

The Social Impact Model for CBAs

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INTRODUCTION

Workers and residents advocate for community benefits agreements (CBAs) to secure a seat at the table and ensure public planning, procurement, and development processes guarantee community benefits. CBAs counter systemic harms and inequities and promote more equitable economic development. Jobs to Move America's (JMA) Jay Mehta Community Benefits Agreement Resource Center developed the social impact model to help labor-community coalitions assess CBA impact and track progress on social justice commitments.

This guide offers a brief overview of community benefits agreements and provides the overarching framework of the social impact model. It defines key principles and utilizes key indicators and metrics to understand and evaluate how CBA provisions affect workers and residents. The guide is organized into the following sections:

- Section 1 | **Social Impact Model: Assessing Community Impact**
Overview and definition of social impact model

- Section 2 | **Community Benefits Agreements: A Tool for a Fair Process and Equitable Outcomes**
Explanation of CBAs and how the social impact model evaluates their outcomes

- Section 3 | **How to Use the Model**
Instructional aid for stakeholders on using the social impact model to evaluate CBA outcomes

- Section 4 | **Resources and Tools**
Core definitions, criteria, and metrics used to evaluate social impact model principles

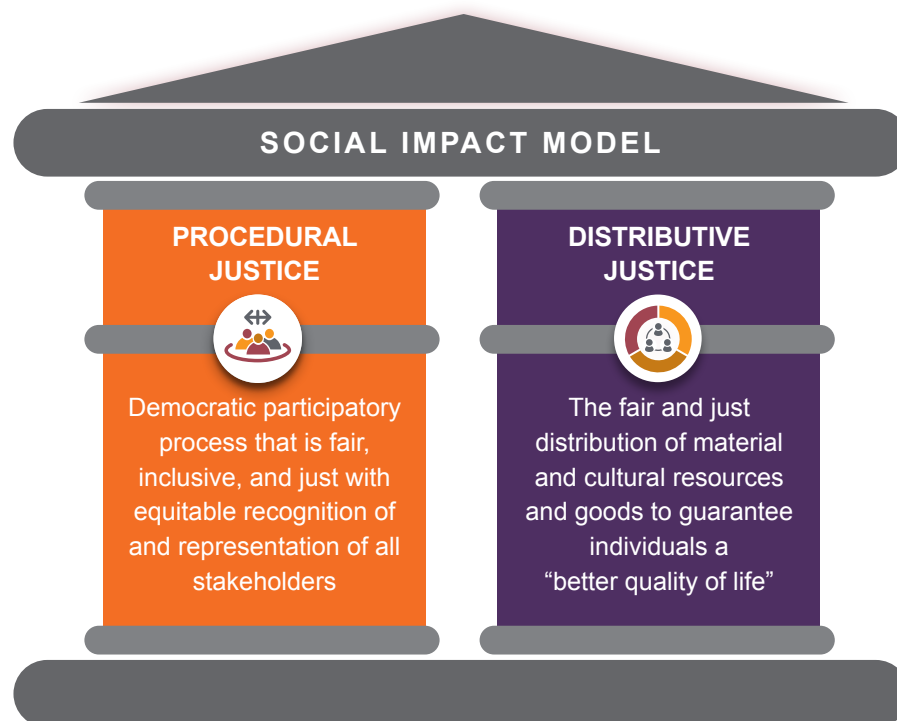
1 SOCIAL IMPACT MODEL: ASSESSING COMMUNITY IMPACT

The social impact model examines the extent to which economic development and public purchasing involving CBAs achieve procedural (process-based) justice and distributive (outcome-based) justice. Procedural justice guarantees that communities equitably participate in the decision-making process, while distributive justice guarantees that communities fairly benefit from proposed projects.

The model utilizes a mixed methods approach to provide the story behind the numbers, and understand and evaluate the impacts of community benefits agreements. It consists of collecting and analyzing qualitative and quantitative data on impacted workers and communities. This model is flexible and will evolve due to new knowledge, experiences, and changing circumstances.

Community groups and labor-community coalitions can use the model as a benchmarking tool to promote social justice and improve worker and resident conditions. In this model, social justice is defined as procedural and distributive justice with each comprising four principles that lead to a positive social impact. The principles of procedural and distributive justice are accompanied by specific criteria and metrics to evaluate the achievement of each principle

Figure 1 | **Social Impact Model: The Two Core Pillars**
Define primary elements that encompass social impact model



2 COMMUNITY BENEFITS AGREEMENTS: A TOOL FOR A FAIR PROCESS AND EQUITABLE OUTCOMES

CBAs are legally enforceable agreements that build worker and community power, address structural inequities, and ensure fair processes and equitable outcomes. The social impact model evaluates how effectively CBAs deliver meaningful participation and tangible improvements in worker and community well-being.

Why do CBAs matter?

CBAs address structural inequities by building community and worker power in decision-making and allocating project benefits. CBAs offer a pathway to:

- Center **procedural justice** by ensuring community and worker recognition and representation, meaningful participation, and stakeholder accountability
- Exercise **long-term community and worker power** through direct negotiation with developers and real influence over project decisions and outcomes
- Deliver **redistributive outcomes** that address past harms, confront present inequities, and advance economic, environmental, racial, and gender justice

What do CBAs do?

Community benefits agreements are defined as mutually beneficial contracts with legally enforceable, measurable, and accountable commitments, signed between community groups and project owners. CBA provisions should ideally include high-road job standards, training and hiring measures, environmental protections and benefits, and other equity-based commitments. The process of negotiating and implementing a CBA ensures that communities participate in the decision-making process for publicly funded projects and procurement. CBAs transform communities by building fairer local economies, guaranteeing environmental protections and mitigation measures, ensuring full transparency, and holding companies accountable.

Who benefits from CBAs?

CBAs are beneficial to all stakeholders if enacted correctly. CBAs support the building of relationships between private entities and communities and help to maximize the benefits to the community, workers and their families, and project owners.

For communities and workers:

- CBAs provide an opportunity for communities and workers to meaningfully participate in the decision-making process and influence project outcomes
- CBAs address community and worker needs and deliver benefits to improve their quality of life
- CBAs guarantee equity-based benefits that address past systemic and individual harms and mitigate present-day exploitation and disparities

For project owners:

- CBAs streamline government approval processes, reduce community opposition to projects, and improve access to public subsidies, incentives, and other financing
- CBAs create measurable recruitment, training, and pathways for a highly skilled and diverse workforce representative of the local community
- CBAs reduce turnover and promote the retention of a skilled workforce
- CBAs demonstrate the employer's commitment to responsible community, environmental, and labor practices

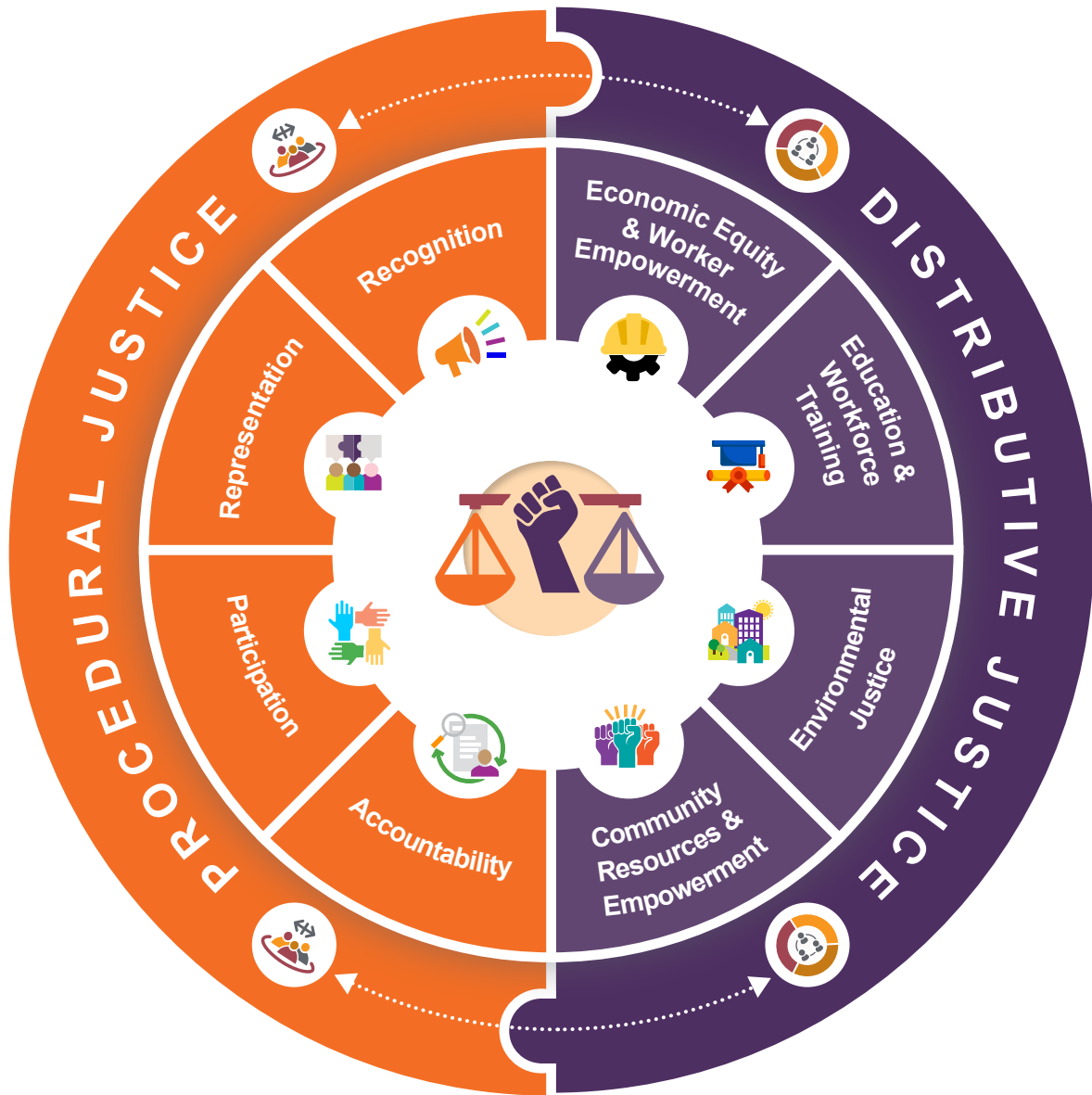
What makes CBAs meaningful, strong, and effective?

Successful CBAs advance both **procedural justice** (fair, inclusive processes) and **distributive justice** (equitable outcomes). The strongest agreements include the following elements:

- A broad, inclusive coalition representative of impacted groups, organizations, and community members with diverse interests
- A relationship based on mutually shared interests among coalition members, and between project owners and coalition
- Equity-based commitments informed by community-identified needs such as fair hiring goals and processes, stronger job quality standards, access to training and education, community resources and supportive services, and environmental justice measures
- A legally binding and enforceable contract with systems and procedures outlined for monitoring, reporting, implementation, evaluation, dispute resolution, and non-compliance

A successful CBA supports meaningful community participation and delivers tangible benefits for communities and workers. The social impact model assesses the effectiveness of the CBA in delivering benefits to residents and workers.

Figure 2 | **Social Impact Model: The Eight Principles**
 Overarching framework that connects procedural and distributive justice and their underlying principles



3 HOW TO USE THE MODEL

The social impact model sets an ideal framework for stakeholders negotiating and implementing community benefits agreements to strive towards, even if not always fully attainable. It can be used at the beginning of the organizing process as a benchmarking tool to identify baseline resident and worker needs and priorities, and after the CBA is signed to track progress of delivering direct benefits and improving workplace and community conditions.

The set of metrics in this model is not exhaustive. Coalitions and community groups are encouraged to adapt and expand them to fit local community and worker needs and specific project requirements. Stakeholders can choose which criteria or metrics best support their aims. The overall purpose of the CBA is to improve worker and community conditions and pursue the highest standards of procedural and distributive justice that can be achieved in negotiations and implementation with project owners.

Below is a step-by-step outline describing how to use the following principles and metrics:

Pre-CBA Assessment

- 1 Identify priorities and needs:** Prior to negotiations, the coalition or community groups use the following resources and tools to identify what process-based and outcomes-based principles are relevant to the project and community, and to what degree they can achieve the key indicators that encompass each social justice principle.
- 2 Collect data:** Qualitative and quantitative metrics found in the model are used as a guide to establish a baseline for measuring the agreement's impact. Data is collected from workers, community members, and other relevant stakeholders through surveys, focus groups, interviews, visioning sessions, and other engagement methods. The data is documented, made publicly available, and stored for later comparison following execution of signed CBA.
- 3 Establish recommendations:** The data provides coalitions and community groups with a clear set of recommendations as they mobilize their own CBA campaigns and build community-company partnerships. As negotiations progress, the coalition uses the metrics and baseline data to inform and prioritize demands that advance social justice.

Post-Signed CBA Evaluation

- 1 Establish committee:** Once a CBA is signed, implementation/oversight committee(s) are established to monitor progress towards achieving CBA provisions and social impact measures.
- 2 Identify metrics:** A designated committee compares baseline worker and community data to current data, and regularly reports outcomes until the project, funding, or agreed-upon timeline ends. Data consists of pre-CBA metrics and additional social impact measures to capture improvements unforeseen with initial assessment. Metrics include direct benefits, such as worker protections and income growth, and indirect benefits, such as improved quality of life or work-life balance.
- 3 Report data regularly:** The committee regularly reports outcomes until the project, funding, or agreed-upon timeline ends. Ideally, reporting is conducted and assessed quarterly and reports made publicly available.
- 4 Analyze data:** The committee tracks new data with the baseline data to assess change and monitor compliance of CBA provisions. The committee uses data to identify areas of improvement during implementation and works together to overcome challenges to achieving positive outcomes for workers and residents.
- 5 Long-term evaluation:** Once the timeline concludes, the committee conducts a final evaluation, preferably one to two years later, to measure the long-term impacts of the CBA on workers and residents. Long-term monitoring is essential to ensure CBA benefits persist for residents and workers after project completion. Analyzing post-CBA outcomes provides evidence to secure future CBAs and advance equity in public planning and procurement.



4 RESOURCES AND TOOLS

This section defines procedural and distributive principles, and outlines the key indicators and qualitative and quantitative metrics used for evaluation.



Procedural Justice



Recognition

What this means:

Acknowledge past and present systemic and individual harms that disadvantage certain identities over others, and include and engage diverse stakeholders

Why it matters:

Inclusion and engagement of diverse stakeholders ensures provisions deliver community-informed benefits, especially for historically disadvantaged groups

How to measure it (core indicators):

- Diverse representation of organizations, residents, and workers in the coalition
- Public acknowledgement of injustices and local disparities
- Opportunities or pathways that repair past harms and guarantee workers and residents participate in decision-making process and benefit from publicly funded projects and procurement

Metrics for Recognition	
Criteria	Metrics
Inclusion and Engagement of Diverse stakeholders	<ul style="list-style-type: none"> • Number and diversity of organizations in coalition, as well as negotiating and implementing CBA • Number and diversity of residents and workers informed of and engaged in various stages of CBA process
Acknowledgement of Past and Present-day Harms that Disadvantage Certain Identities Over Others	<ul style="list-style-type: none"> • Corporations and local governments acknowledge the disparities and discrimination certain demographics experience in local communities through various methods, such as providing a public statement or transforming the business as usual approach to be more inclusive and equitable • Create opportunities or pathways in the current development and CBA processes that repair past harms and guarantee communities and workers participate in and benefit from proposed projects
Solidarity within the Community to Achieve Fair CBA Processes and More Equitable Economic Development	<ul style="list-style-type: none"> • Build a labor-community coalition that promotes solidarity and strengthens communities to engage in a fair CBA negotiation process with corporations • Labor-community coalition and CBA process influences the enactment of more equitable local economic development policies, programs, or practices that encourage community participation and better outcomes for local residents



Representation

What this means:

Guarantee fair access for all stakeholders as well as influence and ownership over various stages of the CBA process

Why it matters:

Fair access, influence, and ownership of process builds community and worker power to engage in the decision-making process

How to measure it:

- Clearly defined stakeholder roles and responsibilities
- Capacity-building resources
- Institutionalized conflict management process
- Early stage community engagement

Metrics for Representation	
Criteria	Metrics
Fair Access, Influence and Ownership of Process	<ul style="list-style-type: none"> • Identify roles and responsibilities for all stakeholders within the decision-making processes in the coalition and among CBA stakeholders • Public/philanthropic funding and resources to build capacity for community engagement without accepting resources from project owner
Mitigation of Institutional Discrimination and Unequal Forms of Power	<ul style="list-style-type: none"> • Structured and institutionalized processes to reduce tension, conflict, and power differentials among stakeholders
Community Engagement Early on in Process	<ul style="list-style-type: none"> • Community engagement in CBA and planning processes occur prior to government approval of project, when possible





Participation

What this means:

Democratic decision-making process builds collaborative and respectful relationships and creates space to meaningfully participate

Why it matters:

A structured, informed, and collaborative CBA process provides communities and workers opportunity to shape decisions and deliver equitable outcomes

How to measure it:

- Defined decision-making process within coalition and across all stakeholders
- Respectful, collaborative relationships within coalition and among all stakeholders
- Authentic dialogue in each stage
- Mutual learning and knowledge sharing among stakeholders

Metrics for Participation	
Criteria	Metrics
Structured Process that is Adaptable to Changing Circumstances	<ul style="list-style-type: none"> • Number of democratically engaged community coalition meetings • Type and frequency of community engagement processes and activities • Develop detailed decision-making process for the coalition and among all CBA negotiation and implementation stakeholders <ul style="list-style-type: none"> ◦ Identify a clearly defined and specific agenda, ground rules, and objectives at various stages of the CBA process • Determine a process for engaging and informing the community on campaign, negotiation, and implementation processes • Flexible implementation process to adapt to unforeseen and foreseeable circumstances
Community Access to Information	<ul style="list-style-type: none"> • Government and corporations are responsible for sharing accurate information of project and planning process with local community and coalition
Respectful Relationships with Effective and Open Collaboration	<ul style="list-style-type: none"> • Build a respectful and collaborative relationship among all stakeholders • Government and corporations should foster trust among community and coalitions by receiving cultural competency training and addressing the inequalities historically disadvantaged communities experience
Authentic Dialogue	<ul style="list-style-type: none"> • Genuine, effective, and authentic dialogue in organizing, negotiation, and implementation processes
Mutual Learning	<ul style="list-style-type: none"> • Mutual learning and sharing of knowledge amongst all stakeholders will create a more effective and collaborative process



Accountability

What this means:

To ensure all stakeholders are held accountable, the process is transparent and encompasses strong reporting, monitoring, evaluation, and enforcement mechanisms

Why it matters:

Transparency builds relationships, reduces power imbalances, and ensures labor-community coalitions can track progress and enforce commitments

How to measure it:

- Clearly identified and regularly reported CBA metrics (e.g., quarterly)
- Active implementation committee with diverse community and worker representation
- Formal conflict-resolution and non-compliance procedures
- Community and worker involvement at every stage of the CBA

Metrics for Accountability	
Criteria	Metrics
Identify Metrics	<ul style="list-style-type: none"> • Clearly defined and specific metrics to measure CBA provisions
Regular Reporting	<ul style="list-style-type: none"> • Regular (preferably quarterly) reporting of CBA implementation • Online database that is accessible to the public and updated regularly
Monitor and Evaluation	<ul style="list-style-type: none"> • Implementation committee(s) <ul style="list-style-type: none"> ◦ Meets regularly to monitor and evaluate the attainment of outcomes ◦ Diverse members, including community participation
Enforcement	<ul style="list-style-type: none"> • Structured conflict and dispute resolution process with a procedure for non-compliance
Transparency	<ul style="list-style-type: none"> • Community and workers are informed of or involved with every stage of the CBA process • Negotiation and implementation process is transparent to all stakeholders





Distributive Justice



Economic Equity and Worker Empowerment

What this means:

Promote access to high-road jobs and improve job quality for local residents with a priority for historically disadvantaged individuals

Why it matters:

Expanding access to high quality, good jobs boosts workers' upward mobility and supports long-term community economic growth

How to measure it:

- Increase in economic mobility (e.g., equitable training and hiring practices)
- Expanded access to union representation and worker rights
- More inclusive and equitable workplace culture

Metrics for Economic Equity and Worker Empowerment	
Criteria	Metrics
Economic Mobility	<ul style="list-style-type: none"> • Reduction in community poverty rates, particularly for historically disadvantaged individuals • Increase in labor force participation rate for prime-age employment-to-population (ages 25–54) • Minority-owned and women-owned business enterprise (MWBE) utilization rate and award amount for contractors, subcontractors, suppliers, etc. • Number, percentage, or funding amount to support the incubation, acceleration, or expansion of small businesses, MWBEs, and veteran-owned businesses • Average wage of new jobs compared to local living wage • Increase in an individual's new wages compared to prior wages • Decrease in unemployment rate • Increase in the percentage and number of historically disadvantaged individuals (e.g., people of color, women, low-income, systems impacted) in high-paying and high-quality jobs • Increase in percentage of jobs that pay a living wage • Increase in household income at 20th, 50th, and 80th percentiles
Worker Rights and Protections	<ul style="list-style-type: none"> • Employers recognize workers' right to collective action, including organizing without interference • Employers respect, recognize, and do not interfere with union and union activities • Workers have the ability to negotiate collective bargaining agreement with their employer

continued

Criteria	Metrics
Inclusive and Equitable Workplace Culture	<ul style="list-style-type: none"> • Worker advocacy system, including discrimination and harassment complaints system • Sense of belonging in the workplace, especially for workers who face discrimination and exclusion on the basis of their demographic background • Diversity, equity, inclusion, and accessibility initiatives in the workplace • Culture of feedback and increased worker participation in the decision-making process • Improved work-life balance with a family-friendly workplace culture and programming
Equitable Hiring Practices	<ul style="list-style-type: none"> • Fair hiring practices and programs, such as ban-the-box hiring policies • Workforce development system, such as sectoral partnerships and targeted outreach, to create more pathways for historically disadvantaged populations to access employment and training opportunities • Funding for outreach and recruitment for historically marginalized individuals for hiring • Funding for employment supplies and uniform





Education and Workforce Training

What this means:

Create equitable access to educational opportunities with wraparound supports and ability for career advancement

Why it matters:

Expanding education and training opportunities increases access to high quality careers for historically disadvantaged individuals

How to measure it:

- Equitable access to training and educational opportunities
- Increased educational attainment
- Promote career mobility and advancement

Metrics for Education and Workforce Training	
Criteria	Metrics
Equitable Access to Training and Educational Opportunities	<ul style="list-style-type: none"> • Training, pre-apprenticeship, and apprenticeship programs with wraparound supports • Sector partnerships with existing workforce development partners, including community entities to advance workforce training and education programs • Participant stipends for pre-apprenticeship program • Funding for outreach and recruitment of historically marginalized individuals for training programs
Educational Attainment	<ul style="list-style-type: none"> • Funding for training, apprenticeships, and other educational programs • Total student enrollment per training/educational program and rate of completion • Percentage change or number of individuals who have earned a credential (certificates, high school diploma or equivalent, or degree)
Career Mobility and Advancement	<ul style="list-style-type: none"> • Apprenticeship/job placement and retention rate (construction and post-construction employment), and distribution of placement by employer type, occupation, and skill level • Increase in earnings post-training, compared to previous position • Increase in occupational skills in specific industries





Environmental Justice

What this means:

Right to live, work, play, and to achieve a safe and healthy community

Why it matters:

Sustainable and responsible development and procurement strengthens worker health and safety and creates healthier, more resilient communities

How to measure it:

- Equitable access to environmental benefits
- Protection from environmental harms with enforcement mechanisms
- Enhanced worker and resident well-being

Metrics for Environmental Justice	
Criteria	Metrics
Equitable Access to Environmental Benefits	Creation of and funding for programs, policies, and practices that lead to more economically just and sustainable communities, such as equal access to green space, and clean air and water
Protection from Environmental Harms with Enforcement Mechanisms	<ul style="list-style-type: none"> • Funding for environmental mitigation and monitoring • Development of practices and programs to prevent and reduce environmental pollution, such as improved air quality • Sustainable construction practices and use of renewable energy
Worker and Community Well-being	<p>Worker Health and Safety</p> <ul style="list-style-type: none"> • Number of participants who receive occupational health and safety training, such as OSHA-10 • Reduction in workplace injuries, illnesses, and deaths • Development of worker safety committees • Elimination and replacement of the use of toxic chemicals • Implementation of strong health and safety standards, procedures, and compliance • Funding for personal protective equipment (PPE) • Number of individuals who received PPE <hr/> <p>Enhance Residents' Well-Being</p> <ul style="list-style-type: none"> • Number of individuals with health insurance • Funding for or increase in the number of residents accessing mental, substance abuse, and physical health services • Reduction in neighborhood mental health or physical health illnesses, such as diabetes, post traumatic stress disorder (PTSD), congestive heart failure (CHF), substance use disorders, depression, cancer, and heart disease • Funding for or increase in the number of residents accessing healthy and nutritional food • Funding for or increase in the number of residents accessing physical fitness and exercise opportunities • Reduction in food insecure individuals



Community Resources and Empowerment

What this means:

Advance social and economic mobility and improve people's quality of life with increased access to community resources and services

Why it matters:

Strengthens social and economic foundations that allow residents and workers, especially historically disadvantaged individuals, to thrive

How to measure it:

- Expand equitable access to affordable housing, transportation, dependent care, and other social needs (e.g., legal services, financial literacy, broadband)
- Personal support and growth, including case management and professional development

Metrics for Community Resources and Empowerment	
Criteria	Metrics
Equitable Access to Affordable Housing, Transportation, Dependent Care, and Other Social Needs	Transportation <ul style="list-style-type: none"> • Funding for or number of individuals who accessed vehicle to work programs • Funding for, number of individuals, or number of rides provided for access to public transportation programs • Funding program to support transportation (public or private) to and from work or workforce development training programs • Funding to improve transportation infrastructure, including public transit • Decrease in the share of income spent on transportation for a family of three at 50% Area Median Income (AMI)
	Dependent Care <ul style="list-style-type: none"> • Number of workers or amount of funding distributed to support child and other dependent care
	Affordable Housing <ul style="list-style-type: none"> • Portion of new rental or housing units included on a project are designated as affordable housing, including at 80% AMI or less • Increase in the number of affordable and available housing units per 100 households with low, very low, and extremely low incomes • Increase in the percentage of individuals, particularly historically disadvantaged, who are homeowners
	Supportive Services <ul style="list-style-type: none"> • Decrease in the percentage of adults with debt in collections • Increase in the percentage of households with a computer and broadband internet subscription in the home • Number of individuals receiving legal services or allocated funding
Personal Support and Growth, Including Case Management, Professional Development	Case Management and Professional Development Support <ul style="list-style-type: none"> • Number of individuals receiving case management services or allocated funding • Number of individuals receiving job readiness and personal development training or funding for training

About CBARC

Jobs to Move America (JMA) is a strategic research and organizing center dedicated to building an equitable and sustainable society with workers and communities by ensuring that public spending promotes the public good. JMA takes a comprehensive approach to its work, and has trailblazed the successful use of community benefits agreements to create high-quality, inclusive jobs in the manufacturing sector. Community benefits agreements are a tool JMA uses to ensure concrete benefits for workers and impacted communities.

The Jay Mehta Community Benefits Agreement Resource Center (CBARC) is a program of JMA that seeks to meet the critical moment of investment in clean and green technology manufacturing by advancing the negotiation of effective and equitable CBAs.

@ Contact CBARC at cbarc@jobstomoveamerica.org for questions about the social impact model or if you see an opportunity to connect on this work.



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