



**buy
social**
CANADA

Social Value Menu Goods and Services Templates for Implementation





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Buy Social Canada is a partner in the Canada-wide Social Enterprise Ecosystem Project, S4ES. S4ES' other partners are the Social Enterprise Institute, Chantier de l'économie sociale, Social Value Lab, and the Canadian Community Economic Development Network, CCEDNet.

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About Buy Social Canada

Buy Social Canada is a social enterprise with the 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.

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

Introduction to the Social Value Menu

Background & Policy Context

Every business, government and organization buys goods and services to run their operations. 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. Businesses, governments, anchor institutions, and non-profit organizations can use this Social Value Menu to leverage their existing purchasing to achieve their social value and community benefit goals.

For an Introduction to the “What, Why and How” of Social Procurement see the “Guide to Social Procurement at www.buysocialcanada.com

Social procurement allows organizations to put purpose into practice.

- **Best value:** Social Procurement is about *adding* a social value consideration alongside price, quality and environmental considerations. Achieving a social value from your purchase achieves the *best value* for your money.
- **Increase your social value as a supplier:** Many organizations wear two hats, existing in the marketplace as both purchasers and as suppliers, when responding to bids or looking to attract new clients or customers, being able to evidence your own social value through your social procurement activities gives you a competitive edge in the marketplace.
- **Employee engagement:** The younger generations of our workforce are extremely motivated by feeling as though they are part of something greater than themselves and are part of a solution to a larger problem.
- **Be part of designing the future:** This is not a fad, but an evolving trend, so now is the time to lean in, bring your business acumen to the tables, and add your voice to the process to be part of designing the future of procurement.

As we see social procurement policies develop and look next to implementation there is a need to have a framework and guidelines to support the inclusion of an added social value from the purchasing of goods and services.

What is the purpose of the Social Value Menu for Goods and Services?

The purpose of this menu is to help you design, evaluate and implement the inclusion of a social value into your procurement process for goods and services.

For templates which involve **Community Benefit Agreements** or the Infrastructure Canada **Community Employment Benefit** Initiative, see the other editions of the Social Value Menu available at: www.buysocialcanada.com

This menu will facilitate your steps towards social procurement implementation. Buy Social Canada can provide training and consulting to support your use of this guide. We can work together to design the implementation of your social procurement specific to your community or organization. For further support and engagement opportunities see the Buy Social Purchasing Partnerships at www.buysocialcanada.com

Who is the Social Value Menu for Goods and Services for?

This menu is for people purchasing goods and services for businesses, institutions, governments and non-profit organizations. You are interested in learning how you can integrate social value considerations into your bid process.

How to Use the Social Value Menu for Goods and Services

This menu will support you in identifying and reporting on social value outcomes that can be achieved through your purchasing of goods and services. The figure below will be used throughout this document to take you through the 5 key steps that we have identified for guiding your social value procurement process:



The Social Value Menu for Goods and Services will help you to:

- Identify your organization's strategic goals
- Identify desired outcomes from the project using four main opportunity areas:
 - Employment
 - Skills & Training
 - Social Value Supply Chain
 - Community Development
- Draft bid language for bid documents and supplier questions¹
- Establish metrics for contracts and reporting requirements

Impact Story



City of Peterborough wanted to increase active transportation in the city so they needed to increase their bike racks. The current supplier of bike racks was based in the United States. The buyer decided to see what could be bought locally instead.

She found a local fabricator who could make the bike racks. As the City consistently bought a certain number of bike racks each year, the producer was able to upgrade their machining equipment and cut custom silhouettes into the racks. By working to increase social value in the purchase, the City supported local employment, reduced transportation emissions and ended up with a better, more beautiful active transit asset.



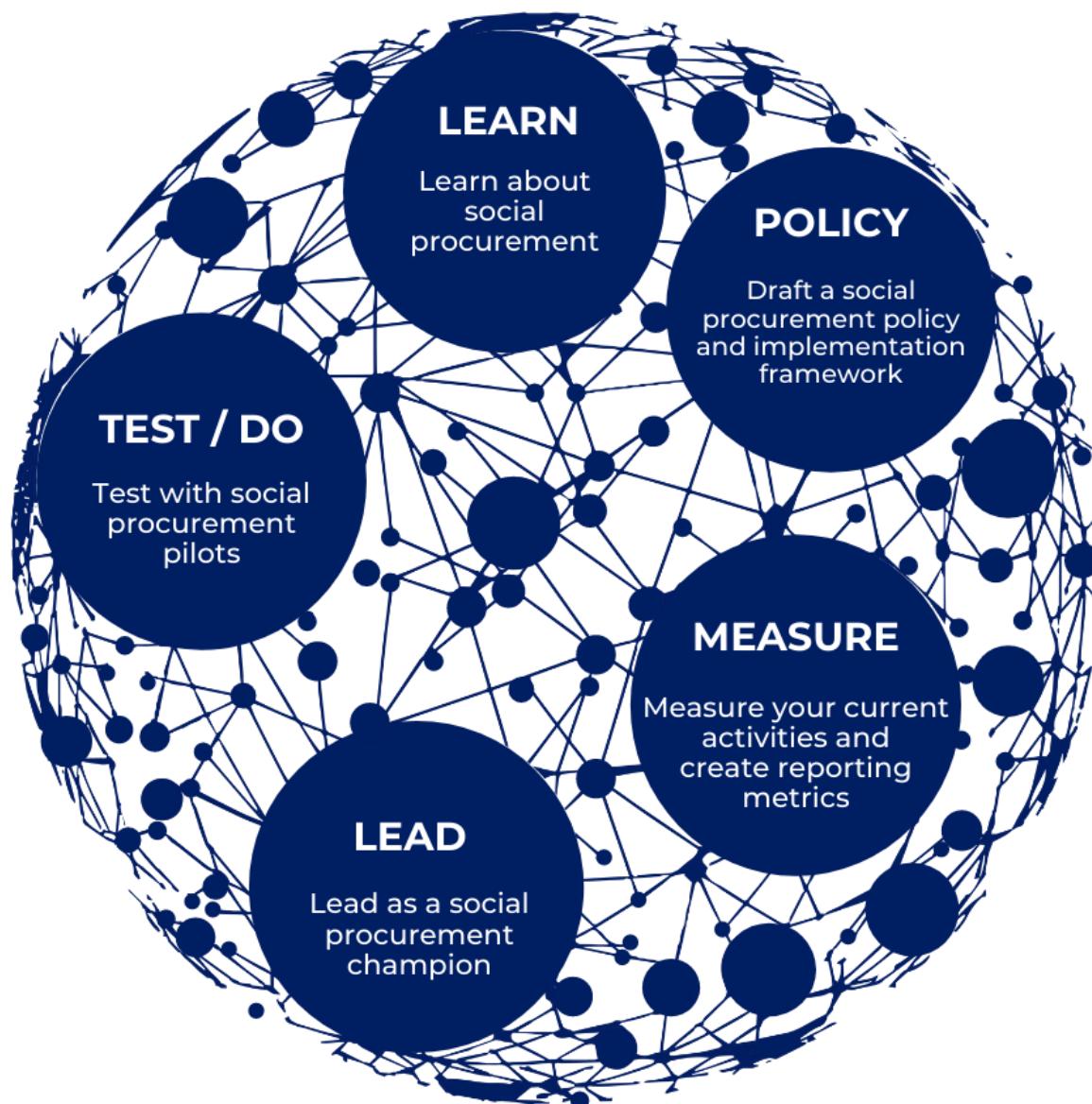
Figure 1. City of Peterborough custom bike racks

¹ Some purchasers – Government and some quasi-government institutions – are subject to the requirements of Canada's Trade Agreements. For organizations subject to Trade Agreements please see Buy Social Canada's Trade Agreement Primer at www.buysocialcanada.com

Social Procurement Organization Journey

The Social Value Menu can help you to identify key goals, language examples, evaluation criteria and metrics for use in many of the activities that make up the social procurement organization journey: learn, policy, test/do, measure and lead.

The journey to embedding social procurement into your organization is not linear. Depending on a range of factors, including your organization's priorities, capacity and prior understanding of social procurement, you may choose to take on a number of these activities at once or in an order that makes sense to you. Whichever order you chose, the parts below are key to the long-term success of social procurement at your organization.



LEARN

Learn about social procurement

Engage in learning activities with your team and incorporate change management into the process. Read the Buy Social Canada [Guide to Social Procurement](#) and other introductory materials. Attend workshops and trainings for procurement staff, business units and anyone else who purchases for the organization. Review the Social Value Menu glossary to become familiar with key terms

Step 1 of the Social Value Menu will help you draft your social procurement policy by identifying what your organizational objectives are. Use information from your pilots to help guide the implementation framework.

POLICY

Draft a social procurement policy and implementation framework

TEST / DO

Test with social procurement pilots

Iterate and refine your social procurement process by implementing pilots. The Social Value Menu can be used to help develop a 'Social Value RFx Questionnaire' which you can add to your bids. Social Value Menu Step 5 helps you to establish what metrics will be tracked and reported on. Use these metrics to reflect on and refine your social procurement process.

Run a social procurement audit and establish a baseline of your current spend to help you identify your targets, goals and priorities related to social value and social enterprise. Incorporate these goals in your bid language, which could include RFPs, RFQs or language used in an email or telephone conversation when sourcing for a direct award. Identify measurable metrics for outcomes that can be reported on throughout implementation, helping with change management, accountability and storytelling.

MEASURE

Measure your current activities and create reporting metrics

LEAD

Lead as a social procurement champion

Use the Social Value Menu to adapt your procurement practices and your organization will be leading on social procurement in your sector! Further opportunities to lead on social procurement include becoming a [Social Purchasing Partner](#) and making the [Buy Social Pledge](#).

Buy Social Canada Purchasing Partners receive a social procurement audit and training as well as discounted rates for further consulting and engagement support.

Now, here are the Social Value Menu steps to help you implement social procurement on a specific purchase.



Step 1: Identify Strategic Organizational Goals

Begin your social procurement implementation process by identifying your organization's existing strategic goals. Consider current relevant policies, both internal and external (such as municipal social policies or your organization's value statement) to help set your goals and targets.

Example:

Source: Organization's Value Statement

Organizational Goal 1: Inclusivity and accessibility – ensuring opportunities in the sector are accessible to the diverse groups of people that make up our community

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

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

Template 1: Identify strategic organizational goals

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 1:

- 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?

Source: _____

Organizational Goal 1: _____

Source: _____

Organizational Goal 2: _____

Source: _____

Organizational Goal 3: _____



Step 2: Identify your desired outcomes by opportunity area

We have identified four key opportunity areas where social value through employment and procurement opportunities can be integrated into the purchasing of goods and services. They are employment, skills & training, supply chains and community development.

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 individuals from equity-deserving groups
- Increased training with recognized qualifications available to individuals from equity-deserving groups
- 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 for SEs, NFPs and local SME

Desired outcomes for Community Development

- Community Engagement
- Provision of community services/cultural contributions

Template 2: Identify Desired Outcomes

Based on the strategic organizational goals you identified in Step 1 you should now explore desired outcomes. 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 1.

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 3: Incorporate a social value weighting into the bid process

Social Value considerations and weighting can be built into all bid processes. There are opportunities to add social value weighting to:

- Credit card/Purchasing Card (P Card) spending
- Direct awards (*below internal and trade agreement threshold or utilizing exceptions*)
- RFx bid processes: *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 questions you ask in your procurement process allow you to identify **direct** opportunities for social value in your own supply chain i.e. When purchasing catering you purchase directly from a social enterprise

And **indirectly**, through the supply chain of your own suppliers i.e. When purchasing cloud services, you ask the bidding companies what social value they have in their own supply chain, perhaps they purchase *their* catering from a social enterprise, or who they will sub-contract part of the contract to e.g. they may sub-contract the dessert element of a catering event to a social enterprise

The following RFx language allows you to request information concerning:

- **Direct** Social value suppliers: i.e. identifying that a bidding organization is a social enterprise or a diverse owned business
- **Direct** Social value in employment practices: i.e. identifying Living Wage employers, inclusive recruitment practices
- **Indirect** 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

Quick Questions for Emails or Calls

For low-value purchases that don't require a bidding process the following language can be used as examples of questions that can be asked of organizations over the telephone or via email as well as questions that can be included in pre-qualification lists and directories. A directory of Buy Social Canada certified social enterprises can be found at www.buysocialcanada.com.

1. Are you a social enterprise? A **social enterprise** is a business that seeks to achieve a defined social, environmental or cultural purpose; it generates a significant portion of its income from selling goods or services, and the majority of net-profits are re-invested in the purpose. Buy Social Canada offers a social enterprise certification to show purchasers that this definition is met.
2. Are you part of a certification body that indicates you are diverse-owned or some other type of social value supplier?
3. What type of social value does your business intentionally seek to create?
4. Do you practice social procurement?
5. Do you pay a Living Wage?²
6. Do you seek to hire from equity-deserving groups? If yes, tell me more about the efforts you take.

² Living Wage Canada www.livingwagecanada.ca

Prompt for Template 3:

Draft 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.

Based upon the project composition and objectives for each project, the bid language can have a selection of questions from the four Opportunity Areas: employment, skills & training, supply chain and community development. You should design your bid language based on your goals, so not all questions provided in Template 3 are needed for every bid. Use the examples provided in Template 3 as samples of the type of information you can request from suppliers or bidders through your bid.

Use Descriptive Language rather than Prescriptive Language

Prescriptive language dictates the activities that are asked for whereas descriptive asks for a narrative of how an activity will be implemented. Descriptive language allows for varying responses and approaches to reach a desired outcome. With a descriptive response to a question, you can incorporate the bidders answer into their contract in order to create accountability for the desired outcome.

Template 3: Identify Bid Language

Employment

(a) Does your organization currently have strategies or policies around diverse, equitable, and/or inclusive employment practices to ensure you are providing employment opportunities for individuals from equity-deserving groups?

Yes

No

(b) Please describe your current processes for implementing your strategies/policies and ensuring employment opportunities for individuals from equity-deserving groups. Please describe how you currently monitor, measure, and report on these processes in the space below.

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

(a) Does your organization have a living wage policy that includes paying both directly employed staff as well as all contracted staff the Living Wage?

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

Yes

No

Supporting document: _____

(b) Does your organization have a policy that suppliers in your supply chain must have a Living Wage Policy?

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

Yes

No

Supporting document: _____

3. What percentage of your employees **currently** receive a living wage? Please provide a number below and provide justification of the percentage reported.

Skills & Training

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

Yes

No

(b) Please provide the total number of apprentices within any apprenticeship program that your organization has had in the last 12 months. Please provide details of your existing program(s) and how you monitor and measure the success of the program(s) in the space below:

2. (a) Do you currently have an Apprenticeship program that targets inclusion of individuals from equity-deserving groups?

Yes

No

(b) Please provide the number of apprenticeship positions that have been given to individuals from equity-deserving groups in the last 12 months. Please provide details of your existing program(s) and how you monitor and measure the success of the program(s) in the space below:

3. (a) Does your organization currently have any paid work-experience or internship program(s)?

Yes

No

(b) Please provide the total number of work-experience positions that your organization has had in the last 12 months. Please provide details of your existing work-experience and/or internship program(s):

* This field is required if you answered Yes in 3. (a)

4. (a) Do you currently have any paid work experience or internship programs that target inclusion of individuals from equity-deserving groups?

Yes

No

(b) Please provide the number of paid work experience positions that have been given to individuals from equity-deserving groups in the last 12 months. Please provide details of your existing program(s) and how you target inclusion of individuals from equity-deserving groups:

* This field is required if you answered Yes in 4. (a)

Supply Chain

1. Is your organization a Small or Medium-sized enterprise?
(Including all employees globally.)

- Yes, we are a small enterprise (1-99 employees³)
- Yes, we are a medium enterprise (100-499 employees)
- 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, 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):

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

3. (a) Does your organization practice social procurement?

Yes

No

(b) If yes, please attach the relevant policy (indicating document name in the space provided), provide a website, or provide evidence of implementation of social procurement in your supply chain:

* This field is required if you answered Yes in 3. (a)

³ Statistics Canada <https://www150.statcan.gc.ca/n1/pub/11f0027m/2011069/part-partie1-eng.htm>

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

Yes

No

(b) If yes, please provide evidence of your tracking methodology.
(For example, a report or recent data on number of contracts and/or dollar spend.):
* This field is required if you answered Yes in 4. (a)

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

Yes

No

(b) Please describe how you will implement, monitor and measure this strategy. You must answer all three to receive full points.

* This field is required if you answered Yes in 5. (a)

Community Development

1. (a) In the last three years, has your organization implemented any programs or initiatives to ensure greater economic opportunity and community integration for equity-deserving groups?

Yes

No

(b) If yes, please provide details of any programs or initiatives:

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

Social Value RFx Questionnaire

An emerging best practice for incorporating social value questions in RFx is the Social Value RFx Questionnaire. The Questionnaire contains a consistent set of questions that are aligned with your social value objectives in your RFx documents as an appendix for the social value component of the bid evaluation.

The Questionnaire asks questions about current business practices versus project specific outcomes. This is a solid first step for introducing social value into your procurement. As your social procurement practice evolves, you can seek social value outcome deliverables that are project specific.

The Questionnaire uses a 'yes / no, with evidence' method, which allows for transparency and reduces subjectivity by the evaluators. By requiring supporting evidence, you ensure that it is not just a checked box, and some proof is shown.

There are multiple benefits to the Questionnaire approach.

For purchasers you can:

- Increase objectivity, fairness, and transparency of evaluation and scoring;
- Increase the ability of the purchaser to define the social value priorities and goals they want to achieve through the contract delivery;
- Allow the purchaser to score and weight the RFx bid social value outcomes based upon their priorities and goals;
- Allow the buyer to receive and evaluate consistent data for each bid submitted;
- Simplify the purchasers' analysis and scoring of all bids since it is based on submission of identical social value outcomes with embedded numerical values;
- Be functional and applicable across multiple RFx platforms; and
- Be functional and applicable across multiple purchases of goods, services, and construction projects (The weighting of the social value within the context of the overall RFx criteria of price, quality, environment, and all other factors may change, but the Questionnaire is always consistently submitted and scored.)

For bidders the Questionnaire process helps to:

- Simplify and provide clarity to bidders on what social value the purchaser will prioritize;
- Complete the Questionnaire once then use on subsequent bids;
- Improve answers over time as they know what questions will be asked;
- Provide consistency and transparency to all bidders on what to expect in terms of providing social value and how their content will be scored; and
- Support bidding companies' capacity to improve their score by increasing their social value outcomes based on consistent Questionnaire use across multiple purchases.

For the purchasing organization, you can:

- Create a baseline and collect data on bid responses, providing purchasing organizations with criteria, data, and metrics to evaluate, report, and improve on their social procurement policy effectiveness.

Each question will have a predetermined number of points which will reflect the purchaser's social value priorities. The Questionnaire weighting as related to the bid evaluation can be determined for each bid. The score on the Questionnaire is then proportionally translated to the weighting on the bid.

For example, if the bidder scores 60% on the Questionnaire and social value is 10 points out of 100 on the bid, they would get 6/10 for that section of their bid score.

Question:	Maximum Points:	Response Score:	Bid Evaluation Points:
The question reflects the goal or desired outcome of the purchaser's social value goals.	Determined by the purchaser, but remains consistent from purchase to purchase, across RFx.	Scored by the purchaser based upon the bidder's answers and evidence.	Reflects how impactful social value will be on the bid award.

Questionnaire Examples



City of Calgary Benefit Driven Procurement Leadership Questionnaire was developed in 2020 and has been included over 100 bids.

Learn more about [City of Calgary Benefit Driven Procurement](#) and see the [Questionnaire](#).



Regional Municipality of Wood Buffalo Social Procurement Questionnaire is being piloted on RFPs and RFQs in 2022.

Learn more about their [Social Procurement Program](#) and see the [Questionnaire](#)



Step 4: Evaluate bids with social value weighting

Bidders' responses to the social value bid 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, project specific priorities, and 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 and retention of support for individuals from equity-deserving groups (both existing and proposed strategies for the performance of this contract)
- Specific implementation, monitoring and reporting strategies to ensure the continued recruitment and retention of support for individuals from equity-deserving groups
- The number and percentage of current and new employment opportunities for individuals from equity-deserving groups (long-term, paid, entry-level 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 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 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 within marginalized 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

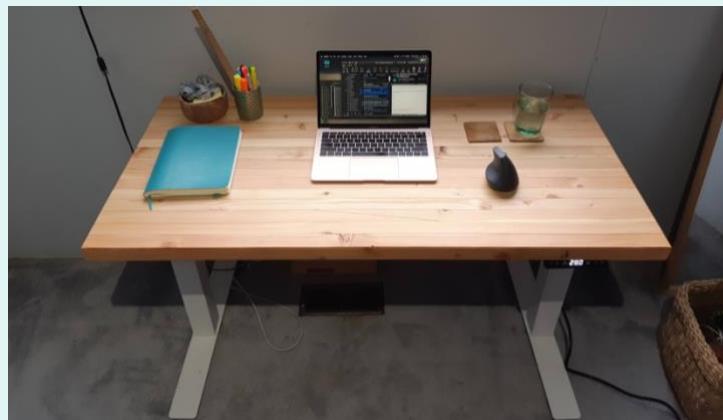
- Clarification on how any key suppliers involved in the design of services from the bidder can contribute to key, local priorities in performance of the contract. This might include access to community hubs (i.e. community centres, cultural venues, parks, local libraries, community-led initiatives, 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

Evaluating Social Value from Emails or Calls

For low-value purchases that don't require a bidding process the Template 3 includes sample questions that can be asked via email or phone call. During that question period feel free to ask further questions as you evaluate whether or not their responses are aligned with your social value outcome goals.

You do not need to use the evaluation matrices below, but it will provide an evaluation framework for the bid language questions which inquire about similar social value outcomes.

When asking about social value outcomes for low-value purchases you can include social value weighting in your purchasing decision. Low-value purchases are a key opportunity to engage with local suppliers, who create social value, versus multinational corporations.



Impact Story

Buy Social Canada has a procurement policy to prioritize purchases from social enterprises. When Tori Williamson, Director of Education and Consulting, needed a desk, she found Certified Social Enterprise Wood Shop Coop.

She emailed them and asked for details on their products and any other social or environmental value associated with each. She chose a beautiful standing desk made from upcycled wood that was handmade by people who face barriers to employment.

Template 4: Evaluation Criteria by Opportunity Area

Evaluation Matrix for RFx Responses under Employment

Q. 1	(b)			
	(a)	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)	Appropriate attachment provided	Appropriate attachment not provided
Yes	3/3	0/3
No	0/3	0/3
(b)	Appropriate attachment provided	Appropriate attachment not provided
Yes	3/3	0/3
No	0/3	0/3

Q.3	(a) & (b)			
	The percentage given is within expectations and the justification given for this number is accepted	The percentage given is below expectations for this project, but the justification given for this number is accepted	The percentage given 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)	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)	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. 3		(b)		
	(a)	Provides some information on current activities but is missing some details	Insufficient information given on current activities	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. 4		(b)		
(a)	A comprehensive description provided of the work experience program targeting individuals from equity-deserving groups	Provides some information on current activities but is missing some details	Insufficient information given on current activities	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)
(a)	Examples of tracking methodology provided	Examples of tracking methodology not provided
Yes	3/3	0/3
No	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)	Details of programs and initiatives provided	Details of programs and initiatives not provided	
Yes	3/3	0/3	
No	0/3	0/3	



Step 5: 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. By integrating the target numbers in each opportunity area from the successful bid, you can reconcile the bidder’s social value procurement aims into a working contract.

Once you’ve seen how a bidder responds to the bid you can incorporate those stated quantities as deliverables for the contract.

Desired Outcome: Increased employment opportunities for women.	
Metrics identified for contract and reporting on Employment for this project	
Employment	
Number of employees from target group working on the contract:	20 employees
Employees from target group as a percentage of total number of employees working on the contract:	12%
Hours	
Number of hours worked by employees from target group during delivery of the contract:	120 hours
Hours worked by employees from target group as a percentage of total number of hours worked by all employees during delivery of the contract:	30 %
Wages	
Total value of wages paid to employees from target group during delivery of the contract:	\$ 3,600
Value of wages paid to employees from target group as a percentage of total value of wages paid to all employees during delivery of the contract:	20 %

Sub-contractors	
Number of employees from target group employed by sub-contractors working on the contract:	4
Sub-contractor employees from target group as a percentage of total number of sub-contractor employees working on the contract:	25 %

Desired Outcome: Greater supplier diversity/include more social enterprise as well as small and medium-sized enterprises in supply chain

Metrics identified for contract and reporting on Procurement for this project

Contract Spend for Social, Small/Medium and Diverse-owned businesses	
Total number of contracts with social enterprises:	9
Total dollar value spent on social enterprises:	\$154,780
Total number of contracts with small and medium-sized enterprises:	20
Total dollar value spent on small and medium-sized enterprises:	\$100,200
Type of diverse-owned businesses reported on:	Black-owned
Total number of contracts with diverse-owned businesses, type listed above:	1
Total dollar value spent on diverse-owned businesses; type listed above:	\$14,700
Type of diverse-owned businesses reported on:	Indigenous-owned
Total number of contracts with diverse-owned businesses, type listed above:	2
Total dollar value spent on diverse-owned businesses; type listed above:	\$50,245

Template 5: Create Contract Evaluation Metrics

Desired Outcome: Increased employment opportunities for a specific target group. Metrics identified for contract and reporting on Employment for this project	
Employment	
Number of employees from target group working on the contract:	
Employees from target group as a percentage of total number of employees working on the contract:	
Hours	
Number of hours worked by employees from target group during delivery of the contract:	
Hours worked by employees from target group as a percentage of total number of hours worked by all employees during delivery of the contract:	
Wages	
Total value of wages paid to employees from target group during delivery of the contract:	
Value of wages paid to employees from target group as a percentage of total value of wages paid to all employees during delivery of the contract:	
Sub-contractors	
Number of employees from target group employed by sub-contractors working on the contract:	
Sub-contractor employees from target group as a percentage of total number of sub-contractor employees working on the contract:	

Desired Outcome: Greater supplier diversity/include more social enterprise as well as small and medium-sized enterprises in supply chain

Metrics identified for contract and reporting on Procurement for this project

Contract Spend for Social, Small/Medium and Diverse-owned businesses

Total number of contracts with social enterprises:	
--	--

Total dollar value spent on social enterprises:	
---	--

Total number of contracts with small and medium-sized enterprises:	
--	--

Total dollar value spent on small and medium-sized enterprises:	
---	--

Type of diverse-owned businesses reported on:	
---	--

Total number of contracts with diverse-owned businesses, type listed above:	
---	--

Total dollar value spent on diverse-owned businesses; type listed above:	
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Impact Story

BC Housing included a social value criterion into an RFP for junk and trash removal.

The bid evaluation of price, service, environment and social led to a social enterprise that employs persons with barriers winning the contract and increasing their hiring of targeted employees.



OF EMPLOYEES REPORTED
THAT CLEANSTART HAS
SIGNIFICANTLY IMPROVED
THEIR HOUSING SITUATION

Employee Updates**

- **Tyler**
As a new employee, we provided Tyler a bus pass for the next 3-months while he gets back on his feet financially.
- **Brendan**
We purchased new steel-toed boots for Brendan, as he did not have the means to finance a pair himself.
- **Mitchell**
Mitchell is responsible for his parents and siblings, which can sometimes mean that he has to put family issues above work. We have created a flexible schedule, so that he can attend to both work and home.

Figure 2. An excerpt from CleanStart's monthly impact report to BC Housing

Glossary

Best value: The optimal combination of total cost, performance, economic, environmental, and social sustainability.

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.

Change management: Transitioning from a mindset and practice of prioritizing only cost and quality to include social value considerations is a process. It is important to create a supportive environment for this change to occur across your organization, which includes education, training, stakeholder engagement, and sharing success stories.

Community Benefit Agreement (CBA): A community benefit agreement (CBA) is a legally enforced agreement on construction, infrastructure and development projects for specific social value outcomes like hiring, training, or procurement that ensures projects enhance social, cultural, environmental, and economic opportunities for community.

Community Capital: The health of a community is not measured by economic value alone. Community capital consists of the five main types of capital: social capital, human capital, cultural capital, economic capital, and physical capital. Building community capital is the means for creating healthy communities.

Community Employment Benefits (CEB): Infrastructure Canada initiative which seeks to provide employment and/or procurement opportunities for at least three of the groups targeted by the initiative: apprentices; Indigenous peoples; women; persons with disabilities; veterans; youth; recent immigrants; and small-sized, medium-sized and social enterprises.

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.

Employment barriers: A spectrum of factors relating to 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.

Equity-deserving groups: Also known as Equity-seeking groups. Groups who have historically been denied equal access to employment, education, and other opportunities and includes, without limitation, the following: members of an Indigenous community; members of a visible minority group; immigrants and refugees; people with recognized disabilities; racialized communities; women; members of the LGBTQ2S community; low-income residents; people with mental or physical health barriers; people facing employment barriers, unemployment or underemployment; and others experiencing barriers to economic opportunity and participation.

Inclusive Employment: Employment practices that provide flexible options that support people from a variety of different backgrounds and abilities to participate in the workforce.

Indigenous Owned Business: 51% or more of the business owned, managed and controlled by individuals who identify as Indigenous or by First Nations by an Indigenous first nation band, metis community, government.

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.

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 Enterprise: A business that sells goods or services, embeds a social, cultural or environmental purpose into the business, and reinvests the majority of profits into their social mission.

Social Procurement: Every purchase has a social, economic, and environmental impact. Social procurement is about using your existing purchasing to capture those impacts to achieve overarching institutional, governmental, or individual goals that helps shape inclusive, vibrant and healthy communities.

Social purpose organization: Social purpose organizations (SPOs) consist of various organizations with a mission to advance social, environmental or cultural objectives. Social purpose organizations include: the charitable and non-profit sector (registered charities, incorporated non-profit organizations and non-profit co-operatives); the private sector (market sector co-operatives and private businesses advancing a social or environmental mission); and hybrid entities such as Community Contribution Companies and Community Interest Companies, found in British Columbia and Nova Scotia respectively.

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.

Further Resources

Available at www.buysocialcanada.com

- Guide to Social Procurement
- Social Value Menu for Community Benefit Agreements
- Social Value Menu for Community Employment Benefits
- Supplier Guide to Social Procurement
- Guide to Social Procurement in Construction and Infrastructure Projects
- Case studies
- Policy and implementation strategies
- Social Purchasing Partnerships
- Directory of Certified Social Enterprises

Contact

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