



Certified Social Enterprise: Enterprising Women Making Art



SOCIAL VALUE MENU

Goods and Services Templates for Implementation



Certified Social Enterprise: MP Maintenance



Acknowledgements

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Social Enterprise Ecosystem Project

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, 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.

For an Introduction to the "How, What & Why" of Social Procurement see the "Guide to Social Procurement at www.buysocialcanada.com

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.

"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

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 Implementation Process

The Social Value Menu can help you to identify key goals, language examples, evaluation criteria and metrics for use in many of the below activities that make up the social procurement implementation process.

The steps to implementation social procurement are 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 steps at once or in an order that makes sense to you. Whichever order you chose, the steps below are key to the long-term success of social procurement implementation at your organization.



MEASURE

Measure your activities and create reporting metrics

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.

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 as well as activate the other activities in this list.

Review the Social Value Menu glossary to become familiar with key terms.

LEARN

Learn about Social Procurement

TEST

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 Procurement Questionnaire' which you can add to your bid process on pilot projects. 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.

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.

Examples of social procurement policies (including Buy Social Canada's own social procurement policy) are available [online](#).

POLICY

Draft a Social Procurement Policy and implementation framework

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 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.

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

Prompts for Template 1:

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?

Template 1: Identify strategic organizational goals for _____

Source: _____

Organizational Goal 1: _____

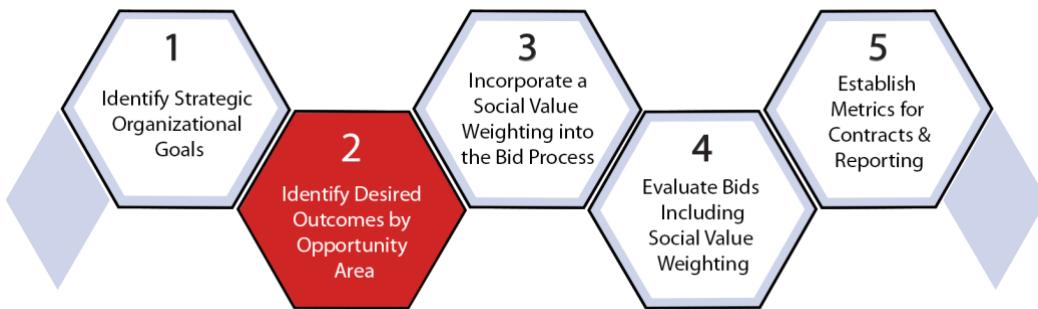
Source: _____

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](#)

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 individuals from equity-seeking groups
- Increased training with recognized qualifications available to individuals from equity-seeking 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 SMEs

Desired outcomes for Community Development:

- Community Engagement
- Provision of community services/ cultural contributions

Prompt for Template 2:

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.

Template 2: Identify Desired Outcomes _____

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 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-seeking 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 for _____

Employment:

1. (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-seeking groups?

Yes

No

- (b) Please describe your current processes for implementing your strategies/policies and ensuring employment opportunities for individuals from equity-seeking 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).

2. (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-seeking groups?

Yes

No

(b) Please provide the number of apprenticeship positions that have been given to individuals from equity-seeking 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-seeking groups?

Yes

No

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

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

Supply Chain:

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

Small enterprise: 1-99 employees³

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, 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-seeking 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)

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-seeking 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-seeking groups
- The number and percentage of current and new employment opportunities for individuals from equity-seeking 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 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 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.

Template 4: Evaluation Criteria by Opportunity Area for _____

Evaluation Matrix for RFx Reponses under Employment

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

Q. 2		
(a)	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 Reponses under Skills & Training

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

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

Q. 3	(b)			
(a)	A comprehensive description provided of the work experience program	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-seeking 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.

Example:

Employment

Hours for target group

New employment

Community Development programs achieved at time of 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 for _____

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:	

Glossary of Terms

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

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

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

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 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, aboriginal-owned, LGBT-owned, veteran-owned vendors.

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.

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 complements 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.

Individual 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 (e.g. 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.

Not-for-profit or Non-profit organization (NFP): 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 Impact Criteria: Social 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 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 outline 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 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 aboriginal owned companies.

Supplier Value: Supplier value is the benefit received by a supplier in a purchasing agreement. Supplier value consists of immediate financial gains and long-term partnerships.

(SME) Small or medium enterprise: A small business has 1–99 paid employees. A medium-sized business has 100–499 paid employees.

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

Social Enterprise (SE): A community-based business that sells goods or services in the market place to achieve a social, cultural and/or environmental purpose; they reinvest a majority of their profits to maximize their social mission.

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

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

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

- Guide to Social Procurement
- Social Value Menu for Community Benefit Agreements
- Social Value Menu for Community Employment Benefits
- Case studies
- Examples of bid documents including social value language
- Policy and implementation strategies
- Social Purchasing Partnerships
- Directory of Certified Social Enterprises

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