



SOCIAL VALUE MENU

Community Employment Benefit
Templates For Implementation





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Social Enterprise Ecosystem Project

Buy Social Canada is a partner in the Canada-wide Social Enterprise Ecosystem, S4ES. A partnership of the [Social Enterprise Institute](#), [Akcelos](#), [Social Value Lab](#) and the Canadian Community Economic Development Network, [CCEDNet](#).

Canada

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About Buy Social Canada



Buy Social Canada is a social enterprise with a mission to advance and grow social procurement. We believe that the purchasing of goods and services, and major development and construction projects are much more than an economic transaction, much more than the construction of a physical structure, they are a means to build community capital, the foundation of a healthy community, contributing to a local community social and economic goals.

We bring together purpose driven purchasers and social enterprise suppliers to build business relationships that generate social benefits for communities across the country. We work with community, private sector, and governments to provide training and develop policy and resources. We offer a recognized, Canada-wide social enterprise certification program that opens the door to an emerging social impact network.

Contact

For further information, please contact Buy Social Canada:

Elizabeth Chick, Executive Director
elizabeth@buysocialcanada.com
(1) 604.416.0318



BUY SOCIAL CANADA 

Introduction to the Social Value Menu

Background and Policy Context

Every purchase has an economic, environmental and social impact, whether intended or not. Social procurement is about capturing those impacts and seeking to make intentional positive contributions to both the local economy and the overall vibrancy of the community.

Social procurement is evolving as a standard means to leverage a greater value from existing procurement of goods and services. Concurrently, with the emergence of Community Benefit Agreements (CBAs), and the [Community Employment Benefit \(CEB\)](#) initiative process, there is a need to have a framework and guidelines to support an added social value from major developments and construction projects.

What is the purpose of this Menu?

The purpose of this document is to provide guidance on the implementation of the [Community Employment Benefits \(CEB\) Initiative](#) which apply to infrastructure projects receiving funding under the Investing in Canada Infrastructure Program, with a requirement to identify and implement employment and procurement community benefits throughout the project.

For more information on the projects that the CEB Initiative applies to and the initiative requirements see the Infrastructure Canada Community Employment Benefits General Guidance.



What is the Community Employment Benefits Initiative?

The CEB Initiative requires applicable projects to provide:

- › Employment opportunities; and/ or
- › Procurement opportunities

For at least 3 out of the 8 following targeted groups:

- › Apprentices
- › Indigenous peoples
- › Women
- › Persons with disabilities
- › Veterans
- › Youth
- › Recent Immigrants
- › Small, medium-sized and social enterprises

“The inclusions of this initiative under the Investing in Canada Infrastructure Program seeks to encourage project planners and communities across the country to take advantage of their infrastructure projects to support the diversification of recruitment, training and procurement practices.”

The CEB Initiative is designed to be flexible and allow provinces and territories to identify targets that complement local and regional needs and current initiatives. The results achieved are required to be reported on an annual basis. Provinces and territories are also asked to develop a community employment benefits approach and associated targets in the 3-year infrastructure plans that are developed under the Investing in Canada Infrastructure Program.

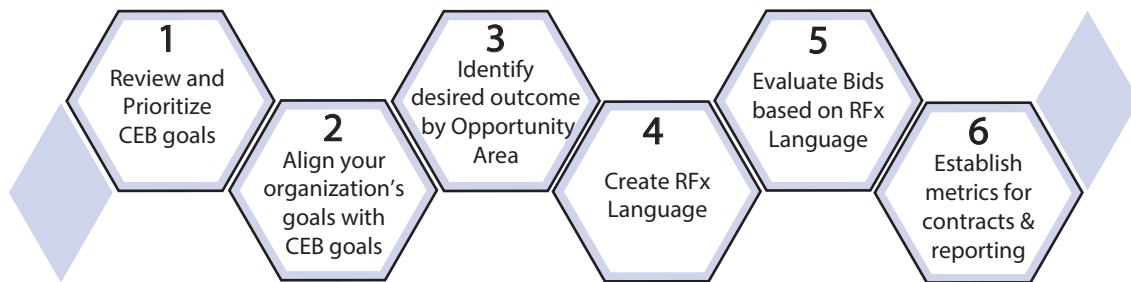
More information available at:

<https://www.infrastructure.gc.ca/pub/other-autre/ceb-ace-eng.html>



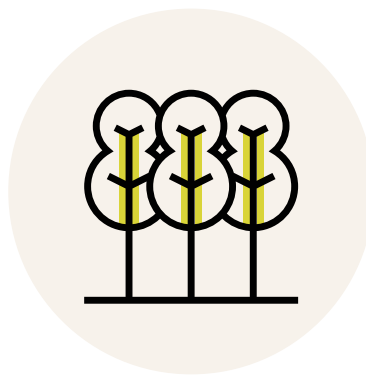
How to use the Social Value Menu?

This templates provided in this Menu will support you in achieving and reporting on community employment benefits for your project. The figure below will be used throughout this workbook to take you through the **6 Key Steps** that we have identified for guiding your social value procurement process.



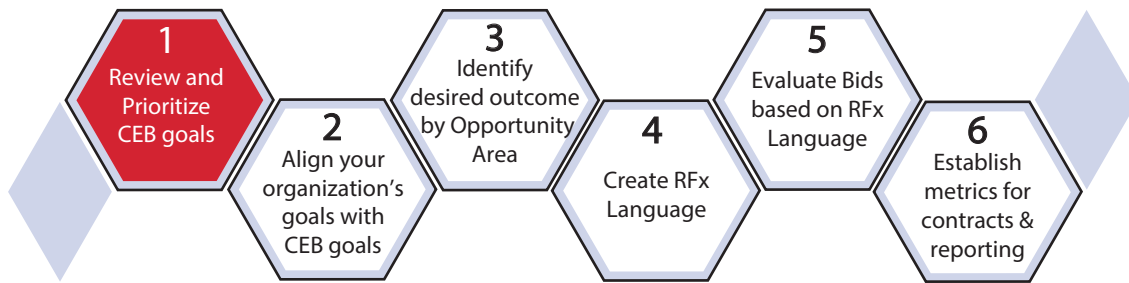
The Social Value Menu will help you to:

- › Identify your own strategic goals and how they align with CEB Initiative target groups
- › Identify the target groups (at least 3) that your organization will commit to
- › Identify desired outcomes from the project using four main Opportunity Areas:
 - › Employment
 - › Skills & Training
 - › Social Value Supply Chain
 - › Community Development
- › Draft CEB RFX language for bid and tender documents
- › Establish metrics for contracts and reporting requirements



Every purchase has an economic, environmental and social impact, whether intended or not.

Step 1: Review and prioritize the goals of the Community Employment Benefit initiative



Before you start creating your own social procurement process for your organization, review the goals of the Community Employment Benefit (CEB) initiative.

Implicated projects are required to provide employment and/or procurement opportunities for at least three of the following groups targeted by the initiative:

Template 1: Target groups identified by CEB initiative

- | | |
|--|---|
| <input type="checkbox"/> Apprentices | <input type="checkbox"/> Veterans |
| <input type="checkbox"/> Indigenous peoples | <input type="checkbox"/> Youth |
| <input type="checkbox"/> Women | <input type="checkbox"/> Recent immigrants |
| <input type="checkbox"/> Persons with disabilities | <input type="checkbox"/> Small-sized, medium-sized and social enterprises |

Template 1 can be used in one of two following ways:

1. You may **simply read and acknowledge these target groups and move on to the next steps** and continue to work through the remainder of the Social Value Menu. Once you have completed the next steps, you can return to this page and select the three (or more) target groups identified by the CEB initiative that you will be able to provide employment and/or procurement opportunities for.

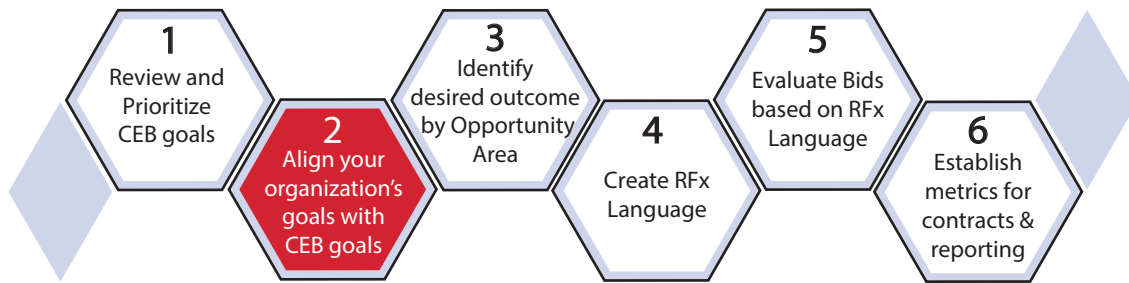
OR

2. You can **use Template 1 to identify at the very outset the three (or more) target groups** identified by the CEB initiative that you will be able to provide employment and/or procurement opportunities for and then move on to the next steps to shape your own social procurement process, guided by the selections you have made here.

This Menu has been designed with flexibility to allow you to optimize each step according to the resources and information available to your organization at this stage, so choose either one of the two methods above based on these factors.

However, the goal of this Menu is to ensure that you have identified which three (or more) target groups will apply to your organization by the time you have completed all 6 of the key steps in the figure above.

Step 2 : Identify your organization's goals and align them with the goals of the CEB



In Step 1 you reviewed the goals of the CEB initiative. Now, begin creating your own social procurement process by **identifying your organization's strategic goals**. Doing this will allow you to align your specific organizational goals with the goals of the CEB initiative, so that you can fulfill your requirement to provide employment and/or procurement opportunities for the three (or more) target groups that your organization has committed to in Step 1.

Example:

Source: <i>Poverty Reduction Plan</i>
Organizational Goal 1: <i>Promote local economic development by creating new opportunities to assist people facing barriers to employment to gain employment skills and experience</i>
CEB target group addressed through this goal (select all that apply):
<input checked="" type="checkbox"/> Apprentices <input type="checkbox"/> Veterans
<input type="checkbox"/> Indigenous peoples <input type="checkbox"/> Youth
<input type="checkbox"/> Women <input type="checkbox"/> Recent immigrants
<input type="checkbox"/> Persons with disabilities <input type="checkbox"/> Small-sized, medium-sized and social enterprises

Listed below are some more examples of strategic organizational goals that can be used for this step:

- › Build a healthy and inclusive community
- › Diverse and meaningful employment opportunities that provide incomes that can support a high quality of life
- › Support integration into the workforce for specific demographics such as newcomers, youth and people with disabilities

Prompts for Template 2:

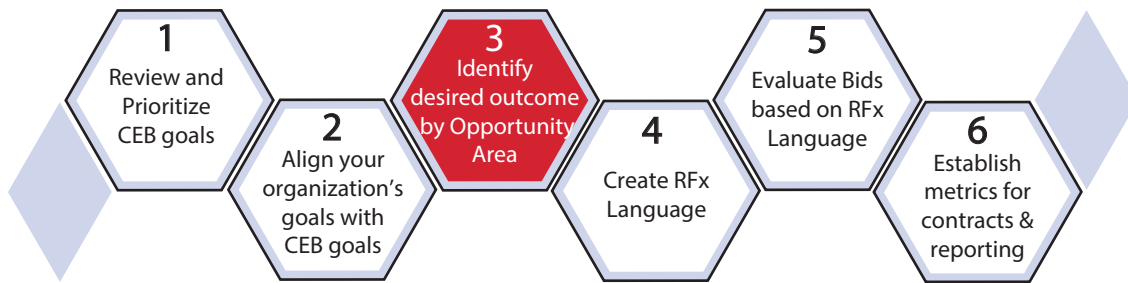
Identifying your strategic organizational goals will be the foundation for your social procurement process throughout the remainder of this Menu. Using the examples above as your guideline, consider the following questions while you fill out Template 2:

- › What are the goals of your organization that are currently being pursued?
- › What are your current strategic plans for long term social and economic goals?
- › What social value goal do you want to achieve through your procurement process?
- › Which of your existing organizational goals can best be aligned with the CEB's goals?

Template 2: Identify strategic organizational goals for _____

Source: _____
Organizational Goal 1: _____ _____
CEB target group addressed through this goal (select all that apply): <input type="checkbox"/> Apprentices <input type="checkbox"/> Veterans <input type="checkbox"/> Indigenous peoples <input type="checkbox"/> Youth <input type="checkbox"/> Women <input type="checkbox"/> Recent immigrants <input type="checkbox"/> Persons with disabilities <input type="checkbox"/> Small-sized, medium-sized and social enterprises
Source: _____
Organizational Goal 2: _____ _____
CEB target group addressed through this goal (select all that apply): <input type="checkbox"/> Apprentices <input type="checkbox"/> Veterans <input type="checkbox"/> Indigenous peoples <input type="checkbox"/> Youth <input type="checkbox"/> Women <input type="checkbox"/> Recent immigrants <input type="checkbox"/> Persons with disabilities <input type="checkbox"/> Small-sized, medium-sized and social enterprises
Source: _____
Organizational Goal 3: _____ _____
CEB target group addressed through this goal (select all that apply): <input type="checkbox"/> Apprentices <input type="checkbox"/> Veterans <input type="checkbox"/> Indigenous peoples <input type="checkbox"/> Youth <input type="checkbox"/> Women <input type="checkbox"/> Recent immigrants <input type="checkbox"/> Persons with disabilities <input type="checkbox"/> Small-sized, medium-sized and social enterprises
Source: _____
Organizational Goal 4: _____ _____
CEB target group addressed through this goal (select all that apply): <input type="checkbox"/> Apprentices <input type="checkbox"/> Veterans <input type="checkbox"/> Indigenous peoples <input type="checkbox"/> Youth <input type="checkbox"/> Women <input type="checkbox"/> Recent immigrants <input type="checkbox"/> Persons with disabilities <input type="checkbox"/> Small-sized, medium-sized and social enterprises

Step 3 : Identify your organization's desired outcome by Opportunity Area



We have identified four key Opportunity Areas where employment and procurement opportunities can be integrated into an infrastructure project in order to achieve CEB targets. They are: **employment, skills & training, supply chains, and community development**

Prompt for Template 3:

Based on the strategic organizational goals you have identified in Step 2, write your desired outcomes for your organization in each of these four Opportunity Areas. Outcome is the level of performance or achievement that occurred because of the activity or services your organization provided. Be sure to explain how each desired outcome directly contributes to fulfilling one or more of your strategic goals from Step 2.

Examples:

Desired outcomes for Employment:

- › Increased employment opportunities for youth/women/indigenous peoples/low-income groups/people with disabilities/ people living in sub-standard housing

Desired outcomes for Skills & Training:

- › Increased apprenticeships and training available to targeted individuals
- › Increased training with recognized qualifications available to targeted individuals
- › School & Higher Education engagement

Desired outcomes for Supply Chain:

- › Greater supplier diversity
- › More procurement from Social Enterprises (SEs), Not-For-Profits (NFPs), local/ regional
- › Small and Medium-sized Enterprises (SMEs)
- › Provision of affordable and/or specifically designed retail and public spaces to SEs, NFPs and local SMEs

Desired outcomes for Community Development:

- › Community Engagement and Consultation processes throughout a project's planning and implementation
- › Provision of community services/ cultural contributions

Template 3: Identify desired outcomes for _____

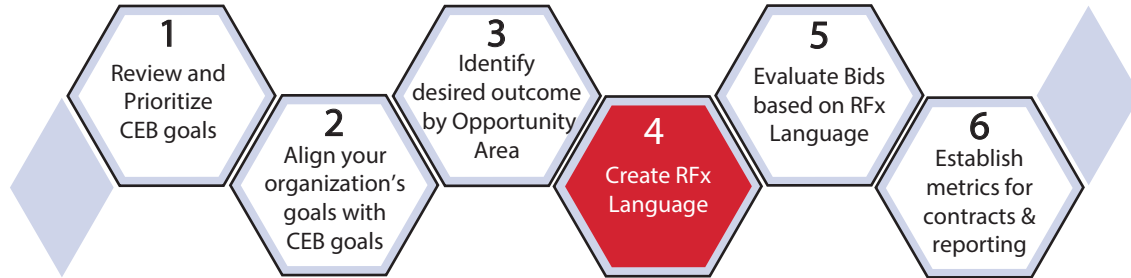
Desired Outcomes for **Employment**:

Desired Outcomes for **Skills & Training**:

Desired Outcomes for **Supply Chain**:

Desired Outcomes for **Community Development**:

Step 4 : Create new RFX Language to reflect your Social Value criteria



RFX is a catch-all term that captures all references to Request for Information (RFI), Request for Proposal (RFP), Request for Qualification (RFQ) and Request for Bid (RFB). The following RFX language allows you to request information concerning:

- › Social Value based organizations: i.e. identifying that a bidding organization is a social enterprise or diverse owned business
- › Social Value based employment practices: i.e. identifying Living Wage employers, inclusive recruitment practices
- › Social value in their supply chain: i.e. identifying a business with a social enterprise or SME in its own supply chain therefore increasing procurement opportunities for those organizations.

Prompt for Template 4:

Create new RFX. language that you can include in contracts with your service providers to reflect the organizational goals and desired outcomes that you have identified. This creates descriptive rather than prescriptive criteria for social procurement to your bidders, allowing proponents the latitude to respond appropriately.

Examples by Opportunity Area:

Based upon the project composition and objectives for each project, the RFX language can have a selection of questions from the following four categories: employment, skills & training, supply chain and community development. Responses for each opportunity area may include:

Employment:

- › Strategies for recruitment, retention of support for identified CEB target groups (both existing and proposed strategies for the performance of this contract)
- › Specific implementation, monitoring and reporting strategies to ensure the continued recruitment, retention of support for identified CEB target groups
- › The number and percentage of current and new employment opportunities for individuals within identified CEB target groups

Skills & Training:

- › Supporting people into work by providing career mentoring, including mock interviews, CV advice, and careers guidance
- › Offering opportunities for work experience or similar activities such as encouraging & providing a level playing field to persons from all backgrounds & circumstances through specific implementation, monitoring and reporting strategies

Supply Chain:

- › Strategies to ensure a diverse supply chain that is accessible to all types of businesses, including SEs, NFPs and SMEs.
- › Specific implementation, monitoring and reporting strategies to ensure a diverse supply chain in the performance of this contract

Community Development:

- › Strategies to engage and consult the local community for previous projects as well as for the performance of this contract
- › Specific implementation, monitoring and reporting strategies to ensure the continued engagement and consultation processes with the local community for this contract

Not all questions provided in Template 4 are needed for every RFx. Use the examples provided in Template 4 as samples of the type of information you can request from suppliers or bidders through your RFx.

Template 4: Identify RFX Language for _____

 Employment 

1. (a) Does your organization currently have strategies or policies around inclusive employment practices to ensure you are providing employment opportunities for any of the CEB target groups?

Yes

No

If Yes, select all that apply from the list below:

Apprentices

Indigenous peoples

Women

Persons with disabilities

Veterans

Youth

Recent immigrants

Small-sized, medium-sized and social enterprises

None of the above

(b) Please describe your current processes for implementing your strategies/policies and ensuring employment opportunities for the identified CEB target groups. Please describe how you currently monitor, measure your progress and report on these processes in the space below.

* This field is required if you selected 'Yes' in 1. (a).

Skills & Training

1. (a) Does your organization currently have any Apprenticeship program(s)?

- Yes No

(b) Please provide details of your existing program(s) below; including the number of current apprentices and how you monitor and measure the success of the program(s)

* This field is required if you answered Yes in 1. (a)

2. (a) Does your organization currently have any Apprenticeship program(s) that target any of the CEB Target groups?

- Yes No

If Yes, select all that apply from the list below:

- | | |
|--|---|
| <input type="checkbox"/> Apprentices | <input type="checkbox"/> Youth |
| <input type="checkbox"/> Indigenous peoples | <input type="checkbox"/> Recent immigrants |
| <input type="checkbox"/> Women | <input type="checkbox"/> Small-sized, medium-sized and social enterprises |
| <input type="checkbox"/> Persons with disabilities | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Veterans | |

(b) Please provide details of your existing program(s) below; including the number of current apprentices and how you monitor and measure the success of the program(s)

* This field is required if you answered Yes in 2. (a)

A large rectangular area with a light blue background and horizontal lines, intended for text entry.

Supply Chain

1. Is your organization a Small or Medium-sized enterprise?

Small enterprise: 1-99 employees;
Medium enterprise: 100-499 employees

Yes, we are a small enterprise Yes, we are a medium enterprise No

2. (a) Do you have a 3rd party certification from any of the following organizations verifying social impact or membership of any organization verifying diverse ownership?

(Examples include but are not limited to: Buy Social Canada Social Enterprise Certification; B-Corp; 3rd party certification that verifies that the business is owned by women, LGBTQ2S, refugees and, racialized minorities, businesses owned by individuals with a recognized disability, Indigenous owned businesses etc.)

Yes No

(b) If yes, please attach proof of certification or membership (indicate document name in the space below):

3. (a) Does your organization have a social procurement policy ?

Yes No

(b) If yes, please attach the relevant policy (indicating document name in the space below) or provide a website link below:

4. (a) Do you currently track the number of contracts and/or dollars spent with diverse and socially inclusive small and medium-sized businesses in your supply chain?

Yes No

(b) If yes, please provide the following information:

(i) Total current number of contracts in supply chain: _____

(ii) Total current value of contracts in supply chain: \$ _____

(iii) Current number of contracts with diverse and socially inclusive small and medium-sized businesses in supply chain: _____

(iv) Current value of contracts with diverse and socially inclusive small and medium-sized businesses in supply chain: \$ _____

5. (a) Does your organization have a strategy for ensuring a diverse supply chain that is accessible to all types of business, including where appropriate diverse and socially inclusive small and medium-sized businesses in the delivery of this contract?

Yes No

Community Development

1. (a) In the last 3 years, has your organization implemented any programs or initiatives to ensure greater economic opportunity and integration for any of the CEB target groups?

(select all that apply)

Yes No

If Yes, select all that apply from the list below:

Apprentices Youth
 Indigenous peoples Recent immigrants
 Women Small-sized, medium-sized and social enterprises
 Persons with disabilities None of the above
 Veterans

(b) If yes, please provide details of any programs or initiatives and how the success of these programs or initiatives are monitored and measured

* This field is required if you answered Yes in 1. (a)

Text area for providing details of programs and monitoring methods.

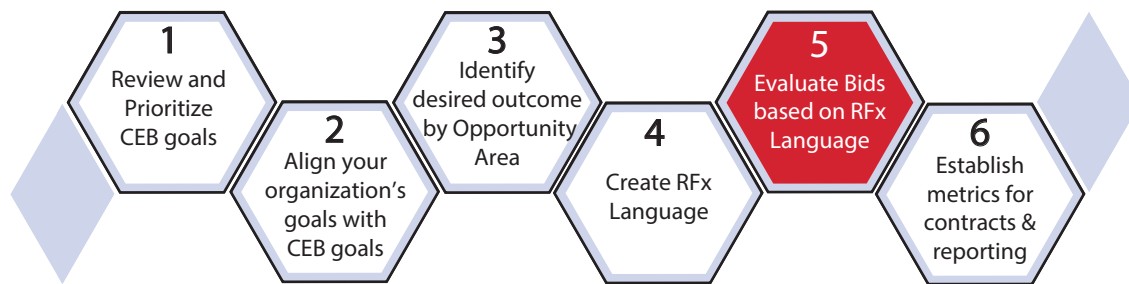
2. (a) Does your organization have a strategy for engaging and consulting with the local community before and during the lifespan of this contract?

Yes No

(b) : Please describe your strategy for engaging and consulting with the local community before and during the lifespan of this contract and how you will ensure the implementation, monitoring and measurement of this strategy.

* This field is required if you answered Yes in 2. (a)

Step 5 : Evaluate Bids based on new RFX Language



Once you have created the social value RFX language, your bidders will then be able to submit their bids in accordance with this social value employment and procurement RFX language and help you fulfill your CEB targets. After receiving bids from service providers, we suggest creating a metric for evaluating bids to determine which bids are most closely aligned with your particular social value goals.

General Guidelines for Evaluating Bid Responses:

While evaluating bid responses from your suppliers, look for the following information as general guidelines for incorporating social value into your supply chain:

Employment:

- › Strategies for recruitment, retention of support for identified CEB target groups (both existing and proposed strategies for the performance of this contract)
- › Specific implementation, monitoring and reporting strategies to ensure the continued recruitment, retention of support for identified CEB target groups
- › The number and percentage of current and new employment opportunities for individuals within identified CEB target groups (long-term, paid, etc.)
- › Explanation of how this would drive improvements in performance and how bidders will ensure equality and accessibility without discrimination to opportunities and promote them so as to be fully accessible
- › Specific measures to ensure safe working conditions for all employees

Skills & Training:

- › Explanation of how key suppliers in the supply chain will continue to provide relevant training or access to training opportunities, including apprenticeships, that ensure equality and accessibility without discrimination to training opportunities, promoted so as to be fully accessible, clearly indicating how this would drive improvements in performance
- › Elaboration on how the bidder currently engages with local schools and higher education institutions to provide skills and training opportunities within the local community and how they would continue to do so during the performance of the contract
- › The number of current training opportunities with recognized qualifications and the number of anticipated opportunities within their organization. The bidder should clarify how they will ensure that these opportunities will be made available, monitored and reported

Supply Chain:

- › Explanation of how the bidder and any key suppliers in their supply chain will ensure a diverse supply chain that is accessible to individuals in the CEB target groups
- › Explanation of current processes of engagement with social-enterprises and diverse-owned suppliers in the bidder's supply chain
- › Explanation of processes for: pre-market engagement activities, reasonable and proportionate insurance requirements, co-design and co-creation of services, giving advanced notice of subcontracting opportunities to potential bidders, practices to ensure prompt payment through the supply chain and provisions to unbundle contracts into subcontracts where possible

Community Development:

- › Clarification on how any key suppliers involved in the design of services from the bidder can contribute to key, local priorities in performance of the contract. This might include access to community hubs (i.e. community centres, cultural venues, parks, local libraries, community-led initiatives, employee volunteering etc.)
- › Elaboration on how the bidder will provide community services and cultural contributions to the local community and explanation of processes for implementing, monitoring and reporting on these services

Template 5: Evaluation Criteria by Opportunity Area for _____

Evaluation Matrix for RFX Reponses under Employment

Q. 1		(b)			
(a)	A comprehensive description provided of current activities and of monitoring and measurement	Provides some information on current activities monitoring and measurement but is missing some requested information	Insufficient information given on current activities or on the monitoring and measurement of progress	No information provided or information provided is unsatisfactory	
Yes	3/3	2/3	1/3	0/3	
No	0/3	0/3	0/3	0/3	
Q. 2		(a) & (b)			
	The percentage deduced from given numbers is within expectations and the justification given for this number is accepted	The percentage deduced from given numbers is below expectations for this project, but the justification given for this number is accepted	The percentage deduced from given numbers is below expectations but above 0, the justification for this number is not considered fully acceptable	No information provided or the number provided is 0	
	3/3	2/3	1/3	0/3	

Evaluation Matrix for RFX Reponses under Skills & Training

Q. 1		(b)			
(a)	A comprehensive description provided of current activities and of monitoring and measurement	Provides some information on current activities monitoring and measurement but is missing some requested information	Insufficient information given on current activities or on the monitoring and measurement of progress	No information provided or information provided is unsatisfactory	
Yes	3/3	2/3	1/3	0/3	
No	0/3	0/3	0/3	0/3	
Q. 2		(b)			
(a)	A comprehensive description provided of current activities and of monitoring and measurement	Provides some information on current activities monitoring and measurement but is missing some requested information	Insufficient information given on current activities or on the monitoring and measurement of progress	No information provided or information provided is unsatisfactory	
Yes	3/3	2/3	1/3	0/3	
No	0/3	0/3	0/3	0/3	

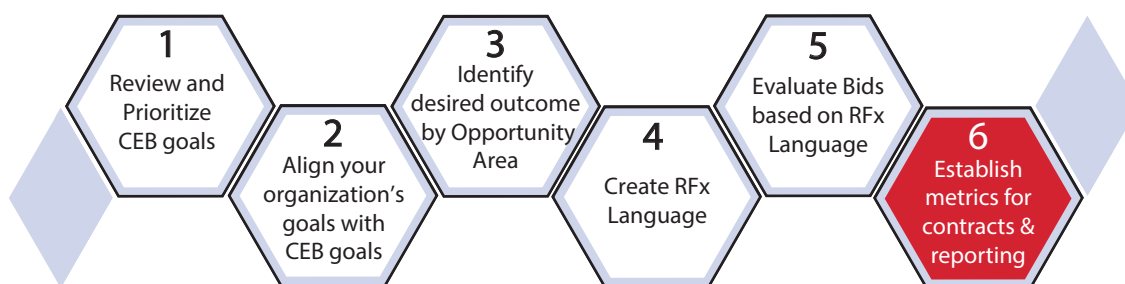
Evaluation Matrix for RFX Reponses under Supply Chain

Q. 1					
Yes, Small-enterprise	Yes, Medium-enterprise		No		
3/3	3/3		0/3		
Q.2					
(b)					
(a)	appropriate attachment provided		appropriate attachment not provided		
Yes	3/3		0/3		
No	0/3		0/3		
Q. 3					
(b)					
(a)	appropriate attachment provided		appropriate attachment not provided		
Yes	3/3		0/3		
No	0/3		0/3		
Q. 4					
(b)					
* Please note: evaluation may be based upon % of contracts or % dollar spend or both)					
(a)	Number or dollar value % indicates a majority (above 50%) of contracts or dollar spend going to diverse and socially inclusive small and medium-sized businesses in supply chain	Number or dollar value % indicates a percentage higher than negligible but lower than majority of contracts or dollar spend going to diverse and socially inclusive small and medium-sized businesses in supply chain	Number or dollar value % indicates a negligible percentage (<2%) of contracts or dollar spend going to diverse and socially inclusive small and medium-sized businesses in supply chain	No information provided or information provided indicates % is 0	
Yes	3/3	2/3	1/3	0/3	
No	0/3	0/3	0/3	0/3	
Q. 5					
(b)					
(a)	A comprehensive implementation, monitoring and measurement plan	A plan that lacks sufficient information on at least one of "implementation, monitoring and measurement" but provides sufficient information to indicate implementation and some form of monitoring and measurement is possible	A plan that lacks sufficient information on at least one of "implementation, monitoring and measurement". Implementation is possible but monitoring and measurement is not.	No information provided or information provided is insufficient to indicate the strategy will be implemented, monitored and measured	
Yes	3/3	2/3	1/3	0/3	
No	0/3	0/3	0/3	0/3	

▶▶▶ Evaluation Matrix for RFX Reponses under Community Development ▶▶▶

Q. 1	(b)			
(a)	A comprehensive description provided of current activities and of monitoring and measurement	Provides some information on current activities monitoring and measurement but is missing some requested information	Insufficient information given on current activities or on the monitoring and measurement of progress.	No information provided or information provided is unsatisfactory
Yes	3/3	2/3	1/3	0/3
No	0/3	0/3	0/3	0/3
Q. 2	(b)			
(a)	A comprehensive implementation, monitoring and measurement plan	A plan that lacks sufficient information on at least one of "implementation, monitoring and measurement" but provides sufficient information to indicate implementation and some form of monitoring and measurement is possible	Insufficient information given on current activities or on the monitoring and measurement of progress.	No information provided or information provided is unsatisfactory
Yes	3/3	2/3	1/3	0/3
No	0/3	0/3	0/3	0/3

Step 6 : Establish metrics for contracts and reporting



After selecting a bid based on 'best value', this final step will allow you to establish metrics for contracts and reporting for each deliverable in the life-time of the project. By integrating the target numbers in each opportunity area set out by the bidder into your contract with this bidder, you can reconcile the bidder's social value procurement aims into a working contract.

Once you have established your contract metric, you will be able to measure the progress of your employment and/or procurement efforts in the three (or more) target groups that you identified in Step 1 based on the CEB Initiative.

Example:

CEB target group identified: <i>Women</i>	
Desired Outcome: <i>Increased employment opportunities for women</i>	
Metrics identified for contract and reporting on Procurement/ Employment for this project	
Headcount	
Number of individuals in target group directly hired:	20
Individuals in target group directly hired as a percentage of total number of new hires:	12%
Hours	
Number of hours worked by individuals in target group directly hired:	120 hours
Hours worked by individuals in target group as a percentage of total number of hours worked by all employees:	30%
Wages	
Total value of wages paid to individuals in target group directly hired:	\$ X
Value of wages paid to individuals in target group as a percentage of total value of wages paid to all employees:	X %
Suppliers	
Number of key suppliers who have hired individuals in target group:	4
Individuals in target group hired by key suppliers as a percentage of total number of employed individuals hired through key suppliers:	25%
Retention	
Number of full-time or equivalent opportunities to be retained throughout the contract and beyond the end date is:	8

Template 6: Create Contract Evaluation Metrics for _____

CEB target group identified:	
Desired Outcome:	
Metrics identified for contract and reporting on Procurement/ Employment for this project	
Headcount	
Number of individuals in target group directly hired:	
Individuals in target group directly hired as a percentage of total number of new hires:	
Hours	
Number of hours worked by individuals in target group directly hired:	
Hours worked by individuals in target group as a percentage of total number of hours worked by all employees:	
Wages	
Total value of wages paid to individuals in target group directly hired:	
Value of wages paid to individuals in target group as a percentage of total value of wages paid to all employees:	
Suppliers	
Number of key suppliers who have hired individuals in target group:	
Individuals in target group hired by key suppliers as a percentage of total number of employed individuals hired through key suppliers:	
Retention	
Number of full-time or equivalent opportunities to be retained throughout the contract and beyond the end date is:	

CEB target group identified:	
Desired Outcome:	
Metrics identified for contract and reporting on Procurement/ Employment for this project	
Headcount	
Number of individuals in target group directly hired:	
Individuals in target group directly hired as a percentage of total number of new hires:	
Hours	
Number of hours worked by individuals in target group directly hired:	
Hours worked by individuals in target group as a percentage of total number of hours worked by all employees:	
Wages	
Total value of wages paid to individuals in target group directly hired:	
Value of wages paid to individuals in target group as a percentage of total value of wages paid to all employees:	
Suppliers	
Number of key suppliers who have hired individuals in target group:	
Individuals in target group hired by key suppliers as a percentage of total number of employed individuals hired through key suppliers:	
Retention	
Number of full-time or equivalent opportunities to be retained throughout the contract and beyond the end date is:	

Glossary of Terms

Target Groups:

- › Apprentices: An apprentice is a paid employee, registered with the regional apprenticeship authority, who works under the supervision of a certified journeyman to learn their skilled trade and fulfill all requirements established by their province or territory. (Employment Social Development Canada)
- › Indigenous Peoples: Self-identified
- › Women: Self-identified
- › Person with a disability: Self-identified
- › Veterans: Any former member of the Canadian Armed Forces who successfully underwent basic training and is honourably released. (Veterans Affairs Canada)
- › Youth: Young workers up to age 29 . (Youth Policy - Privy Council Office)
- › Recent Immigrants (self-identified; recent landed immigrants within 10 years of start of work)
- › Small enterprise (1-99 employees)
- › Medium enterprise (100-499 employees)
- › Social enterprise: A business with an embedded mission to achieve social, cultural or environmental aims through the sale of goods and services. At least 50% of the business' revenue comes from selling goods and/or services in the marketplace and at least 50% of the business' profits go back into executing its social, cultural or environmental mission. (Buy Social Canada)

Barrierred individual: A person with barrier(s) to employment. This most often refers to a spectrum of physical health, mental health, social exclusion, limited education and skills, language and cultural differences or other obstacles to engaging in a traditional employment opportunity, which requires work place, work environment or work expectation to accommodate successful participation in the workforce.

Best value: The optimal combination of total cost, performance, economic, environmental and social sustainability of goods and services being offered. Proposals may be evaluated not only on pricing and total cost of ownership, but also inclusive of environmental and /or social considerations, delivery, servicing, and the capacity of the proponent to meet other criteria, all stated in the proposal documents.

Bid: includes a proposal submitted in response to a Request for Proposal and a written formal offer, submitted in response to an invitation to supply goods/services/infrastructure, where the specifications and conditions of the goods or services are known and disclosed in the request.

Certifications: 3rd party verified designations that confirm social and/or environmental practices.

Community Development: An activity that improves the overall health of the community, whether through generating a community benefit (e.g. community service) or building a community asset (e.g. cultural venue). Rooted in local knowledge and defined by the community itself.

Community Engagement: The collaborative process in which local residents, organizations, businesses and other groups come together to address community challenges, priorities or needs. May also refer to the process in which developers and the municipal government consult with these groups to identify opportunities for enhancing the well-being of the community during infrastructure or development projects.

Contract: An agreement between supplier and purchaser of goods, services or construction, including a purchase order, formal agreement or other document evidencing the obligation, and any amendments.

Contracting Authorities: commissioners, procurement officers/managers and purchasing authorities.

Contractor: refers to a broad range of organizations, including social enterprise, non-profits, small and medium enterprise and larger contractors that compete to deliver goods and/or services on a contractual basis to a public sector contracting authority.

Corporate Social Responsibility: businesses that have an actionable corporate social responsibility program in place.

Direct Award: under threshold purchases or to businesses that meet the direct award criteria.

Diverse supplier: A supplier that fulfils the business practice that encourages the use of historically under-represented businesses in a company's supply chain, in particular minority-owned, women-owned, aboriginal-owned, LGBT-owned, veteran-owned vendors.

Fair Wage: hourly wage rates set for specific occupations based on community market conditions and/or local government policy.

Full-time employment: Full time employment is determined by your organizational policy and/or the appropriate government regulatory requirements.

ITQ Invitation to Quote: Similar to an Invitation to Tender (ITT), this solicitation method is a price-based competition that is typically used for small-dollar, under-threshold contracts.

(ITT) Invitation to Tender: Sometimes called a Request for Tender (RFT) or Call for Tender (CFT) an ITT is a price-based competitive solicitation process used for higher-value contracts. An ITT is most often used for the purchase of goods, construction or straightforward buys where there is a clear set of specifications and the purchaser wants to find the lowest price.

Living Wage: the minimum income necessary for a worker to meet their basic needs. Needs are defined to include food, housing, and other essential needs such as clothing. Each community has a different living wage calculation.

Locally owned business: Private companies (ex. single owner or partnership, employee owned, co-operative or social enterprise/non-profit): Headquartered in the province, > 50% of owners residing in the province.

Locally Grown products: Agricultural products grown in the province (ex. food, plants, fibre, wood) or Manufactured products with >50% materials grown in the province.

Locally Made* products: Products wholly or largely (>50%) manufactured or processed in the province. Can include products produced without local materials or ingredients. Local made products with local ingredients or materials can add “Local Grown” if applicable.

(NFP) Not-for-profit or Non-profit organization: Incorporated provincially or federally an organization whose purpose is to solve social, cultural, and/or environmental problems. Revenues or profits generated by a non-profit must be used to further their mission. Some non-profits are registered charities by Canada Revenue Agency.

(NRFP) Negotiated Request for Proposals: An NRFP solicitation that includes a rigorously structured and clearly identified negotiation process as part of selecting the successful proponent for contract award. Depending on the language used, an NRFP typically does not attract Contract A obligations.

People who face barriers to employment: Barriers to employment can include lack of access to transit, needing accessible workplace accommodations, hiring and retention biases, needing flexible work hours and/or requiring additional workplace supports. Some population groups are more likely to face these barriers- people with disabilities, Indigenous youth, newcomers to Canada, etc.

(SME) Small or medium enterprise: A small business has 1–99 paid employees. A medium-sized business has 100–499 paid employees. Social Enterprise A community-based business that sells goods or services in the market place to achieve a social, cultural and/or environmental purpose; they reinvest a majority of their profits to maximize their social mission.

Supplier: The person or company selected to provide products or services under the terms of the contract. Extends to and includes any sub-contractors to the supplier. Also referred to as “Contractor”.

Supplier Diversity: A business practice that encourages the use of historically under-represented businesses in a company’s supply chain, including minority-owned, women-owned, aboriginal-owned, LGBT-owned, veteran-owned vendors.

Social Value: The impacts of programs and organizations on the well-being of individuals and communities. Social enterprises and social purpose businesses can generate social value by innovating products and services that meet community needs and by participating in social procurement.

Social Purchasing Criteria: The requirements taken into consideration when an organization evaluates a supplier of goods and services based on the social impact, environmental impact, price and quality of the supplier and its products.

Further Resources

Available at: www.buysocialcanada.com/documents-and-resources

- › Case studies
- › Examples of Bid Documents including Social Value Language
- › Policy and Implementation Strategies

References

Social purchasing and Community Benefit Agreement background and information:

Buy Social Canada:
www.buysocialcanada.com

Community Employment Benefits General Guidance:
www.infrastructure.gc.ca/pub/other-autre/ceb-ace-eng.html

Infrastructure Bilateral Agreements:
<https://www.infrastructure.gc.ca/prog/agreements-ententes/index-eng.html>

Contact

For further information, please contact Buy Social Canada:

Elizabeth Chick, Executive Director
elizabeth@buysocialcanada.com
(1) 604.416.0318





Buy Social Canada

337 Gore Ave Vancouver, BC V6A 2Z3

buysocialcanada.com

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