



# SOCIAL VALUE MENU

Community Employment Benefit  
Templates For Implementation





## Acknowledgements

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This document was prepared by Sadia Tabassum.





## 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's 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](mailto:elizabeth@buysocialcanada.com)





# Introduction to the Social Value Menu

## Background & 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 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.

The CEB Initiative requires applicable projects to provide:

- Employment opportunities; and/ or
- Procurement opportunities

For at least three out of the eight following targeted groups:

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

“The inclusion 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.”

More information available at:

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





## How to Use the Social Value Menu

The 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 menu to take you through the **six 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 three) 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: Identify Your Organization's Strategic Goals



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.



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 six of the key steps in the figure above.

**Step 2:** Identify strategic organizational 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: Poverty Reduction Plan

Organizational Goal 1: Promote local economic development by creating new opportunities to assist people facing barriers to employment to gain employment skills and experience

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 |

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

- Build a healthy and inclusive community
- Create diverse and meaningful employment opportunities that provide incomes to
- support a high quality of life

- Support integration into the workforce for specific demographics such as newcomers,
- youth and people with disabilities

**Prompt 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 will 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):								
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><input type="checkbox"/> Apprentices</td> <td style="width: 50%;"><input type="checkbox"/> Veterans</td> </tr> <tr> <td><input type="checkbox"/> Indigenous Peoples</td> <td><input type="checkbox"/> Youth</td> </tr> <tr> <td><input type="checkbox"/> Women</td> <td><input type="checkbox"/> Recent immigrants</td> </tr> <tr> <td><input type="checkbox"/> Persons with disabilities</td> <td><input type="checkbox"/> Small-sized, medium-sized and social enterprises</td> </tr> </table>	<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
<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):								
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><input type="checkbox"/> Apprentices</td> <td style="width: 50%;"><input type="checkbox"/> Veterans</td> </tr> <tr> <td><input type="checkbox"/> Indigenous Peoples</td> <td><input type="checkbox"/> Youth</td> </tr> <tr> <td><input type="checkbox"/> Women</td> <td><input type="checkbox"/> Recent immigrants</td> </tr> <tr> <td><input type="checkbox"/> Persons with disabilities</td> <td><input type="checkbox"/> Small-sized, medium-sized and social enterprises</td> </tr> </table>	<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
<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							

	9
--	---

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. An outcome is the performance or achievement that occurred because of the activity or services that were provided. The template gives you space 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**: \_\_\_\_\_

\_\_\_\_\_

Strategic Goal fulfilled by Outcomes: \_\_\_\_\_

\_\_\_\_\_

Desired Outcomes for **Skills & Training**: \_\_\_\_\_

\_\_\_\_\_

Strategic Goal fulfilled by Outcomes: \_\_\_\_\_

\_\_\_\_\_

Desired Outcomes for **Supply Chain**: \_\_\_\_\_

\_\_\_\_\_

Strategic Goal fulfilled by Outcomes: \_\_\_\_\_

\_\_\_\_\_

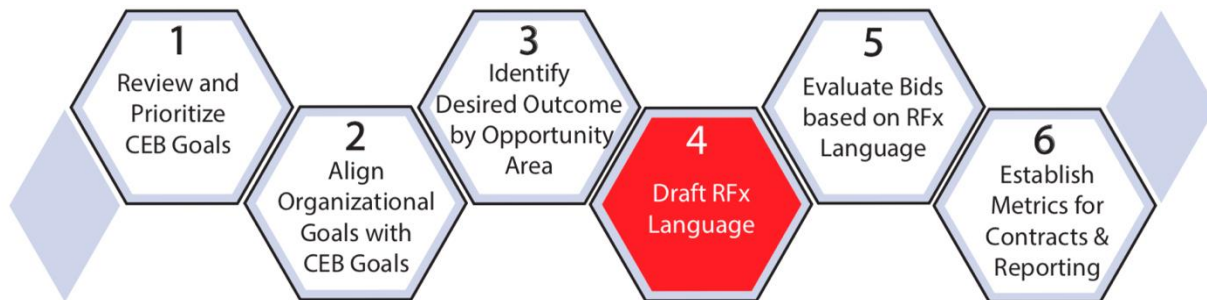
Desired Outcomes for **Community Development**:: \_\_\_\_\_

\_\_\_\_\_

Strategic Goal fulfilled by Outcomes: \_\_\_\_\_

\_\_\_\_\_

## Step 4: Draft 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 organizations with a social enterprise or SME in their own supply chain, therefore increasing procurement opportunities for those organizations.

### Prompt for Template 4:

Draft RFX language that you can include in contracts with your service providers to reflect the organizational goals and desired outcomes that you have identified. Draft descriptive rather than prescriptive criteria for social procurement for your bidders, allowing proponents the latitude to respond with a variety of appropriate implementation opportunities

### 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 and 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: Draft RFX Language for \_\_\_\_\_

Employment:

(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 <input type="checkbox"/>	<input type="checkbox"/> No
------------------------------	-----------------------------

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

<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	

(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).

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Skills & Training:

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

Yes <input type="checkbox"/>	<input type="checkbox"/> 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)

---

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---

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

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

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

<input type="checkbox"/> Indigenous Peoples	<input type="checkbox"/> Veterans
<input type="checkbox"/> Women	<input type="checkbox"/> Youth
<input type="checkbox"/> Persons with disabilities	<input type="checkbox"/> Recent immigrants

(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)

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## 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; third party certification that verifies that the business is owned by women, refugees, businesses owned by individuals with a recognized disability, and 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









## Step 5: Evaluate Bids based on new RFX Language



Bidders' responses to the social value RFX language in your bid documents will need to be evaluated and scored. We have provided a suggested evaluation matrix which can be edited or adjusted to reflect your organizational goals and the project- specific priorities as well as social value goals.

### General guidelines for evaluating bid responses:

When evaluating bid responses from your suppliers based on your social value criteria, you can expect to see responses that include the following:

#### Employment:

- Strategies for recruitment, retention and 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 centers, 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 Responses 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 Responses 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 Responses under Skills & Training

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	A plan that lacks sufficient information on at least one of "implementation, monitoring and measurement".	No information provided or information provided is insufficient to indicate the



		measurement” but provides sufficient information to indicate implementation and some form of monitoring and measurement is possible	Implementation is possible but monitoring and measurement is not.	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 Responses 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	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

## 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. The metric target can be aligned with the amounts identified by the winning bid. Infrastructure Canada requires reporting on employment hours and contract values for small, medium and social enterprises. Additional metrics may be collected and reported on as well.

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:

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

Metrics identified for contract and reporting on Employment for this project	
CEB target group identified: <u>Women</u>	
Desired Outcome: <u>Increased employment opportunities for women</u>	
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 %
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%
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 %
Sub-contractors	
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 %

\* please see next page for the example continued...

Metrics identified for contract and reporting on Procurement for this project	
CEB target group identified: <u>N/A</u>	
Desired Outcome: <u>Greater supplier diversity/ include more social enterprises as well as small and medium-sized enterprises in supply chain</u>	
Contract Spend for Social, Small/Medium and Diverse-owned businesses	
Total number of contracts with <b>social enterprises:</b>	9
Total dollar value spent on social enterprises:	\$154,780
Total number of contracts with <b>small and medium-sized enterprises:</b>	20
Total dollar value spent on small and medium-sized enterprises:	\$100,200
Total number of contracts with <b>diverse-owned businesses:</b>	2
Total dollar value spent on diverse-owned businesses:	\$50,245

Template 6: Create Contract Evaluation Metrics for \_\_\_\_\_

Metrics identified for contract and reporting on Employment for this project	
CEB target group identified: _____	
Desired Outcome: _____ _____	
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:	
Headcount	
Number of individuals in target group directly hired:	
Individuals in target group directly hired as a percentage of total number of new hires:	
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:	
Sub-contractors	
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:	

Metrics identified for contract and reporting on Procurement for this project	
CEB target group identified: <u>N/A</u>	
Desired Outcome: <u>Greater supplier diversity/ include more social enterprises as well as small and medium-sized enterprises in supply chain</u>	
Contract Spend for Social, Small/Medium and Diverse-owned businesses	
Total number of contracts with <b>social enterprises</b> :	
Total dollar value spent on social enterprises:	
Total number of contracts with <b>small and medium-sized enterprises</b> :	

Total dollar value spent on small and medium-sized enterprises:	
Total number of contracts with diverse-owned businesses:	
Total dollar value spent on diverse-owned businesses:	

## Glossary of Terms

### Community Employment Benefit (CEB) Target Groups

- **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 honorably 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)
- **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)

**Barriered 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:** Third party verified designations that confirm social and/or environmental practices.

**Community capital:** Community capital describes the total assets of a community that the community benefits from and can invest into community development. It consists of the six main types of capital: social capital, human capital, cultural capital, natural capital, economic capital, and physical capital. Community capital is essential to a sustainable community and builds relationships between various community groups and processes.

**Community Benefit Agreement (CBA):** A Community Benefit Agreement (CBA) is an agreement between community, government, and developers that ensures development projects enhance local social, environmental, and economic opportunities.

**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.

**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.

**Developer (owner):** The group that applied for re-zoning and is responsible for compliance throughout the life cycle of the project.

**Direct award:** Under threshold purchases or to businesses that meet the direct award criteria.

**Diversity:** Diversity is the differences between individuals within an organization, and it serves to promote innovation and growth within the organization. Types of diversity can include cultural, socio-economic, and experiential diversity.

**Diverse supplier:** A supplier that fulfills the business practice that encourages the use of historically under-represented businesses in a company's supply chain, in particular minority-owned, women-owned, Indigenous-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.

**First source hiring:** "Diverse jobs for diverse people across the entire lifecycle of development" which compliments the supplier diversity procurement objectives by considering work opportunities through an equity lens i.e. jobs that are appropriate for a diverse range of people no matter their age, gender, ability etc. which by necessity challenges developers and contractors to consider opportunities beyond (before, during, or after) the construction phase.

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

**Indirect supply chain:** An indirect supply chain consists of the goods and services required to maintain and grow a business that is not an integral part of its final product or service. An indirect supply chain may include packaging materials used to ship a product, office supplies, or software used for inventory tracking.

**Individuals with 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, such as people with disabilities, Indigenous youth, newcomers to Canada, etc.

**Individuals within marginalized group(s)** (also referred to as equity-seeking groups): Marginalized groups include, but are not limited to, Indigenous Peoples, youth, women, recent immigrants, people with disabilities and people with experience of homelessness.

**Infrastructure:** Infrastructure is the basic physical and organizational structures required by a community to function. It includes water and electricity systems, roads, schools,

hospitals, and airports. Infrastructural development entails high-cost investment but is essential to a community's social and economic prosperity.

**(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.

**Lifecycle of development:** Lifecycle of development is defined as the time from site preparation to post-occupancy and includes office and other off-site positions and tasks.

**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, fiber, 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

NFPs are registered charities by Canada Revenue Agency.

**Private Corporation:** A private corporation, or for-profit corporation, is an organization incorporated to operate a business that when it generates profits they are distributed for the benefit of the owners and shareholders.

**RFx:** A catch-all term that captures all references to Request for Information (RFI), Request for Proposal (RFP), Request for Qualification (can be used to refer to Request for Quote) (RFQ), and Request for Bid (RFB).

**Social benefit:** Social benefit describes the positive social impact generated by an organization. Social benefits can include job opportunities, environmental restoration, and community resources. The primary goal of a social enterprise is to generate social benefit alongside profit.

**Social value criteria** (also referred to as social impact criteria): Social value/ impact criteria are the standards maintained by an organization that regulate its practices to ensure the organization meets its goals for minimizing negative social impacts and maximizing positive social impacts. Social value/ impact criteria are established following an organization's impact measurement and leads to the formation of an impact management plan.

**Social procurement:** Social procurement means leveraging a social value through existing purchasing. Social procurement is an umbrella term that encompasses the social purchasing of goods and services as well as Community Benefit Agreements that leverage social value through infrastructure and development projects.

**Social procurement criteria:** Social procurement criteria are the requirements taken into consideration when an organization evaluates a supplier of goods or services based on the social impact, environmental impact, price, and quality of the supplier and its products.

**Social purchasing policies and guidelines:** Social purchasing policies and guidelines are organizational policies and frameworks that out-line how an organization can add social value to their existing purchases.

**Social value:** Social value refers to the impacts of programs and organizations on the wellbeing of individuals and communities. Social enterprises and social purpose businesses can generate social value by innovating products and services that meet community needs and participating in social procurement.

**Social value supply chain:** A social value supply chain is the total goods and services that make up an organization's direct and indirect supply chain and their social value. To understand its social value supply chain, an organization must critically assess the social impact of all products and their suppliers.

**Supplier:** A supplier is an individual or organization that provides goods or services to a purchaser.

**Supply chain:** A supply chain is a network of organizations, individuals, resources, activities, and technology that move a product from initial production to the final consumer. It is composed of a direct supply chain, which includes all materials that become part of the final product, and an indirect supply chain, which includes all resources that contribute to the product's manufacturing and delivery but are not incorporated into the product.

**Supplier diversity:** Supplier diversity is the incorporation of minority-owned organizations into supply chains or government contracts. Minority-owned organizations include women owned, veteran owned, and Indigenous-owned companies.

**Targeted individual:** An individual targeted by an employer for a targeted employment strategy. Employers may wish to expand or purposefully be more inclusive in their workforce or work requirements through targeted recruitment strategies and workplace accommodations that achieve greater representation of historically disadvantaged or other groups with barriers to employment.

**Workforce development:** Workforce development is considered an interconnected set of solutions to meet employment needs – by preparing workers with the skills necessary for a specific type of job. Workforce development can include changes to culture, changes to attitudes, and changes to people's potential that help to positively influence a business' future success. Workforce development is also sometimes referred to as employee development and is considered an important aspect of business success.

## Further Resources

Available at: [www.buysocialcanada.com/documents-and-resources](http://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](http://www.buysocialcanada.com)

Community Employment Benefits General Guidance:

[www.infrastructure.gc.ca/pub/other-autre/ceb-ace-eng.html](http://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](mailto:elizabeth@buysocialcanada.com)

