

COASTAL COMMUNITIES

Social Procurement

INITIATIVE

Drafting an RFP for Services with
Social Value Criteria

Zoom Format Overview

Today we are using Zoom – let's go over some of the features:

- Mute / unmute
- Stop / Start your video
- Raise Your Hand
- Chat box
- Participants
- Rename yourself
- Breakout rooms

Meet your presenters



Larry Berglund
Principal
Presentations Plus



Rob Fisher
CCSPI Project
Coordinator
Scale Collaborative

Introductions

Let's take a moment to introduce ourselves:

- Name
- Organization and Title
- What is your biggest challenge when drafting an RFP with social values?

Coastal Communities Social Procurement Initiative (CCSPI)

Mission

Improve the health of our communities and the strength of our economies by changing the culture of public sector procurement.

Purpose

CCSPI helps local governments, First Nations and institutional purchasers on Vancouver Island and in the Coastal Communities turn their procurement dollars into achievable and measurable community benefits.

www.ccspi.ca

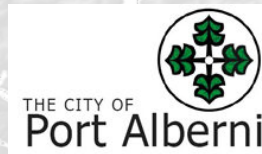
CCSPI members



Alberni-Clayoquot
Regional District



DUNCAN



THE CITY OF
Port Alberni



District of
SECHELT



City of
Campbell
River



TOWN OF
GIBSONS



TOWN OF
QUALICUM BEACH



District of Sooke



Comox Valley
REGIONAL DISTRICT



Strathcona
REGIONAL DISTRICT



CITY OF
COURTENAY



LADYSMITH



qathet
REGIONAL DISTRICT



SQUAMISH



THE VILLAGE OF
CUMBERLAND



CITY OF NANAIMO
THE HARBOUR CITY



REGIONAL
DISTRICT
OF NANAIMO



DISTRICT OF TOFINO



Making a difference...together



Powell River
coastal by nature



the Village of
Sayward



THE CITY OF
VICTORIA

CCSPI project **impact**

Impact at a Glance

29

Participating
Governments &
Organizations

200+

Individual
Members

\$200_{m+}

Social
Procurement
Spend

50+

Pilot Projects
Undertaken

CCSPI team



CCSPI member resources



Training

Register for upcoming training



Comms Tools/FAQs

Access the CCSPI Communications Guide, FAQs & associated resources



Online Resources

Access online resources, templates & examples



Webinars

Watch previously recorded webinars



Impact Measurement

Measure & evaluate your community impact



Community of Practice

Join the bi-monthly community of practice for procurement staff



Island-Wide Prequalification

Access the vendor pre-qualification template



Talk to the CCSPI Team

Book a call with the CCSPI team (see more info below)



COVID-19 Recovery Toolbox

Access the COVID-19 recovery resources

CCSPI bi-monthly community of practice



Join the bi-monthly community of
practice for procurement staff

- ✓ Connect with other CCSPI members
- ✓ Learn about how other members are implementing social procurement
- ✓ Stay up to date on CCSPI resources and tools

Session goals

Drafting an RFP for services with social value criteria

- ✓ **Revising a traditional RFP** to include social procurement criteria
- ✓ **Using a social outcome** as the purpose for an RFP
- ✓ Using **prescriptive and descriptive criteria**
- ✓ **Value-per-point** model scoring

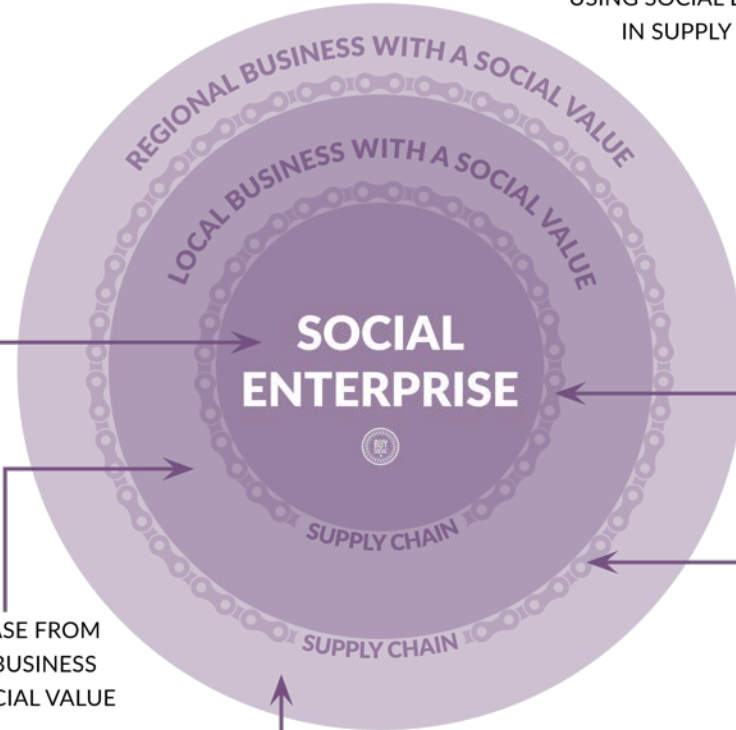
RFP assumptions

- ✓ There is capacity in the local market for social enterprises
- ✓ There has been a communication plan in place supporting Social Procurement

Concentric circle considerations

A PURCHASE FROM A SOCIAL ENTERPRISE

A PURCHASE FROM A BUSINESS USING SOCIAL ENTERPRISE IN SUPPLY CHAIN



A PURCHASE FROM A LOCAL BUSINESS WITH A SOCIAL VALUE

A PURCHASE FROM A REGIONAL BUSINESS WITH DEMONSTRATED SOCIAL VALUE

A PURCHASE FROM BUSINESS USING LOCAL BUSINESS WITH SOCIAL VALUE IN SUPPLY CHAIN

1. RFP Introduction

- The City of Municipality (the “City”) invites Proposal submissions from qualified Contractors interested in bidding on the Landscape Services for Neighbourhood Collectors, Minor Collectors & Local Roads as described in [Schedule A] Scope of Services.
- **As part of the City’s commitment to Social Procurement Initiatives, the City will include social value criteria in its evaluation of Proposals.**
- If awarded, the term of a Contract shall be for 20XX and 20XX. The Contract will expire on Month, Day 20XX unless terminated, cancelled or extended. The term of the Contract may be extended or renewed at the City’s sole discretion for one (1) additional one (1) year term subject to satisfactory performance reviews and price negotiations. The City shall not incur any liability, should it choose not to exercise its exclusive option to renew the Contract.
- Firm pricing is required for the initial Contract term.
- This Request was prepared by Person, Procurement Consultant of Firm Name under Contract with the City of Municipality.

2. RFP definitions

Throughout this Request for Proposal (RFP), the following definitions will be used

Social value

- “Social value” means that the Services as described will take into consideration but not be limited to employment of people with barriers; working with social enterprises; community development; and / or utilizing locally available materials where and when ever possible.

2. RFP definitions

Throughout this Request for Proposal (RFP), the following definitions will be used

Barrierred individual

- “Barrierred individual” means a person with barrier(s) to employment, which requires workplace work environment or work expectation to accommodate successful participation in the workforce.

2. RFP definitions

Throughout this Request for Proposal (RFP), the following definitions will be used

Social enterprise

- “Social enterprise” means a business with an embedded mission to achieve social, cultural or environmental aims through the sale of goods and services. At least 50% of the business’ revenue comes from selling goods and/or services in the marketplace and at least 50% of the business’ profits go back into executing its social, cultural or environmental mission.

2. RFP definitions

Throughout this Request for Proposal (RFP), the following definitions will be used

Social purchasing criteria

- “Social purchasing criteria” means the City evaluates a supplier of goods and services based on the social impact, environmental impact, price and quality of the supplier and its products.

5.3 Social values

- Describe all initiatives, policies or programs that demonstrate your company's effort towards sustainable practices and responsibility (Social, Ethical, Environmental).

5.4 Methodology

- 7. State your process that will ensure that the City's commitments to social values are included wherever and whenever in the performance of the work.

5.6.2. Social community values

- Within its response, the Proponent has the opportunity to describe any social and community benefits it is prepared to supply as part of the Contract. Unless otherwise stated, it is understood that there are no extra costs for these services, however if there are any additional costs pertaining hereto, the summary and explanation of those costs should be submitted on [Schedule B] Pricing form below.

5.6.2. Social community values

Social and Community Value items could include:

- ✓ The employment of people facing barriers;
- ✓ Unique or proprietary methods of work;
- ✓ Involvement of Social Enterprises in any portion of the work;
- ✓ Your company's supply chain practices which could be inclusive of local sourcing for labour and / or materials;
- ✓ Your company's commitments to a diverse supply chain;
- ✓ Your company's ability to monitor and measure social and community value commitments;
- ✓ Other

6.3 Desirable Criteria

Ref.	Criterion	Max. Pts.	Min. Pts.
5.2	Company Profile and Experience	20	6
5.3	Social Value initiatives, policies or practices	15	6
5.4	Methodology	45	9
5.5	Technical Qualifications and Experience	20	9
	Total	100	
5.8	References The City, acting reasonably, may not enter into any Contract with a Proponent whose references are found to be unsatisfactory.	Pass/Fail	

6.4 Price Evaluation

- Prices shall be submitted in a sealed envelope separate from the balance of the proposal.
- Prices will be evaluated on a **value per point basis: proposed price / total of evaluated points = best value**. The proponent with the lowest cost / evaluated points will become the first leading proponent.

Best Value Example

	A	B	C	D
Environmental record	7.8	7.0	7.9	8.1
Quality	5	5	5	5
Performance	7	7	8.4	8.5
Community benefits	8	8	8	8.3
Products	5	5	5	5
Service	6	7.4	8.5	8.5
Total value points	38.8	39.4	42.8	43.4

Highest non-financial score

Best Value Example

Supplier	A	B	C	D
\$ Amount	560,000	558,000	555,000	562,000

Highest bid

Supplier	A	B	C	D
\$ Value per-point	14,433	14,162	12,967	12,949

Lowest cost on a value-per-point basis

RFP Summary

- The intent was to support (2) key areas the City wanted to develop:
 1. Skills and Training; and
 2. Social Value Supply Chain outcomes

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Questions?

www.ccspi.ca