remain aligned. Canoe Members benefit from ongoing platform improvements while maintaining the stability, predictability, and governance required for successful public sector ERP operations.

Risk identification and mitigation plan

The purpose is to show subject-matter expertise through clear identification and management of material risks ahead of time. Listing risks with high likelihood or high impact before mitigation will not reflect negatively on the Proponent. In fact, demonstrating a thorough understanding of ERP implementation risks and their management will show depth of expertise and practical experience. Proponents should use judgment and focus only on material risks that require specialized knowledge of ERP implementations.

Generic risk frameworks or methodologies, including general project risk management, transfer of risk to client via change order will not demonstrate specialized knowledge and will score poorly. Identified risks must relate directly to ERP implementation and be detailed enough to show validity and relevance. The Proponent must explain how mitigation measures avoided or minimized negative impacts on project outcomes.

Proponents should emphasize risk and issue avoidance or mitigation tactics that helped manage budget, schedule, and scope effectively without defacto transferring the risk to client.

Risk Description *	Proposed mitigation *	How this reduces deviation on project and impact on Member. *
Misalignment Between ERP "Out-of-the-Box" Capabilities and Public-Sector Business Requirements: Public sector organizations frequently assume that an ERP will naturally support their existing processes. In practice, many legacy processes evolved around historical systems, manual workarounds, or policy interpretations. Without early alignment, this results in late discovery of gaps, excessive configuration, or pressure for customizations, which may drive scope growth, cost escalation, and delays.	• Conduct process led fit to standard workshops early in the design phase, anchored on ERP delivered capabilities rather than legacy workflows. • Explicitly differentiate between: – statutory / regulatory requirements, – true business critical needs, and – historical preferences. • Use capability based prioritization (must / should / could) to guide configuration decisions and limit custom development. • Document accepted process changes and design decisions early and socialize them across functional leads to prevent re litigation later in the project.	• Reduces late-stage design changes that typically increase cost and extend timelines. • Limits unnecessary customizations, lowering long-term support and upgrade costs. • Creates shared ownership of design decisions, reducing downstream resistance and rework.
Insufficient User Adoption Due to Inadequate Change Management and Training: ERP implementations often fail to deliver expected benefits because users revert to manual workarounds or parallel systems. This is particularly acute in public-sector environments with unionized workforces, diverse user groups, and high operational continuity requirements.	• Embed role-based change and training planning into the implementation lifecycle rather than treating training as a final activity. • Engage business users early through design validation, conference room pilots, and scenario-based testing to build familiarity and confidence. • Tailor training to how work is performed in a municipal context, not generic ERP navigation. • Provide hypercare support immediately post-go-live to reinforce correct usage and rapidly resolve issues.	• Reduces productivity loss following go-live. • Minimizes reliance on manual workarounds that undermine data quality. • Accelerates realization of benefits without requiring additional scope or cost.
Unrealistic Cutover, Go-Live and Service Continuity Planning: ERP go-live failures often stem from compressed cutover plans that do not reflect real operational constraints, such as payroll cycles, financial close, or service delivery commitments.	• Develop a detailed, business-validated cutover plan aligned to operational calendars and statutory deadlines. • Conduct cutover rehearsals to validate timing, sequencing, and contingency plans. • Clearly define rollback and stabilization procedures without deferring risk to the Member.	• Prevents last-minute delays or forced deferrals. • Protects continuity of critical public services. • Ensures a controlled transition without cost overruns or emergency interventions.
Insufficient Executive and Organizational Alignment Leading to Delayed Decisions: ERP implementations can stall when decision rights, sponsor alignment, and approval pathways are unclear. This can cause delayed design decisions, unresolved policy questions, and late scope rework.	- Confirm executive sponsors, decision rights, and escalation paths during mobilization. - Establish a regular steering committee cadence with decision logs and action owners. - Use design sign-off gates to confirm policy decisions before build and testing. - Escalate unresolved cross-functional decisions early with options, impacts, and recommended paths forward.	- Reduces decision delays that can push design, build, and testing milestones. - Limits rework caused by late policy or process decisions. - Keeps Member leadership aligned on scope, schedule, and operational trade-offs.
Integration Failures Across ERP and Specialized Municipal Systems: Many public sector entities rely on integrations between ERP platforms and specialized systems (e.g., payroll providers, asset management, utilities, taxation, etc.). Poorly defined or late-tested integrations can disrupt core services and delay deployment.	• Identify all required integrations early and treat them as core scope deliverables, not technical afterthoughts. • Define integration principles, data ownership, security, and error handling during design. • Conduct end-to-end integration testing using real operational scenarios, including failure conditions. • Sequence integration cutovers to align with business operations and statutory cycles.	• Prevents go-live disruptions to payroll, billing, and financial operations. • Reduces schedule slippage caused by late integration rework. • Avoids emergency fixes that inflate cost and divert operational resources.

Situational questions

Many Canadian public entities face a common challenge. They must modernize aging, highly customized ERP systems while maintaining operational stability, protecting sensitive data, working within limited budgets and managing significant organizational change. For example, many municipal systems are approaching end of life, including Dynamics GP. They also face staffing shortages, limited consulting capacity, complex integrations, and pressures to adopt cloud, SaaS, and emerging technologies without disrupting essential services.

Using this scenario, describe how your team would lead a public sector entity through this modernization challenge. Avoid using marketing material in your response.

Question	Answer *

Describe how the project team would plan and manage the transition from an on-premise or hybrid architecture to a modern cloud or SaaS platform.	KPMG plans and manages the transition from on premise or hybrid environments to modern cloud or SaaS platforms using a structured, risk aware, public sector aligned methodology. Our approach balances modernization with operational continuity, security, governance, and organizational readiness. Depending on a Member's maturity, we can begin at the cloud strategy stage or build on existing work already completed. 1. Strategy, Readiness & Planning We begin by assessing the current architecture, integrations, data, technical debt, and operational drivers. We evaluate readiness across people, process, data, technology, security, and governance to determine "cloud fit" for each workload. We then develop a phased migration roadmap and business case, including effort, cost, risks, and sequencing. 2. Cloud Architecture, Design & Environment Enablement We design a secure, scalable cloud architecture aligned with municipal, provincial, and federal requirements. Where Members do not have an existing cloud landing zone, we leverage Canadian public-sector landing zone templates from Microsoft, AWS, or Google. These templates follow well-architected frameworks and support ITSG-33/NIST compliance while incorporating vendor-recommended cloud adoption practices. Our team also rationalizes legacy applications, defines a sustainable integration strategy, and plans for data architecture, retention, and archival in alignment with regulatory, operational, and audit needs. In addition, KPMG helps Members understand how a vendor's SaaS platform meets municipal security and compliance requirements. Where needed, we provide education and guidance using the Cloud Security Alliance's Cloud Control Matrix to clarify roles and responsibilities across SaaS, PaaS, and hybrid models, helping Members confidently manage obligations in shared-responsibility environments. 3. Data Migration & Transition from Legacy Systems KPMG uses iterative migration cycles—including data discovery, cleansing, mapping, conversion, reconciliation, and validation—to ensure high quality data enters the new ERP environment. We plan for coexistence or dual running as needed and develop decommissioning and archival strategies that support statutory reporting and audit requirements. 4. Implementation, Testing & Cutover We configure the SaaS platform using standard capabilities, build secure integrations, and conduct comprehensive testing (system, integration, security, performance, and UAT). A detailed cutover plan—including freeze periods, final data loads, and rollback procedures—ensures a smooth transition with minimal operational disruption. 5. Transition to Cloud Operations & Continuous Optimization KPMG provides post go live stabilization, issue triage, and performance tuning. We help Members establish cloud operations roles, governance, and support processes (monitoring, release management, security operations) and provide training and capability transfer. We then develop a roadmap for ongoing optimization, automation, and improvement aligned to SaaS release cycles. Cross Cutting Practices: Throughout all phases we embed: • Cloud & Cyber Security: zero trust design, IAM, compliance, and continuous validation. • Governance & PMO: structured oversight using KPMG's 3PM methodology. • Change Management & Training: stakeholder engagement, change impacts, readiness, and role based training.
Describe how the project team would support data cleaning, migration, and integration with other systems.	KPMG supports data cleaning, migration, and systems integration using our Powered Enterprise delivery method, adapted to the selected ERP vendor's tools. Our approach combines people, method, and packaged tooling to manage data quality, migration, and integrations in a business centric, outcomes focused manner rather than a purely technical ETL exercise. Key Tasks: • Prepare for data migration workshop • Conduct data migration workshop • Conduct data audit (Data Health Check) • Prepare data migration scope and requirements document • Present DM scope and requirements document • Conduct organizational and infrastructure assessment for data migration • Conduct risk assessment for data migration and prepare mitigation plan • Complete data migration approach and strategy document Data Cleaning & Preparation: KPMG conducts an early and structured data quality assessment to identify duplicates, inconsistencies, missing fields, and legacy coding issues. We work with Member SMEs to: • Define data ownership, standards, and cleansing rules. • Profile source data and address quality gaps before migration. • Apply repeatable cleansing and validation routines to ensure compliance with audit, privacy, and statutory reporting requirements. Data Migration: KPMG's Powered Data Migration approach uses five phases (Vision, Validate, Construct, Deploy, Evolve) to deliver controlled, transparent, and reconcilable migrations: • Vision: Confirm migration scope, assess initial data quality, and draft the migration strategy and cutover plan. • Validate: Finalize the strategy, validate assumptions, and confirm migration requirements with Members. • Construct: Stage source data, apply mapping and transformation rules, and configure validation and reconciliation routines. • Deploy: Execute multiple dress rehearsals, refine conversion logic, and perform the final load for go live with full business sign off. • Evolve: Provide post go live support for issue resolution, data validation, and strengthening Member ownership. • This structured multi cycle approach ensures Members enter go live with accurate, validated, and reconciled business data. Integration with Other Systems: KPMG designs and delivers a secure, scalable integration architecture aligned to the Member's broader application environment. The project team supports: • Integration strategy and design (APIs, vendor connectors, middleware/iPaaS, batch interfaces). • Interface development for key systems such as banking, time and attendance, asset management, permitting, HR benefits, or BI reporting. • End to end integration testing to validate data flows across financial, HR/payroll, and procurement processes. • Ongoing governance for monitoring, error handling, SaaS release impacts, and Member capability building.

Describe how the project team would address cybersecurity, privacy, and regulatory requirements during the transition.	KPMG is a leading provide of cyber security, privacy and regulatory services at a local, national and international level. KPMG provide knowledge leadership benchmarking organizations in their cybersecurity, privacy and regulatory maturity and makes recommendation to right size governance so that organizational needs are met. KPMG's takes security and privacy by design approach with methods rooted in ISO, NIST and CIS frameworks and tailored to meet jurisdictional regulatory needs. Work in regions around the word KPMG has helped advise governments on their regulatory policies and legislation. Taking this context into account, KPMG supports ERP implementations with the following approach: Define the strategy and confirm constraints and resources – Each jurisdiction will have regulatory constraints to adhere to and depending on the phase of the project we could be gathering requirements or could be supporting implementations that are being done by a third-party vendor. Where possible KPMG will leverage controls benchmarks (such as CIS controls benchmarks) that confirm best practices for cybersecurity and privacy configurations for the solutions in scope. 1. Security & Privacy by Design During Architecture and Planning Before configuration begins, the project team conducts a structured security and privacy impact alignment that includes: • Identification of sensitive data types (e.g., payroll, benefits, tax data, banking details, personal identifiers) • Mapping of regulatory obligations (e.g., provincial privacy legislation, records retention requirements, financial reporting standards) • Clarification of data residency requirements and cross-border data flow constraints • Definition of role-based access principles and segregation of duties requirements. Security controls are incorporated into the solution design phase rather than retrofitted. This includes: • Role-based access control (RBAC) aligned to least-privilege principles • Segregation of duties matrices for finance and procurement workflows • Multi-factor authentication integration (where supported) • Audit logging configuration for financial and HR transactions • Encryption requirements for data at rest and in transit. For SaaS deployments, we explicitly map the shared responsibility model between ERP OEM and Member to ensure there are no control gaps. 2. Secure Transition from Legacy to Cloud/SaaS ERP transitions introduce risk during the migration window. To mitigate this: a) Data Migration Security Controls • Secure extraction procedures from legacy systems • Encrypted transfer channels for all migration data • Restricted migration environments with controlled access • Masking or anonymization in lower (non-production) environments • Strict handling of payroll and financial master data. b) Environment Segregation • Separate development, test, and production environments • Controlled promotion processes with documented approvals • Access recertification before production go-live. c) Legacy Decommissioning Controls • Formal data archival and retention mapping • Secure decommissioning of on-premise servers • Verification that sensitive data is removed from retired systems This prevents orphaned data exposure — a common but often overlooked risk in ERP modernization. 3. Integration Security Management Public sector ERP implementations frequently integrate with: • Payroll providers • Banking institutions • Asset management systems • Utility/tax systems • Benefits providers. The project team treats integrations as high-risk components and: • Defines secure API or middleware standards • Implements encryption and authentication protocols • Conducts end-to-end integration testing including failure scenarios • Validates data integrity between systems before go-live • Establishes monitoring and alerting for integration failures. Security reviews are conducted before production activation of any interface. 4. Privacy Compliance & Regulatory Alignment KPMG ensures that ERP design aligns with: • Applicable provincial and federal privacy legislation • Records retention and audit obligations • Public sector financial control frameworks • Data minimization principles. Key actions include: • Privacy impact alignment during design • Ensuring only necessary personal data is migrated • Validating that data retention policies are enforceable within the ERP • Confirming audit trails meet financial and public accountability standards. We also support Members in documenting compliance decisions for audit transparency. 5. Security Testing Before Go-Live Cybersecurity validation is incorporated into testing cycles, including: • Role-based access validation testing • Segregation of duties conflict testing • Integration security validation • Configuration vulnerability checks • Log monitoring validation. For higher-risk environments, security review checkpoints are embedded in go-live readiness assessments. 6. Go-Live & Stabilization Controls During cutover and stabilization: • Elevated system access is time-bound and monitored • Temporary access rights are revoked post-deployment • Hypercare monitoring focuses on security events and integration stability • Incident response escalation paths are pre-defined This prevents privilege creep and unmonitored changes during the critical transition window. 7. Post-Deployment Governance After go-live, the project team supports Members in establishing: • Access recertification cycles • Release management controls aligned to SaaS update cycles • Ongoing segregation of duties monitoring • Incident response and escalation protocols • Audit support processes. We ensure Members understand how to maintain compliance within evolving SaaS environments, where updates are frequent and shared-responsibility models apply.

Describe how the project team would approach organizational change management to support user adoption.	KPMG recognizes that successful ERP implementation is as much a people and process transformation as it is a technology deployment. For Canoe, this is further amplified by the consortium model—where adoption occurs within individual Member organizations with different operating realities, governance structures, and levels of internal capacity. Our project team will embed organizational change management (OCM) throughout each engagement to enable awareness, build commitment, equip users with practical skills, and reinforce new ways of working post go-live. Our approach is aligned to leading practice change frameworks (e.g., ADKAR) and is delivered in a pragmatic, scalable way so it can be right-sized for small municipalities as well as larger, more complex Members. OCM activities are sequenced with implementation milestones to reduce disruption and ensure readiness at key decision points (design sign-off, testing, training, cutover, and stabilization). OCM approach to support user adoption: • Change strategy and impact assessment: identify impacted stakeholder groups, map impacts to roles/processes, and define a change plan tailored to the Member's operating model and deployment approach. • Change governance and sponsorship: integrate OCM into the project governance cadence and enable visible sponsorship at the Member level (executive sponsor and functional leaders) to reinforce priorities and remove barriers. • Change network (champions / super users): establish a Member-led network to support local adoption, provide peer coaching, validate training content, and create two-way feedback loops. • Communications and engagement: deliver targeted, plain-language communications that explain what is changing, why it matters, when it happens, and what each audience needs to do—supported by town halls, Q&A, office hours, and pulse checks. • Role-based training and performance support: develop curricula aligned to future-state processes and security roles, using blended delivery (instructor-led, labs, job aids, quick reference guides) and realistic scenarios to build confidence before go-live. • Readiness, cutover, and go-live support: conduct readiness checkpoints (training completion, user preparedness, support readiness), deliver go-live communications, and provide hypercare with coordinated business and technical triage. • Reinforcement and sustainment: reinforce new behaviors through refresher learning, targeted coaching, updated procedures/SOPs, and transition to operational ownership to sustain adoption beyond initial stabilization. This approach provides a consistent change backbone across Canoe's program while allowing each Member to tailor activities to its scope, ERP platform, pace, and local constraints—supporting predictable readiness and strong adoption without imposing a one-size-fits-all operating model. Measuring and reporting user adoption: We define practical adoption metrics early and monitor them through implementation and stabilization so Members and Canoe have visibility into readiness, usage, and areas requiring additional support. Measures are calibrated to the Member's solution and operating context and are reviewed through regular governance cadences. Adoption is assessed using a balanced set of leading and lagging indicators, such as: • Readiness and engagement: stakeholder participation, communications reach, champion network activity, and completion of readiness checkpoints. • Training completion and proficiency: course completion, assessment results (where used), and manager/super-user validation of role readiness. • System usage and process compliance: transaction volumes, feature utilization (where available), and reduction in legacy workarounds/manual processes. • Support trends and stabilization: ticket volume/themes, time to resolution, and recurring issues indicating training or process gaps. We use these insights to target communications, coaching, and training reinforcements, and we report adoption progress through Member governance forums (and, where appropriate, program-level reporting) to support timely course correction and sustained outcomes.
Describe how the project team would assess the current legacy environment, including customizations, integrations, data quality, and risks.	KPMG assesses the current legacy environment using our Powered Enterprise methodology, supported by the integration strategy framework and Cloud Integration Framework (CIF). This provides a consistent, repeatable approach to understanding customizations, integrations, data quality, and risks before transitioning to a modern cloud or SaaS platform. Our assessment typically includes the following Powered-aligned activities: 1. Powered "Discover & Assess" – Legacy System & Customization Review KPMG begins with a structured review of the legacy ERP to understand how it operates today. Activities include: • Inventorying all customizations (reports, extensions, scripts, workflows). • Assessing business value, technical viability, and alignment with future SaaS capabilities. • Identifying opportunities to retire, simplify, or replace custom functionality with Powered leading practices. Outcome: A customization rationalization assessment aligned to Powered's "adopt-not-adapt" design principles. 2. Integration Assessment Using the KPMG integration strategy framework The framework defines how the team evaluates the existing integration landscape across systems, patterns, volumes, and constraints. KPMG assesses: • All inbound/outbound integrations (APIs, batch, file-based, real-time, event-based). • Existing integration platform capabilities, protocols, latency issues, and monitoring gaps. • Data flow dependencies and business processes impacted by interface behavior. • Volumetrics, frequency, and performance characteristics that influence future design. This includes creating an integration inventory, identifying affected applications, mapping current data flows, and documenting nonfunctional requirements such as scalability, availability, DR, and security. Outcome: A Powered integration strategy and interface catalogue that informs transition planning. 3. Data Quality & Data Readiness Assessment We evaluate the condition of legacy data using Powered-aligned data accelerators, focusing on: • Completeness, accuracy, duplicates, and inconsistent coding structures. • Master data quality (vendors, customers, employees, COA, assets). • Historical data requirements and statutory audit/reporting obligations. • Mapping and transformation needs, including crosswalk support for Chart of Accounts translation. Outcome: A data quality scorecard and cleansing plan that informs migration sequencing. 4. Technical, Security & Operational Risk Assessment Using Powered controls and ISO/NIST/CIS frameworks, KPMG evaluates risks in the current environment, including: • End-of-life technology, unsupported custom integrations, and manual workarounds. • Access control weaknesses, segregation-of-duties gaps, and logging/monitoring limitations. • Integration stability, performance bottlenecks, or single-point dependencies. • Privacy, residency, and regulatory compliance risks tied to legacy systems. Outcome: A consolidated risk register and mitigation plan. 5. Synthesis & Powered Roadmap All assessment findings are consolidated into a Powered transition roadmap that includes: • Customization modernization plan (retain / replace / retire). • Integration transformation plan using CIF accelerators. • Data cleansing and migration readiness requirements. • Prioritized risks and remediation steps. • Sequencing options to transition safely from legacy to cloud/SaaS.

Describe how the project team would manage competing demands on internal staff and limited resourcing.	KPMG recognizes that public sector organizations often face significant constraints on internal staff availability during ERP initiatives. Our approach is designed to reduce the burden on Member teams by using a flexible, scalable, and globally supported resourcing model that ensures continuity and minimizes operational disruption. 1. Use of a Structured Resourcing Service Delivery Model KPMG applies a formal Resourcing Service Delivery Model that allows us to rapidly identify, onboard, and integrate qualified professionals based on Members' capacity and timelines. This model includes structured onboarding, clear role definitions, and proactive performance monitoring to ensure resources operate independently without requiring excessive time from internal staff. 2. Access to a Large, Pre Screened Talent Pool We leverage our extensive Canadian and global talent pool—including local consultants, national specialists, and KPMG's offshore centers—to scale support up or down as Member capacity changes. This provides additional capacity during peak periods and reduces reliance on already stretched internal teams. 3. Smart Resource Matching Using internal skills-matching platform KPMG uses internal skills-matching platform, our internal skills-matching platform, to quickly source the right expertise based on skillset, availability, and budget. This ensures Members only receive resources who meet their needs, reducing rework and minimizing the effort required from internal staff. 4. Flexible Scaling to Match Member Availability Our staffing model is intentionally agile. We can: • Increase KPMG effort during critical phases (e.g., design, testing, cutover). • Reduce KPMG presence when internal teams are available. • Shift work to remote or global delivery teams to reduce the load on Member staff. This flexibility ensures work progresses even when Member resources have competing operational demands. 5. Clear Governance & Communication Cadence Using KPMG's Portfolio, Program, and Project Management (PPPM) method, we establish clear governance, defined decision pathways, and predictable communication rhythms. This streamlines Member involvement, ensuring their time is focused only on key decisions and approvals—not day-to-day delivery. 6. Minimizing Disruption Through Repeatable Frameworks & Tools Our use of global delivery centers, accelerators, and standardized templates reduces the volume of Member input required for tasks such as documentation, testing, and integration planning. This helps avoid bottlenecks and protects internal teams from overload. 7. Proactive Issue Management & Contingency Resourcing If resourcing challenges arise, we respond quickly by reassigning, replacing, or supplementing personnel, as outlined in our issue resolution and resource replacement process. This ensures continuity and prevents Member workload from increasing.
Describe how the project team would control costs, timelines, and risks while maintaining essential operations.	KPMG manages costs, timelines, and risks using a structured, disciplined delivery approach tailored to public sector environments where essential operations must continue uninterrupted. Our methods emphasize proactive planning, strong governance, flexible resourcing, and continual monitoring. 1. Strong Governance Through KPMG's PPPM Framework KPMG uses its Portfolio, Program, and Project Management (PPPM) framework to structure planning, oversight, and delivery. This includes clear definition of scope, work plans, governance routines, and performance metrics to ensure disciplined control of budget, schedule, and risks throughout the engagement. The PPPM model ensures: • Defined charters, scope boundaries, and assumptions (Scope phase) • Mature planning for schedule, resourcing, communications, and controls (Organize phase) • Structured execution and monitoring processes (Execute + Check phases) • Formal transition and controlled close out (Transition phase) This method ensures decisions are made quickly, escalations are clear, and project outcomes remain aligned with operational constraints. 2. Cost Control Through Flexible Resourcing & Global Delivery To contain and predict costs, KPMG applies a structured Resourcing Service Delivery Model that uses a large, prescreened talent pool, supported by Canadian, regional, and global delivery teams. This enables: • Right sized staffing based on complexity and phase • Rapid sourcing of talent through internal platforms such as internal skills-matching platform • Scaling up or down as workloads shift • Cost-effective offshore/remote delivery options when appropriate This model prevents cost overruns by ensuring Members are only paying for the capacity and expertise required at any given time. 3. Timeline Control Through Structured Planning & Predictive Resourcing KPMG manages schedule risk by combining detailed work breakdown structures with predictable staffing practices. The model includes: • Creation of an integrated project plan with dependencies, milestones, and critical path tracking • Continuous monitoring of progress and resource utilization • Rapid onboarding and substitution of resources if delays or performance issues emerge (supported by our replacement protocol) Because resourcing and delivery are tightly governed, KPMG can maintain timeline commitments even when internal staff availability fluctuates. 4. Risk Management Through Proactive Identification, Monitoring & Mitigation KPMG integrates risk management into every phase of the PPPM framework. This includes: • Ongoing risk assessments covering operational, technical, staffing, and schedule related risks • Clear escalation pathways • Early issue detection through regular status reporting and governance reviews • Access to specialized SMEs (architecture, cybersecurity, integration, data) to resolve emerging risks quickly This enables timely interventions before risks become cost or timeline impacts. 5. Protecting Essential Operations Through Workload Shielding & Structured Engagement KPMG ensures that Members' essential operations remain stable by: • Minimizing dependency on internal staff through experienced KPMG practitioners • Performing the majority of analysis, documentation, testing coordination, and configuration work within KPMG teams • Using structured stakeholder involvement (e.g., targeted workshops, defined decision points) to avoid unnecessary time commitments • Aligning project activities with operational cycles (payroll, financial close, seasonal workloads) The PPPM model specifically emphasizes aligning project execution with the client's operating environment to avoid operational disruption. 6. Transparent Communication & Account Management KPMG's account leadership team maintains predictable communication through: • Regular governance meetings • Progress reporting aligned to client requirements, Direct partner involvement to maintain quality and quickly resolve issues This focus on structured communication is a core component of KPMG's client management approach and ensures Members always have visibility into cost, schedule, and risk status.

Situation: A Member is transitioning to a new ERP system. This includes the Finance module. Using plain language, propose the ideal sequence for implementing the various Finance module components. Your response should include: -which component of the Finance module should go first, second and third etc; -why are you recommending this order? Do not state that the sequence: "depends on the client".	When moving to a new ERP system, the Finance module is most successful when implemented in a sequence that builds a strong accounting foundation first, then activates core day-to-day finance functions, and finally adds more advanced or specialized capabilities. This reduces rework, supports accurate reporting, and helps staff adopt the new system in manageable steps. Start with the core accounting foundation, then build the transaction engine (AP/AR/CM/FA), then add procurement and expenses, followed by budgetary controls, and finish with advanced capabilities, because each layer depends on the stability of the one before it. Below are details regarding commended order, note that this is a solution agnostic approach and sequences, tools and accelerators available may change depending on the solution involved. 1. Start with the Accounting Foundation (General Ledger & Core Structures) Components included: • General Ledger • Chart of Accounts • Organizational/enterprise structures • Accounting rules and posting logic • Financial reporting foundation. Why this first: These elements are the backbone of the entire Finance system. Every other Finance component—payables, receivables, procurement, assets—relies on the chart of accounts, organizational structures, calendars, and accounting rules. Getting these right from the beginning avoids reconfiguring multiple modules later and ensures consistent financial reporting across all processes. What this enables: • A stable accounting framework • Consistent posting across all Finance functions • Early validation of reporting needs • A clear structure for all future modules. 2. Implement the Core Transaction Processing Modules (Day to Day Finance) Components included: • Accounts Payable • Accounts Receivable • Cash Management / Banking • Fixed Assets. Why this second: These areas represent the day to day financial transactions that flow into the General Ledger. Once the foundational accounting structure is established, these modules can be configured to feed transactions into the ledger accurately. This creates a fully functioning financial “engine” early in the project and ensures that the organization can validate end to end processes such as: • invoice to payment • billing to cash • asset acquisition and depreciation • bank reconciliation. What this enables: • Reliable period end close • Reconciled financial data • Confidence in operational workflows • Early benefits realization for Finance teams 3. Add Upstream Spend and Expense Management (Procurement & Expenses) Components included: • Purchasing / Procurement • Supplier management • Employee expenses / travel claims. Why this third: Procurement and expense processes generate financial commitments and transactions that eventually flow into payables, cash management, and the General Ledger. These modules depend on approvals, tax rules, accounting rules, and supplier data already being stable—so they are best introduced after the core Finance engine is running. This reduces rework and ensures that financial controls (e.g., approval workflows, coding structures) are already in place. What this enables: • Controlled spending through consistent processes • Better visibility into purchasing activity • Smooth integration with Accounts Payable • Stronger financial governance. 4. Introduce Budgeting, Commitments, and Financial Controls (If Applicable) Components included: • Budget checking / budget control • Commitments and encumbrances • Public sector–style spending controls. Why this fourth: Budget controls need real transaction data to be meaningful. Implementing them only after core processes are validated ensures that the organization’s budgets align with actual operational workflows. If implemented sooner, the risk of redesign or incorrect budget rules is much higher. What this enables: • Reliable budget to actual reporting • Reduced risk of overspending • Clear financial accountability. 5. Add Advanced or Specialized Financial Capabilities (Optional, Based on Need) Components may include: • Financial forecasting • Advanced reconciliations or automation • Lease accounting • Project costing and billing • Analytics and dashboards. Why this last: These capabilities rely on stable data, mature processes, and consistent use of the core Finance components. By implementing them after stabilization, the organization can adopt them at a manageable pace without overwhelming staff or compromising operations. What this enables: • Enhanced insight and visibility • Improved compliance • Ongoing optimization beyond initial go live.

Engagement , Marketing and Training

Line Item	Question	Response *

1	Describe the engagement and marketing strategy your company will implement if successful in this solicitation. Your answer should be specific to the various types stakeholders involved.	If awarded, our engagement and marketing strategy will align directly with Canoe's national cooperative procurement model, its provincial partner associations, and the joint marketing responsibilities outlined in Schedule C of the Draft Program Agreement. KPMG brings national reach across Canada with established public sector and not-for-profit sector relationships in every province. Our strategy combines coordinated national messaging with localized provincial engagement to ensure consistent awareness while respecting regional member needs. 1. Internal Enablement – National Alignment We will begin by educating our Canadian public sector and not-for-profit teams through: • National and regional business development meetings • Dedicated Canoe contract briefings • CRM tagging and tracking of Canoe Members • Clear guidance on when and how to position the Canoe contract. This ensures that every KPMG partner and director working with municipalities, agencies, and broader public sector entities understands: • What the Canoe contract enables • The benefits to Members • The process for engagement under the cooperative framework. This creates a consistent national message while enabling local relationship-based outreach. 2. Canoe Corporate & Program Coordination We will meet with Canoe leadership to define a coordinated launch and engagement plan, including: • Designated KPMG program lead and contact matrix • Defined escalation pathway • Joint customer engagement strategy • Participation in reviews • Reporting transparency and pipeline visibility. Where applicable we will provide materials aligned to Canoe's communication channels and website. 3. Provincial Partner Engagement Recognizing Canoe's partnership structure across provinces, we will support: • Participation in provincial municipal conventions • Reverse trade shows and association events • Targeted province-specific ERP modernization webinars • Educational briefings tailored to rural and mid-sized municipalities. This ensures awareness extends beyond a national announcement and reaches operational decision-makers at the regional level. 4. Executive & Operational Stakeholder Outreach Different stakeholders require different messaging: Executive (CAOs, CFOs, CIOs): • Briefings on ERP project opportunities, risks and best practices • Governance and compliance-focused materials • Business case considerations. Operational (Finance, HR, IT teams): • Practical webinars on data migration, cutover, and integrations • Knowledge-sharing sessions leveraging KPMG case experience • Access to white papers and modernization insights. KPMG regularly publishes thought leadership on digital transformation and ERP modernization, which will be leveraged and curated specifically for Canoe Members. 5. Knowledge Sharing & Value-Add Education KPMG regularly publishes thought leadership we can perform knowledge sharing which may include: • Access to relevant webinars and recorded sessions • ERP readiness checklists • Data governance and cloud transition guidance • Case-based learning examples.
2	Collaboration between Canoe and the vendor is essential to the buy-in of group purchasing by vendors and their distribution network. What do you expect Canoe's role to be in demonstrating the value of the contract?	We view Canoe as the program sponsor, governance authority, and primary conduit to its Member network. Canoe's role in demonstrating contract value includes promoting the agreement through its established communication channels, providing visibility into Member participation across provinces, and sharing high-level utilization trends or emerging modernization themes that can help prioritize engagement efforts. Access to aggregate Member counts, regional distribution insights, and anonymized indicators of upcoming ERP modernization demand would support coordinated outreach planning while respecting Member autonomy and confidentiality. This allows both parties to proactively educate Members ahead of legacy system sunsets or funding cycles. Successful collaboration relies on shared responsibility: Canoe provides trusted access, visibility, and program governance; we provide delivery excellence, education, and disciplined market engagement.
3	Describe how you will train your sales force and distribution network on the value of utilizing the group purchasing such as the Canoe contract for public sector and non for profit clients. Include details on measure you will put in place, such as type and cadence of engagement etc.	We will implement a structured enablement program to ensure our public sector sales and delivery teams actively and consistently position the Canoe contract. Initial Enablement (First 60 Days): • National virtual briefing for all public sector and not-for-profit partners and directors • Regional business development sessions tailored by province • Distribution of a Canoe contract positioning guide (value proposition, eligibility criteria, engagement process) • CRM tagging of Canoe Members and integration of Canoe contract prompts within opportunity workflows. Ongoing Reinforcement: • Inclusion of Canoe contract review in public sector pipeline calls • Annual refresher training as part of public sector sales onboarding • Dedicated internal knowledge hub with FAQs, positioning scripts, and escalation contacts. Performance Measures: • Tracking of Canoe-tagged opportunities in CRM • Monitoring utilization rates by KPMG sales region • Review of pipeline conversion metrics during quarterly business reviews • Internal reporting to public sector leadership on Canoe contract adoption.

4	Describe your methodology and approach to a successful start up / implementation plan and ongoing review and monitoring of the contract use and promotion. Include details on measure you will put in place.	Upon award, we will implement a structured but streamlined start-up plan focused on alignment, awareness, and operational clarity. Start-Up Phase (First 60–90 Days): • Confirm designated program contacts and escalation pathways • Conduct an internal briefing with relevant public sector teams • Develop a concise Canoe contract overview guide for internal use • Align CRM tracking to identify Canoe Members and related opportunities • Coordinate with Canoe on initial contract listing and promotional materials. Ongoing Monitoring and Review: • Include Canoe contract visibility in regular public sector pipeline discussions • Track Canoe-related opportunities and engagements within our CRM system • Provide required sales reporting to Canoe in accordance with the agreement • Participate in periodic check-ins with Canoe to review utilization trends and discuss improvement opportunities, as appropriate. Measures in Place: • CRM tagging of Canoe-related accounts and opportunities • Quarterly internal review of Canoe contract activity • Annual review of contract positioning within public sector teams • Monitoring of contract utilization trends by region.
5	How will you be monitoring the adoption and utilization of the Canoe contract by your sales and distribution network? Which key performance indicators will you be monitoring?	We will monitor adoption and utilization of the Canoe contract through existing internal business development and CRM processes rather than creating a separate oversight structure. Canoe-related accounts and opportunities will be tagged within our CRM system to allow visibility into engagement activity. This enables basic tracking of contract awareness, pipeline activity, and conversion to executed engagements. Adoption will be monitored through: • Identification of Canoe Members within active opportunities • Number of opportunities referencing the Canoe contract • Conversion of Canoe-tagged opportunities to signed engagements • Regional distribution of Canoe-related activity. These indicators will be reviewed periodically as part of our regular public sector business development discussions. Where adoption appears low in a particular region, we may provide refresher briefings to ensure continued awareness.
6	Describe your commitment to attending and/or sponsoring Canoe member engagement events (e.g., reverse trade shows, conventions, golf tournaments, educational offerings, retreats etc.)	KPMG is committed to supporting Canoe member engagement activities as part of maintaining visibility and strengthening relationships within the public sector community. Where appropriate and aligned with regional priorities, we will participate in Canoe-sponsored events such as reverse trade shows, municipal conventions, and educational sessions. Attendance will be coordinated through our provincial public sector teams to ensure relevant subject matter expertise is available and that participation aligns with Member needs and anticipated ERP modernization timelines. We are open to sponsoring select Canoe member events where there is clear alignment with the ERP implementation services program and mutual value in education-focused engagement. Sponsorship decisions will be assessed annually based on event relevance, Member participation levels, and regional demand. In addition to in-person participation, we are prepared to contribute to virtual educational offerings, webinars, and knowledge-sharing sessions to broaden reach across Canoe's national Member base.
7	Provide details on industry and association partnerships your company has fostered over time which will be beneficial to promoting the Canoe contract in Canada.	KPMG maintains longstanding relationships with municipal, provincial, and broader public sector associations and non-profit organizations across Canada. We also maintain active engagement with regional Chambers of Commerce and economic development organizations, which support local visibility and ongoing relationships with municipal and public sector leaders. These relationships strengthen our ability to engage within the same Member communities served by Canoe. KPMG actively participates in Canadian public sector and municipal forums to share insights and support informed decision-making. For example, KPMG advisors have been featured speakers and contributors at events such as the Future Cities Roadshow across multiple provinces, presenting on digital transformation, governance, and technology modernization for cities. KPMG has also delivered national webinar series focused on municipal climate action, ESG reporting, and public sector financial management, including sessions through organizations such as the Financial Management Institute of Canada. Additionally, KPMG hosts public webinars on topics such as Indigenous participation in infrastructure projects, demonstrating sustained engagement with government and community stakeholders. These established networks and thought leadership platforms may provide natural channels to raise awareness of the Canoe contract in a manner that is educational, credible, and aligned with public sector priorities.

Sales network

Question	Response *
Describe your company's capability to meet the CANOE Member needs across Canada or for each geographical area the Proponent wishes to do business in. Your response should address at least the following areas. a. Sales force. Please include details, such as the locations of your network of sales.	KPMG has a national presence across Canada with offices in all major regions, including Alberta, British Columbia, Saskatchewan, Manitoba, Ontario, Quebec, and Atlantic Canada. These offices include locally based public sector partners and client engagement teams who support municipal, provincial, and non-profit organizations. Our sales model is regionally relationship-driven and nationally coordinated. Public sector partners and directors manage local engagement with Members, supported by national ERP alliance and implementation specialists as required. This structure allows us to provide both local responsiveness and scalable delivery capacity across provinces. Opportunities are managed through a shared CRM platform, ensuring visibility across regions and enabling coordinated support where needed. This approach allows us to serve Canoe Members consistently across Canada while aligning engagement to regional priorities and resource availability.
Describe your how you manage government sales. Include details on the sales force and training structure and how you specifically address sales and marketing with public sector clients in a group procurement context.	KPMG manages government sales through a structured, relationship-led model supported by national coordination and sector specialization. Public sector opportunities are led by regionally based partners and directors who are accountable for municipal, provincial, and broader public sector accounts within their jurisdictions. Our sales force is organized by sector and region, with designated public sector leads supported by ERP alliance specialists and implementation subject matter experts. Opportunities are tracked through a shared CRM platform to ensure visibility, coordination, and resource planning across provinces. Training for public sector engagement includes: • Orientation on public procurement processes and compliance requirements • Regular briefings on contract vehicles such as Canoe • Alignment sessions with ERP OEM alliance teams. In a group procurement context, we emphasize: • Positioning the contract as a procurement efficiency tool • Clear articulation of pre-negotiated terms and pricing structure. Our approach ensures that government sales activities remain compliant, coordinated, and aligned with public sector expectations, while maintaining flexibility to address Member-specific requirements within the cooperative framework.

Environmental and social governance ESG

Question	Response *
Describe your corporate ESG initiatives.	KPMG's commitment to provide a supportive and innovative workplace for our people has been recognized year after year, including the following: • Canada's Best Workplaces for Women in 2025 and Best Workplaces for Inclusion in 2025 by Great Place To Work® Canada • Canada's Greenest Employers 2024 [Guidance Note: 2024 will be the last award date. KPMG is no longer participating in this program and will no longer submit content to the Top 100 Awards] • Canada's Best Diversity Employers 2024 [Guidance Note: 2024 will be the last award date. KPMG is no longer participating in this program and will no longer submit content to the Top 100 Awards]. In addition, as a leading professional service firm, KPMG is managing its environmental footprint and takes action to support its environmental commitments, including: • Through KPMG International, KPMG reports to Carbon Disclosure Project (CDP) and has developed a science-based target, validated by the SBTi. KPMG International's science-based target, which KPMG in Canada has adopted, has been validated by the Science Based Targets initiative's Target Validation Team. Our

target reads as follows: “KPMG commits to reduce absolute scopes 1, 2, and 3 GHG emissions 50% by 2030 from a 2019 base year. KPMG also commits to increase annual sourcing of renewable electricity from 50% in 2019 to 100% by 2030.” KPMG in Canada has been sourcing renewable energy certificates to address 100% of our electricity consumption across the country since 2023.

- KPMG has committed to Environment & Climate Change Canada’s Net-Zero Challenge.
- KPMG has committed to building a LEED Gold standard for all new builds or major renovations. To date, 60% of KPMG’s office space is currently built to LEED Gold standards. However, while we build to LEED standards, we often forgo the certification process due to the additional costs associated with certification.

KPMG has also been recognized as an ESG Leader from various international ratings agencies, including but not limited to:
- IDC MarketScape: Worldwide Carbon Management and Net-Zero Services 2025
- Verdantix Green Quadrant: Climate Change Consulting 2025
- HFS Horizons Report: Sustainability Services 2024
- IDC MarketScape: European ESG Technology Services for CSRD Compliance 2024
- IDC MarketScape: Asia/Pacific Sustainability/ESG Program Management Services 2024
- Verdantix Green Quadrant: ESG and Sustainability Consulting 2024
- ALM Pacesetter: ESG: Social 2024
- IDC MarketScape: Worldwide ESG Program Management Services 2023-2024
- ALM Intelligence Pacesetter: ESG: Environmental, 2023-2024
- Verdantix Green Quadrant: Climate Consulting 2023.

Global ESG is focused on driving positive impact as the #1 ESG brand.

KPMG has now been recognized by four independent market analysts as leaders in ESG and climate consulting.

KPMG named a Market Leader in the HFS Horizons Report: Sustainability Services 2024

KPMG has been recognized as a Horizon 3 Market Leader in the HFS Research Horizons report: Sustainability Services 2024.

According to the report, “KPMG reinforces the importance of sustainability in business strategies, operations, and reporting through multiple entry points—from assessment and strategy to the ESG program management office and the CSO target operating model (TMO).”

Additionally, the report notes that “KPMG has been growing its sustainability services by partnering with leading technology firms, such as Microsoft, Workiva, and SAP, to provide innovative ESG solutions. It offers tailored training programs and leadership development initiatives to help organizations integrate sustainability into their business strategy and culture. KPMG actively engages in pro bono consulting and social responsibility initiatives, focusing on supporting education and promoting social equity.”

The report examines 25 service providers and assesses the innovation and value potential of vendor capabilities across three horizons. The research assesses how well service providers are addressing the needs of sustainability that underpin the 17 UN SDGs with consulting, technology, BPO, BPM, engineering, and managed services noting “sustainability focuses on the long-term health of natural ecosystems and communities, aiming to balance environmental, social, and economic dimensions.

Creating a sustainable business involves integrating these dimensions in every business step.”

Source: https://kpmg.com/xx/en/our-insights/esg/kpmg-firms-named-a-market-leader-in-sustainability-services.html

KPMG has been recognized as a Leader in the IDC MarketScape: European ESG Technology Services for CSRD Compliance 2024 Vendor Assessment.

“KPMG professionals have developed a fast-track readiness assessment to evaluate companies' level of preparednessq for CSRD requirements. To provide an accurate indication of companies' current level of preparedness to the first draft set of ESRSs requirements, the assessment tool has been based on the final ESRSs. With the help of this tool, a customer's most recent publicly available report(s), including annual, sustainability, and CDP report(s), are reviewed. As the assessment follows a standardized approach, it allows for the evaluation of any company that will be subject to the CSRD. As a result, CSRD compliance can be benchmarked across different industries and different company sizes.”

“KPMG's background in ESG advisory services makes it a good choice for customers that quickly need to become compliant with CSRD and other reporting requirements. KPMG can deliver all major ESG-related services and serve as a one-stop-shop for initial reporting support extending to a broader sustainability transformation.”

Source: "IDC MarketScape: European ESG Technology Services for CSRD Compliance 2024 Vendor Assessment", July 2024, IDC #EUR150734224

Link: https://idcdocserv.com/EUR150734224e_KPMG

KPMG named a Leader in the IDC MarketScape: Asia/Pacific Sustainability/ESG Program Management Services 2024

KPMG International has been recognized as a “Leader” in the IDC MarketScape: Asia/Pacific Sustainability/ESG Program Management Services 2024. The report notes, “KPMG possesses one of the strongest adjacent digital tools in the market. Its wide range of software offering to supplement its services engagements has empowered KPMG clients even after the services' engagement has ended. In Asia/Pacific, there were customer case studies of this as well.”

Additionally, the report states, “In Asia/Pacific, where a hands-on, face-to-face approach is still valued in high regard and often still expected from business-to-business (B2B) and business-to-government (B2G) engagements with advisory component, especially if the project tackles a confusing new business concept, KPMG's boutique firm delivery was recognized by clients as the market differentiator. Further, IDC market intel reveals that KPMG is often among the last names of short-listed qualified candidates in sustainability/ESG program-related competitive biddings in some growth markets in sustainability/ESG program services.” Adding, “KPMG was recognized by its Asia/Pacific clients for its industry-specific expertise and ability to provide personal, localized assistance, with clients highlighting that KPMG has the human capital to have a representative walk into their office the next day to sort out an issue.”

The IDC report provides an in-depth analysis of 14 sustainability and environmental, social, and governance (ESG) program management services providers in the Asia/Pacific region, highlighting the demand for such services due to the region's growing sustainability maturity. It identifies the key differentiators among vendors, such as technological capabilities and regional expertise, predicting that future leadership will hinge on integrating technology into consultancy services. The report aims to guide tech buyers in selecting providers that align with their sustainability and ESG objectives.

Source: https://kpmg.com/xx/en/about/industry-analyst-accolades.html#accordion-23af15cd65-item-460b1b5d65

KPMG named a global Leader in the Verdantix Green Quadrant: ESG and Sustainability Consulting 2024

Verdantix has named KPMG a global Leader in ESG and Sustainability Consulting, in its latest report entitled Green Quadrant: ESG and Sustainability Consulting 2024.

KPMG has been recognized as a global Leader in the Verdantix Green Quadrant: ESG and Sustainability Consulting 2024. According to the report, “Through the integration of sustainability into its broader offerings, KPMG has enhanced its ability to support large firms seeking to address sustainability concerns holistically.” Adding “As part of KPMG’s corporate ESG strategy, the firm intends to make ESG the watermark that runs through its global organization. This is motivating the firm to increasingly integrate sustainability considerations in broader technology and business transformation programs, through the construction of cross-functional teams.”

Additionally, the report notes that “Large firms at various levels of ESG maturity, looking for integrated sustainability solutions, should approach KPMG, to profit from its synergistic approach to sustainability. KPMG is also well-suited to firms that require strategy lens for climate, carbon, circular economy, and water- and nature-related reporting and disclosures. In addition, businesses should contemplate using KPMG’s services for projects involving the testing of governance models for ESG-relevant inadequacies, and to benefit from the provider’s capabilities in anticipating and managing ESG-related reputational risks, and threats from potential litigation and shareholder activism.”

The report provides a detailed, fact-based benchmark of 17 of the most prominent ESG and sustainability consulting providers in the market. Learn more here.

Source: https://kpmg.com/xx/en/about/industry-analyst-accolades.html#accordion-a40e6f1098-item-1e3773083b

KPMG has been recognized as a Leader, receiving the top score overall, in the ALM Pacesetter: ESG: Social 2024.

KPMG was the only “Big 4” firm recognized as a Leader in this space.

- “KPMG works with clients to develop an ESG framework that is transformative, flexible, and leverages data and technology to drive measurable impact and achieve long-term value.”
- “For KPMG, developing and implementing an effective ESG framework is an enterprise-wide transformational initiative. In line with the firm's end-all, one-stop-shop for business transformation business model, KPMG has developed a number of ESG solutions to support clients with their ESG-related needs. Some of these solutions include but are not limited to, strategy transformation and implementation, value and deals, assurance in audit, tax and legal services, and reporting.”
- “The firm has recognized that the growing importance of the “S” in ESG is driven by shifting priorities, influence, and scrutiny from investors, customers, talent, and community stakeholders, increasing pressure for clients to report their social impact data. In response to this need and based on the firm’s own learnings and relationships with clients, not-for-profits, regulators, governments, and sector associations, KPMG offers social sustainability services on a global scale. The firm's social solutions are grounded in impact, evaluation, and assessment analysis coupled with perception and sentiment analysis to bridge the voices of all relevant stakeholders. KPMG’s value proposition is based on integrating social considerations across its professional services to help drive business growth while contributing to societal well-being and sustainable development.”
- “The firm has developed a suite of proprietary solutions (twenty-one) to meet specific client objectives relating to the “S” in ESG. The firm has organized its approach into three distinct social categories, from an internal lens to an external. To begin with, KPMG consultants can help clients address social-related business needs that pertain to the workforce in areas of inclusion, diversity, equity (IDE), human rights, and modern slavery, to name a few. The firm supports clients in developing social-related strategies that take into account the organization's values and their impact on the organizational policies, procedures, structure, culture, and ways of working. In the customer and supplier pillar, consultants examine the interactions between the business and its supply chain partners and consider the effects of these factors on an organization’s decisions, products, and purchasing activities. In the last pillar, the firm helps business leaders consider the social implications that extend to the community. This includes providing a deep understanding of an organization’s presence in the market and highlighting the impact on individuals and

	groups that exist beyond the immediate transactional sphere of a business. In its consistent effort to quantify and strategize the social impact of sustainability efforts, KPMG leverages advanced tools and methodologies to drive informed decision-making and long-term value creation. These tools align KPIs with business goals, identify tangible and intangible benefits, and gauge program effectiveness, to name a few." KPMG named a worldwide Leader in the IDC MarketScape: ESG Program Management Services 2023-2024 KPMG has been recognized as a worldwide Leader in the IDC MarketScape: ESG Program Management Services 2023-2024. According to the report, "KPMG's service's adjacent software was one of the strongest in the assessment. By offering a wide range of software to supplement its services engagements, KPMG empowers its clients to continually drive impact even after the services' engagement has ended." Additionally, the report notes that "Customers should consider KPMG in situations where managed software and services are of a high priority. KPMG's suite of adjacent software extends the impacts of a project past the end of the engagement period." The report evaluates 11 environmental, social, and governance (ESG) program management services providers worldwide. Learn more here. Source: https://kpmg.com/xx/en/about/industry-analyst-accolades.html#accordion-1785dea08f-item-36b9749320 KPMG named a global Leader in ALM Intelligence Pacesetter: ESG: Environmental, 2023-2024 KPMG has been recognized as a global leader in Environmental consulting in the first of a three-part Pacesetter Research series on ESG from globally recognized analyst ALM Intelligence. KPMG topped the leader group and all 24 firms profiled with an overall score of 89.7 percent. KPMG has been recognized as a market Leader in ESG environmental consulting, the report notes "For KPMG, ESG is transformative for both themselves and their clients, where ESG is embedded throughout the organization to drive measurable change." Adding, "For KPMG, ESG is everything a business does and how it does it. Therefore, authenticity in an organization's ESG approach is critical to developing a sustainable future. In addition, to optimize ESG and build sustainability, KPMG works with organizations to embed ESG into the business strategy with board-level support to drive financial value, and effectively communicate goals throughout the organization using ESG metrics to understand KPIs. As a result, KPMG provides an integrated and holistic ESG framework that is embedded throughout the organization to ensure a successful transformation." Additionally, the report states "…Climate IQ is KPMG's tool that allows clients to assess their current portfolios and quantify the potential financial impact of such physical and transition risks as well as opportunities. Climate IQ methodology is streamlined and automated generating financial estimates that provide the forward-looking information to help with strategic capital planning as expected by boards and investors and outlined by the TCFD." The report explores how the most innovative professional services providers in 2023 are helping clients understand, develop, and properly manage environmental factors as part of their business strategy – as well as how innovative providers themselves are developing an environmental focused approach that is aligned to meet their own ESG organizational goals. Source: https://kpmg.com/xx/en/about/industry-analyst-accolades.html#accordion-a6ec6a7d25-item-b2fc63103f KPMG named a global Leader in Verdantix Green Quadrant: Climate Change Consulting, 2023 Verdantix placed KPMG among the world's leading firms in categories including climate risk, strategy and governance, and emissions data assurance. Of 15 firms profiled in the Verdantix report, Green Quadrant: Climate Change Consulting 2023, only six were identified as leaders, with KPMG making its debut appearance alongside WSP, ERM and other members of the Big Four. KPMG has been recognized as a market Leader in climate change consulting, the report notes "KPMG stands out for its climate risk strategy and emissions data assurance capabilities." Adding, "KPMG offers a strategy-led approach to climate risk, with expertise in readiness reviews and board engagement capabilities for climate action. Through the use of its proprietary ClimateIQ multi-industry risk management tool to help firms assess both physical and transitional climate risks, KPMG helps firms understand and project the impact of climate change on their business." Additionally, the report states "KPMG's capabilities in disclosure and assurance-related services make it a strong shortlisting candidate for businesses that are at the readiness stage for complying with regulations. Furthermore, KPMG's global footprint will be a benefit to firms with cross-jurisdictional operations and complex disclosure requirements." The report provides a detailed, fact-based benchmark of 15 of the most prominent climate change consulting providers in the market to identify those who "demonstrated the most comprehensive climate change consulting capabilities. Based on the proprietary Verdantix Green Quadrant methodology, the analysis included two-hour live briefings, customer interviews and vendor responses to a detailed 94-point questionnaire, covering 15 capability and three momentum categories. Source: https://kpmg.com/xx/en/about/industry-analyst-accolades.html#accordion-bc214d0741-item-993cebb80f

Addenda, Terms and Conditions

PART D -TERMS AND CONDITIONS OF THE SOLICITATION PROCESS

Proponents should structure their proposals in accordance with the instructions in the Procurement Portal.

A proponent who submits conditions, options, variations, or contingent statements, either as part of its proposal or after receiving notice of selection, may be disqualified.

1.1.1 Ability to Provide Deliverables

The Proponent has carefully examined the Solicitation documents and has a clear and comprehensive knowledge of the Deliverables required. The proponent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the Solicitation for the rates set out in its proposal.

1.1.1.2 Non-Binding Pricing

The Proponent has submitted its pricing in accordance with the instructions in the Solicitation. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

1.1.2 Proposals in English

All proposals are to be in English only.

1.1.3 No Incorporation by Reference

The entire content of the proponent's proposal should be submitted in a fixed format, and the content of websites or other external documents referred to in the proponent's proposal, but not attached, will not be considered to form part of its proposal.

1.1.4 Past Performance

In the evaluation process, Canoe may consider the proponent's past performance or conduct on previous contracts with Canoe or other institutions.

1.1.5 Information in SOLICITATION Only an Estimate

Canoe and its advisers make no representation, warranty, or guarantee as to the accuracy of the information contained in this Solicitation or issued by way of addenda. Any quantities shown or data contained in this Solicitation or provided by way of addenda are estimates only and are for the sole purpose of indicating to proponents the general scale and scope of the Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this Solicitation.

1.1.6 Proponents to Bear Their Own Costs

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

1.1.7 Proposal to be Retained by Canoe

Canoe will not return the proposal or any accompanying documentation submitted by a proponent.

1.1.8 No Guarantee of Volume of Work or Exclusivity of Contract

Canoe makes no guarantee of the value or volume of work to be assigned to the selected proponent. The agreement to be negotiated with the selected proponent will not be an exclusive contract for the provision of the described Deliverables. Canoe may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

1.1.9 Trade Agreements

Proponents should note that (based on the Members looking to purchase under this Solicitation) this procurement process is subject to the requirements of:

- Comprehensive Economic and Trade Agreement between Canada and the European Union, Chapter 19 (Government Procurement)
- Canadian Free Trade Agreement, Chapter 5 (Government Procurement)
- New West Partnership Trade Agreement, Article 14 (Procurement) and Part V, Section C (Exceptions: Government Procurement)
- Trade and Cooperation Agreement Between Ontario and Quebec, Chapter 9
- Atlantic Procurement Agreement
- Ontario Broader Public Sector (BPS) Procurement Directive

1.2 Communication after Issuance of Solicitation

1.2.1 Proponents to Review Solicitation

Proponents should promptly examine all of the documents comprising this Solicitation and may direct questions or seek additional information in writing through the Procurement Portal on or before the Deadline for Questions. No such communications are to be sent or initiated through any other means. Canoe is under no obligation to provide additional information, and Canoe is not responsible for any information provided by or obtained from any source other than the Solicitation Contact or the Procurement Portal. It is the responsibility of the proponent to seek clarification on any matter it considers to be unclear. Canoe is not responsible for any misunderstanding on the part of the proponent concerning this SOLICITATION or its process.

1.2.2 All New Information to Proponents by Way of Addenda

This Solicitation may be amended only by addendum in accordance with this section. If Canoe, for any reason, determines that it is necessary to provide additional information relating to this Solicitation, such information will be communicated to all proponents by addendum posted in the Procurement Portal. Each addendum forms an integral part of this Solicitation and may contain important information, including significant changes to this Solicitation. Proponents are responsible for obtaining all addenda issued by Canoe.

1.2.3 Post-Deadline Addenda and Extension of Submission Deadline

If Canoe determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, Canoe may extend the Submission Deadline for a reasonable period of time.

1.2.4 Verify, Clarify, and Supplement

When evaluating proposals, Canoe may request further information from the proponent or third parties in order to verify, clarify, or supplement the information provided in the proponent's proposal. Canoe may revisit, re-evaluate, and rescore the proponent's response or ranking on the basis of any such information.

1.2.5 Restricted Communications

Proponents that fail to comply with the requirement to direct all communications to the Solicitation Contact may be disqualified from the Solicitation process. Without limiting the generality of this provision, Proponents may not communicate with or attempt to communicate with the following (unless instructed to by the Solicitation Contact):

1. any RMA director, officer, employee or agent (other than the Solicitation Contact);
2. any member of the Evaluation Team;
3. any expert or advisor assisting the Evaluation Team; or
4. any other elected official of any level of government, including any advisor to any elected official.

1.2.6 Authorized Communications, Amendments, Waivers

Proponents are advised that from the date of issue of the Solicitation through any award notification:

1. only the Solicitation Contact is authorized by CANOE to amend or waive the requirements of the Solicitation pursuant to the provisions of this Solicitation; and
2. under no circumstances shall a Proponent rely upon any information or instruction from any commissioner, officer, employee, agent of CANOE or RMA unless the information or instruction is provided in writing by the Solicitation Contact.

1.3 Notification and Debriefing

1.3.1 Notification to Other Proponents

Once an agreement is executed by Canoe and a proponent, the other proponents may be notified directly in writing and will be notified by public posting of the outcome of the procurement process.

1.3.2 Debriefing

Proponents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the Solicitation Contact and must be made within sixty (60) days of such notification. The Solicitation Contact will contact the proponent's representative to schedule the debriefing. Debriefings may occur in person at Canoe's location or by way of conference call or other remote meeting format as prescribed by Canoe.

1.3.3 Procurement Protest Procedure

Any proponent with concerns about the Solicitation process is required to attend a debriefing prior to proceeding with a protest.

If, after attending a debriefing, the proponent wishes to challenge the Solicitation process, it should provide written notice to the Solicitation Contact in accordance with the procurement protest procedures below:

A bid dispute must be submitted within 5 Business Days of the circumstances giving rise to the dispute. To submit a bid dispute, proponents must deliver a written submission containing:

1. The name, address, and telephone number of the Proponent;
2. An indication that the bid dispute is authorized by an authorized signing officer or representative of the Proponent;
3. The Solicitation number;
4. Identification of the statute or procedure that is alleged to have been violated;
5. A precise statement of the relevant facts;
6. Identification of the issues to be resolved;
7. The Proponent's argument and supporting documentation; and
8. The Proponent's proposed resolution. All documentation must be addressed to:

Attention: General Manager, Canoe Procurement Group of Canada
Canoe Procurement Group of Canada
2510 Sparrow Drive, Nisku, Alberta T9E 8N5

EMAIL: proposals@canoeprocurement.ca

Once a bid dispute has been received, the General Manager, Canoe Procurement Group of Canada will initiate a review of the matter. The General Manager will complete that review and provide a response to the proponent as soon as reasonably possible, but generally within 10 Business Days.

That response shall be the final response from CANOE regarding the bid dispute.

Filing a bid dispute does not affect a Proponent's ability to participate in ongoing or future procurement opportunities with CANOE.

1.4 Conflict of Interest and Prohibited Conduct

1.4.1 Conflict of Interest

For the purposes of this Solicitation, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

1. in relation to the Solicitation process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including, but not limited to:
2. having or having access to confidential information of Canoe in the preparation of its proposal that is not available to other proponents;
3. having been involved in the development of the Solicitation, including having provided advice or assistance in the development of the Solicitation;
4. receiving advice or assistance in the preparation of its response from any individual or entity that was involved in the development of the Solicitation;
5. communicating with any person with a view to influencing preferred treatment in the Solicitation process (including, but not limited to, the lobbying of decision-makers involved in the Solicitation process); or
6. engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive Solicitation process or render that process non-competitive or unfair; or
7. in relation to the performance of its contractual obligations under a contract for the Deliverables, the proponent's other commitments, relationships, or financial interests:
8. could, or could be seen to, exercise an improper influence over the objective, unbiased, and impartial exercise of its independent judgement; or
9. could, or could be seen to, compromise, impair, or be incompatible with the effective performance of its contractual obligations.

1.4.2 Disqualification for Conflict of Interest

Canoe may disqualify a proponent for any conduct, situation, or circumstances, determined by Canoe, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above.

An existing supplier of Canoe may be precluded from participating in the Solicitation process in instances where Canoe has determined that the supplier has a competitive advantage that cannot be adequately addressed to mitigate against unfair advantage. This may include, without limitation, situations in which an existing supplier is in a position to create unnecessary barriers to competition through the manner in which it performs its existing contracts, or situations where the incumbent fails to provide the information within its control or otherwise engages in conduct obstructive to a fair competitive process.

1.4.3 Disqualification for Prohibited Conduct

Canoe may disqualify a proponent, rescind an invitation to negotiate, or terminate a contract subsequently entered into if Canoe determines that the proponent has engaged in any conduct prohibited by this Solicitation.

1.4.4 Prohibited Proponent Communications

Proponents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in the Procurement Portal.

1.4.5 Proponent Not to Communicate with Media

Proponents must not, at any time directly or indirectly, communicate with the media in relation to this Solicitation or any agreement entered into pursuant to this Solicitation without first obtaining the written permission of the Solicitation Contact.

1.4.6 No Publicity or Promotion

CANOE does not wish any Proponent, including the Ranking Proponent, to make any public announcement or distribute any literature regarding this Solicitation or otherwise promote itself in connection with this Solicitation or any arrangement entered into under this Solicitation without the prior written approval of CANOE.

If a Proponent, including the Ranking Proponent, makes a public statement either in the media or otherwise that is contrary to CANOE's wishes noted above, then:

1. CANOE may disqualify that Proponent; and
2. although CANOE intends to treat all Proposals as confidential, CANOE may disclose any information about a Proponent's Proposal to provide accurate information and/or to rectify any false impression which may have been created.

1.4.7 No Lobbying

Proponents must not, in relation to this Solicitation or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the selected proponent(s).

1.4.8 Illegal or Unethical Conduct

Proponents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion, or collusion. Proponents must not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials, or other representatives of Canoe; deceitfulness; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this SOLICITATION.

1.4.9 Supplier Suspension

Canoe may suspend a supplier from participating in its procurement processes for prescribed time periods based on past performance or based on inappropriate conduct, including, but not limited to, the following:

1. illegal or unethical conduct as described above;
2. the refusal of the supplier to honor its submitted pricing or other commitments;
3. engaging in litigious conduct, bringing frivolous or vexatious claims in connection with Canoe's procurement processes or contracts, or engaging in conduct obstructive to a fair competitive process; or

4. any conduct, situation, or circumstance determined by Canoe, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

In advance of a decision to suspend a supplier, Canoe will notify the supplier of the grounds for the suspension and the supplier will have an opportunity to respond within a timeframe stated in the notice. Any response received from the supplier within that timeframe will be considered by Canoe in making its final decision.

1.5 Confidential Information

1.5.1 Confidential Information of Canoe

All information provided by or obtained from Canoe in any form in connection with this Solicitation either before or after the issuance of this Solicitation:

1. is the sole property of Canoe and must be treated as confidential;
2. is not to be used for any purpose other than replying to this SOLICITATION and the performance of any subsequent contract for the Deliverables;
3. must not be disclosed without prior written authorization from Canoe; and
4. must be returned by the proponent to Canoe immediately upon the request of Canoe.

1.5.2 Confidential Information of Proponent

A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by Canoe. The confidentiality of such information will be maintained by Canoe, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by Canoe to advise or assist with the Solicitation process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this Solicitation, questions are to be submitted to the SOLICITATION Contact.

1.6 Procurement Process Non-Binding

1.6.1 No Contract A and No Claims

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty, and without limitation:

1. this Solicitation will not give rise to any Contract-A-based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and
2. neither the proponent nor Canoe will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract, or failure to honour a proposal submitted in response to this Solicitation.

1.6.2 No Contract until Execution of Written Agreement

This Solicitation process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service will be created between the proponent and Canoe by this Solicitation process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

1.6.3 Non-Binding Price Estimates

While the pricing information provided in proposals will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the proposals and the ranking of the proponents. Any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation or ranking or the decision of Canoe to enter into an agreement for the Deliverables.

1.6.4 Cancellation

Canoe may cancel or amend the Solicitation process without liability at any time.

1.6.5 Competition Act

Under Canadian law, a Proponent's Proposal must be prepared without conspiracy, collusion, or fraud. For more information on this topic, visit the Competition Bureau website at http://www.cb-bc.gc.ca/eic/site/cb-bc.nsf/eng/01240.html, and in particular, part VI of the *Competition Act,* R.S.C. 1985, c. C-34.

1.7 Rights of Canoe Procurement Group of Canada – General

In addition to any other express rights or any other rights which may be implied in the circumstances, CANOE reserves the right to (in its sole discretion):

1. make public the names of any or all Proponents;
2. request written clarification or the submission of supplementary written information from any Proponent and to incorporate such clarification or supplementary written information into the Proponent's Proposal;
3. waive formalities and accept Proposals that substantially comply with the requirements of this Solicitation;
4. contact or not contact any or all references provided by the Proponent;
5. verify with any Proponent or with a third party any information, or check references other than those provided by Proponents, as set out in a Proposal:
6. disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information, or any Proponent whose reasonable failure to cooperate with CANOE impedes the evaluation process, or whose Proposal is determined to be non-compliant with the requirements of the Solicitation;
7. disqualify any Proponent that has a Conflict of Interest or Unfair Advantage, or where reasonable evidence of any Unfair Advantage or Conflict of Interest is brought to the attention of CANOE, and CANOE determines that no reasonable mitigation is possible, or that the Proponent has not taken sufficient steps to promptly address such matters to the satisfaction of CANOE;
8. disqualify any Proponent that is bankrupt or insolvent, or where bankruptcy or insolvency are a reasonable prospect;
9. disqualify any Proponent that has engaged in significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts;
10. disqualify any Proponent if the Proponent, or any officers, directors or other key personnel of the Proponent:
    a. are subject to final judgments in respect of serious crimes or other serious offences; or
    b. have engaged in professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Proponent – including where there is any evidence that the Proponent or any of its employees or agents colluded with any other Proponent, its employees or agents in the preparation of its Proposal, or have made false declarations to CANOE;
11. disqualify any Proponent if the Proponent has failed to pay taxes;
12. make changes, including substantial changes, to this Solicitation provided that those changes are issued by way of addenda in the manner set out in this Solicitation;
13. accept or reject a Proposal if only one Proposal is submitted;
14. accept any Proposal in whole or in part;
15. reject a subcontractor proposed by a Proponent within a consortium;
16. reject a Proposal:
    a. if CANOE or RMA has initiated a dispute, claim or litigation with that Proponent;
    b. if that Proponent has initiated or is involved in a dispute, claim or litigation against CANOE or RMA that CANOE or RMA considers to be frivolous, vexatious, without merit and/or unreasonable;
    c. if the Proponent has failed to satisfy an outstanding debt to CANOE or RMA;
    d. if the Proponent has a history of illegitimate, frivolous, unreasonable or invalid claims;
    e. if the Proponent provides incomplete, unrepresentative or unsatisfactory references; or
    f. if CANOE determines that it would not be in the public interest to accept the Proposal;
    g. select a Proponent other than the Proponent whose Proposal reflects the lowest cost to CANOE; or
    h. cancel this Solicitation process at any stage (without providing reasons), and thereafter issue a new request for proposals, request for qualifications, engage in limited tendering, or take no further action in respect of the matters contemplated by this Solicitation.

By submitting a Proposal, the proponent authorizes the collection by CANOE of the information identified in this Solicitation which CANOE may request from any third party.

1.7.1 No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this Solicitation.

1.7.2 Disclosure of Information

The proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by Canoe to the advisers retained by Canoe to advise or assist with the Solicitation process, including with respect to the evaluation of this proposal.

1.8 Governing Law and Interpretation

These Terms and Conditions of the Solicitation Process (PART D):

1. are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
2. are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
3. are to be governed by and construed in accordance with the laws of the province of Alberta and the federal laws of Canada applicable therein.

End of PART D

☑

I have the authority to bind the Proponent.

- Dmytro Nechytailo, Partner, KPMG LLP

Conflict of Interest
The proponent must declare all potential Conflicts of Interest or unfair advantages as described in this Solicitation. This includes disclosing the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (a) participated in the preparation of the proposal; AND (b) were employees of Canoe within twelve (12) months prior to the Submission Deadline.

By Selecting "NO" in the box below, the Proponent declares that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the Solicitation.

○ **Yes** ◉ **No**

The Proponent is deemed to have read and taken into account all addenda issued by Canoe.

Please check the box in the column "**I have reviewed this addendum"** below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum 02 CAN-2025-002 Fri March 6 2026 02:04 PM	☑	11
Addendum 01-CAN-2026-002 Tue February 24 2026 04:24 PM	☑	7

Schedule "B1"

PRICING

Schedule “C”

MARKETING AND PROMOTION OF AGREEMENT

Once the Agreement is awarded, the Supplier will meet with Canoe to discuss an effective launch strategy, and shall provide:

- Supplier’s contact information;
- Customer engagement strategy;
- Access to knowledge sharing materials (e.g., webinars);
- Escalation process;
- Marketing materials, and,
- Other relevant materials.

To support Members, Canoe and the Supplier will work together to encourage the use of the Agreement resulting from this RFP.

The Supplier will actively promote the Agreement to Members by:

- Educating and creating awareness within their dealer and distribution networks about group purchasing, Canoe Procurement Group and the use of Canoe contract by Members;
- Conducting sales and marketing activities directly to onboard Members;
- Providing excellent and responsive Members support;
- Identifying Members savings; and
- Identifying improvement opportunities (e.g., planning priorities, multi-year projects).

Canoe will promote the use of the Agreement with Members by:

- Using online communication tools to inform and educate;
- Holding information sessions and webinars, as required;
- Attending, when appropriate, Members and Supplier events;
- Facilitating Member engagement, where appropriate;
- Providing effective business relationship management;
- Managing and monitoring Supplier performance;
- Facilitating issue resolution; and
- Marketing Supplier promotions.

Schedule “D”

SAMPLE SALES REPORT

CANOE SUPPLIER ADMIN FEE TEMPLATE
Monthly Submission of Data Required

Supplier Name: OFFICE SUPPLY COMPANY
Canoe Contract Number: CAN-2024-IIII
Month: June
Year: 2024

Member Number	Member Name	Province	Branch (if applicable)	Date of Purchase	Transaction Date	Accounting Date	PO #	Invoice #	Item Description	Category (Parts / Labour / Service)	Item cost	Miscellaneous	Freight	Subtotal	PST	GST/HST	Total Invoice	Amount eligible for Admin Fee	Admin Fee Rate	Admin Fee to Canoe
AB1603	SAMPLE ONLY County of your County	AB	ED	3/5/2024	3/5/2024	3/5/2024	555662	9955623	Pens	Parts	5.32	-	-	5.32	-	0.27	5.59	5.32	5.00%	0.27
AMM5002	SAMPLE ONLY RM of your town	MB	WN	2/1/2024	2/25/2024	3/1/2024	TR33556	9955624	Trays	Parts	552.30	0.20	0.50	553.00	33.18	27.65	613.83	552.30	5.00%	27.62
SAR1222	SAMPLE ONLY Town of At Home	SK	RG	12/23/2023	1/31/2024	3/1/2024	202403jjj	9955625	Whiteboard	Parts	1,555.20	-	20.30	1,575.50	110.29	78.78	1,764.56	1,555.20	5.00%	77.76
TOTALS											2,112.82	0.20	20.80	2,133.82	143.47	106.69	2,383.98	2,112.82	5.00%	105.64