

Appendix: The Checklist

This section of the report summarizes the key conclusions in a way that helps enable procurement managers and others to evaluate their efforts to engage in social procurement and the delivery of community benefits.

This approach aims to set up structures that encourage supplier and workplace diversity over the longer term, while not dictating specific outputs on a project level. If the current CBA approach places the government as the primary actor, this approach has the government set the terms that structurally enable it to use a diverse group of suppliers, and for suppliers to diversify their workforces.

Checklist Items		Yes
Supplier Diversity		
1.	Is our procurement process neutral with respect to bidders on the basis of union affiliation, gender, ethnic origin, or other identifiable factors? If not, identify and remove barriers that disqualify bidders on these bases.	
1(a)	Do our bylaws allow bidding regardless of these factors? If not, remove anything that specifically restricts bidding based on these factors.	
2.	Have we made efforts to increase awareness of government contracts among as wide a variety of vendors as possible, including within communities that are under-represented?	
3.	Have we contacted community partners—chambers of commerce, business associations, neighbourhood associations, employment agencies, immigration services agencies, small business groups, economic development agencies, and so on—to communicate procurement opportunities?	
4.	Do existing requirements on bonding, insurance, and so on hinder supplier diversity?	
4(a)	Have we removed any requirements that are likely, even inadvertently, to reduce supplier diversity?	
5.	Are we bundling contracts in appropriate ways that allow smaller, diverse suppliers to participate in procurement?	
5(a)	For senior governments, are we designing and phasing major projects so that smaller firms can feasibly take on portions of them?	
6.	Does our procurement process trigger this outreach to stakeholders early and at appropriate times?	
6(a)	Have we allocated sufficient time and resources to this effort?	
7.	Have we sought a balance between supplier diversity and value for taxpayer money?	

Checklist Items		Yes
Workforce Diversity		
1.	Are we maximizing the pool of labour that may participate in public work?	
1(a)	Have we eliminated anything (e.g., excessively-long-term standing-offer agreements, and exclusive agreements including project labour agreements) that would reduce, deliberately or accidentally, the available pool of labour?	
2.	Have we engaged community groups, social enterprises, a variety of construction unions, community colleges, construction associations, employment centres, contractors, developers, and other key stakeholders to develop this workforce continually, rather than placing weight on a given project to achieve numerical goals?	
3.	Have we provided supports for employers who wish to diversify their workforce?	
4.	Have we sought a balance between workforce diversity and value for taxpayer money?	
Project Management		
1.	Have we done the work of connecting new workers to project needs up front, and avoided downloading to contractors?	
2.	Have we included community benefits in our project planning? This includes identification of strategic priorities, desired amenities, economic development, workforce development, community capacity-building, and so on before any detailed project design work is done.	
3.	Have we created a community engagement plan that includes the public, equity-seeking groups, social enterprises and agencies, and the construction industry?	
4.	Is there a current inventory of local resources such as community agencies, social enterprises, labour, local business, materials, and suppliers?	
5.	Have we identified sources of available labour with useful skills, safety training, and basic personal protective equipment?	
6.	Is there a focus on partnerships—owner, engineer, contractor, social enterprises, community, training organizations—for both single projects and for the government’s procurement initiatives over time?	

Checklist Items		Yes
Project Management (continued)		
7.	Have we established realistic and clear goals with readily collected metrics, and are they being included in contract documents?	
8.	Is there plurality in the partnerships with community agencies, recruiting equity-seeking groups from a diverse set of organizations?	
Measurement		
1.	Do our measurement policies allow for flexibility and creativity on the part of the contractor to fulfill requirements in efficient and innovative ways?	
2.	Have we considered the size of a given project and made a realistic assessment of its ability to achieve employment outcomes for targeted groups?	
3.	Have we incorporated tracking of aggregate, community-level data into our government's measurement of CBA success?	