



CBA bid language and procurement support: Sample language and templates for RFX bids and tender documents

Background and policy context

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

Social procurement is evolving as a standard means to leverage a greater value from existing procurement of goods and services. With the City of Vancouver passing the [Community Benefit Agreement Policy](#) in 2018, there is a need to have a framework and guidelines to support an added social value from major developments and construction projects.

What is the purpose of this document?

The purpose of this document is to help you include social value language in your RFX, Bid and Tender process during your implementation of the City of Vancouver's Community Benefit Agreement Policy.

This document can be used by **Developers** that are required, or are choosing, to implement a CBA on their development project.

This document can also be used by **General Contractors** who have successfully bid for projects with a CBA attached and are looking for examples of RFX language for contracting sub-contractors for such projects.

Draft RFx language to reflect your social value criteria

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

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

This language can be used by a developer in order to identify a general contractor or other delivery partners for a development project. It can also be used by successful bidders for sub-contracts when issuing RFx documents.

Prompt for RFx language template

In order to implement the CBA Policy you need to draft RFx language that you can include in contracts with your services providers to reflect the organizational goals and desired outcomes that you have identified.

RFx language should be *descriptive* and not *prescriptive* in order to give bidders the opportunity to respond with a variety of appropriate implementation opportunities.

As the writer of the document you can assist this process by providing information on the specific organizational goals and project outcomes that may have been identified as a priority on the project, for example: reconciliation, building healthy communities, skills development and employment opportunities for local youth etc.

The RFx should require bidders to outline previous experience(s) of achieving social value on development projects as well as strategies to implement the CBA policy requirements for this project. It is suggested that the RFx includes an introductory section explaining the City of Vancouver's CBA Policy requirements:

Sample language example:

- ❖ This development project includes a City of Vancouver mandated or voluntary Community Benefit Agreement
- ❖ The Community Benefit Agreement requires a minimum of 10% first source hiring and 10% social procurement throughout the build and operations phases of this development project

Below are further RFx language examples that can be used in both the developer's RFx and subsequent RFx documents attached to the development project:

Examples by opportunity area:

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

Employment:

- Strategies for recruitment, retention of support for individuals in 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 identified for individuals or groups with barriers to employment
- The number and percentage of current and new employment opportunities for individuals or groups with barriers to employment

Social procurement:

- Strategies to ensure a diverse supply chain that is accessible to all types of businesses, including social enterprises, non-profit organizations and small and medium enterprises.
- Specific implementation, monitoring and reporting strategies to ensure a diverse supply chain in the performance of this contract

Skills and training:

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

Community development:

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

Not all questions provided in the template are needed for every RFx. Use the examples provided in the template as samples of the type of information you can request from suppliers or bidders through your RFx. Language can be edited to recognize your project priorities while remaining descriptive e.g. "Equity seeking groups" can be edited to specify specific groups such as Indigenous peoples, youth, newcomers to Canada etc.

Employment:

- ❖ The Community Benefit Agreement requires a minimum of 10% first source hiring throughout the build and operations phases of this development project

1. (a) Does your organization currently have strategies or policies around inclusive employment practices to ensure you are providing employment opportunities for individuals in equity-seeking groups?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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(b) Please describe your current processes for implementing your strategies/ policies and ensuring employment opportunities for individuals in equity-seeking groups. Please describe how you currently monitor, measure your progress an report on these processes in the space below

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

2. (a) i. Please provide the total number of project-specific employment positions that are required for the delivery of this contract:

ii. Please provide the number of project-specific employment positions that you are committing will go to individuals in equity-seeking groups to help you fulfill the targeted outcomes in the City of Vancouver's CBA Policy. Please specify the type of employment contract:

* Please note that your responses for parts i. and ii. will be evaluated as a percentage of project-specific positions that will go to individuals in equity-seeking groups

(b) Please explain why this number is the maximum number of positions that could be made available to individuals in equity-seeking groups for the performance of this contract:

3. (a) i. Please provide the total number of project-specific entry-level positions that are required for the delivery of this contract:

ii. Please provide the number of project-specific entry-level positions that you are committing will go to individuals in equity-seeking groups to help you fulfill the targeted outcomes in the City of Vancouver's CBA Policy. Please specify the type of contract:

* Please note that your responses for parts i. and ii. will be evaluated as a percentage of project-specific entry-level positions that will go to individuals in equity-seeking groups

(b) Please explain why this number is the maximum number of entry-level positions that could be made available to individuals in equity-seeking groups for the performance of this contract:

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

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

<input type="checkbox"/> Yes: _____	<input type="checkbox"/> No
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(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.

<input type="checkbox"/> Yes: _____	<input type="checkbox"/> No
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(c) What percentage of current employment opportunities that will be involved in the delivery of this contract **currently** provide a living wage? Please provide a number below and how you would monitor and measure this throughout the contract reporting period:

(d) What percentage of employment opportunities that will be involved in the delivery of this contract **will** provide a living wage? Please provide a number below and how you would monitor and measure this throughout the contract reporting period:

Social procurement:

The Community Benefit Agreement requires a minimum of 10% social procurement and 10% local procurement throughout the build and operations phases of this development project

1. Is your organization a small or medium-sized enterprise?

Small enterprise: 1-99 employees;

Medium enterprise: 100-499 employees

<input type="checkbox"/> Yes, we are a small enterprise	<input type="checkbox"/> Yes, we are a medium enterprise	<input type="checkbox"/> No
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2. (a) Do you have a Third-party certification from any of the following organizations verifying social impact or membership of any organization verifying diverse ownership?

*** Third-Party Certification** defined as Cooperatives, Social Enterprises, Community Contribution Companies, B-Corps, LGBTQ2S Owned Businesses, Women Owned Businesses, a business owned by an Immigrant or Refugee, Members of a 'Buy-Local' or Social Purpose Business Alliance such as LOCO BC or the Business Alliance for Local Living Economies, Ashoka, or Buy Social Canada or a First Nations owned business or social enterprise or a certified Living Wage employer. Other third party certifications may be considered and adopted in the future.

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) If yes, please attach proof of certification or membership (indicate document name in the space below):

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

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) If yes, please attach the relevant policy (indicating document name in the space below) or provide a website link below:

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

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) If yes, please provide the following information:

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

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

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

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

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

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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(b) Please describe how you will implement, monitor and measure this strategy to help you fulfill the targeted outcomes in the City of Vancouver's CBA Policy:

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

Skills and training:

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

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) (i) Please provide the total number of apprentices within any apprenticeship program that your organization has had in the last 12 months:

(iii) Please provide details of your existing program(s) and how you can monitor and measure the success of the program(s) to help you fulfill the targeted outcomes in the City of Vancouver's CBA Policy in the space below:

* This field is required if you answered Yes in 1. (a). Please note that your responses for (b) i. and ii. will be evaluated as a % of apprenticeship positions for individuals in equity-seeking groups

2. (a) Does your organization currently have any paid work experience program(s)?

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) (i) Please provide the total number of work experience positions that your organization has had in the last 12 months:

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

(ii) Please provide the number of apprenticeship positions that have been given to individuals in equity-seeking groups in the last 12 months:

(iii) Please provide details of your existing work experience program(s) and how you can monitor and measure the success of the program(s) to help you fulfill the targeted outcomes in the City of Vancouver's CBA Policy in the space below:

* Please note that your responses for (b) i. and ii. will be evaluated as a % of work experience positions for individuals in equity-seeking groups

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?

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) If yes, please provide details of any programs or initiatives that can help you to fulfill the targeted outcomes in the City of Vancouver’s CBA Policy and how the success of these programs or initiatives are monitored and measured

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

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

<input type="checkbox"/> Yes:	<input type="checkbox"/> No
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(b) : Please describe your strategy for engaging and consulting with the local community before and during the lifespan of this contract and how you will ensure the implementation, monitoring and measurement of this strategy to help you fulfill the targeted outcomes in the City of Vancouver’s CBA Policy in the space below:

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