



AGENDA

BUSINESS ADVISORY COMMITTEE

July 2, 2019, 11:30 AM

LEGAL TRADITIONS COMMITTEE ROOM

Members

Councillor W. Sutherland, Chair

Councillor P. Demong, Vice-Chair

City Manager G. Cole

Mayor N. Nenshi, Ex-Officio

1. CALL TO ORDER
2. OPENING REMARKS
3. CONFIRMATION OF AGENDA
4. CONFIRMATION OF MINUTES
 - 4.1 Minutes from the Regular Meeting of the Business Advisory Committee, 2019 April 03
5. CONSENT AGENDA
 - 5.1 DEFERRALS AND PROCEDURAL REQUESTS
None
 - 5.2 BRIEFINGS
None
6. POSTPONED REPORTS
(including related/supplemental reports)
None
7. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES
 - 7.1 Establishment of City Approved Indemnified Contractors Whiteboarding Session- Update, BAC2019-0815

8. ITEMS DIRECTLY TO COMMITTEE

8.1 REFERRED REPORTS

8.1.1 Motion Arising with Respect to Social Procurement Update, (PFC2019-0384),
BAC2019-0870

8.2 NOTICE(S) OF MOTION
None

9. URGENT BUSINESS

10. CONFIDENTIAL ITEMS

10.1 ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES
None

10.2 URGENT BUSINESS

11. ADJOURNMENT



MINUTES

BUSINESS ADVISORY COMMITTEE

**April 3, 2019, 3:30 PM
ELECTRIC LIGHT COMMITTEE ROOM**

PRESENT: Councillor W. Sutherland, Chair
Councillor P. Demong, Vice-Chair
City Manager G. Cole
ALSO PRESENT: City Clerk L. Kennedy

1. CALL TO ORDER

Councillor Sutherland called the Meeting to order at 3:30 p.m.

2. OPENING REMARKS

Councillor Sutherland provided opening remarks.

3. CONFIRMATION OF AGENDA

Councillor Demong was elected Vice-Chair of the Business Advisory Committee, by acclamation.

Moved by Councillor Demong

That the Agenda for today's meeting be amended by adding the following item:

1. Acknowledging the Business Advisory Committee's Terms of Reference; and
2. Acknowledging the City Manager delegation to S. Sharp.

MOTION CARRIED

Moved by Councillor Demong

That the Agenda for the 2019 April 03 Regular Meeting of the Business Advisory Committee be confirmed, **as amended**.

MOTION CARRIED

4. CONFIRMATION OF MINUTES

None

5. POSTPONED REPORTS

None

6. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

6.1 Establishment of a Working Group (Verbal) - BAC2019-0444

Moved by Councillor Demong

That with respect to Verbal Report BAC2019-0444, the following be approved:

That the Business Advisory Committee:

1. Establish a working group, per Section 9 of the Business Advisory Committee's Terms of Reference, that the Working Committee report back to the Business Advisory Committee on a regular basis; and
2. Report back to the Priorities and Finance Committee no later than 2019 September 17 on its workplan.

MOTION CARRIED

7. ITEMS DIRECTLY TO COMMITTEE

7.1 REFERRED REPORTS

None

7.2 NOTICE(S) OF MOTION

None

8. URGENT BUSINESS

None

9. CONFIDENTIAL ITEMS

9.1 ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

None

9.2 URGENT BUSINESS

None

10. ADJOURNMENT

Moved by Councillor Demong

That this meeting adjourn at 3:35 p.m.

MOTION CARRIED

The next Regular Meeting of the Business Advisory Committee will be held at the Call of the Chair.

CONFIRMED BY COMMITTEE ON

CHAIR

ACTING CITY CLERK

UNCONFIRMED

**Planning & Development Report to
Business Advisory Committee
2018 July 02**

**ISC: UNRESTRICTED
BAC2019-0815**

**Establishment of City Approved Indemnified Contractors Whiteboarding Session-
Update**

EXECUTIVE SUMMARY

The Business Advisory Committee (BAC) has been establishing Working Groups with external stakeholders to gain better insight on what barriers businesses are encountering during their regular communications with various City departments.

On May 16, 2019, representatives from the BAC met with Kang Construction, Precision Underground Services, Peak Contracting, Cannex and Kobi Construction Ltd., all approved on the City of Calgary's Indemnification Contractors list. Discussions involved some of the business barriers Indemnified Contractors (ICs) are facing during their frequent communications with City departments that provide the necessary permits and services for their work conducted. A representative from the Councillor's Office also attended the Indemnified Contractors Engagement Session on May 28, 2019 held at the Water Services building.

With a short construction season for ICs, a streamlined process is necessary for the success of their businesses.

RECOMMENDATION:

- 1) Direct Administration from Water Resources and Water Services to report back to the Business Advisory Committee (BAC) on analysis of the "What We Heard" Report and provide items currently actioned and any further actions to be taken no later than 2019 July 31; and
- 2) Direct Administration to identify resolutions on barriers identified involving timelines, customer service and innovative/collaborative thinking.

PREVIOUS COUNCIL DIRECTION / POLICY

During the April 3, 2019 Business Advisory Committee, in respect to Verbal Report BAC2019-0444, the following was approved:

That the Business Advisory Committee:

1. Establish a working group, per Section 9 of the Business Advisory Committee's Terms of Reference, that the Working Committee report back to the Business Advisory Committee on a regular basis; and
2. Report back to the Priorities and Finance Committee no later than 2019 September 17 on its workplan.

Planning & Development Report to
Business Advisory Committee
2018 July 02

ISC: UNRESTRICTED
BAC2019-0815

Establishment of City Approved Indemnified Contractors Whiteboarding Session- Update

REASON(S) FOR RECOMMENDATION(S):

BAC would like to forward the recommendations on to General Manager David Duckworth to direct the appropriate Administration to analyze their current practices and processes. BAC aims to make doing business with the City of Calgary more customer service focused and eliminate any unnecessary setbacks throughout processes.

ATTACHMENT(S)

1. Attachment 1 – Indemnified Contractors Working Group- What We Heard Report



Indemnified Contractors Whiteboarding Session- May 16, 2019

"What We Heard" Report

Summary of Input

- 21 companies on indemnify list, 1800 families represented. **4 less ICs this year (went out of business) due to process change.**
- 10 years' experience needed to get on that list
- 200 days of good conditions (2/3 year) to complete work, wasting time with paperwork. More steps and more length to the process.
- Little jobs are holding companies over, can't plan
- Minimum 4 weeks City processes to energize from paperwork/permits = 1-3 days' worth of physical work execution
- 6 groups within City to attain permits: Development Approvals, Inspections, Roadway Operations and Detours/Traffic, Water Resources, Clean Water Distribution, Urban Forestry, Plumbing & Gas. (Can take 4 week process from inspections to bucket in ground for a 2-day job. **5 years ago it was 1 week**)
- No collaborating/communications between all groups (6) involved
- 8-9hrs worth of physical work= 5hrs worth of paperwork (used to be able to move every day, but now slowed down)
- In the past, 3-5 movements from site to site (infill) projects. Now 2 movements per week.
- 2013 jobs: IC Stakeholder #1 approx. 148; IC Stakeholder #2 approx. 170
- 2018 jobs: IC Stakeholder #1 approx. 104; IC Stakeholder #2 approx. 130
- IC Process: internally starts with Permission to Construct Addendum request - use to be 2 days, now agreement letter comes through in 7 business days (for every project) due to re-org within Water Resources Department. Set up Traffic Permits (Traffic Dept.) - 7 business days minimum, need to give day and time of closure, need to wait for acceptance/approval, or re-apply if denied. If it rains, need to request permits be adjusted or bylaw can give fine for 1 day off from approval date due to weather. Utility locates (Alberta One Call), Water Distribution Valve Control, Excavation Permits (Roads Dept.) and Indemnification Agreement Inspection Request (notification to commence work).
- What about an annual permit? Can still submit to Roads and monitored by them.
- Distribution & Control department shut down job for 5 weeks this winter due to water main breaks. Shutting down 1 week of every month this summer for City flushes/work, no valve controls offered during those weeks (where no jobs can be done).
- Can only have 6 controls at a given time, 1 layer of permit process is off and throws off the complete job timeline
- Contractors use to be able to touch valves, now only City designated and certified individual can touch the valve (due to risk mitigation, policy enforced). Bring inspectors, who are onsite daily,

back in as certified to touch those valves (previously they use to be able to). Lack of resources/employees? Yes- could hire more certified/qualified control individuals.

- Currently 4 or 5 new inspectors who do not understand how to- what can be a 20min job turned into 3hrs due to lack of knowledge
- Use to be able to call Distribution “field guys”- now told to call 311, wait for 4 hrs for someone to call back who is from the wrong department
- City hires may not be knowledgeable on the industry needs
- Business Advisory Committee focus: Policy, procedure or bylaw issue? Who is involved in making those decisions and how can we revise? **Water Resources- an efficient program used to work and new management came in that “fixed” a system that wasn’t broken.**
- Councillor Sutherland asked when did everything change?
- 2 years ago (**investigate prior to 2017**)
- Urban Forestry saying 2 water lines needed for a \$200 tree that is most likely to die soon- deterring inner city development
- Road degradation fees (expensive) that did not exist 5 years ago
- City took sidewalks away from developers, now asphalt sidewalks in front of new show homes because City is behind on projects.
- **Online process for permits, can’t talk to people- no human interaction. Big issue, not as personable. Can receive general “declined” notification for permit with no reason displayed. Suggestion to have a point person (ie. File Manager equivalent) to contact when issues arise. Councillor Sutherland says paperless needs to remain, but would like one contact person.**
- Building Permit Driveway Let Down deposit campaign a couple years ago to make deposit refund availability more aware- **what happened to making this an accessible communication?**
- Ask to Roads, degradation and indemnification fees, permission to permit (not a tax collector for City) do not want to have a GST exempt on your account.
- When the project does not qualify for a flat rate Permission to Permit, the IC provides the Excavation Dept. with the trench cut measurements upon job completion and they bill the IC for the Road Degradation & Top Lift Paving Fees, which the IC then passes on to the project builder 4-8 weeks after completing the project. (This process presents significant collection issues and liability to the IC who has no recourse, unlike the City who can withhold future permits until payment received).
- Suggestion to make a flat rate (\$1900 residential, \$5000 for commercial) to eliminate absorbed unpredicted fees.
- Provide bid info on non-flat rate fees, and City calculates- should be billing flat rate upfront instead of Builder pay for that upfront.
- **Why is Storm Water Drainage revamp map not public/available to IC? Outdated and incorrect drawings regularly provided.**
- Flushing assembly- job at end of street, ensuring quality drinking water, why can’t a new service be tied to an existing pipe. City says it will go in to install a Flushing Assembly but it can take them 2-4months and developer waits. “Dead end main”
- Water Distribution department is the most difficult and has “really slowed everything down” in everyone’s process. Deal with uncooperative staff, unhelpful, not empowered to make their own decisions. New wave of Managers from schools of theory and not field/industry experience.
- Front line staff saying “not my job” for a permission to permit stamp.

Identified Departments

Water Resources/Services:

- i) Addendum (Permission to Construct)- This permit requires seven business days to obtain. Used to be two days, then five days, now seven.
- ii) Water Kill- Contractors depend on info from City to determine location of water kill (killing off the old service during excavation). This info can be wrong or out dated and the contractor then needs to dig in several locations to find it (ie. Located once on a different street from where they were digging to find). *Department advised it would be the contractors responsibility to find the kill at their own expense.
- iii) Valve Control (Distribution)- Lack of availability for valve control. Two IC stakeholder groups met with Manager of Water Distribution to smooth process, still an issue. Agreed on 6 valve controls at one time, with four being open site. Which several crews need to share amongst all crews. (No controls 1 wk every month during summer for preventative maintenance-freezing/water main breaks). Notified contractors Friday, May 3rd before May 6-9th no valve control. Scramble over weekend to adjust work timelines, tell clients work can't be conducted last minute. Distribution says they are "too busy", contractors perceive this as an increase in management/supervisors in the Water Resources department and not enough qualified front line workers to handle workload. Recently a number of inspectors hired, none of which are experienced/knowledgeable/qualified and are "less than helpful".
 - a. "Procedure is tedious and allows for no flexibility, ideal to have customer service that provides timely valve control and room for flexibility"
 - b. Turnaround time for reopening of valve can vary from one day to two weeks
 - c. More contractors being added to Indemnification List?

Suggestions Previously Raised by ICs

- 1) To have various City departments working together collaboratively (as per one of the City's pillars). Discuss impact of their individual decision make on developer or the contractor.
- 2) Requested Team Leaders or Managers to visit sites and see impact of various decisions on their work. To date, no one has been interested and contractors have been told that concerns can be addressed via email.
- 3) Be more cognizant of IC timelines ie. Notification on May 3rd of no valve control from May 6-9th. Contracts signed 6-9 months in advance of job commencement and confirm scheduling 4-6 weeks in advance.
- 4) Stakeholder engagement be held prior to substantial changes, more cost effective and collaborative to gain numerous perspectives (ie. An updated Master Agreement was drafted, no consultation to gain insight on adverse effects. Contractors told only minor changes made, when in reality over 20 changes made, many significant. *Contractors also led to believe if they refused to sign the document as it stood, results would be removal from Indemnification List.)
 - a. "In 2016, \$70,000 was spent on an engagement seminar intended to focus on creating a culture of collaboration. Money was not well spent"

- 5) Lack of staff conducting Valve Controls- contractors perceive this as an increase in management/supervisors in the Water Resources department and not enough qualified front line workers to handle workload.
- 6) Once agreed to have ICs provide two-week schedule for Valve Controls to assist Water Distribution in planning for controls. However, Water Distribution retains their six controls at a time with only four open sites allowed.

Business Advisory Committee Recommendations- July 2, 2019

Establishment of City Approved Indemnified Contractors Whiteboarding Session- Update

- 1) BAC conducted a whiteboarding session with Indemnified Contractors on May 16, 2019 and created a “What We Heard” Report.
- 2) BAC identified process barriers and opportunities regarding ICs stakeholder group.
- 3) Have appropriate City Administration from Water Resources and Water Services report back to BAC on analysis of the “What We Heard” Report and items currently actioned and any further actions to be taken no later than July 31, 2019.

REFERRED REPORT

Motion Arising with Respect to Postponed Report, Social Procurement Update, (PFC2019-0384), BAC2019-0870

Excerpt from the Minutes of the Combined Meeting of Council, held 2019 June 17:

“Moved by Councillor Farkas
Seconded by Councillor Farrell

That with respect to Postponed Report PFC2019-0384, the following Motion Arising be adopted:

That Council request the Business Advisory Committee to consider Report PFC2019-0384 and provide an opinion to Council by no later than Q4 2019.

MOTION CARRIED”

“Moved by Councillor Demong
Seconded by Councillor Magliocca

That Item 7.7, Procurement Update, PFC2019-0384 be postponed to the 2019 September 9 Combined Meeting of Council.

ROLL CALL VOTE

For: (10): Councillor Chahal, Councillor Chu, Councillor Colley-Urquhart, Councillor Davison, Councillor Demong, Councillor Farkas, Councillor Gondek, Councillor Keating, Councillor Magliocca, and Councillor Sutherland
Against: (3): Mayor Nenshi, Councillor Carra, and Councillor Farrell

MOTION CARRIED”

ATTACHMENTS TO THIS BACKGROUND DOCUMENT:

1. Report PFC2019-0384 and Attachment 1 (Information Only)

Deputy City Manager's Office Report to
Priorities and Finance Committee
2019 May 14

ISC: UNRESTRICTED
PFC2019-0384

Social Procurement Update

EXECUTIVE SUMMARY

The purpose of this report is to seek Council's approval of the Social Procurement Advisory Task Force Terms of Reference, Scoping Report for the pilot projects and Work Plan. This will allow Administration to move forward, with Council's direction, toward utilization of existing procurement to create greater community benefit and economic resilience. Administration's three-year Social Procurement implementation strategy pilot project will be agile and learn fast by using external and internal stakeholder input to adapt. It will try various options to reach the goal of a shift towards procurement based on achieving multiple outcomes that put the citizen first in addition to maximizing financial value.

ADMINISTRATION RECOMMENDATION:

That the Priorities and Finance Committee recommends that Council:

1. Approve the Social Procurement Advisory Task Force Terms of Reference, Scoping Report for the Pilot Projects and the Work Plan identified in Attachment 1; and
2. Direct Administration to return to the Priorities and Finance Committee with an update no later than Q1 2020.

RECOMMENDATION OF THE PRIORITIES AND FINANCE COMMITTEE, 2019 JUNE 4:

That Administration Recommendations contained in Report PFC2019-0384 be adopted.

Opposition to Recommendations:

Against: Councillor Chu and Councillor Farkas

PREVIOUS COUNCIL DIRECTION / POLICY

On 2018 April 05, Council unanimously adopted a Notice of Motion C2018-0396 directing Administration to develop a report on Social Procurement and report back to Council no later than Q4 2018.

On 2018 December 17, Council directed Administration to proceed with the Social Procurement initiative C2018-1379 by developing Terms of Reference for the Sustainable, Ethical, Environment Procurement Policy (SSEPP) Advisory Task Force, a Scoping Report for the three pilot projects and a Work Plan and report back to Council through PFC by Q1 2019. Council also approved a budget of \$505,000 for the Social Procurement initiative to be funded from the Budget Savings Account (BSA).

On 2019 March 18, Council approved a deferral report with a report back date of 2019 May. The additional time allowed Administration to engage potential stakeholders, determine the best governance structure for the Terms of Reference for this initiative and launch the Advisory Task Force.

**Deputy City Manager's Office Report to
Priorities and Finance Committee
2019 May 14**

**ISC: UNRESTRICTED
PFC2019-0384**

Social Procurement Update

BACKGROUND

Historically, procurement has been about choosing the supplier offering the lowest price while still meeting technical requirements of providing high quality products or services with minimal risk. Social Procurement is a means of using our procurement dollars to make intentional positive contributions to both the local economy and the overall vibrancy of the community.

In response to Notice of Motion C2018-0396, Supply Management engaged Buy Social Canada who were selected by a competitive process to develop a report on how The City of Calgary could implement Social Procurement. This included a review of the best or evolving practices in other jurisdictions, risk analysis, industry perspective, review of relevant policies and practices at The City, review of current legislation and trade agreements and potential benefits to the community. During the 2018 December 17 Council meeting, Council approved this report in principal. Administration was asked to report back to the Priorities and Finance Committee with the Terms of Reference for the Advisory Task Force, the Work Plan and the Scoping Report for the Pilot Projects.

INVESTIGATION: ALTERNATIVES AND ANALYSIS

Terms of Reference

Administration has engaged various stakeholders and reviewed numerous options for the governance model for the Social Procurement Advisory Task Force (Attachment 1, pages 11-15). With efficiency, reducing red tape and agility in mind, Administration recommends an Advisory Task Force that advises and makes recommendations to the Director of Supply Management who in turn makes decisions and reports to Council. The Advisory Task Force will advise on potential issues, identify areas of opportunity, support the development of outcome measurements and help to build relationships between suppliers and The City. Through this Advisory Task Force, we are also signaling to the market that this is a new initiative and we are open to feedback. We will be counting on this group to help us identify what is working and what is not working quickly and adapt based on these learnings.

Scoping Report for Pilot Projects

The Pilot projects identified (Attachment 1, pages 16-19) are areas Administration has either determined can be tested and evaluated quickly or areas we must work on such as Community Benefit Agreements tied to larger construction projects including those with federal government funding. Through the Advisory Task Force, supported by the Supply Management business unit, many options will be identified and tested for each type of pilot project. This fast-paced trial of various options will allow us to adapt the project as needed to ensure we are truly creating a program that puts citizens first. For each of these opportunities the objectives, outcomes and measurements will be developed, tested and evaluated.

Work Plan

The three-year Work Plan (Attachment 1, pages 3-10) is divided into three phases that are intended to try various opportunities and see where the greatest social benefits can be achieved quickly. It is also structured in such a way to train internal and external stakeholders early and test pilot projects that require less up-front work first. This foundational work will make it easier when we have more complicated pilot projects that will be initiated in Phase 2 (2020). This

**Deputy City Manager's Office Report to
Priorities and Finance Committee
2019 May 14**

**ISC: UNRESTRICTED
PFC2019-0384**

Social Procurement Update

phased approach will also help provide time for engagement and relationship building with industry and social enterprises.

In Phase 1 (2019), we will be designing, initiating, learning and piloting the first three types of pilot projects and the Community Benefit Agreement for Green Line. In Phase 2 (2020), we will be engaging more broadly, continue to test, measure and initiate the next three types of pilot projects. Finally, in Phase 3 (2021), we will work through implementation of social procurement into The City's procurement procedures.

Stakeholder Engagement, Research and Communication

The Advisory Task Force held their first meeting on 2019 May 1 and its membership is made up of a multi-stakeholder group from various sectors (Attachment 1, page 13). The first meeting consisted of an overview of the project and identifying gaps where additional representation is required. As well, the first working group was struck to review a current procurement opportunity. The Advisory Task Force will meet regularly for the remainder of the project to meet the objectives outlined in the Work Plan. In addition to this, Administration is working on developing a Communications Plan, an Engagement Plan and a Change Management Plan for this project. As part of the communications strategy, this initiative will be tied into the ongoing Business Friendly work to ensure alignment.

Strategic Alignment

Social Procurement aligns with many Council priorities including a commitment to creating and sustaining a vibrant, healthy, safe and caring community that works for all today and tomorrow. This commitment has been expressed through policies, plans and strategies including the Triple Bottom Line Policy Framework, Calgary's Resilience Strategy, the imagine CALGARY plan, and the 2020 Sustainability Direction. The City recognized the potential to achieve many of these objectives by leveraging its existing purchasing power with the adoption in 2008 of the Sustainable Environmental and Ethical Procurement Policy (SEEPP). The addition of Social Procurement is the next step in leveraging procurement to help with economic recovery and creating a more resilient city by utilizing City dollars to achieve greater community benefit.

Social, Environmental, Economic (External)

Financial Capacity

Current and Future Operating Budget:

There is an approved budget of \$505,000 from the Business Savings Account (BSA) to cover the pilot project but does not include additional operating costs required to continue Social Procurement past the initial three years.

Deputy City Manager's Office Report to
Priorities and Finance Committee
2019 May 14

ISC: UNRESTRICTED
PFC2019-0384

Social Procurement Update

Current and Future Capital Budget:

No impacts have been identified for this recommendation.

Risk Assessment

There is a risk that we will not get the community benefit outcomes we are looking to achieve; however, this is why we are planning to try a number of different approaches to find the right fit and achieve multiple outcomes that put the citizen first while maximizing financial value. We will learn fast and adapt as necessary. There is also a risk that there will be resistance to change both internally and externally as this is a new way of doing procurement for The City. One of the goals of our multi-stakeholder Advisory Task Force is that they represent a sector perspective in order to address this transition and develop of policy that can work.

REASON(S) FOR RECOMMENDATION(S):

After thorough research of other jurisdictions and alignment with other areas of The City, Administration believes the proposed Social Procurement Advisory Task Force Terms of Reference, Work Plan and Scoping Report of Pilot Projects will provide a solid foundation for this project, foster greater economic resilience for Calgarians and be successful in building a more resilient, accessible and inclusive community.

ATTACHMENT(S)

1. Attachment 1 – Social Procurement Policy Implementation Report

SOCIAL PROCUREMENT POLICY IMPLEMENTATION

Background

The City of Calgary adopted in principle a social procurement policy and strategy to create a Sustainable, Social, Ethical and Environmental Procurement Policy, (SSEPP), that will advance the utilization of existing procurement to create local social, economic and environmental value.

The social procurement policy will integrate social value into the existing SEEPP procurement process.

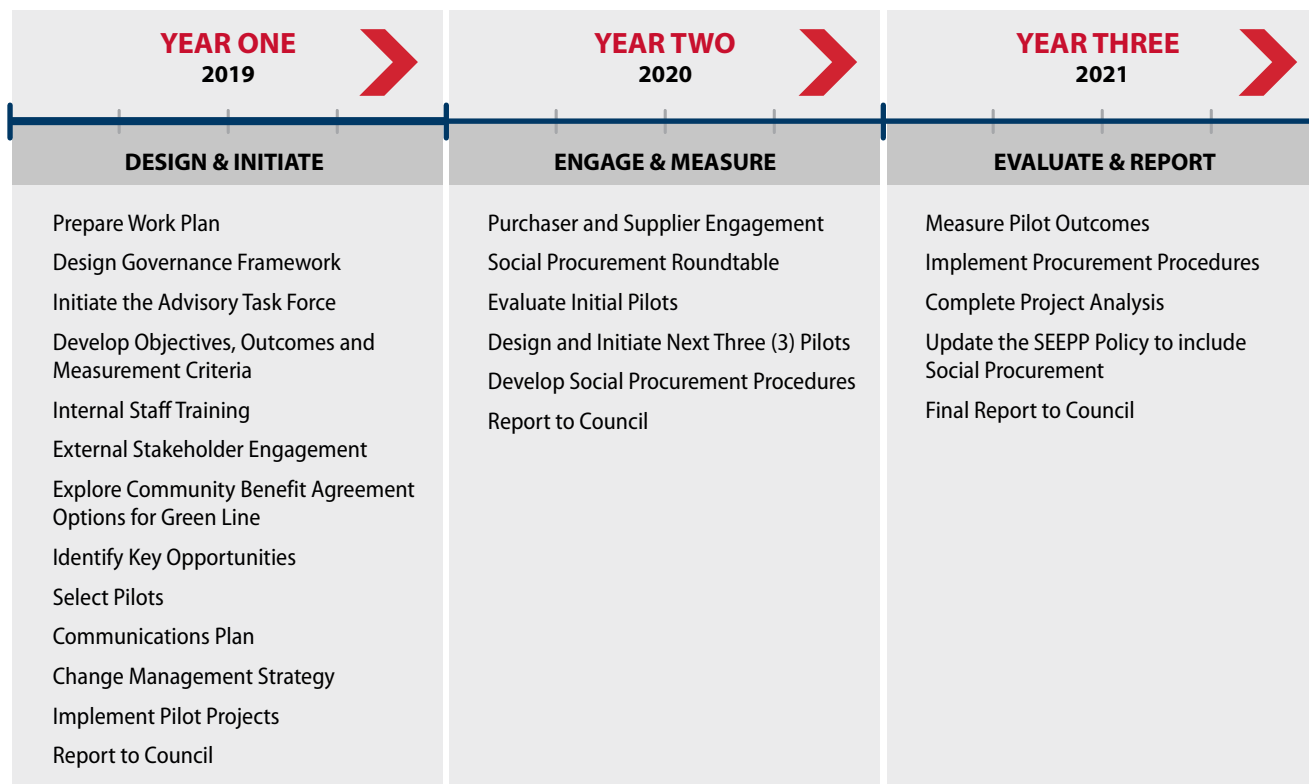
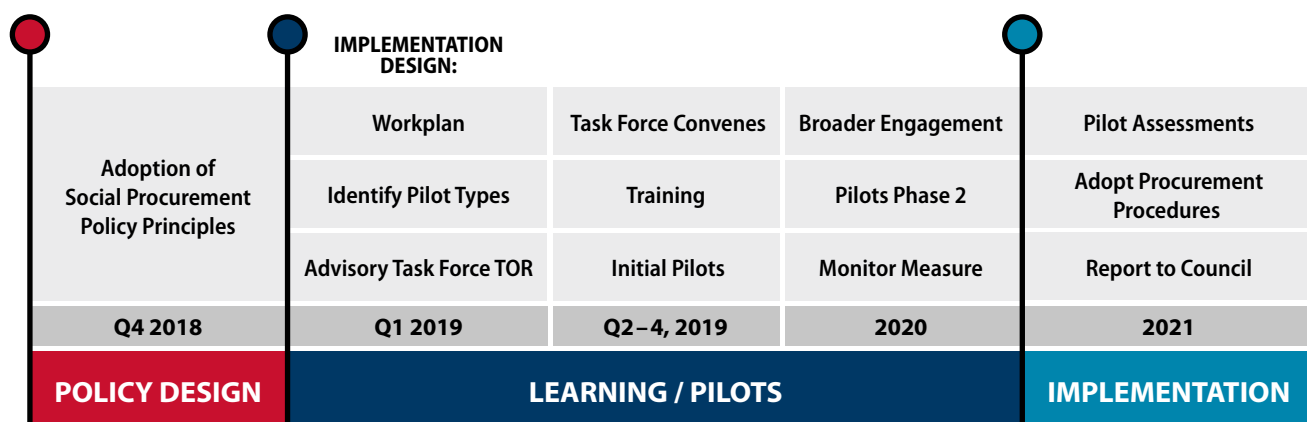
The key local economic and social issues that SSEPP will contribute to addressing are:

- Increased access to City contracts for a more diverse, more resilient, and more socially inclusive small- and medium-sized business sector
- Greater economic opportunity and integration for marginalized groups in Calgary
- Increased apprenticeship, paid work-experience, and entry-level opportunities in the trades and other career-track employment, especially for marginalized community members, e.g. Indigenous peoples, women, and immigrants
- Increased preparedness to respond to Infrastructure Canada's recent requirement for Community Benefit Employment Agreements for infrastructure investments. And the ability to provide greater community benefit for large construction projects.

This report responds to Council's request that Administration return to the Priorities and Finance Committee with a:

- *Work Plan for Implementation of the Social Procurement Strategy*. A three year flexible, agile approach will allow ample opportunities to test, verify, and implement sound policy and effective practices. – Page 3
- *Terms of Reference for the Advisory Task Force*. A multi-stakeholder group comprised of city, private sector, and community representatives. – Page 11
- *Scoping Report for the Pilot Project Framework and Examples*. Multiple pilots will use variable models to test the options and opportunities of social procurement. – Page 16

Work Plan for Implementation of the Social Procurement Strategy



Work Plan Summary

PHASE 1

January 2019 to December 2019

- Prepare three-year Work Plan
- Design Social Procurement Project Governance Framework
- Initiate the Advisory Task Force
 - Appoint Members
 - Provide Orientation / Training for Members
- Develop Objectives, Outcomes and Measurement Criteria
- Design and Initiate Internal Staff Training
- Design and Initiate External Stakeholder Engagement
- Develop Communications Plan
- Develop Change Management Strategy
- Identify Opportunities
 - Goods & Services Purchasing
 - Green Line Infrastructure
- Scope Green Line Community & Employment Benefit Agreement
- Implement Initial Pilot Projects
- Report to City Council

PHASE 2

January 2020 to December 2020

- Maintain Purchaser and Supplier Engagement Process
 - Initiate Social Procurement Roundtable
- Evaluate Initial Pilots
- Design and Initiate Next Three (3) Pilots (*"Pilots Stage 2"*)
- Develop and Adopt Procurement Procedures
- Report to City Council

PHASE 3

January 2021 to December 2021

- Implement Pilots Stage 2
 - Measure Pilot Outcomes
- Implement Procurement Procedures
- Complete a Project Analysis
- Update the SEEPP Policy to include Social Procurement
- Final Report to City Council

Work Plan Detailed Process

PHASE ONE

January 2019 to December 2019

- Prepare three-year Work Plan
- Design Social Procurement Project Governance Framework
 - Complete Terms of Reference for Advisory Task Force
- Initiate the Advisory Task Force
 - Appoint Members
 - Provide Orientation/Training for Members
- Identify Opportunities for Pilot Projects
 - Develop Objectives, Outcomes and Measurement Criteria
- Scope the Green Line Community Benefit Agreement Options
- Design and Initiate Internal Staff Training
- Design and Initiate External Stakeholder Engagement
- Develop Communications Plan
- Develop Change Management Strategy
- Implement the Initial Pilot Projects
- Report to City Council

Develop Social Procurement Objectives, Outcomes and Measurement Criteria

The recommended objectives for consideration in the design and measurement of pilots may include:

- Increased access to contracts from The City for small- and medium-sized businesses and social enterprises that demonstrate social value outcomes

- Increased opportunities for small businesses and social enterprises to access sub-contracting through enhanced relationships with The City's prime contractors
- Support for capacity building for small- and medium-sized businesses and social enterprises to be prepared to participate in sub-contract supply opportunities and Community Benefit Agreements
- Increased preparedness to comply with Alberta Integrated Bilateral Agreement for the Investing in Canada Infrastructure Program
- Green Line Community Benefit Agreement Design with developer and community engagement

Design and Initiate Internal Staff Training

City Staff Training Plan: Introduction to Social Procurement Workshop

1. 2-hour introduction for Procurement staff and Advisory Task Force
 - In-person
 - Webinar recorded and available on-demand

Training Objective:

Internal City departments will be provided with learning sessions and social procurement guidelines to effectively contribute to the program design, implementation and success.

After the training the Stakeholders will have the capacity to consider and evaluate opportunities:

- Identify key procurement opportunities from both the purchasing side and supply side
- Identify 'low hanging fruit' within existing purchasing items and services

- Engage and identify social procurement opportunities through Calgary Housing Company (CHC)
- Examine contract opportunities emerging over the next 1-5 years allowing potential proponents to prepare to bid successfully
- Work with major contractors and suppliers, Tier 1, to identify potential opportunities for sub-contracting
- Work with social enterprises and small- and medium-sized businesses to identify capacity matching opportunities through a supplier capacity analysis
- Understand the applicable trade agreements
- Understand Community Benefit Agreement options and employment opportunities

Training for City Purchasers

- Review existing procurement policy for barriers and opportunities
- Adjust the criteria requirements in all bid request documents to include social value considerations
- Decide social value weighting ranges for commonly procured goods and services
 - E.g. Catering, construction, landscaping, maintenance services, vehicles and technical equipment
- Understand the applicable trade agreements
- Access extended learning and training opportunities via the Social Enterprise Institute

Design and Initiate External Stakeholder Engagement

Workshops and Training Opportunities for Potential Suppliers

- Opportunity Identification
- How to Respond to RFP
- Pre-qualification Requirements
- Community Benefit Agreement Process

Explore Community Benefit Agreement Opportunities

- Engage construction industry representatives and community members regarding Green Line application of Canada – Alberta Integrated Bilateral Agreement for the Investing in Canada Infrastructure Program which states that “*we will report on community employment benefits, provided to at least three (3) of the federal target groups (apprentices, Indigenous peoples, women, persons with disabilities, veterans, youth, new Canadians, or small-medium-sized enterprises and social enterprises)*”.
- Review and identify infrastructure or major development projects for Community Benefit Agreement (CBA) opportunities

External Stakeholder Engagement will include:

- Providing coaching to increase awareness and participation by local businesses and social enterprises
- Providing regular information and training sessions for current and potential suppliers
- Encouraging major suppliers, construction industry contractors to implement social procurement in their supply chain
- Providing learning events and engagement activities
- External cross-sector supplier and purchaser events
- Host trade shows for large contractors to meet social value suppliers
- Identifying and preparing a list of pre-qualified social value suppliers that provide low dollar procurement opportunities directly for business units.
 - E.g. Catering, couriers, temporary labour, printing services

Develop Communications Plan

Staff will prepare an internal and external communications plan to inform stakeholders on the new policy, including goals, expected outcomes and processes.

Develop Change Management Strategy

Staff will integrate the Social Procurement Policy expectations and change process into existing staff learning and procedural programs.

Identify and Initiate Pilot Project Opportunities

The implementation of different types of pilot projects will test and design multiple outcomes and be agile in order to fail fast and learn fast. This will help us to reach our goal of achieving multiple outcomes that put the citizen first in addition to maximizing financial value. This includes the inclusion of more small- and medium-sized businesses and social enterprises. This process will be advised by the Advisory Task Force, City staff and be led by The City.

Examples of Phase One Pilot Program Opportunities

Low value Purchases:

Explore trade agreement financial threshold opportunities to do direct small item purchasing

- Examine The City's previous purchases under the \$25,000 amount (e.g. catering, printing, couriers, events, etc.) for potential direct contracting where social objectives can be achieved:
 - Indigenous-owned catering service
 - Non-profit space for events

Trade Agreement Exceptions:

Explore Trade agreement exceptions that meet the "*legitimate public welfare objectives*" using Non-profit Suppliers and Persons with Disability Suppliers

- Trade agreements allow exceptions for direct purchasing from non-profits
- Purchase temporary labour support from non-profit employment training provider
- Utilize non-profit social enterprise for maintenance services for Calgary Housing repairs

Include Social Value Language in RFP's for Targeted City Departments:

- Example: Calgary Housing opportunities to work with suppliers that employ residents to do:
 - Apartment and unit refurbishing
 - Interior and exterior maintenance
 - Catering, cleaning, maintenance, and recycling

Pilot RFPs with additional weighting for social value for upcoming procurement opportunities for services that would be a good fit for social procurement

- Examples: catering, landscaping, etc.

Each pilot project will measure options for data collection and reporting systems, such as:

- The number and financial value of contracts maintained with local businesses and social enterprises
- The number and financial value of new contracts awarded to local businesses and social enterprises
- The number of targeted employment positions filled
- The number and financial value of supplier sub-contracts

- The number of apprenticeships and training positions created and completed
- Increased knowledge of procurement process for small businesses
- Increased knowledge from City staff on how to create social benefit through purchasing
- Increased number of small businesses responding to procurement opportunities
- Number and dollar value of jobs created for targeted marginalized groups
- A count of equivalent full time employees per contract, reported by supplier
- Amount of payroll to targeted employees, reported by supplier
- Contracts directed to or won by diverse suppliers and social enterprises
- Number of contracts awarded that have a social value component, reported by The City
- Dollar Value of Contracts that have a social value component, reported by The City
- Assess annual City purchasing percentage awarded to small- and medium-sized businesses
 - Assess by postal code
 - Assess by business sector

Assess internal implementation progress using an annual updated SSEEPP leadership questionnaire to evaluate social procurement progress toward the goals identified by the Task Force. Metrics that measure outcomes will be preferred.

Community Benefit Agreements:

Phase 1 pilots will include scoping and advising on a CBA and Community Employment Benefit Plan that may be implemented as part of the SSEEPP policy framework as applied to the Green Line Project.

PHASE TWO

January 2020 to December 2020

- Maintain Purchaser and Supplier Engagement Process
 - Social Procurement Roundtable
- Evaluate Initial Pilots
- Design and Initiate Next Three Types of Pilots (*"Pilots Stage 2"*)
- Develop Procurement Procedures
- Update to Council, Q1 2020

Maintain Purchaser and Supplier Engagement Process

- Initiate Community of Practice through a multi-stakeholder, facilitated Social Procurement Engagement
- Engage Anchor Institutions in the process

Evaluate Initial Pilots

- Utilize measurement criteria to evaluate outcomes
- Assess barriers and prepare adjustment strategy
- Use Advisory Task Force perspective and experience

Design and Initiate Pilots Stage 2

- RFPs social value criteria and weighting on a major purchase
 - Social value opportunity for Tier 2 and 3 suppliers
- Private sector partner engagement in a social procurement project

Develop Procurement Procedures

- Advisory Task Force and Supply Management co-creation process
- Review solicitation processes (including RFQs, and RFIs), including but not limited to:
 - Criteria and weighting
 - Application of trade agreements
- Assess opportunity identification and supplier matching
- Draft and circulate findings in a memo for review and comment

PHASE THREE

January 2021 to December 2021

- Implement Pilots Stage 2
 - Measure Pilot Outcomes
- Implement Procurement Procedures
- Update to Council, Q1 2021
- Provide Final Report to Council, Q1 2022

Implement Pilots Stage 2

- Use Advisory Task Force, External Stakeholders and Staff input to do a comprehensive analysis of pilot projects and create report

Complete Design and Implement Procurement Procedures

- Use Phase 2 Consultation Process to develop procedures
- Review and adjust procedures with internal City staff from:
 - Law and Legislative Services
 - Finance
 - Supply Management

Prepare Final Assessment and Project Report

- Outcomes Analysis
- Stakeholder Evaluation
- Social Value Outcomes

Work Plan Time Line and Resources

PHASE ONE

TASK	PHASE ONE TIME LINE	LEAD RESPONSIBLE
WORK PLAN	Q1 2019	STAFF
Initiate the Advisory Task Force	Q2	Staff
Design and Initiate Internal Staff Training	Q2-3	Consultant
Explore Community Benefit Agreement Options	Q2	Task Force
Design and Initiate External Stakeholder Engagement	Q2-3	Consultant
Develop Communications Plan	Q3	Staff
Develop Change Management Strategy	Q3	Staff
Identify Opportunities and Initiate Initial Pilot Projects	Q2-Q4	Task Force / Staff

PHASE TWO

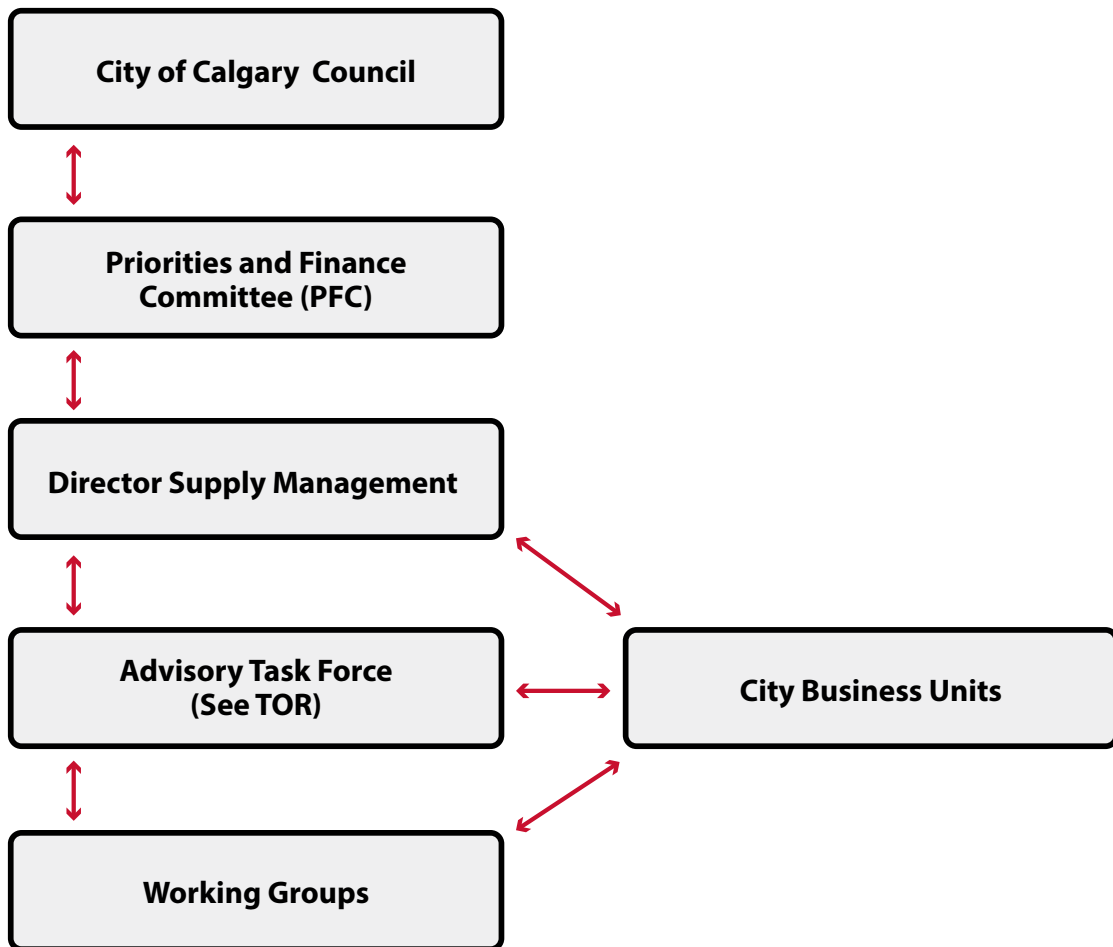
TASK	PHASE TWO TIME LINE	LEAD
WORK PLAN	Q1 2020	STAFF
Report to Council	Q1	Staff / Task Force
Purchaser and Supplier Engagement Process	Q1-Q2	Consultant
Identify Multiple Pilot Opportunities: test, evaluate, pivot, implement, report	Q2	Task Force
Initiate Social Procurement Roundtable	Q2	Consultant
Design and Initiate Next Three (3) Pilots	Q3	Task Force / Staff
Develop Procurement Procedures	Q3	Staff

PHASE THREE

TASK	PHASE THREE TIME LINE	LEAD
WORK PLAN	Q1 2021	STAFF
Report to Council	Q1	Staff
Complete Pilots Stage 2	Q1-Q2	Staff
Measure Phase Pilot Outcomes	Q2	Task Force
Implement Procurement Procedures	Q3	Staff
Report to Council	Q1-2022	Staff

Terms of Reference for the Advisory Task Force

SOCIAL PROCUREMENT POLICY STRATEGY GOVERNANCE MODEL



TERMS OF REFERENCE:

Social Procurement Implementation Advisory Task Force

1. Background

The City of Calgary has accepted in principle a social procurement policy and strategy to create a Sustainable, Social, Ethical and Environmental Procurement Policy, SSEEP, that will advance the utilization of existing procurement to create local social, economic and environmental value.

The primary purpose of the Social Procurement policy is to respond to local economic and social issues, with potential outcomes:

- Increased access to City contracts will contribute to a more diverse, more resilient, and more socially inclusive small and medium-sized business sector
- Support for economic recovery with greater opportunity and integration for marginalized groups in Calgary
- Increased apprenticeship, paid work-experience, and entry-level opportunities in the trades and other career-track employment, especially for marginalized community members, e.g. Indigenous peoples, women, and immigrants.
- Increased prepared to respond to Infrastructure Canada's recent requirement for Community Benefit Employment Agreements for infrastructure investments.

2. Purpose

The Advisory Task Force is a multi-stakeholder group to advise and support The City on the process of designing, implementing and measuring a social value into the existing procurement process.

Members of the Advisory Task Force acknowledge and agree that the outcomes and responsibilities expected of them are to:

- Support and monitor integration into existing City of Calgary social objectives: Calgary's Resilience Strategy (under development), imagineCALGARY, Enough for All, etc.
- Inform City staff and Task Force Members with stakeholder value and process issues
- Support mitigation of supplier and construction sector fears and perceived barriers
- Build relationships between suppliers and purchasers
- Identify social issues and measurable benchmarks for success consistent with existing City policy
- Identify 'low hanging fruit' and pilot project opportunities
- Support the development and application of the outcomes measurement process

3. Roles and Responsibilities

The role of the Advisory Task Force is to advise the Director of Supply Management on the implementation of the Social Procurement Program. The Task Force will support the implementation process to: create the appropriate goals, establish the measurement criteria and the reporting methodology. The Social Procurement process will build upon existing policies, programs and strategies of the SSEEP Policy as presented to The City of Calgary at the regular meeting on December 2018 (<https://pub-calgary.escribemeetings.com/filestream.ashx?DocumentId=75350>).

The Advisory Task Force is by its purpose and design intended to be advisory only. It is not a decision making body. The public members are expected to represent a sector voice and perspective to positively contribute to the policy implementation.

The Advisory Task Force will, at a minimum, meet quarterly and will be responsible to submit annual progress reports to City Council through the Director of Supply Management.

Advisory Task Force members agree to participate in regular meetings and appropriate training opportunities, prepare for meetings, and contribute professionally as required from time to time.

4. Reporting Relationships

The Advisory Task Force reports to and is responsible to the Director of Supply Management.

5. Decisions

Collaboration and mutual respect are basic principles of the Advisory Task Force conduct.

Decision-making of the Advisory Task Force will strive to reach consensus by all members in attendance. However, if the Co-Chairs determine that consensus cannot be reasonably reached and the Task Force is at quorum, a vote shall be held and the decision shall be made by the simple majority. If there is a tie, The City co-chair will decide.

6. General

6.1 Membership

Membership as defined within the policy:

- One (1) Representative from Supply Management - Co-chair
- One (1) Representative from Supply Management - Project Lead and Secretariat
- One (1) Representative from Resilience and Infrastructure Calgary
- One (1) Representative from Calgary Neighbourhoods
- One (1) Representative from Environmental and Safety Management
- One (1) Representative from Facility Management
- Two (2) Representatives from City Corporations
 - E.g. Attainable Homes Calgary Corporation, Calgary Arts Development, Calgary Economic Development, Calgary Housing Company, Calgary Municipal Land Corporation, Calgary Technologies

- One (1) Representative from the Calgary Construction Association
- One (1) Representative from the Calgary Road Builders Association
- One (1) Representative from Calgary Economic Development
- One (1) Representative from the Chamber of Commerce
- One (1) Representative from Respect for the Earth and All People (REAP)
- One (1) Representative from Momentum
- One (1) Representative from Anchor Institution
- At large appointment(s)

The initial Advisory Task Force members will be selected by the Director of Supply Management.

The main Task Force may create working groups to meet at other times to address and report back on identified and specific issues. Each task force will have a defined topic, described outcome and reporting timeline.

Terms and processes will comply with Council Policy on Governance and Appointments of Boards, Commissions and Committees as published at <http://www.calgary.ca/CA/city-clerks/Documents/Council-policy-library/CP2016-03-Governance-Appointments-BCCs.pdf>.

6.2 Term

Term begins upon appointment by of the Director of Supply Management.

Term ends on December 31, 2021 unless terminated earlier.

If a member terminates prior, then The City staff Co-Chair may appoint a replacement representing a similar stakeholder perspective or experience.

6.3 Meeting Chair

The Advisory Task Force will elect one Co-Chair from the non-City members of the Task Force. The Co-Chair will contribute to the agenda preparation, the meeting content, and report preparations.

6.4 Agenda Items

Supply Management is responsible for the administrative and secretariat requirements of the Advisory Task Force. The Project Lead will coordinate the secretariat function of the Task Force. In addition to agenda compilation, this role also includes provision of analysis, technical support and subject matter expertise.

Any member can raise or propose agenda items. Agenda items are to be provided two weeks in advance of meetings to the secretariat for agenda inclusion. The agenda and supporting documentation will be forwarded to Task Force members one week prior to meetings.

The agendas for the quarterly meetings will generally follow the topic areas outlined in the Project Plan, subject to periodic decisions about scheduling and deliverables made by members of the Task Force.

Facilitation may be provided for Advisory Task Force general meetings as required and determined by the Director of Supply Management.

6.5 Minutes

The minutes will be prepared by Supply Management and will be circulated to the Task Force. Records of meetings will be managed by Supply Management.

6.6 Frequency and Duration of Meetings

The Task Force will meet for 2 hours quarterly or more often subject to relative progress based on the Project Plan and schedule, meetings may occasionally be cancelled or the agenda items dealt with through e-mail, teleconference or Skype, etc.

Additional meetings may be set for Task Force members or smaller sub-sets to deal with specific agenda items or deliverables.

6.7 Delegates & Proxies

If a member of the Task Force is not available to attend a meeting, a delegate will be permitted to attend provided the delegated representative has appropriate decision-making authority. The delegated representative is expected to bring information back to the absent member.

6.8 Quorum Requirements

Quorum is defined as a simple majority of the total membership of the Task Force. In general, this will mean half of the total number of members.

6.9 Review of Terms of Reference

The Terms of Reference will be reviewed once a year.

6.10 Confidentiality

Task Force members will be required to treat all communications as confidential and are not to disclose any internal information without the prior written consent from one of the City Staff Task Force Co-Chair on any matter that may impact the success of the process or create a real or perceived conflict of interest.

6.11 No Employment, Service, Agency Relationship

Membership on the Advisory Task Force does not constitute employment with The City of Calgary or any other City department or agency. Nothing in this Agreement is intended to create, creates or shall be interpreted or construed as creating a partnership, joint venture or the relationship of principle and agent, or of employer and employee between you and The City or any other City department or agency.

6.12 Reimbursement

Task Force members will not be compensated for their time.

6.13 Intellectual Property

All property and property rights including intellectual property rights and interests and claims in or to any record produced by one or more members of the Task Force or by anyone on behalf of the Task Force for the purposes of this agreement or fulfilling their responsibilities as a member of the Advisory Task Force, shall immediately, as soon as they come into existence, vest in and remain the property of The City of Calgary. Members must ensure that any and all agreements and arrangements between themselves and anyone acting on your behalf or for them comply with this provision. Members agree to assist The City including signing any documents that may be required to be signed to give effect to this provision. This assistance shall be provided without any further consideration being paid or otherwise provided to the member. This provision survives the expiry or early termination of this agreement.

6.14 Conflict of Interest

Conflict of interest is as defined by The City of Calgary Conflict of Interest Policy HR-LR-004 (<http://publicaccess.calgary.ca/ldm01/livelink.exe?func=ccpa.general&msgID=MsrsKK-sKqL&msgAction=Download>).

Members must, in undertaking their responsibilities under this agreement and as a member of the Advisory Task Force, act honestly, only in the public interest, and at all times in a manner that upholds the highest ethical standards so that public confidence and trust in the integrity, objectivity and impartiality of government are conserved and enhanced. In carrying out their responsibilities as a member of the Advisory Task Force, members must not act in any way to further their own or a family members' private or personal interests.

Furthermore, members must not knowingly take advantage of, or benefit from, any information, confidential or otherwise, that is obtained in the course of undertaking their responsibilities under this agreement and as a member of the Advisory Task Force, which is not generally available to the public, either during the term of this agreement or after its expiry.

If members anticipate they may find themselves or are in a situation that constitutes an actual or perceived conflict of interest, they must inform The City of Calgary Director of Supply Management immediately in writing and complete any required documentation disclosing the nature of the conflict. Members agree to abide by any instructions provided by The City of Calgary to address the conflict up to and including removing themselves or being removed as a member of the Advisory Task Force.

This provision survives the expiry or early termination of this Agreement.

6.15 Termination

Should a member wish to end membership on the Advisory Task Force, they must inform The City of Calgary in writing and provide the date on which their membership will end.

Missing 3 consecutive meetings may be cause for termination.

The City of Calgary may terminate membership on the Advisory Task Force at any time without notice or reason and membership ceases on the effective date of that termination.

The City of Calgary may terminate this agreement at any time without notice or reason and membership ceases on the effective date of that termination.

This Agreement terminates on the date that membership ends, but the confidentiality clause remains in affect even after termination.

Pilot Project Framework and Examples

The social procurement pilots will have three (3) key objectives:

1. Establish the data collection and reporting systems for measuring outcomes
2. Use variable models to test the options and opportunities of social procurement models
3. Provide the framework and basis for permanent social procurement procedures

Pilot Projects Evaluation Framework: Alignment with City of Calgary Policy & Programs

Each pilot project will evaluate the options for data collection and reporting systems for measuring outcomes, which may include items such as:

- The number and financial value of contracts maintained with local businesses and social enterprises
- The number and financial value of new contracts awarded to local businesses and social enterprises
- The number of targeted employment positions filled
- The number and financial value of supplier sub-contracts
- The number of apprenticeships and training positions created and completed
- Increased knowledge of procurement process for small businesses
- Increased knowledge from City staff on how to create social benefit through purchasing
- Increased number of small businesses responding to procurement opportunities

- Number and dollar value of jobs created for targeted marginalized groups
- A count of equivalent full time employees per contract, reported by supplier
- Amount of payroll to targeted employees, reported by supplier
- Contracts directed to or won by diverse suppliers and social enterprises
- Number of contracts awarded that have a social value component, reported by The City
- Dollar Value of Contracts that have a social value component, reported by The City
- Assess annual City purchasing percentage awarded to small- and medium-sized businesses
 - Assess by postal code
 - Assess by business sector
- Assess internal implementation progress using an annual updated SSEPP leadership questionnaire to evaluate social procurement progress toward the goals identified by the Task Force.

The pilots will use variable models to test the options and opportunities of social procurement models

Examples of Potential Phase One Pilot Program Opportunities

Low value Purchases:

Explore trade agreement financial threshold opportunities to do direct small item purchasing

- Examine The City's previous purchases under the \$25,000 amount (e.g. catering, printing,

couriers, events, etc.) for potential direct contracting where social objectives can be achieved:

- Indigenous owned catering service
- Non-profit space for events

Trade Agreement Exceptions:

Explore Trade agreement exceptions that meet the “*legitimate public welfare objectives*” using Non-profit Suppliers and Persons with Disability Suppliers

- Trade agreements allow exceptions for direct purchasing from non-profits
- Purchase temporary labour support from non-profit employment training provider
- Utilize non-profit social enterprise for maintenance services for Calgary Housing repairs

Social Value Language and Weighting in RFP’s for Targeted City Departments:

- Example: Calgary Housing opportunities to work with suppliers that employ residents to do:
 - Apartment and unit refurbishing
 - Interior and exterior maintenance
 - Catering, cleaning, maintenance, and recycling

Pilot RFP with additional weighting for social value for upcoming procurement opportunities for services that would be a good fit for social procurement

- Examples: catering, landscaping, packaging, fulfilment, etc.

Provide the framework and basis for permanent social procurement procedures

Based upon the pilot projects evaluations and learnings the Supply Management staff will design and implement permanent social procurement procedures.

Social Procurement Pilot Objectives Meeting City of Calgary Policy Goals:

The following City of Calgary policies, strategies and frameworks were reviewed to identify how the five types of social procurement pilot projects can contribute to meeting The City's priorities and aspirations.

- **Pilot 1** – Direct Award:
Under Financial Threshold
- **Pilot 2** – Direct Award:
Trade Agreement Exception
- **Pilot 3** – Social Value Weighting RFP
- **Pilot 4** – Sub-Contract Opportunity
- **Pilot 5** – Green Line Community
Benefit Agreement

Policy Objectives	More diverse more resilient, and more socially inclusive small and medium-sized business sector.	Greater economic opportunity and integration for marginalized groups.	Increased apprenticeship, paid work-experience, and entry-level opportunities in the trades and other career-track employment.	Increased preparedness to respond to Infrastructure Canada's investments.
PILOT ALIGNMENT				
Pilot 1	✓	✓		
Pilot 2	✓	✓	✓	✓
Pilot 3	✓	✓		
Pilot 4	✓	✓		
Pilot 5		✓	✓	✓

Policy Objectives	More diverse more resilient, and more socially inclusive small and medium-sized business sector.	Greater economic opportunity and integration for marginalized groups.	Increased apprenticeship, paid work-experience, and entry-level opportunities in the trades and other career-track employment.	Increased preparedness to respond to Infrastructure Canada's investments.
CITY OF CALGARY ALIGNMENT				
One Calgary	✓	✓	✓	✓
Council Directives	✓	✓	✓	✓
Calgary 2020	✓	✓	✓	
Triple Bottom Line Policy	✓	✓	✓	
Municipal Development Plan	✓		✓	
imagineCalgary	✓	✓	✓	✓
Capital Infrastructure Investment Principles			✓	✓
SEEP	✓			
White Goose Flying	✓		✓	
Capital Infrastructure Investment Principles			✓	✓
Community Economic Development Neighbourhood Framework	✓	✓		✓
Welcoming Community Policy	✓	✓		
PARTNERSHIP STRATEGY ALIGNMENT				
100 Resilient Cities Framework	✓	✓	✓	✓
Calgary Economic Development Strategy	✓	✓	✓	
Enough for All		✓	✓	
Calgary Local Immigrant Partnership – Local Settlement Strategy	✓	✓	✓	

