



# PROCUREMENT EXCELLENCE NETWORK

Partners for **Public Good**

→ WORKBOOK



## Measuring Performance of Workforce Goals in Public Contracts

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This workbook will help state and local governments measure the impact of workforce goals and labor standards in public procurements. It contains a series of activities to help you further refine performance metrics and design a reporting process to monitor workforce standards.

## Introduction

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State and local governments often aim to use public contracting as a lever to create good jobs for residents. But how do you know if workforce goals or labor standards in public contracts are making a difference? The key to achieving meaningful impact is a streamlined, results-driven procurement process with clear performance metrics tied to workforce outcomes and consistent monitoring over the life of a contract.

### How to Use this Template

By the end of this workbook, you will develop a Workforce Standard Monitoring Plan that outlines a clear process to effectively measure progress towards workforce goals and can be seamlessly integrated into your jurisdiction's [Contract Management Plan](#).

It is ideal to define performance metrics and reporting requirements in the early stages of drafting your solicitation and contract agreement before selecting a vendor. At the same time, allowing flexibility to refine details as needed after contract award can be helpful, especially when piloting new standards. This workbook is intended to walk you through key considerations to refine metrics and reporting procedures within the first month of the contract, and partner closely with your vendor as you do so.

This workbook is a companion to our guide [How Public Procurement Can Create Good Jobs](#), our Template: [Writing Good Jobs Goals into a Results-Driven Solicitation](#), and our [Contract Management Plan Template](#). We recommend reviewing these resources in advance of working through these exercises.

### Who should use this workbook?

This workbook is designed for government leaders and staff, including procurement, workforce, and user department teams, who are responsible for implementing workforce standards into procurement.

### A note before getting started

To use this workbook effectively, your team should already be aligned on the workforce standard you are seeking to advance, whether that goal is for employers to hire locally, pay workers a living wage, or something else. This workbook will not tell you which workforce or labor standard to adopt, nor will it recommend specific approaches to operationalize that goal (e.g., making it a requirement versus offering incentives).

If your team is not aligned on those points, pause before getting started. Refer to our guide, [How Public Procurement Can Create Good Jobs](#) for guidance and case studies. Then review our [Template: Writing Good Jobs Goals into a Results-Driven Solicitation](#) and develop clear language that integrates workforce standards into your solicitation. We also encourage you to [reach out](#) to our team to schedule a free coaching call.

## Core Components

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This workbook guides you through three core components of monitoring a workforce goal or labor standard in your contract: refine key performance metrics, design a reporting process, and use data to drive action. Below are a series of exercises that will help you track progress, clarify responsibilities, and make data-informed decisions to achieve your jurisdiction's workforce goals.

*Note: Examples are for illustration only and should be replaced with your jurisdiction-specific information.*

### Core Component #1: Refine Key Performance Metrics

**Purpose:** As the saying goes, if you can't measure it, you can't manage it. Establish a clear set of performance metrics that your government can track and use as meaningful measures of progress toward your workforce goal or labor standard throughout the life of a contract. If you already defined performance metrics in the solicitation and contract, use this moment to clarify and refine which ones to prioritize as early indicators of success or potential challenges post-award.

#### **Step 1.1: Clearly describe your labor standard or workforce goal**

What labor standard or workforce goal do you want to achieve in this contract?

*Ex. Local hire policies, living wage ordinances, community benefits agreements, apprentice utilization goals, hiring from a local job training program, etc.*

**Step 1.2: Determine what information you will need to collect**

Instructions: Individually or as a team, answer the warm-up questions below to clarify the data and evidence you need to measure progress on your workforce goal or labor standard.

1. Imagine you are four months into a contract that includes your workforce standard. What early indicators or activities show that the vendor is trying to meet your workforce goal or labor standard? What early indicators would show that the vendor is off track?

**Early indicators the vendor is on track:**

*Ex. Established partnerships with local workforce organizations, sharing hiring needs, advertising job postings to disadvantaged workers, etc.*

<b>1</b>
<b>2</b>
<b>3</b>

**Early indicators the vendor may be off track:**

*Ex. Lack of communication, missing reporting deadlines, submitting incomplete documentation, etc.*

<b>1</b>
<b>2</b>
<b>3</b>

2. Imagine a contract just ended and the vendor achieved your workforce goal. How would you describe the project’s success to your boss? What data and evidence would you use?

**What success looks like:**

*Ex. Increase in local workers and apprentices hired onto government contracts, increase in workers receiving a living wage and benefits, etc.*

**Supporting data and evidence:**

*Ex. Percentage increase in hires over time, fewer wage violation complaints from workers, qualitative feedback from community workforce partners, etc.*

**Step 1.3: Align on a clear set of well-defined metrics and how you will track them**

Instructions: Drawing from your responses in Steps 1 and 2, use the Performance Metrics Table below to write at least three well-defined metrics that you will use to monitor vendor progress on your labor standard or workforce goal. For each metric, indicate how you will collect data to measure progress and good faith efforts (if relevant).



*Refer to the Workforce Performance Metrics Bank and Workforce Good Faith Effort Bank in the Appendix for examples of metrics and good faith efforts related to common workforce goals and labor standards.*

WORKFORCE STANDARD MONITORING PLAN				
Performance Metrics Table				
Performance Metric	Target	Reporting Frequency	Data Collection Method	Related Good Faith Effort Activity & Documentation (if relevant)
<i>Example: % of project hires that are registered apprentices</i>	10%	Quarterly	Vendor Workforce Report Spreadsheet	<i>Activity: Outreach to registered apprenticeship programs Documentation: Share emails and job posting advertisements</i>

## → Checklist for Getting Your Metrics “Just Right”

- The metrics are realistic and feasible for vendors and government staff to track
- The metrics do not duplicate data your government already collects elsewhere
- The metrics include a mix of outputs (activities) and outcomes (impact)
- Each metric has a clear benchmark target that defines progress toward the goal
- Each metric is valuable for decision-making, and there’s a clear purpose for how your government will use it

### Core Component #2: Design a Reporting Process

**Purpose:** Performance reporting requires coordination and collaboration. Distinguish between vendor and government staff responsibilities to make sure the reporting process for your workforce standard balances accountability with feasibility at each stage of the contract. The end goal is to design a reporting process that works well for everyone and allows your jurisdiction to consistently measure progress towards your workforce goal throughout the life of a contract.

#### Step 2.1: Outline vendor & staff responsibilities

Instructions: Using the table on the next page, list out responsibilities and activities that you expect vendors to perform, as well as the steps government staff will take to collaborate, offer support, and reinforce expectations at each stage of the contract. Think of this list as a “shared journey” you anticipate vendors and staff will take to accomplish and report on your workforce goal or labor standard, with accountability and consistency for both.

WORKFORCE STANDARD MONITORING PLAN		
Workforce Standard Accountability Checklist		
Contract Stage	Vendor Responsibilities	Government Staff Responsibilities
Pre-Award	<i>Example: Attend Pre-Bid Meeting</i>	<i>Example: Present overview of workforce standards at Pre-Bid Meeting</i>
Kickoff	<i>Example: Share staffing and hiring plan</i>	<i>Example: Provide workforce reporting template</i>
Ongoing		
Q1		
Q2		
Q3		
Q4		
Closeout		

**Step 2.2: Identify resources and materials to help vendors and staff succeed**

Instructions: Review your list of responsibilities above, then take inventory of any tools, documents, templates, or resources you have or will create to equip vendors and staff and with helpful information and guidance to successfully carry out responsibilities and achieve your workforce goal or labor standard.

*Examples may include: Pre-Submittal PowerPoint slides with overview of workforce goal, vendor reporting template, non-compliance letters, etc.*


**Step 2.3: Build a results-driven reporting process**

Instructions: Review your responses in Steps 1 and 2, then concisely summarize the key steps in your reporting process. For each step, indicate how it is completed, the end deliverable, who is responsible, when it occurs, and any supporting resources. Where necessary, include any remediation and escalation procedures your government will take if a vendor does not meet expectations.

*Tip: Refer to our guide, [How Public Procurement Can Create Good Jobs](#), for detailed guidance on designing your reporting process.*

WORKFORCE STANDARD MONITORING PLAN				
Workforce Reporting Process Overview				
Step Description	Key Deliverable	Responsible Party	Frequency / Due Date	Resources
<i>Example: Vendor submits quarterly reporting</i>	<i>Completed Vendor Workforce Report Spreadsheet</i>	<i>Vendor</i>	<i>4 times a year, due Jan 31, Apr 30, Jul 31, and Oct 31</i>	<i>Vendor Workforce Reporting Template</i>

## Core Component #3: Use Data to Drive Action

**Purpose:** Performance data is most impactful when it’s actively used to manage outcomes. Create an action plan for how you will use workforce data to guide decisions. This action plan should include how you will use data to communicate progress, proactively engage with vendors, and share findings with key stakeholders.

### Step 3.1: Prepare a vendor engagement meeting agenda

**Instructions:** Review the performance metrics and reporting process from Core Components #1 and #2. Then draft a brief agenda for a quarterly performance meeting with a vendor who must comply with your workforce standard. As you draft the agenda, consider: What data and topics would you bring to the meeting to discuss? What questions would you ask to better understand performance on workforce standards? If the vendor is underperforming, what actions or support would you propose to get the vendor on track? If the vendor is performing well, how would you help them stay on track and document best practices for other contracts?

VENDOR ENGAGEMENT MEETING AGENDA
<p><b>Data and topics to discuss:</b>  <i>Examples: Data - total # of project hires, # of registered apprentices hired, % of project hires that are registered apprentices, etc. Topics – Good Faith Efforts, reporting requirements, etc.</i></p>
<p><b>Questions to ask vendor:</b>  <i>Examples: Which outreach efforts are working well? Where are you seeing challenges in moving from outreach to hiring?</i></p>
<p><b>Actions to help vendor get back on track or document best practices:</b>  <i>Example: Help vendor schedule a meeting with the Job Placement Coordinator at a local apprenticeship program</i></p>

**Step 3.2: Summarize data across contracts and communicate outcomes**

Instructions: Looking ahead, consider how you will summarize workforce performance data across one or more contracts to communicate outcomes to senior leaders, vendors and other key stakeholders. What format would be best to use (e.g., written report, chart, graph, spreadsheet, scorecard, dashboard)? What aggregate data points are most helpful to communicate progress, challenges, and trends across contracts? How can you analyze or disaggregate the data by demographics or job type to best inform decisions?

*Tip: Engage a data expert in your jurisdiction to help outline how you will summarize workforce data in a meaningful way.*

**Data summary format:**

<i>Examples: Written report, graph, data dashboard, etc.</i>

**Helpful ways to aggregate the data:**

<i>Examples: Total hires across all contracts per year, average hourly wage rate across all contracts, most common Good Faith Effort activity across all vendors, etc.</i>

**Helpful ways to disaggregate the data:**

<i>Examples: Disaggregate by job classification, by worker demographics (gender, Zip code, race, etc.)</i>

### Step 3.3: Outline a Workforce Performance Data Summary

Instructions: In a separate document, draft an outline for how you will compile and present workforce performance data across contracts. Use your responses above to determine what information is most compelling to different audiences and how to organize it for clarity and impact. The outline will serve as a blueprint for the final deliverable you use to summarize your data, whether that's a written report or data dashboard.

If you choose a written report, the following structure may be helpful:

1. Purpose & Audience
2. Background
3. Key Findings Across Contracts
4. Disaggregated Trends (e.g. by job classification, demographics, etc.)
5. Recommendations

If you choose a Data Dashboard, download our [Workforce Reporting & Data Dashboard Template](#) for further guidance.

**Congratulations!** You completed all core components of a Workforce Standard Monitoring Plan to effectively measure progress towards workforce goals over the life of a contract. You are prepared to seamlessly integrate your Workforce Standard Monitoring plan into your jurisdiction's Contract Management Plan, and we strongly encourage you to do so.

## APPENDIX

### Workforce Performance Metrics Bank

Below are sample performance metrics that may apply to different kinds of workforce goals or labor standards in government contracts.

Category	Example Performance Metric
<i>Job Placement</i>	<ul style="list-style-type: none"> <li>• Total number of hires</li> <li>• Number of hires disaggregated by classification and trade</li> <li>• Number of hires disaggregated by worker demographics</li> </ul>
<i>Local Hiring</i>	<ul style="list-style-type: none"> <li>• Percentage of hires from local jurisdiction or target geography</li> </ul>
<i>Apprenticeship Utilization</i>	<ul style="list-style-type: none"> <li>• Percentage of hires that are registered apprentices</li> <li>• Percentage of work hours performed by registered apprentices</li> <li>• Percentage of journey-level and apprentice-level work hours</li> </ul>
<i>Wages &amp; Benefits</i>	<ul style="list-style-type: none"> <li>• Percentage of workers paid a living wage</li> <li>• Percentage of workers offered health care benefits</li> <li>• Percentage of workers offered paid leave</li> <li>• Percentage change in wage-related issues reported by workers</li> </ul>
<i>Worker Protections &amp; Representation</i>	<ul style="list-style-type: none"> <li>• Percent change in workplace safety incidents over time</li> <li>• Percent change in worker complaints over time</li> <li>• Percent of workers covered by collective bargaining agreements</li> </ul>
<i>Retention &amp; Career Advancement</i>	<ul style="list-style-type: none"> <li>• Percent of workers retained beyond one year, by role and demographics</li> <li>• Percent of workers promoted by role and demographics</li> <li>• Percent of workers that received employer-sponsored education and training, including industry recognized certifications</li> </ul>
<i>Recruitment and Outreach</i>	<ul style="list-style-type: none"> <li>• Number of interviews with disadvantaged workers</li> <li>• Number of recruitment or hiring events attended</li> </ul>

### Workforce Good Faith Effort Bank

Below are sample vendor activities that may demonstrate a vendor has made a good faith effort to achieve workforce goals or labor standards in government contracts.

Category	Example Performance Metric	Example Documentation
<i>Awareness &amp; Planning</i>	Develop a workforce hiring plan tailored to specific trades, unions, apprenticeship programs, and workforce partners serving target population	Written hiring plan or staffing projection
	Maintain a current list of applicants from target population, including contact information and hiring outcomes	Applicant tracking log with notes on hiring decisions
	Use inclusive language in job postings (gender-inclusive, person-centered, clear required vs. preferred qualifications)	Copies of job postings or outreach materials
	Implement an inclusive candidate selection process (consistent criteria, accommodations, competency-based interviews)	Written hiring procedures or interview rubric

Category	Example Performance Metric	Example Documentation
<i>Recruitment &amp; Outreach</i>	Conduct outreach to small and local businesses, Disadvantaged Business Enterprises (DBEs), or Minority and Women Owned Businesses (MWBs) with a track record of hiring target population	Emails, outreach logs, meeting notes
	Encourage referrals from current employees in target population	Referral program description or internal communication
	Provide advance notice of hiring needs to workforce programs and community-based organizations	Proof of notice sent or partner contact list
	Advertise job openings and hiring events through labor unions, workforce programs, and community partners	Copies of advertisements, distribution lists
	Attend recruitment or hiring events serving target population	Event sign-in sheets, agendas, photos
	Allow scheduled job site visits or job shadowing for participants from target population	Site visit schedules or partner organization confirmations
	Participate in industry sector meetings to share hiring needs and job postings	Meeting attendance records or meeting minutes
<i>Retention &amp; Support</i>	Provide on-the-job training and mentorship to target population	Training curriculum, mentorship match assignments
	Provide structured training or mentoring opportunities for new hires from target population	Training schedules or supervisor check-ins
	Offer wraparound supportive services (e.g. transportation, childcare, accommodations)	Service descriptions, referral documentation
	Conduct performance reviews of supervisors' adherence to good faith efforts	Copies of performance review questions or criteria