



# Buying With Impact

## Social Enterprise Procurement Playbook

Strategies, Practices & Resources to enable Advanced Education Institutions to amplify the social impact of their purchasing



# Acknowledgments

The Buying With Impact Project (BWI), led by MaRS Discovery District, included advanced education institution partners, advisors, and additional supporting organizations.



## MaRS Discovery District

BWI was led and managed by MaRS Discovery District (MaRSDD). It also conducted research, designed and developed procurement interventions, and wrote reports for the BWI Project.



## Advanced Education Institutions (AEIs)

Ryerson University and The University of Toronto, Scarborough and St. George campuses, partnered with MaRS and participated in the design and development of the procurement changes in the BWI Project. AEIs also provided guidance and input on materials and BWI initiatives through an Advisory Board.



## Social Venture ConneXion (SVX)

SVX is a financial services firm that designs strategies, manages products, and mobilizes capital for impact ventures, funds, organizations, and investors. SVX provides a platform for **capital raising and making investments** in cleantech, health, education, food, and people.



## Ontario Education Collaborative Marketplace (OECM)

OECM played an advisory role on the BWI Project, advising on the focus of research and direction for impact procurement in post-secondary institutions. OECM also provided insight to relevant local, national and international regulations, policies and trade agreements.



## AnchorTO

AnchorTO is a coalition of Anchor Institutions across Toronto committed to incorporating social procurement into their practices. In addition to supporting the adoption of the BWI procurement changes across these institutions, AnchorTO played an advisory role on the BWI project in the shaping and delivery of the project's initiatives.

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# About the BWI Project

BWI worked in partnership with AnchorTO, AElS and social enterprises to study, then co-design and prototype impactful, feasible, and viable approaches to social enterprise procurement.

The Buying With Impact (BWI) project is about developing practices that enable Advanced Education Institutions (AEIs) in Toronto, the Greater Toronto Area, and beyond to procure more goods and services from social enterprises. The MaRSDD project team worked in partnership with AnchorTO, AEIs and social enterprises to study, then co-design and prototype new approaches to social enterprise procurement. The aim was to create practices that would be impactful, feasible, and viable.

The BWI project builds on previous work to develop capacity for social enterprise procurement completed by groups such as Buy Social Canada, AnchorTO, and the B Lab in developing B-Corp Certification. As well this work links to the Investment and Readiness stream of the federal Social Finance Fund and the provincial Procurement and Investment Readiness Fund (PIRF), both of which were created specifically to build social enterprise capacity by enabling people to invest in their businesses.

This Playbook shows universities, colleges, research institutes, and other centres of post-secondary learning a number of ways in which they can make social enterprise procurement integral to their purchasing practices. The information provided here is based on the tools and insights co-created by AEIs and social enterprises during the BWI project.

# Why This Playbook? Why Now?

Increasingly, government, for-profit businesses, institutions, and nonprofits are turning to social procurement in order to leverage more value from their purchasing decisions. Simple *procurement* is a business transaction, whereby specific value is obtained at the lowest price. By contrast, *social procurement* enables buyers to turn their purchases into powerful instruments for the creation of social value.\* *Social enterprise procurement* is a way for buyers to target their procurement at *suppliers who specialize in adding social value to commercial activities*: social enterprises. In other words, social enterprise procurement is a specialized form of social procurement. It leverages the creation of social, environmental, and economic value and improved outcomes in local communities through the purchase of goods and services from social enterprises.

AEIs can play an important role in developing and practicing social enterprise procurement. Well beyond the education they provide and the research they support, AEIs are community “anchors.” They are significant local employers, buyers, and hubs of social and cultural life. Moreover, they are committed to having a positive, transformative impact on their immediate surroundings and the community at large.

This Playbook explains how AEIs in Toronto, the Greater Toronto Area, and beyond (especially post-secondary institutions) can boost their local and community impact through social enterprise procurement. The smaller purchases made day-to-day by AEIs, as opposed to larger purchases such as those over \$100,000, can bolster social enterprises and help AEIs deliver on their social missions and mandates.

Adapting AEI procurement practices to the needs and capacities of social enterprises does not come easy, however. The Buying With Impact (BWI) project was launched to explore ways of making social enterprise procurement a viable and feasible option for AEIs in Toronto, the Greater Toronto Area and beyond.

*“Transforming procurement today for a better tomorrow.”*

Social enterprise procurement targets suppliers who specialize in adding social value to commercial activities: social enterprises.

\*LePage, D. (2014). Exploring social procurement. *Accelerating Social Impact*. CCC Ltd, Vancouver, B.C.

# What is Social Enterprise Procurement?

More and more, public procurement is about leveraging societal value from purchases. There is a growing realization of the societal responsibility inherent in procurement activities.

Public procurement is the process by which AEIs and other public sector organizations acquire necessary products and services at the best possible cost, quality, and timing.\* More and more, it is also about the leveraging of societal value from purchases. There is a growing realization among institutions of the societal responsibility inherent in procurement activities. In the course of meeting an organization's need for goods, services, works and utilities, there are also ways to create significant value for society, environment and the economy.

This is called *social procurement*. In the context of public sector purchasing, social procurement involves the utilization of procurement to achieve social objectives that as yet are not captured in institutional policies and norms. Certain staff, departments or mandate driven offices from an institution, such as a Sustainability or Diversity Office, might have a specific social mission to reduce greenhouse gas emissions for a part of a campus, or recruit students for work from a specific community. However, these social missions might not yet be a formal part of an institution's overall mission and strategic plan. A powerful mechanism by which AEIs can carry out social procurement is by purchasing from social enterprises, thereby elevating social procurement to social *enterprise* procurement.

Social enterprises specialize in adding social value to their commercial activities by benefiting disadvantaged groups in the community. The profits of social enterprises are reinvested back into the community rather than distributed to private shareholders. Furthermore, the performance of social enterprises is judged by the difference they make to the communities in which they operate (their social impact) rather than by the profits they generate for private shareholders. In their operations, social enterprises demonstrate innovative ways to achieve public benefit. They often employ people who typically have more difficulty finding jobs, such as at-risk youth, Aboriginal people, persons with disabilities, newcomers or those with mental health or addiction challenges.

\*Brammer, S., & Walker, H. (2011). Sustainable procurement in the public sector: an international comparative study. *International Journal of Operations & Production Management*, 31(4), 452-476.

Loosemore, M. (2016). Social procurement in UK construction projects. *International Journal of Project Management*, 34(2), 133-144.



# What are Social Enterprises?

Social enterprises seek to achieve measurable social and environmental impact alongside financial return from their operations.\* They share five features: 1) they earn revenue; 2) the social impact of their business activities is intentional; 3) they measure and report on this impact; 4) this impact grows in step with the growth of the business; and 5) the primary focus of business activity is to contribute to solving a key societal issue.

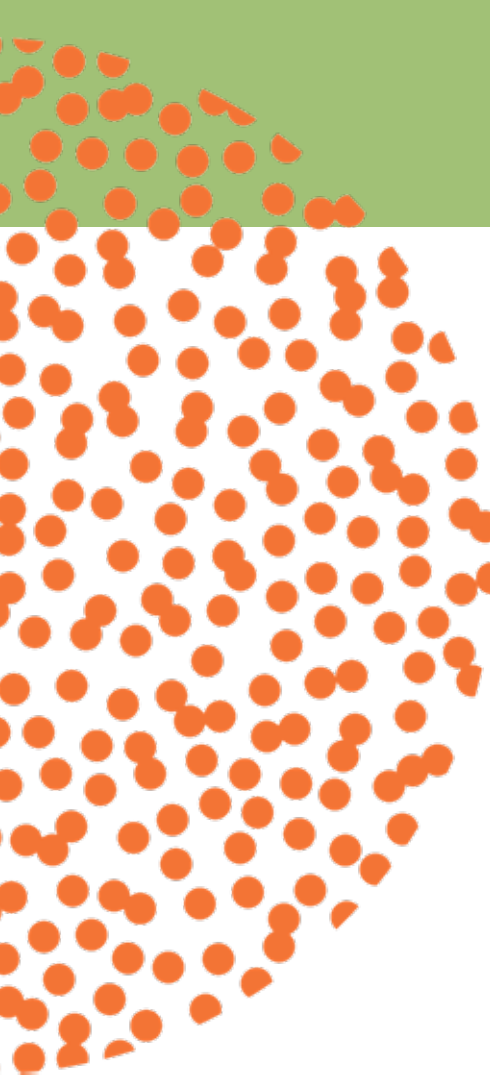
Social enterprises operate at the intersection of traditional charities and traditional businesses. Traditional charities depend predominantly on grants, donations, and endowments to cover their costs of operation. Even when charities earn market-based revenue, their mission is to exclusively maximize social profit, so the revenues go directly to support nonprofit operations. Social profit is the result of positive social impact. Conversely, the mission of traditional businesses is the maximization of financial profit. Businesses that run corporate social responsibility and corporate philanthropy programs, while important, perceive social benefit to be ancillary or secondary to financial profit. This includes for-profit organizations with 1-for-1, donation and offset philanthropy programs.

The table below outlines the key features of social enterprise, charities, and traditional businesses.\*\*

\* Government of Ontario. (2015, December 30.) Impact: A Social Enterprise Strategy for Ontario. Retrieved from <https://www.ontario.ca/page/impact-social-enterprise-strategy-ontario#section-3>

\*\*Adapted from CAF Venturesome. CAF: Charities Aid Foundation and Ryder, Paul & Vogeley, Joanna. (2017). Telling the impact investment story through digital media: an Indonesian case study. *Communication Research and Practice*, 4, 1-21.

	Primary driver is to achieve SOCIAL VALUE		Achieve measurable SOCIAL IMPACT alongside FINANCIAL RETURN			Primary driver is to achieve FINANCIAL VALUE	
	TRADITIONAL CHARITY		SOCIAL ENTERPRISE			TRADITIONAL BUSINESS	
			Not-for-profit	For-profit			
Funding Model	Purely charitable funding from grants, donations, or endowment	Additional market-based revenue stream	Potentially self-sustaining >75% market revenues	Social Business: Profits are reinvested	Mission-driven for-profit enterprise ("B-Corp")	Corporate social responsibility (CSR) & philanthropy	Pure profit orientation
Business Model	NA: No business model	Sales not necessarily linked to mission; Revenues fund the NFP	Intentionally creates direct impact through a business model that tackles a market shortfall or externality		Uses socially responsible principles in ops. Eg: procurement, production, etc.	Social benefit is not built into business model. Impact is ancillary, optional, or reliant on profit (CSR: 1-for-1, donations, offsets)	
Example	Big Brothers, Big Sisters	Charity thrift stores	Good Foot Delivery	Lucky Iron Fish	Ben & Jerrys	Kimberly Clark	Walmart
Focus	Youth mentorship services	Lower-cost goods	Jobs for people with disabilities	Iron deficiency in vulnerable populations	Responsible agriculture	Personal care products	Convenience shopping
Impact Measure	# participants connected	# items re-used	# hours employment	# people with improved iron status outcomes	Certified humane eggs, FairTrade ingredient	FSC-certified paper products; CSR program	N/A



The purpose of a social enterprise is to achieve social and financial profit simultaneously. These organizations intentionally create social impact by leveraging a market shortfall or externality that limits social good. This impact is either a direct result of the product or service offered by the enterprise, or a direct result of the socially responsible practices present in their business operations. Social enterprises must be self-sustaining, with at least 75% of revenues derived from the market. These profits can be completely reinvested in the business, or the enterprise can operate as a mission-driven, for-profit entity.

The Canadian social enterprise landscape is expansive and poised for growth. As of 2016, there were approximately 10,000 social enterprises in Ontario, employing an estimated 160,000 people and serving 3.4 million customers per year. In 2016, Quebec was home to 11,200 social economy organizations that generated over \$47 billion in revenues and 220,000 payroll jobs. In 2017, the Canadian organic food and beverage market was valued at \$4.4 billion. More social enterprises are created each year to address the growing need for private sector actors to take a more proactive role in meaningful social and environmental impact.\*

BWI's AEI stakeholders, Ryerson University and University of Toronto, have yet to use social enterprise procurement extensively. They described some standalone social procurement efforts, such as one-off purchases by a professor or department, or the establishment of specific initiatives, such as the University of Toronto Green Offices Program. Current support for social enterprises primarily focuses on offering incubation or acceleration services, such as co-working spaces, cross-disciplinary experiential learning labs or seed funds for social innovators, for example, Ryerson DMZ, University of Toronto Entrepreneurship and York University Entrepreneurship Development Institute. However, there is no systematic approach across the AEIs, and the executive decision to actually buy from and strengthen social enterprises for the purposes of the AEI itself, is missing. One opportunity in this regard is to integrate local social enterprises into an AEI's procurement process. This strategy can meet the procurement needs of the AEI while generating social benefits for the wider community and boosting the capacity of those social enterprises so they can access a wider array of public sector buyers. This would be a fruitful partnership for all concerned.

So what's keeping these partnerships from happening? What can AEIs and social enterprises do to turn this situation around?

\* Canadian Organic Market Report 2017. (2017). Retrieved June 27, 2019, from [https://ota.com/sites/default/files/Canadian Organic Market Report 2017 teaser.pdf](https://ota.com/sites/default/files/Canadian%20Organic%20Market%20Report%202017%20teaser.pdf)

Government of Ontario. (2016, June 21). Ontario's Social Enterprise Strategy 2016-2021. Retrieved from <https://www.ontario.ca/page/ontarios-social-enterprise-strategy-2016-2021>

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Marceau, S., & Routhier, C. (2016). *L'économie sociale au Québec: Portrait statistique 2016*. Retrieved June 27, 2019, from <http://www.stat.gouv.qc.ca/statistiques/economie-sociale/portrait-economie-sociale-2016.pdf>





**GoodFoot** is a point-to-point courier service that provides meaningful employment for the neuro-diverse community. Delivery occurs on-foot and with public transportation to reduce environmental impact by maintaining a low-carbon footprint. GoodFoot's AEI clients include University of Toronto and York University. In 2013, the University of Toronto's Social Economy Centre determined that every \$1 invested with GoodFoot generated \$2.36 in social value.



Large AEIs with social mandates nowadays are unable to realize positive social impacts from the products or services they purchase. For example, colleges and universities generally hire large supplier couriers such as UPS for shipping. Yet there are social enterprise courier services that deliberately hire local youth in flexible working arrangements so they can gain work experience, earn income and potentially attend courses at those very universities and colleges. Why the disconnect? The research of the BWI project identified four barriers, and four opportunities to resolve this divide.

# The Current AEI Procurement Process

BWI identified eight stages in current AEI procurement. Four barriers to social enterprise procurement were identified in this process, as well as four opportunities.



The partner institutions engaged in the BWI project shared an 8-stage procurement process: 1) Learning and awareness, 2) Identify need, 3) Develop Requirements and Standards, 4) Solicit Suppliers, 5) Commit to Supplier, 6) Provision of Goods and Services, 7) Payment, and 8) Feedback. At each stage purchasers, procurement staff and/or suppliers undertake a variety of individual actions, follow processes, use systems and engage in interactions with others. Four barriers to social enterprise procurement were identified in this process, as well as four opportunities. (See diagram, pp. 14-15.)

## 4 Barriers

### **Institutional Constraints at AEIs**

As open as AEIs may be to social enterprise procurement, internal constraints prevent them from taking action. Restrictive evaluation and assessment criteria during procurement may disqualify social enterprises as suppliers. AEI stakeholders referred to antiquated processes and bureaucratic hurdles, and that the overall strategy and mandate of the AEI may not have a matching social purpose that aligns with purchasing from social enterprises. As public organizations, AEIs follow provincial and national regulations and guidelines, as well as trade agreements. To reduce the risk of non-compliance some AEIs may choose to interpret these narrowly.

### **Satisfaction with the Status Quo**

The procurement processes of AEIs are well-established and tailored to their specific needs. That means the status quo by and large enjoys a great deal of satisfaction, whereas change connotes risk – for example, risk to the institution's reputation when goods and services are procured from new suppliers. AEIs hesitate to procure from social enterprises whose business models, capacities, and availability are little known or understood. AEIs will often feel compelled to compare social enterprises with conventional commercial vendors and assess their goods and services strictly in terms of economics and price, regardless of the business's social mission. The convenience and comfort of the status quo can make AEIs highly resistant to change.

## Asymmetries of Time and Pace

AEIs and social enterprises differ greatly in their planning horizons and operation cycles. Social enterprises operate in a very fast-paced, ever-changing environment and prefer a predictable cash flow. Their planning horizon is around 30-60 days. Contrast that to the very stable environment in which AEIs operate, with purchasing cycles based on the academic year. Decision processes at AEIs slow down during the high-intensity teaching periods of fall, winter and spring, and accelerate in the summer. Furthermore, procurement decisions have to go through lengthy approval cycles. This misalignment poses a major hurdle for social enterprises, which lack the means to accommodate lengthy pay cycles and bureaucratic processes. It often discourages AEIs and social enterprises from forming lasting partnerships.

## Limited Capacity of Social Enterprises

Many social entrepreneurs have no experience working with AEIs. They must invest valuable time and resources in networking to establish the right contacts. When a connection is made with an AEI, social enterprises have difficulties explaining their social value and understanding AEI's procurement processes. Therefore, social enterprises often depend on internal champions from the AEI to initiate contact with the procurement team or other purchasing departments that might be interested in their goods or services.

Social entrepreneurs are actively concerned citizens that recognize social problems and strive for immediate solutions. They are driven by their passion and vision to find practical ways to both give back to, and fix an aspect of the community that is simply not working.

Social entrepreneurs are proactive. They do not rely on the shifting priorities of government or major foundations to achieve their vision. Rather than leaving societal needs to the government or business sectors, social entrepreneurs find what is not working and solve the problem by changing the system, spreading the solution, and persuading entire societies to take new leaps. Social entrepreneurs are closer to where the problem occurs and they often understand their community's needs.

**Blue Ocean Office Supplies** is an environmentally-friendly ink and toner retailer that sources recycled and remanufactured ink and toner products and resells them at an affordable price. AEIs purchasing from Blue Ocean include offices at Ryerson University, University of Waterloo and University of Guelph. In addition to environmental responsibility, the company commits to impact by providing a 10% pre-tax rebate on all sales to positive social organizations.



## 4 Opportunities



### **Revise AEI procurement policies and procedures**

We heard from AEI stakeholders about opportunities to update existing procurement policies and procedures that they thought were outdated and/or rigid. AEIs can try to better accommodate the limitations of social enterprises. For example, offer prompt payments or shorter payment periods, and more predictable order volumes. AEIs should also consider revising procurement decision criteria to consider the price of a purchase, and its social value to the community. AEIs can also consider ways to encourage and incentivize buying from new suppliers, including social enterprises.

### **Increase knowledge exchange between stakeholders**

AEIs and social enterprise don't know a lot about each other, including their respective needs and capabilities. AEIs would benefit from training sessions about social enterprises – their products, capacity, and social values and impact. Social enterprises would benefit from training sessions about an AEI's procurement processes – its formalities, assessment criteria and procurement capacities. This would increase transparency for all partners and thus encourage proactive behaviour.

### **Share value systems**

While AEIs recognize their responsibility to support local communities as well as their role in addressing the UN Sustainable Development Goals (SDGs),\* this is not always manifested in procurement decisions. Internal leaders and champions can make procurement processes more focused on specific social, economic and environmental targets. Additionally, procurement teams could learn more from social enterprises about their values and how they can be aligned with the AEI's mandate to create value for students, employees and the community.



\*The Sustainable Development Goals are 17 goals set by the United Nations in 2015. They establish targets on a range of key issues (including poverty reduction, production and consumption, education, energy, equality, health and well-being, and the environment) in order to enable member states to make the world a better place by 2030.



## Leverage common AEI procurement behaviours

AEIs share a number of common features and behaviours in the procurement processes and practices. Most purchase orders follow a cycle that aligns with the academic year. This may also help social enterprises better predict AEI demand. The shared timing and requirements of purchase orders means AEIs could make volume purchases together, providing larger and more predictable sales for social enterprises.

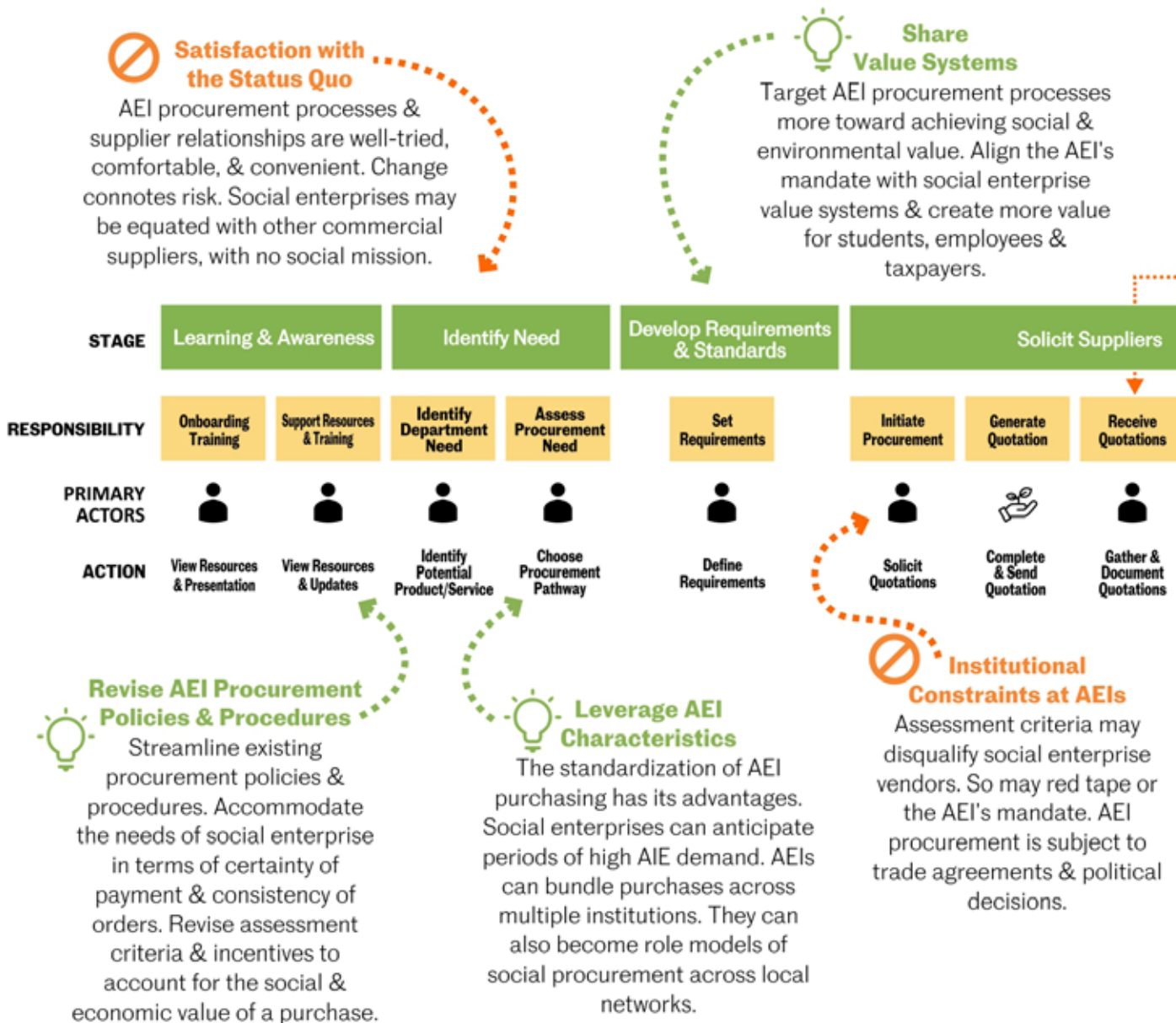
**GoJava** is an environmentally-friendly coffee pod supplier that provides carbon-neutral delivery and recycling for used coffee pods. Its closed loop strategy allows people to enjoy coffee pods while simultaneously reducing their environmental waste. AEIs who have worked with GoJava include departments at University of Toronto and Ryerson University. Since GoJava's launch, the company has diverted over 150,000 pounds of waste from landfills, recycled over 2M coffee pods, and planted over 16,000 trees.





# Procurement Process, Barriers, & Opportunities

BWI Project participants identified 8 stages in AEI procurement, each with particular tasks performed by various actors. 4 barriers to social enterprise procurement were identified, and 4 opportunities.





**“Moment of Truth”**  
The absence of sufficient responses to RFQs can seriously delay the decision to issue Purchase Orders.

**“MOMENT OF TRUTH”**



**Limited Capacity of Social Enterprises**  
Most social enterprises are small & lean. Barring an internal champion, they have to invest scarce time & resources networking with AElS & marketing social enterprise to them.

**Asymmetries of Time & Pace**  
Social enterprises operate in an ever-changing environment with a 30-60 day planning horizon. AEl decision processes slow down in fall, winter & spring, then accelerate in summer.

**Increase Knowledge Exchange**  
Raise awareness of the organizations' respective needs & capabilities. Train AElS in the products, capacity & social values & impact of social enterprise. Train social enterprises in AEl procurement processes – formalities, assessment criteria & capacities.

NB: The names of some stages differ from institution to institution. Sometimes a stage has no name at all.

# Implementing Social Enterprise Procurement

BWI surfaced 14 initiatives to leverage the opportunities and resolve the barriers. Some initiatives are more complex; others are quite simple. An implementation plan has been developed for each.

The BWI Project partners surfaced 14 specific initiatives for leveraging these opportunities and resolving pain points and barriers in terms of social enterprise procurement. The recommended initiatives range from modifying AEI strategic priorities to adapting procurement policies, processes, practices, applications and human capacity. We developed an implementation plan for each initiative as our recommendation, to help your AEI achieve targeted outcomes. (See pp. 18-45.)

There is no one way to implement the 14 initiatives. The best implementation approach will depend on the context and culture of your institution. Certain recommended initiatives are more complex while others are quite simple. Therefore, each implementation plan identifies a short-term approach as well as more robust, complete and interconnected solutions in the medium and long term as the implementation of social enterprise procurement evolves over time.

## Degrees of Change

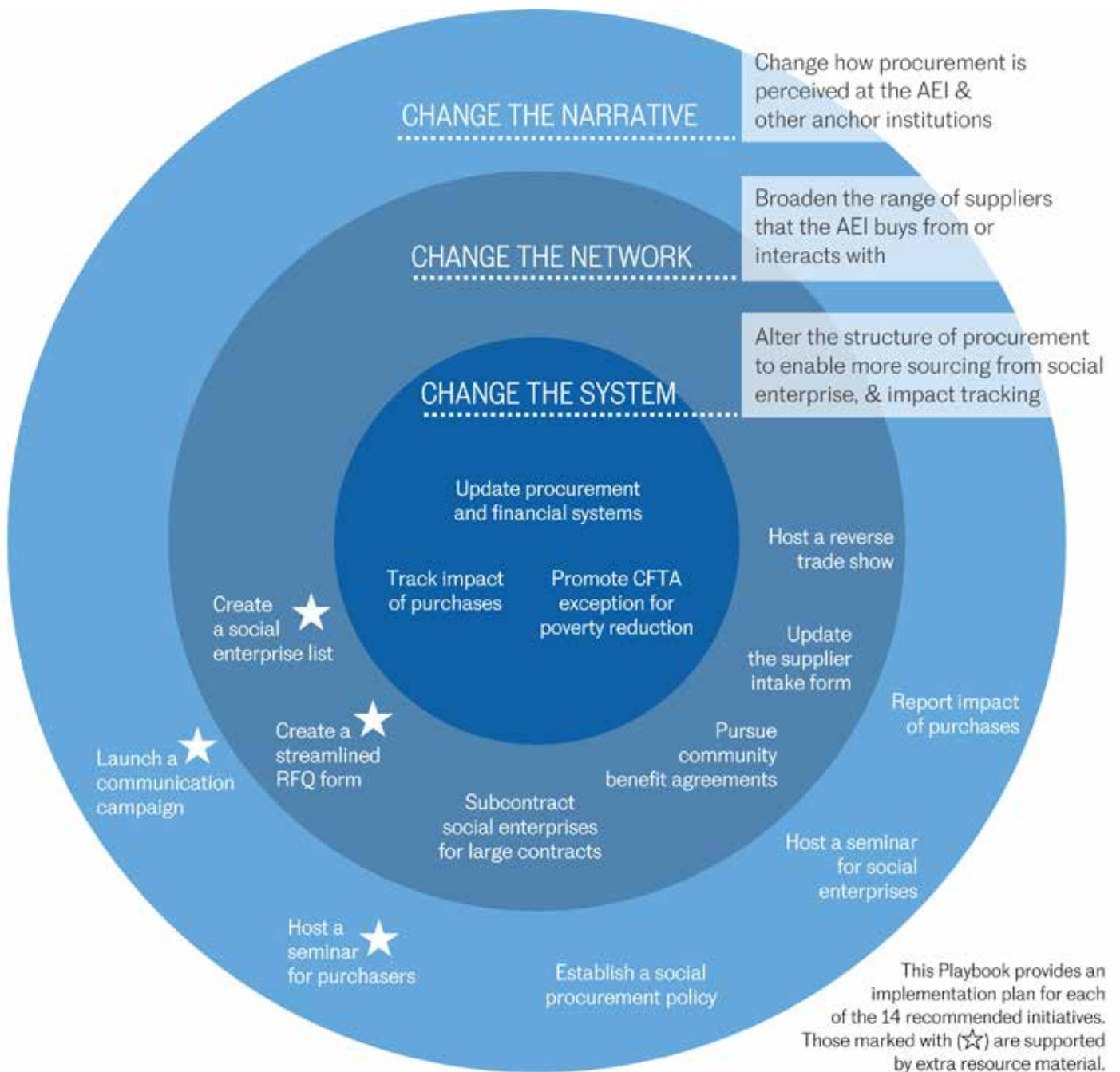
The 14 recommended initiatives require different degrees change within each AEI. They also differ in the level of outcomes that each AEI can expect social enterprise procurement to achieve in local communities. BWI participants categorized three main groups of initiatives, each of which involves a different degree of change:

**Change the Narrative:** initiatives that change the way procurement is perceived at AEIs. Not merely an exchange of a good or service for money, social enterprise procurement is a powerful way to create social and environmental value.

**Change the Network:** initiatives that broaden the range of sources that AEIs interact with or buy from. They may deliberately seek out social enterprises in order to fulfill the AEI's social mission.

**Change the System:** initiatives that alter the structure of procurement itself – the metrics, the forms, the rules and the financial systems. AEIs enable transactions with social enterprises and track the full impact of these transactions over time.

Which degree of change is the best match for your institution's current mission, staffing, and resources? What factors might alter your institution's expectations over time?



Interviews with procurement staff and purchasers surfaced constraints and bureaucratic hurdles that would hinder the ability of social enterprises to participate in AEI procurements for purchases exceeding \$100,000. The Request for Proposals (RFP) requirements of international, national and provincial trade agreements do not apply to purchases under \$100,000. Consequently, the BWI project targeted most of its recommended initiatives at encouraging participation by social enterprises on contracts of \$25,000 to \$99,999 in value.



# Recommended Initiatives that Change the Narrative

## 1. Host a seminar for purchasers.

Create an introductory seminar about social enterprise procurement for your purchasing staff. This could include a walk-through of your AEI's current application of social enterprise procurement and how that aligns with your institution's mandate. The seminar can serve as a venue to solicit staff feedback about their experience of the barriers and opportunities that social enterprise procurement involves. It is also an excellent opportunity to increase staff awareness of the potential impacts of such practices. Consider inviting local social enterprises to attend and discuss their products, services and impact.

Time Frame	Short Term
What	Outlines the AEI's social impact goals, provides a definition of social enterprise, explains the process encouraged by the institution, and how impact will be tracked.
Who	<ul style="list-style-type: none"><li>• <b>Procurement team</b> delivers the seminar.</li><li>• <b>Purchasers</b> attend seminar and provide feedback.</li><li>• <b>Suppliers</b> explain how they run their business, create services/goods, and their impact.</li></ul>
Frequency	Hosted three times bi-weekly in the first months of the initiative.
Implementation	<ol style="list-style-type: none"><li>1. Determine pilot participants (e.g., purchasing heads, department heads).</li><li>2. Plan and book seminars.</li><li>3. Invite relevant participants to a test seminar.</li><li>4. Work with test group to integrate feedback.</li><li>5. Roll out updated seminar across institution.</li></ol>





Medium Term	Long Term
Start to report on preliminary impact data tied to SDGs and the AEI spend.	Arrange to have some social enterprises speak at the seminar and answer questions.
As per Short Term.	As per Short Term.
Hosted quarterly	Hosted quarterly
6. Report impact in the seminar.	7. Reach out to local, relevant social enterprises on the list to ask if they would like to be involved.

**Key Considerations:**

- Start small and target invitations to a test group of purchasers before rolling out to the entire organization.
- This is a less complex solution and can be implemented early on. Nevertheless, ensure enabling infrastructure, such as the Social Enterprise List (see Initiative 8), has been tested and finalized before launch.
- Integrate feedback from attendees on an ongoing basis to improve the seminar and messaging.

**Outcomes:**

Informs and educates purchasers about social impact and social enterprise to encourage purchasing from such businesses and to help purchasers see the connection between the AIE’s mandate and social enterprise procurement.

**Out of the Box (OTB)** is a construction contracting service that exclusively employs historically-marginalized young people in Toronto. The organization also provides them with training and space for personal development, so that they may gain foundational knowledge and skills that can be applied in the future. OTB has worked with the City of Toronto, Toronto Community Housing, and other clients. Since its inception, over 60 marginalized youth have moved through the program.

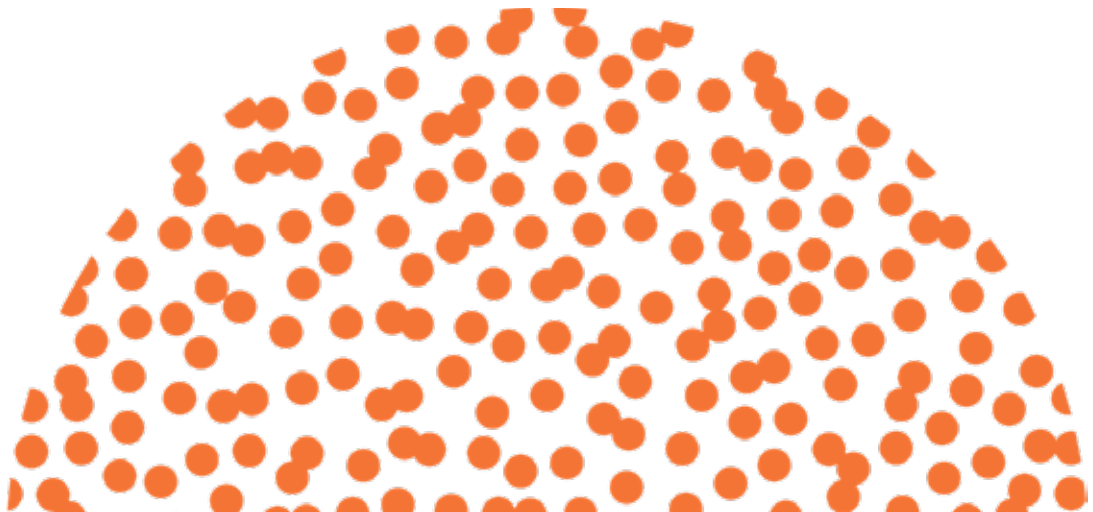


BWI Project members have created “Introduction to Buying with Impact,” a PowerPoint presentation concerning social enterprise procurement, that can be adapted to the context of your institution. You can modify the presentation content to include your institution’s impact mandate, Sustainable Development Goals, and provide more details about social enterprises and recommended purchasing practices within your AEI. The presentation also includes recommendations for tracking social impact. Click here to download a copy of the presentation.

## 2. Launch a communication campaign.

Launch a campaign to encourage purchasers, staff, and faculty to buy with impact. This can be combined with many of the other recommended initiatives, like process improvements (Initiative 14), a Social Enterprise List (Initiative 8) and purchaser seminar training sessions (Initiative 5). A formal, top-down approach to communication can be taken, or it can be an informal, grassroots initiative, depending on the culture and context of your AEI. Guiding purchasers through social enterprise procurement options and actions lowers the barrier to entry by purchasers. When influential change-makers present licence and a path towards change, there is a higher likelihood that change will occur, especially if it is low risk and easy to do.

Time Frame	Short Term
What	Start by informally sharing with internal AEI champions information about the initiative, such as the SE list (Initiative 8) and seminar details.
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> determines the procurement categories and communicates available suppliers to purchasers.</li> <li>• <b>Purchasers</b> choose the supplier to purchase from in each procurement category.</li> <li>• <b>Communications</b> (if the AIE's resources permit) organize institution-wide send-outs.</li> <li>• <b>Champions</b> - Sustainability Office, Diversity Office, Accessibility for Ontarians with Disabilities Act compliance coordinator, Inclusion Office within the AEI.</li> </ul>
Frequency	At least twice before launching a formal annual campaign.
Implementation	<ol style="list-style-type: none"> <li>1. Identify internal AEI champions (Sustainability Office, Diversity Office, Inclusion Office).</li> <li>2. Provide champions with clear messaging and resources about how social procurement can work within the institution (Social Enterprise List, dates for training).</li> <li>3. Have the champions spread information about how to conduct social enterprise procurement to purchasers they think would be receptive.</li> <li>4. Get feedback on the message and update messaging accordingly.</li> </ol>



Medium Term	Long Term
Formalize communication in an email sent to all purchasers in the institution.	Have communications and procurement staff collaborate in the launch of a campaign to raise awareness of social procurement across the AEI and AnchorTO coalition.
As per Short Term.	As per Short Term.
Once or twice a year in advance of a key AEI purchasing cycle (e.g. for academic institutions, in the spring prior to peak purchasing in the summer).	Once or twice a year, strategic to the AEI's average purchasing cycles.
<ol style="list-style-type: none"> <li>1. Identify all purchasers in the institution.</li> <li>2. Streamline communication in an email; attach all relevant resources and training opportunities.</li> <li>3. Identify high-level executive who will send email communication.</li> <li>4. Identify and brief support team to answer any questions after email is sent.</li> <li>5. Send email.</li> </ol>	<ol style="list-style-type: none"> <li>1. Work with communications to draft promotional materials and branding to accompany information.</li> <li>2. Create a communication plan and roll-out of information.</li> <li>3. Leverage communication network at AnchorTO.</li> </ol>

**Key Considerations:**

- Communication can be as simple or as complex as you want and should involve many different channels, depending on the culture and structure of the organization.
- In the early stages, any way you can plant ideas about the initiative will help.
- Consider, even at the early stages of implementation, to have a timeline and plan for a roll-out of information.
- This solution should be launched early in the implementation process and should be linked with the development of several other initiatives.

**Outcomes:**

Inform staff, specifically purchasers, across the organization about the social procurement program in order to build awareness, change behaviours and, in turn, increase purchases from social enterprises.

BWI Project members created an email outlining the BWI initiative and the recommended purchasing process. You can modify the content in this email for your institution. [Click here to download a copy of the email.](#)

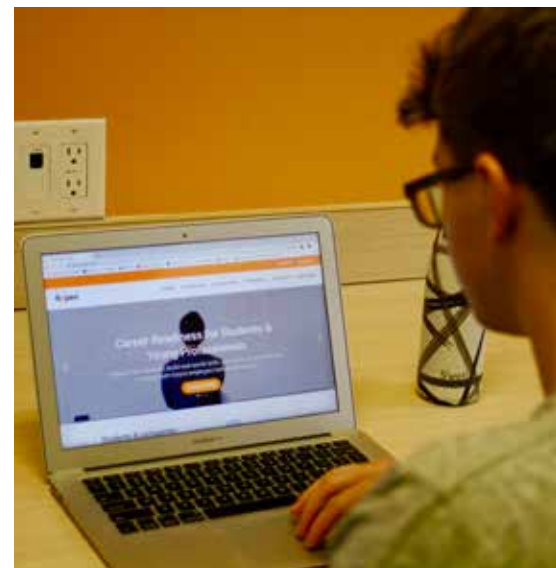
When influential change-makers present licence and a path towards change there is a higher likelihood that change will occur, especially if it is low risk and easy to do.

### 3. Establish a social procurement policy.

Upgrade procurement policies with a declaration of your AEI's social impact mandate and the principles for incorporating social enterprise procurement criteria in the evaluation of suppliers to form the basis for your AEI's desired social impact procurement outcomes. For example, state your AEI's social impact goals as they align with specific Sustainable Development Goals, and add this language to your procurement templates (such as the Request for Quotation presented in Initiative 7). These measures will affirm the importance of purchasing from social enterprises. They can also enable the implementation of other, longer-term strategies of social enterprise procurement.

Consider feedback from purchasers when updating policies. There is a risk that the policy may be perceived as burdensome to them rather than complementary to the goals that they ought to strive for.

Time Frame	Short Term
What	Add social enterprise procurement guidelines in a stand-alone document that could lead to a policy in the medium-term.
Who	<ul style="list-style-type: none"> <li>• Procurement team drafts the policy.</li> <li>• Purchasers/test groups test the policy.</li> </ul>
Frequency	Could involve many rapid iterations based on feedback from users.
Implementation	<ol style="list-style-type: none"> <li>1. Obtain executive buy-in.</li> <li>2. Review best practices and examples from other jurisdictions.</li> <li>3. Draft language and circulate internally for feedback.</li> <li>4. Approve and communicate.</li> </ol>



Medium Term	Long Term
Translate guidelines into language in procurement policies that express the AEI's social impact mandate and the principles on which purchasers could base suitable criteria in the evaluation of potential suppliers.	Mandatory measures added to policy for purchasers to follow.
As per Short Term.	As per Short Term.
Potentially, when the overall procurement policy is open for review and update (perhaps within 5 years).	When the policy is open for review and update after the mid-term actions are evaluated (5 years).
<ol style="list-style-type: none"> <li>1. Obtain executive buy-in.</li> <li>2. Review best practices.</li> <li>3. Update the language and circulate language internally; hook into sustainability committees.</li> <li>4. Approve and communicate.</li> </ol>	<ol style="list-style-type: none"> <li>5. Keep policy current by updating every 5 years to coincide with the institution's strategic plan renewal cycle.</li> </ol>

**Key Considerations:**

- Consider feedback from purchasers when updating policies.
- There is a risk that the policy may be perceived as burdensome to purchasers rather than complementary to the goals that they ought to strive for.
- Drafting new policy is complex and will take >1 year, but social enterprise procurement guidelines or small modifications can be implemented first.
- All other actions do not need to be dependent on updating a policy first.

**Outcomes:**

Acts as a foundational document and resource that supports and emphasizes the importance of social enterprise procurement across the organization.

**Riipen** is a digital platform that connects educators, students, and industry professionals through meaningful, project-based experiential learning. The platform enables 1) companies to access top student talent, 2) educators to offer work-integrated projects, and 3) students to develop practical work experience for future employment. Riipen collaborates with students and educators at over 150 universities and colleges, such as George Brown College and University of Toronto. Its platform has connected over 30,000 students, 10,000 companies and 150 AEIs.





## 4. Report impact of purchases.

Have staff identify social enterprises in your AEI's supply chain in order to track the money spent in social enterprise procurement. Depending on the precision of impact tracking (see Initiative 12), staff might be able to identify the spend towards specific Sustainable Development Goals, such as those declared in your Social Procurement Policy as part of your AEI's social impact mandate. (See Initiative 3.) The impact of bids from different social enterprises could also be reported on, using data collected from the Request for Quotation form. (See Initiative 7.)

Time Frame	Short Term
What	Report on spend aligned to each SDG and include in seminar and on website.
Who	<b>Procurement staff</b> prepares the data for the report. Sustainability office/committee or other impact-related body reports on institutional impact.
Frequency	Quarterly
Implementation	<ol style="list-style-type: none"> <li>1. Define and approve impact categories on which to report.</li> <li>2. Vendor database alignment - create fields in vendor tracking system for linkage.</li> <li>3. Clean data.</li> <li>4. Train buyers to log purchases.</li> <li>5. Design report.</li> <li>6. Run report.</li> <li>7. Promote success on website and seminar.</li> </ol>

Celebrating these successes internally (e.g., through memos or service awards) can help to reinforce these actions and inspire more staff to do likewise. Sharing these successes externally (e.g., through public reports or the website) can create benchmarks to which your AEI is accountable – and which other institutions may choose to imitate, potentially enabling report across multiple AEIs. Initiatives 1, 2, 5 and 9 involve activities that can also serve as venues for such reports.

Sharing successes internally and externally establishes accountability as well as baselines for improvement. It also reinforces purchasing behaviours by demonstrating the value of social procurement.

Medium Term	Long Term
Coordinate with the sustainability committees (or other impact-related body) to include metrics and successes of social procurement in their reports.	Work with social enterprises to combine their data with the AEI spend that is aligned with SDGs to determine broader impact.
Annual report of the AEI's sustainability office/committee or other impact-related body.	Social enterprise spend reports done quarterly by AEI procurement team and updated on procurement website.
Annually	Quarterly report on procurement website
<ol style="list-style-type: none"> <li>1. Define and approve impact categories on which to report.</li> <li>2. Vendor database alignment – create fields in vendor tracking system for linkage.</li> <li>3. Clean data.</li> <li>4. Train buyers to log purchases.</li> <li>5. Create summary presentation based off buyer logs.</li> <li>6. Present at sustainability committees.</li> <li>7. Connect with sustainability office to coordinate reporting.</li> </ol>	<ol style="list-style-type: none"> <li>1. Define and approve impact categories on which to report.</li> <li>2. Vendor database alignment - create fields in vendor tracking system for linkage.</li> <li>3. Clean data.</li> <li>4. Train buyers to log purchases.</li> <li>5. Reach out to social enterprises on a quarterly basis to request impact data.</li> <li>6. Translate into shareable successes on website, seminar, sustainability reports.</li> </ol>

**Key Considerations:**

- Consider engaging social enterprises early on to determine what type of data you can receive. Certain social enterprises, specifically B-Corps, have identified that it is easy for them to report on impact.
- Consider having a central repository of reports and impact data captured for the broader AnchorTO coalition, hosted by AnchorTO.
- Reporting impact can only be done if the appropriate tracking mechanisms have been implemented first.

**Outcomes:**

Share successes internally and externally to establish accountability and baselines for improvement while also reinforcing purchasing behaviours by demonstrating the value of social procurement.



## 5. Host a seminar for social enterprises.

Bring social enterprises up to speed on how your AEI makes purchasing decisions. Host a seminar that explains your AEI's social mandate, Requests For Quotation (RFQs), payment periods for purchase orders, purchasing cards, payment through assignment, and other direct payment options as applicable to your AEI. The seminar could also be very informative for purchasing staff in your AEI. (The inclusion of purchasers may also entice more social enterprises to take part.) Participant feedback could improve the seminar's content and your AEI's social procurement practices. Inviting suppliers and purchasers from other institutions to your event could trigger a significant knowledge exchange between suppliers and purchasers.

Time Frame	Short Term
What	Host a seminar to train social enterprises on anchor institution policies and processes.
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> plans and hosts seminar.</li> <li>• <b>Social enterprises</b> attend seminar.</li> </ul>
Frequency	Quarterly
Implementation	<ol style="list-style-type: none"> <li>1. Work with social enterprises to determine knowledge gap. Interview social enterprises when they are added to your AEI's Social Enterprise List. Determine how much they know about your AEI's procurement. Send them the social enterprise seminar to learn more about it. (They could also inform seminar content.)</li> <li>2. Book and plan training seminars.</li> <li>3. Develop content.</li> <li>4. Identify social enterprises to invite (targeted).</li> <li>5. Draft and send invitations.</li> </ol>



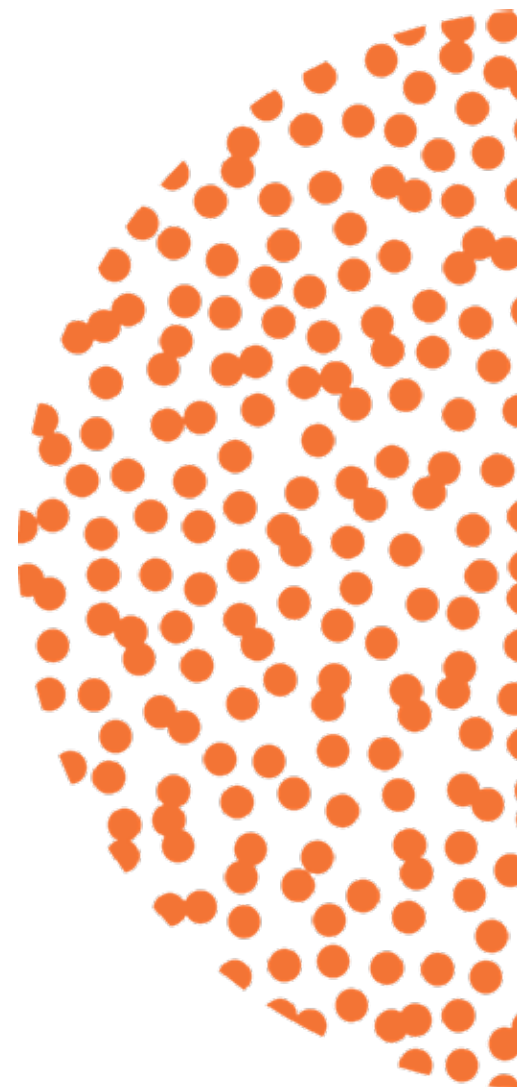
Medium Term	Long Term
Provide an opportunity for social enterprises to meet purchasers so they can hear about purchaser needs.	Coordinate with AnchorTO to host a session that informs social enterprises about the broader coalition.
<ul style="list-style-type: none"> <li>• <b>Procurement team</b> plans and hosts seminar.</li> <li>• <b>Social enterprises</b> attend seminar.</li> <li>• <b>New purchasers</b> attend seminar.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> and <b>AnchorTO</b> plan and host seminar.</li> <li>• <b>Social enterprises</b> attend seminar.</li> <li>• <b>New purchasers</b> attend seminar.</li> </ul>
Quarterly	Annually
<ol style="list-style-type: none"> <li>1. Work with social enterprises to determine knowledge gap. Interview social enterprises when they are added to your AEI's Social Enterprise List. Determine how much they know about your AEI's procurement. Send them the social enterprise seminar to learn more about it. (They could also inform seminar content.)</li> <li>2. Book and plan training seminars.</li> <li>3. Develop content.</li> <li>4. Identify social enterprises and purchasers to invite (broader).</li> <li>5. Draft and send invitations.</li> </ol>	<ol style="list-style-type: none"> <li>1. Work with social enterprises to determine knowledge gap. Interview social enterprises when they are added to your AEI's Social Enterprise List. Determine how much they know about your AEI's procurement. Send them the social enterprise seminar to learn more about it. (They could also inform seminar content.)</li> <li>2. Book and plan training seminars.</li> <li>3. Develop content.</li> <li>4. Adapt content to fit the AnchorTO context. Identify social enterprises and purchasers to invite (broadest).</li> <li>5. Confirm training session dates to ensure highest participation by listed social enterprises and purchasers.</li> <li>6. Draft and send invitations.</li> </ol>

**Key Considerations:**

- Start small; target invitations.
- Consider implementing after the purchaser seminar (Initiative 1) has been implemented.
- Consult with social enterprises to ensure that the information presented is what they are looking to receive.

**Outcomes:**

Increase social enterprises' awareness of AEI procurement to assist with navigating organizational processes.



Participant feedback could improve the seminar's content and your AEI's social procurement practices. Inviting suppliers and purchasers from other institutions to your event could trigger a significant knowledge exchange between suppliers and purchasers.

(left) Toronto Enterprise Fund's Employment Social Enterprise Conference, April 2019.



# Recommended Initiatives that Change the Network

## 6. Subcontract social enterprises for large contracts.

RFPs concerning goods and services totaling over \$100,000 might be too big for any one social enterprise to handle. Use these RFPs to create opportunities to involve social enterprises as subcontractors. An RFP might stipulate that bidders draw from a provided list of social enterprises when selecting subcontractors for the overall contract. (The same way RFPs often include lists of pre-approved suppliers.)

Experiment with this approach in your AEI. In the case of a construction company, your RFP could include a list of social enterprises capable of supplying worksite custodians. Similarly, a pre-approved list of social enterprise caterers could be given to an event coordinator, or courier/shipping services to a supplier of office equipment. If it works – for you and the large contractor – consider making it policy. That will send large contractors a strong signal that they need to find social enterprise partners and, perhaps, provide support to these partners so they can fulfill even larger subcontracts. One sure sign of success will be a large contractor who adds its recommendations to your AEI’s list of pre-approved social enterprises.

Time Frame	Short Term
What	<ul style="list-style-type: none"> <li>• Ask suppliers if they can work with social enterprises when issuing new or renegotiating RFPs.</li> <li>• Consider including an evaluation component related to social impact in sourcing partners and assessing RFP responses.</li> </ul>
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> creates the policy or identifies a purchaser willing to pilot the idea and communicate the requirements for subcontracting, facilitating the identification of suitable subcontractors, potentially assisting the negotiation of the contract and capacity needs of the social enterprise.</li> <li>• <b>Purchaser</b> has a purchase that is above the open and competitive procurement threshold of \$100,000 for goods or services and is willing to pilot the idea.</li> <li>• <b>Large Supplier</b> is a short-listed supplier for the procurement that has the capability/willingness to subcontract to a social enterprise.</li> </ul>
Frequency	At least once a quarter.
Implementation	<ol style="list-style-type: none"> <li>1. Determine the gap between current practices and desired state.</li> <li>2. Brief purchasing champions about opportunity.</li> <li>3. Set up communication channel between procurement and purchasers to flag willing suppliers.</li> </ol>

### What are Social Enterprises Best Equipped to Supply?

Social enterprises are particularly effective suppliers of day-to-day, consumable goods and services, including: 1) food and food services; 2) construction, renovation, and painting; 3) office equipment, supplies, and accessories; 4) publications and other printed matter; 5) furniture. Specialized research and equipment purchases are not such a good fit.



Medium Term	Long Term
Pilot idea with a supplier.	Issue new or renegotiate RFPs to include social enterprise subcontracting requirements (with exceptions) where feasible.
As per Short Term.	As per Short Term.
Try this more than once before changing RFP.	RFP template changes could occur with policy updates at least once every 5 years.
<ol style="list-style-type: none"> <li>Identify a willing supplier to test the idea.</li> <li>Integrate feedback into process.</li> </ol>	<ol style="list-style-type: none"> <li>Modify RFP templates (financial, legal, policy).</li> <li>Communicate goals with suppliers.</li> <li>Tracking and reporting.</li> </ol>

**Key Considerations:**

- Potential for variance in complexity across industries and across individual contracts.
- Can be implemented later on.
- Applies to purchases over \$100,000 in value.

**Outcomes:**

Overcome the lack of capacity on the part of small social enterprise suppliers by having them partner with large suppliers.

This initiative relates to purchases of a higher value, totaling over \$100,000.



**Out of This World Cafe & Catering**

(right) provides high-quality, reasonably-priced food from its locations in downtown Toronto. In addition to breakfast, lunch, snacks and beverages, it caters to groups numbering from 5 to 175. Out of This World Cafe has been active since 2001, providing employment opportunities to consumer/survivors of the mental health system.



## 7. Create a streamlined Request for Quotation (RFQ) form.

Obtaining quotes from suppliers can be burdensome to purchasers. Especially when the RFQ involves goods or services valued at \$25,000 to under \$100,000, two or three quotes are often required. A blizzard of email may result, and using different forms across your AEI (or no form at all), can impede timely responses from suppliers, especially small ones. Creating and using a standard RFQ form can enable your AEI's purchasers and its social enterprise suppliers to communicate more swiftly and clearly.\*

Again, experimentation is key to make this work in your AEI. Try an RFQ form at the level of an interested department; fine-tune that, before introducing something more widely applicable or mandatory. Introduce questions that enable purchasers to include social and environmental impacts when evaluating an array of potential suppliers. Note that an upgrade to the RFQ is also essential to Initiative 12 (Impact Tracking).

\*It can also enable an AEI to measure and track social impact. For example, you could add the AEI's social impact goals to the RFQ form. You will then be able to compare bids from multiple suppliers in terms of those goals. (See also Initiatives 4 and 7.)

Time Frame	Short Term
What	RFQ is an email with standardized questions or a pdf of a hard-copy version.
Who	<ul style="list-style-type: none"> <li>• <b>Purchasers</b> send quotation request to suppliers.</li> <li>• <b>Suppliers</b> fill out the RFQ.</li> <li>• <b>Procurement team</b> develops and owns form if in a centralized model.</li> <li>• <b>Department</b> owns form if in decentralized model.</li> </ul>
Frequency	Iterate enough times to detect common patterns in errors of form completion.
Implementation	<ol style="list-style-type: none"> <li>1. Determine most common information requested by purchasers from suppliers.</li> <li>2. Determine what standardized information should be asked.</li> <li>3. Test out the form with a test group of purchasers.</li> <li>4. Determine appropriate data-tracking mechanisms.</li> <li>5. Approve and communicate.</li> </ol>

The Raging Spoon (*right*) has been providing catering services throughout Toronto's west-end and central areas since 1997. It supplies a variety of appetizers, hot and cold entrees and desserts to meetings, conferences and special events, including student-led campus events. The Raging Spoon employs people with mental health or addiction issues who have an interest in food service related employment.



Medium Term	Long Term
RFQ is a third-party online form (e.g., Google form) that vendors fill out via emailed url link.	RFQ is an online form that is integrated into the AEI's procurement system. Vendors fill out via emailed portal login.
As per Short Term	As per Short Term
Conduct quarterly reviews to quality control data going into the system. Iterate form based on errors.	Conduct quarterly reviews to quality control data going into the system. Iterate form based on errors.
<ol style="list-style-type: none"> <li>6. Upload questions to create a cloud-based form, such as Google or Wufoo.</li> <li>7. Approve and communicate.</li> </ol>	<ol style="list-style-type: none"> <li>8. Determine opportunities for integration into financial system.</li> <li>9. Develop these integrations into financial system.</li> <li>10. Test with user groups.</li> <li>11. Approve and communicate.</li> </ol>

**Key Considerations:**

- Add language in social procurement guidelines and/or policy that gives purchasers flexibility to choose social enterprises over potential lower cost suppliers.
- An update to the RFQ is integral to Initiative 12 (Impact Tracking) in order to alert bidding parties and for bid assessment.

**Outcomes:**

Assist purchasers to collect relevant information from suppliers in order to make impact decisions.

BWI Project members created an RFQ form that was tested by suppliers and purchasers participating in the BWI project. You can modify the content in this form for your institution. [Click here to download a copy of the form.](#)



Experimentation is key. Try an RFQ form with one department; fine-tune that, before introducing something more widely applicable or mandatory.

## 8. Create a Shared Social Enterprise List

It is common for purchasers to develop lists of social enterprise suppliers on whom they can rely. However, if these lists are not shared across the AEI, it can be a challenge to identify and get information about the social enterprises relevant to your purchasing. Work with other purchasers to create and maintain a list of social enterprises shared across your AEI. Include the suppliers' social impact as well as their product or service. Over time, make arrangements to share that list with those of other AEIs (such as AnchorTO members). Then make sure to curate it: add, update and subtract entries in light of common experience. The more information purchasers share, the less time it will take to find social enterprises that can meet your AEI's needs.

Time Frame	Short Term
What	Excel file listing relevant social enterprises in Ontario, organized by popular product categories most relevant to AEI purchases.
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> owns and updates Social Enterprise list.</li> <li>• <b>Market Research Owner</b> is responsible for updating, adding, and removing social enterprises from the list.</li> <li>• <b>Business Officers</b> are responsible for aligning purchases to social enterprises.</li> </ul>
Frequency	<ul style="list-style-type: none"> <li>• Update businesses on the list as frequently as possible.</li> <li>• Review the applicability of the list's parameters annually.</li> </ul>
Implementation	<ol style="list-style-type: none"> <li>1. Identify owner and manager of Social Enterprise List.</li> <li>2. Launch SE List with other initiatives, such as the communication campaign and purchaser seminar.</li> <li>3. Update suppliers on the list, and list parameters as necessary.</li> </ol>

Many social enterprises facilitate the development and maintenance of shared lists through the process of certification. Certification shows that an outside party validates a company's overall social and environmental performance and other important features. For example, the B Lab evaluates how a company's operations and business model impact its workers, community, environment and customers.

The certification process is robust. Participating social enterprises often pay annual certification fees. Likewise, your AEI will likely have to pay a fee in order to access the information on one of these certified lists.

Certified lists of social enterprises (including many operating in the Toronto and Greater Toronto area) are available from the following sources:

- Canadian Aboriginal and Minority Supplier Council (CAMSC)
- Canadian Gay and Lesbian Chamber of Commerce (CGLCC)
- Certified Women Business Enterprises (WBE Canada)
- Canadian Council for Aboriginal Business
- Inclusive Workplace Supply Council of Canada
- Buy Social Canada

Medium Term	Long Term
<p>AEI internal website that is updatable, searchable, and categorized by product and impact area.</p> <ul style="list-style-type: none"> <li>• Managed and owned by each institution separately.</li> <li>• IT develops a basic website or purchases software, coordinates where website is hosted.</li> <li>• <b>Product Owner</b> responsible for the development of the web page.</li> </ul>	<p>AnchorTO website that is updatable, searchable, and categorized by product and impact area.</p> <ul style="list-style-type: none"> <li>• Managed and owned by one entity (AnchorTO).</li> <li>• <b>Consultant</b> potentially develops a website that meets the needs of all AnchorTO members.</li> <li>• <b>AnchorTO members</b> provide supplier updates to the list and feedback on list parameters.</li> </ul>
As per Short Term.	As per Short Term
<ol style="list-style-type: none"> <li>1. Identify product developers, resources and host.</li> <li>2. Validate and source information.</li> <li>3. Upload information.</li> <li>4. Test with users.</li> <li>5. Launch after testing cycles are complete.</li> </ol>	<ol style="list-style-type: none"> <li>1. Determine broader coalition purchasing needs.</li> <li>2. Identify fields/variables/categories for a list. (Ensure things from disparate AEI Social Enterprise Lists can be mapped).</li> <li>3. Index list so it is searchable.</li> </ol>

Work with other purchasers to create and maintain a list of social enterprises shared across your AEI. Make sure to curate it: add, update and subtract entries in light of common experience.

**Key Considerations:**

- Start small and prioritize high quality social enterprises that respond to AEI procurement practices (volume, spend, etc.) and achieve high impact.
- Work with social enterprises to create the list.
- Create an information management plan for sourcing new suppliers and removing old ones.
- Feed the list into the invitations to reverse trade-show (Initiative 9) and to the seminar for social enterprises (Initiative 5).
- Compare with the City of Toronto's Social Enterprise List.
- Don't wait for a policy - build a list right away. It is considered paramount to the success of this initiative.

**Outcomes:**

Make it easier for purchasers to find relevant social enterprises to increase diversity of suppliers and the dollars spent on social enterprise goods/services.

BWI Project members created a Social Enterprise List, and categorized it in terms of the Sustainable Development Goals addressed by each entry. Feel free to modify the contents of this list to suit the needs of your institution. You can find a copy of the list here.



## 9. Host a Reverse Trade Show.

At a “Reverse Trade Show,” the buyers (AEI purchasers in this case) take center stage to explain their needs to current and potential suppliers. The suppliers learn about future contracting opportunities; your AEI gains a better understanding of the marketplace and potential capacity issues. No contracting commitments are made on either side. Typically, such shows are medium to large in scale. If held at strategic points in your AEI’s annual purchasing cycle, such as late spring and summer, they will help social enterprises to anticipate when your AEI’s needs are most acute. AEIs can also use Reverse Trade Shows to sound out the social enterprise market: Are our requirements feasible? What risks might they entail?

Time Frame	Short Term
What	Hosted by AEI procurement staff who share institutional needs based on procurement data.
Who	<ul style="list-style-type: none"> <li>• Procurement team hosts event.</li> <li>• Social enterprise suppliers attend event.</li> </ul>
Frequency	Quarterly
Implementation	<ol style="list-style-type: none"> <li>1. Plan and book event.</li> <li>2. Invite social enterprises included on the Social Enterprise list (Initiative 8).</li> <li>3. Have policies/practices ready to share with social enterprises.</li> <li>4. Provide social enterprises with a sense of the needed goods and services.</li> <li>5. Provide social enterprises with a sense of the important impacts the AEI wants to make.</li> </ol>



Medium Term	Long Term
Hosted by AEI procurement staff and recruits major institutional purchasers to speak to needs and meet with invited social enterprises.	Hosted by AnchorTO. Purchasing staff from AnchorTO members present needs to invited social enterprises.
<ul style="list-style-type: none"> <li>• <b>Procurement team</b> hosts event.</li> <li>• <b>Social enterprise suppliers</b> attend event.</li> <li>• <b>Purchasers</b> attend event.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>AnchorTO purchasers</b> attend event.</li> <li>• <b>Social enterprise suppliers</b> attend event.</li> </ul>
Quarterly	Annually
<ol style="list-style-type: none"> <li>1. Plan and book event.</li> <li>2. Invite social enterprises included on the Social Enterprise list (Initiative 8).</li> <li>3. Invite purchasers with relevant purchasing needs.</li> <li>4. Provide social enterprises with a sense of the important impacts the AEI wants to make.</li> </ol>	<ol style="list-style-type: none"> <li>1. Plan and book event.</li> <li>2. Invite social enterprises included on the Social Enterprise list (Initiative 8).</li> <li>3. Open event to any AnchorTO member purchasers that want to attend.</li> </ol>

At a Reverse Trade Show, the suppliers learn about future contracting opportunities. The AEI gains a better understanding of the marketplace and potential capacity issues.



**Building Up** (*left*), Toronto's leading social contractor, is a non-profit construction contractor that delivers high-quality work while providing long-term career pathways for marginalized Torontonians who face multiple barriers to employment. Since 2016 Building Up has generated +\$7M in revenue; renovated, improved, and/or retrofitted +10,000 units of social housing; and supported +230 individuals in starting their trades careers.

**Key Considerations:**

- Hosted a month or two before major buying cycles at an AEI (e.g., in an academic setting, summer is the time with the most purchasing activity).
- At this event, there may be a temptation to make contracting decisions. However, depending on the value of a potential contract, follow-ups may require or lead to an open competition, RFQ, or direct negotiation.
- Ensure that representatives ask for feedback about their advice. Would social enterprises be able to implement the advice given? What are the major barriers that they face?
- This information should feed into the Social Enterprise List (Initiative 8).
- A tradeshow could be hosted after the seminar for social enterprises (Initiative 5). The Social Enterprise List gets updated to inform participation.

**Outcomes:**

Encourage social enterprises to do business with AEs by giving them a sense of institutional needs. Reverse Trade Shows are an opportunity to signal to social enterprises the impacts that institutions are interested in achieving.

See the Ontario "[Interim BPS Primer on Innovation Procurement](#)" (p. 32) for more details on Reverse Trade Shows.

## 10. Update the new Supplier Intake Form.

Make sure your AEI's Supplier Intake Form includes fields in which social enterprises can identify themselves and the social and/or environmental impacts of their work. This will help you track your AEI's impact and highlight the importance of social enterprises as suppliers. It can be sent to suppliers in advance of any RFQ in order to collect information about the marketplace. If linked to the RFQ (Initiative 7), all the information on the RFQ could be transferred to the Supplier Intake Form.

This key solution will help you track and report your AEI's impact and highlight the importance of social enterprises as suppliers.

Time Frame	Short Term
What	Add Social Enterprise identification field(s) on current supplier intake form, paper or digital.
Who	<ul style="list-style-type: none"> <li>IT generates and integrates supplier intake form into procurement system.</li> <li>Procurement manages and provides quality assurance for its use.</li> <li>Purchasers and suppliers give feedback on usability of form.</li> </ul>
Frequency	Quality control review as part of initial roll-out, then check monthly.
Implementation	<ol style="list-style-type: none"> <li>Add field(s) to supplier intake form.</li> <li>Test with suppliers and purchasers.</li> <li>Communicate to purchasers.</li> <li>Procurement team input forms into system (if paper).</li> <li>Procurement team monitor for quality control and feedback.</li> </ol>



Interpreter Services Toronto (IST) (*right*) provides affordable interpretation and translation services in over 200 languages. Its intensive training equips immigrant and refugee women with the skill, certification, confidence and independence to become professional Language Interpreters and vital community members. A social purpose enterprise of the Barbra Schlifer Commemorative Clinic, IST has been serving the increasing diverse population of Greater Toronto since 1987.

Medium Term	Long Term
Link RFQ form (Initiative 7) to supplier intake form.	Collect new supplier data in an open-by default manner. Store data in a form accessible by API so the institution's suppliers can be viewed by anyone.
As per Short Term.	As per Short Term.
As per Short Term.	As per Short Term.
<ol style="list-style-type: none"> <li>1. Add field(s) to supplier intake form.</li> <li>2. Test with suppliers and purchasers.</li> <li>3. Communicate to purchasers.</li> <li>4. Cross-reference RFQ form information and supplier information.</li> <li>5. Integrate forms into system.</li> <li>6. Procurement team monitor for quality control and feedback.</li> </ol>	<ol style="list-style-type: none"> <li>1. Add field(s) to supplier intake form.</li> <li>2. Test with suppliers and purchasers.</li> <li>3. Communicate to purchasers.</li> <li>4. Collect supplier data according to an Open Contracting Data Standard.</li> <li>5. Announce supplier lists in a machine-readable format publicly accessible online, using open contracting standard.</li> </ol>

**Key Considerations:**

- This is a key solution that can enable the tracking and reporting of impact. Consider implementing earlier on.

**Outcomes:**

Helps purchasers identify social enterprises in supplier records, and track their spend and impact.

**The Open Contracting Data Standard**

(OCDS) provides guidance on the form procurement data takes, at which stages it can be collected, and when it can be reported. It also enables AEI staff, higher levels of government, civic-minded organizations and suppliers to access information in machine-readable ways. For more information, see <http://standard.open-contracting.org/latest/en/schema/release/>





## 11. Pursue community benefit agreements.

AEIs are frequently major developers of real estate or infrastructure. When your AEI comes to a formal agreement with a community that is affected by a large development project, it can ensure that it creates opportunities for residents who otherwise might not stand to benefit: young workers, newcomers, foreign-trained professionals or people living on low incomes. Benefits usually include some combination of jobs, training or apprenticeships, business opportunities and neighbourhood improvements. In cases of residential construction, a number and variety of affordable housing units may be negotiated. Such agreements signal major suppliers that they too need to find partners – like social enterprises – who can deliver on the stipulated terms.

Time Frame	Short Term
What	Ask land development firms about their social and environmental impact.
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> gathers group, identifies eligible projects.</li> <li>• <b>Legal council/partnership group</b> establishes and negotiates agreement.</li> <li>• <b>Purchaser</b> has an infrastructure project for the AEI involving more than \$100,000 in goods or services and is willing to develop a community benefit agreement.</li> <li>• <b>Community</b>, meaning an association of residents who are not currently benefiting from economic growth.</li> <li>• <b>Large Supplier</b> (development firm), meaning a short-listed supplier for the project with the capability/willingness to implement apprenticeships or other benefits negotiated through the process.</li> </ul>
Frequency	Every time a new supplier is added (see Initiative 10).
Implementation	<ol style="list-style-type: none"> <li>1. Speak with land development firms and suppliers at early stages to gauge social and environmental impact.</li> <li>2. Engage with legal team to develop a plan for negotiations with land developers and community members.</li> </ol>

Community Benefit Agreements can ensure that large contracts create opportunities for residents who otherwise might not stand to benefit: young workers, newcomers, foreign-trained professionals or people living on low incomes.



Medium Term	Long Term
Partner with a community group to define benefits and eligible AEI projects, such as new infrastructure construction like residences, research centres, etc.	Start issuing community benefit agreements with community groups and land development firms.
As per Short Term.	As per Short Term.
Establish immediately and every time the AEI expands its physical plant.	Every time a large construction project or land purchase is undertaken.
<ol style="list-style-type: none"> <li>1. Issue an open call-out to community members.</li> <li>2. Organize meetings and other events that allow for participation by members with kids or those who work during the day.</li> <li>3. Host interviews, meetings to agree on benefits and projects.</li> </ol>	<ol style="list-style-type: none"> <li>4. Engage legal team to work through final agreement details and negotiations.</li> </ol>

**Key Considerations:**

- This may only be of value for large complex projects in construction as it requires a high level of legal action or legal department involvement, and is often complex.
- Anticipate drafting community benefit agreements for each new building at the AEI. Potentially they could also apply in cases of retrofits and large deferred maintenance work.

**Outcomes:**

Generate community benefits from major builds at anchor institutions.

This initiative relates to purchases of a higher value, totalling over \$100,000.



A community benefit agreement signed by the University of Toronto required suppliers to employ **Hammer Heads** (left), a youth program of the Central Ontario Building Trades, in the recent build of the Environmental Science & Chemistry Building and Highland Hall. Hammer Heads pairs skilled trade workers with underserved youth to apprentice on local construction sites.

# Recommended Initiatives that Change the System

## 12. Track impact.

To buy with impact, it is crucial to find out what impact your AEI purchases are actually having, and then tell people about it. Have your AEI's procurement staff establish impact goals, criteria, metrics and tracking mechanisms in collaboration with your AEI's champions. Make sure these impact goals are specified when soliciting and when assessing bids (see Initiative 7) so impact can be tracked for social enterprises that bid as well as those that provide goods and services. Then feature the results in quarterly newsletters, performance reports or even in your training seminars for purchasers and suppliers (Initiatives 1 and 5).

Have procurement staff establish impact goals, criteria, metrics and tracking mechanisms. Make sure these goals are specified when soliciting and when assessing bids.

Time Frame	Short Term
What	Social procurement suppliers are tagged/identified in the AEI's procurement system so that reports can be easily generated on social procurement spend. (See Initiative 10.)
Who	<ul style="list-style-type: none"><li>• <b>Procurement team</b> integrates categories in tracking tools, communicates this to purchasers.</li><li>• <b>IT and/or contractor</b> develops website.</li><li>• <b>Suppliers</b> send reports about certified impacts.</li><li>• <b>Third party accountant/Procurement team</b> evaluates the social return on investment.</li></ul>
Frequency	Every transaction with a social enterprise.
Implementation	<ol style="list-style-type: none"><li>1. Update Supplier Intake Form and other process documents to include social enterprises and SDGs.</li><li>2. Run quarterly reports.</li><li>3. Report impact. (See Initiative 4.)</li></ol>

You may also want to track the cultural shift you see in purchasers at your AEI as they increase the volume of their purchases from social enterprises over time. This shift in cultural impact can be tracked within your AEI and across multiple institutions, especially when common protocols are followed. For example, the KABI protocol is an effective way to measure the baseline in Knowledge, Attitudes, Behaviours, and Intentions around social enterprise procurement when you first implement these recommended initiatives in your AEI. Then, over time, you can monitor the shift as purchasers become more comfortable with the new procurement practices and tools.

BWI Project members created a KABI protocol that they used to generate a baseline for partner AEIs. [Click here to download a copy of the KABI Protocol.](#)

Medium Term	Long Term
Suppliers certified by organizations like B-Corp, report how well the AEI's procurement spend fulfills the impacts outlined in their certification.	Impact tracking includes the attribution of every dollar spent to the social return on investment that the funds to social enterprises generate.
As per Short-Term.	As per Short-Term.
Every month or quarter depending on the suppliers' capability to send information.	Once a year as part of an annual report.
<ol style="list-style-type: none"> <li>Analyze procurement data to identify social enterprises that have provided goods/services.</li> <li>Request impact reports from social enterprises with third party certification.</li> <li>Analyze reports.</li> <li>Report impact. (See Initiative 4.)</li> </ol>	<ol style="list-style-type: none"> <li>Train or hire staff to calculate and report Social Return on Investment (SROI).</li> <li>Report impact. (See Initiative 4.)</li> </ol>

**Social Return on Investment (SROI)** may be of great importance to impact tracking. SROI is a procedure for calculating (in dollars) the social return generated by an investment, e.g., spend \$1 and get \$10 worth of social benefit. Staff may be trained in calculating SROI, or an accountant specializing in SROI may be hired.

**Key Considerations:**

- More complex tracking mechanisms may require the involvement of the AEI's financial services and IT teams.
- In the short term, encourage social enterprise suppliers to get certification as part of a continued relationship with the AEI.
- Update the RFQ form and bid assessment to include impact goals.
- In the medium term, limit impact tracking to certified suppliers. Consider sourcing from "For benefit" (B-Corp) companies that track, measure and report on their impact to uphold the certification.
- Consider quarterly meetings with AnchorTO to share social enterprise connections and progress reports.
- Some certifying organizations may not share how they index the suppliers in their lists. The AEI may need to get that information directly from certified social enterprises.
- Consider prioritizing impact tracking and demonstrating results to increase the buy-in from key individuals.
- Currently, attribution is difficult to calculate and highly customized, making it difficult to repeat in a standardized way. However, aligning to the SDGs and establishing standardized product categories can be a consistent approach.

**Outcomes:**  
Provides robust impact data for the social enterprise procurement program.

### 13. Promote the CFTA's exception for poverty reduction.

One of the best-kept secrets about the current Canadian Free Trade Agreement (CFTA) is the exception it provides for purchases under \$200,000 in value. It allows AEIs to insert poverty reduction requirements in RFPs, even if those requirements do not relate to the suppliers' direct services or limit trade between the provinces. Educate your purchasers about this. It establishes a threshold under which they can direct more purchases to local social enterprises and thereby actively reduce poverty in Ontario.\*

Time Frame	Short Term
What	Tell purchasers about the exception.
Who	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> informs purchasers of the exception, when working with purchasers on an unrelated procurement.</li> <li>• <b>Purchasers</b> hear about the exception via one-to-one discussions with procurement team while completing an unrelated procurement.</li> </ul>
Frequency	Ad hoc
Implementation	<ol style="list-style-type: none"> <li>1. Inform purchasers about exception informally when assisting with an unrelated purchase.</li> <li>2. Follow up with more information and assistance should purchasers wish to exercise the exception in a future procurement.</li> </ol>

The exception allows AEIs to insert poverty reduction requirements in RFPs, even if those requirements do not relate to the suppliers' direct services or limit trade between the provinces. Educate your purchasers about this.



\* Internal Trade Secretariat. (2017). Canadian Free Trade Agreement: Consolidated Report. P. 65. Retrieved from <https://www.cfta-alec.ca/wp-content/uploads/2017/06/CFTA-Consolidated-Text-Final-Print-Text-English.pdf>

Medium Term	Long Term
Train purchasers about the exception.	Advocate to the federal government a broader exception that includes other Sustainable Development Goals.
<ul style="list-style-type: none"> <li>• <b>Procurement team</b> incorporates the exception in a seminar about social enterprise purchasing. (See Initiative 1).</li> <li>• <b>Purchasers</b> attend the seminar.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Procurement team</b> provides briefings to federal government relations department of the AEI or leadership.</li> <li>• <b>Government relations staff/institution leadership</b> advocate on behalf of the organization for changing the exception definition.</li> <li>• <b>Innovation Hub</b> provides thought leadership on the potential positive impact of broadening the limited tendering exception.</li> </ul>
Whenever a seminar occurs.	In the middle of a federal election cycle, when the CFTA is renegotiated or updated.
<ol style="list-style-type: none"> <li>1. Include information about the exception in seminars geared to suppliers and purchasers. (See Initiative 1.)</li> </ol>	<ol style="list-style-type: none"> <li>1. Discuss the idea with the AEI's government relations representative.</li> <li>2. Create an advocacy plan, that may involve other AEIs.</li> <li>3. Advocate for changing the exception.</li> </ol>

**Key Considerations:**

- Purchasers should consider that large contracts may involve orders of a size difficult for small suppliers to meet. Consider shifting to Initiative 6.
- Adopt a mindset of building suppliers' capacity to meet the requirements of large contracts.
- The training associated with the exception could go hand-in-hand with supplier training and capacity building so they are able to meet large contracts, such as through Initiative 5.
- Since many AEIs rely heavily on municipal, provincial and federal tax revenue, lobbying government (if done poorly) for changes to the CFTA may jeopardize an institution's relationships with its funders. It may be safer to create a coalition of institutions through which to conduct this advocacy.

**Outcomes:**

Increase the number and value of contracts awarded to social enterprises that reduce poverty.

**HigherEdPoints** is a digital service that converts anyone's loyalty program points into payments for school tuition and student loans. Currently, the company has over 125 AEIs as clients, including the federal student loan program, and universities nationwide, such as the University of Toronto, the University of British Columbia and the University of Waterloo. HigherEdPoints users have saved over \$1.7M collectively on school tuition and student loans, enabling more students of all ages to receive quality education and reduce their burden of debt.





## 14. Update procurement and financial systems.

Embed new fields in your AEI procurement and financial systems to enable tracking of every purchase from a social enterprise and its associated impacts. This will automate impact tracking so your AEI can demonstrate and share the full value of its purchasing over time. This is key to reinforce social enterprise procurement and make it habitual. This tracking provides your leadership with the data it needs to show how these practices fulfill your AEI goals, share these successes and further incentivize this behaviour. Impact data collected in a machine-readable format can also be combined with data from other institutions, so impact can be tracked across organizations.

Time Frame	Short Term
What	Optimize or change the fields in the current procurement record system. For example, insert fields to identify transactions with social enterprises and the associated impact category.
Who	<ul style="list-style-type: none"> <li>• Procurement staff and IT/Vendor.</li> <li>• Procurement team data analyst and the institution's IT team update financial information system. This may involve the financial system platform supplier if major changes are necessary.</li> </ul>
Frequency	Regularly as part of continuous improvement and quality control.
Implementation	<ol style="list-style-type: none"> <li>1. Assign an unused tracking field in the current financial information system to serve as a tag for tracking social enterprises.</li> <li>2. If not available, negotiate a change order with supplier to add field OR purchase a new procurement system that allows for tracking.</li> </ol>

This initiative will automate impact tracking so your AEI can demonstrate and share the full value of its purchasing over time. Such tracking is key to reinforcing social enterprise procurement and making it habitual.

Medium Term	Long Term
Optimize the automation of supplier intake, tracking, and reporting. (See Initiative 10.)	Depending on the anchor institution and whether procurement is centralized or decentralized a greater emphasis on the architecture of the procurement data will need to be developed to take full advantage of a digital system.
<ul style="list-style-type: none"> <li><b>Procurement staff and IT/Supplier.</b> This would be done for the procurement and financial services of each AEI. However, if a data standard was used (e.g., the Open Contracting Data Standard), information could be aggregated across institutions.</li> </ul>	<ul style="list-style-type: none"> <li><b>Procurement staff and IT/Vendor/Social Return on Investment accountant.</b></li> </ul>
Regularly as part of continuous improvement and quality control.	Update in coordination with procurement policies approximately once every 5-10 years.
1. Complete implementation of Initiative 10.	<ol style="list-style-type: none"> <li>Engage with digital procurement platform vendor OR develop system with an in-house developer and data analyst.</li> <li>Apply data standard specifically geared to procurement data (e.g., the Open Contracting Data Standard).</li> </ol>

**Key Considerations:**  
This may be an expensive and complex solution, so consider creating work-arounds where applicable, while working towards this over time.

**Outcomes:**  
Enables infrastructure to report on social procurement spend broken down by impact.



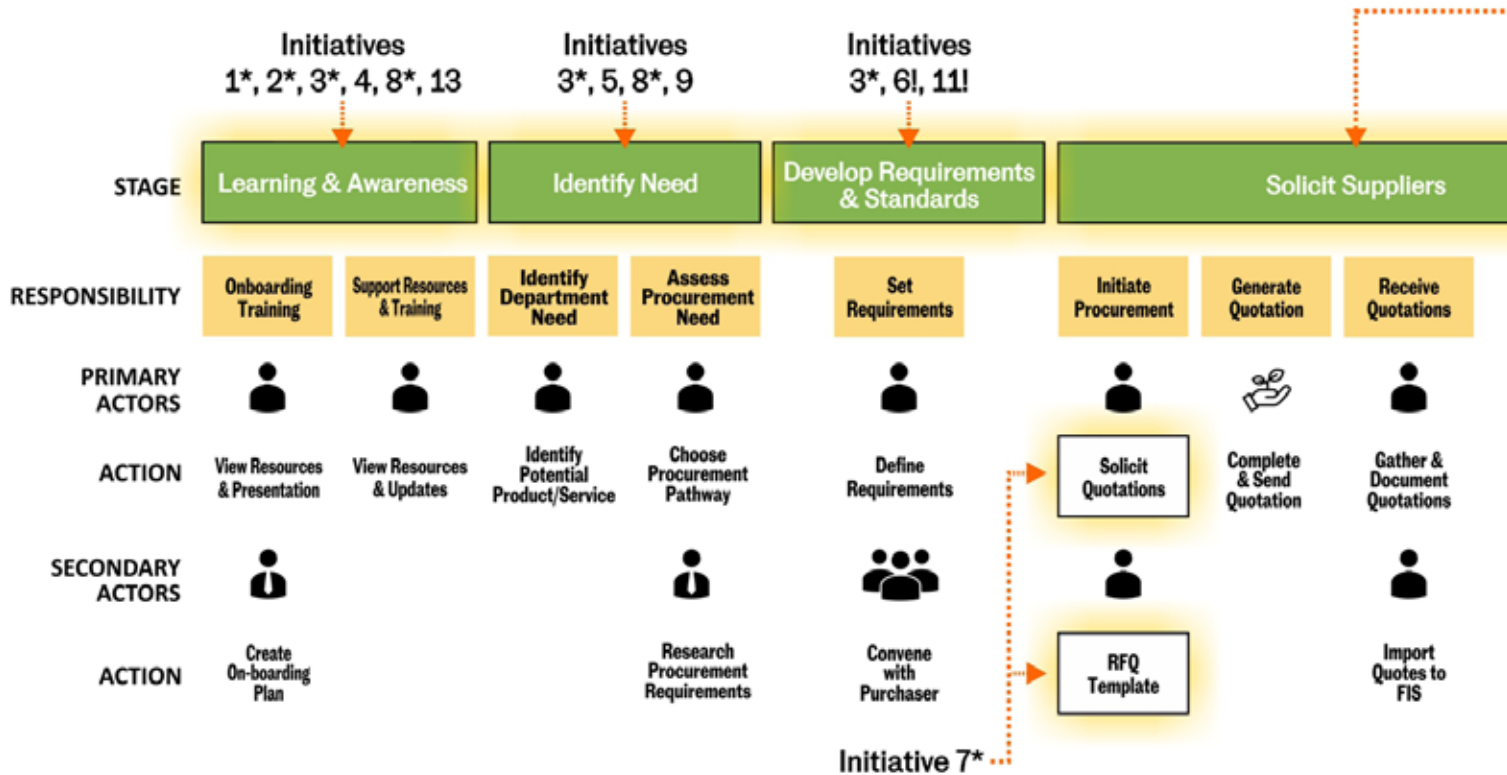
**Gateway Linens & Disposal Services** (GL&DS) is a social enterprise of The Salvation Army, in Toronto. GL&DS is an industrial laundry whose customers are public sector and not-for-profit organizations, largely emergency shelters, and respite and drop-in centres. GL&DS is an employment retraining program focused on individuals facing significant barriers, notably through the experience or high risk of homelessness.



**LINENS & DISPOSAL SERVICES**

# 14 Recommended Initiatives ...

BWI Project participants devised 14 initiatives that would enable AEs and social enterprises to do more business with each other. Several concern multiple stages of the procurement process. Some (indicated with “\*”) can be implemented in the short term; the rest require more time. All but two (indicated with “!”) apply to purchases with a value less than \$100,000. Initiatives 12 and 14 involve significant updates to an AE’s procurement and financial systems.



## ... involving different degrees of change

### CHANGE THE NARRATIVE

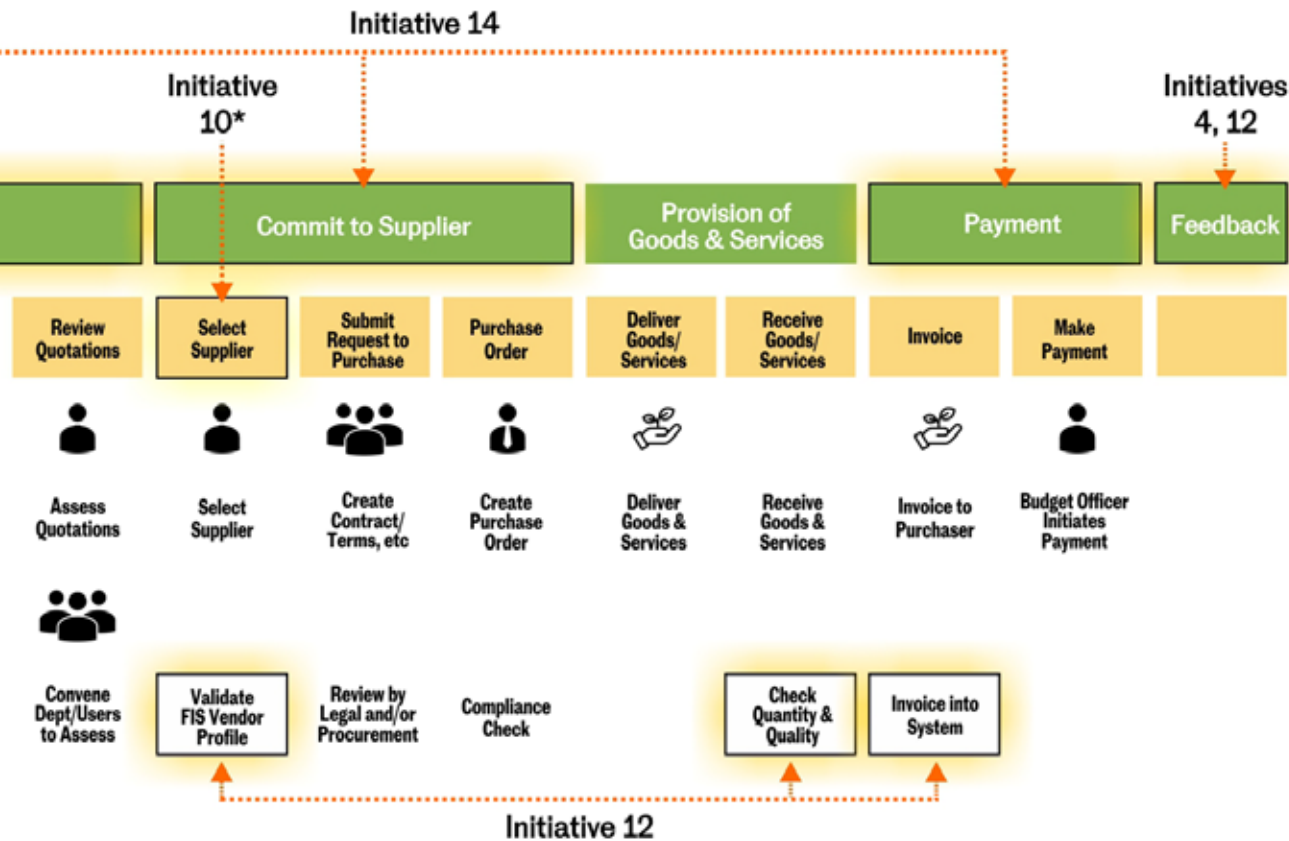
- 1\* Host a seminar for purchasers.
- 2\* Launch a communication campaign.
- 3\* Establish a social procurement policy.
- 4 Report the impact of purchases.
- 5\* Host a seminar for social enterprises.

### CHANGE THE NETWORK

- 6! Subcontract social enterprises for large contracts.
- 7\* Create a streamlined RFQ form.
- 8\* Create a social enterprise list.
- 9 Host a reverse trade show.
- 10\* Update the Supplier Intake Form.
- 11! Pursue community benefit agreements.

### CHANGE THE SYSTEM

- 12 Track impact of purchases.
- 13 Promote the CFTA exception for poverty reduction.
- 14 Update procurement and financial systems.



Note: Some AEIs take a decentralized approach to procurement. Each department appoints its own purchasing officer. This makes it difficult to mandate specific types of purchase. Across the AEI, diverse suppliers may be sourced for the same service or product. When procurement is centralized, onboarding of procurement staff and the addition of new suppliers to the procurement system occur in one place with one type of form or procedure. Training is centralized. There are fewer vendors of record for each category of purchase.



# Further Research

To continue this work, conduct pilot purchases with Initiatives 1, 2, 7 and 8. Set a baseline measure around social enterprise procurement practices (Initiative 12). Partner with other AEIs to develop the remaining 10 initiatives.

This Playbook and the research behind it is just one step along the journey to AEIs implementing social enterprise procurement. There is still much more to do.

The scope of this project included studying, then co-designing and prototyping new approaches to social enterprise procurement. We encourage you to adapt and test social enterprise procurement, by conducting pilot purchases with Initiatives 1, 2, 7 and 8. Additional resources relating to those initiatives are available in this Playbook. During that testing period, you might also try using the KABI protocol to set a baseline measure for your AEI around social enterprise procurement practices (Initiative 12). In addition, consider partnering with AnchorTo and other AEIs to develop the remaining 10 initiatives for which additional resources are not available in this Playbook.

AEIs should also work on creating outcomes-based specifications and key performance indicators for social enterprise procurements. These will help you define outcome expectations related to the impact of a purchase, and measurements for determining how successful a social enterprise procurement has been. They are key to embedding social enterprise procurement practices in AEIs. We encourage you to develop these specifications and indicators for your own AEI and to partner with other institutions to do so. In this way, you can help build your own AEI's capacity for social enterprise procurement as well as the capacity of the network as a whole.



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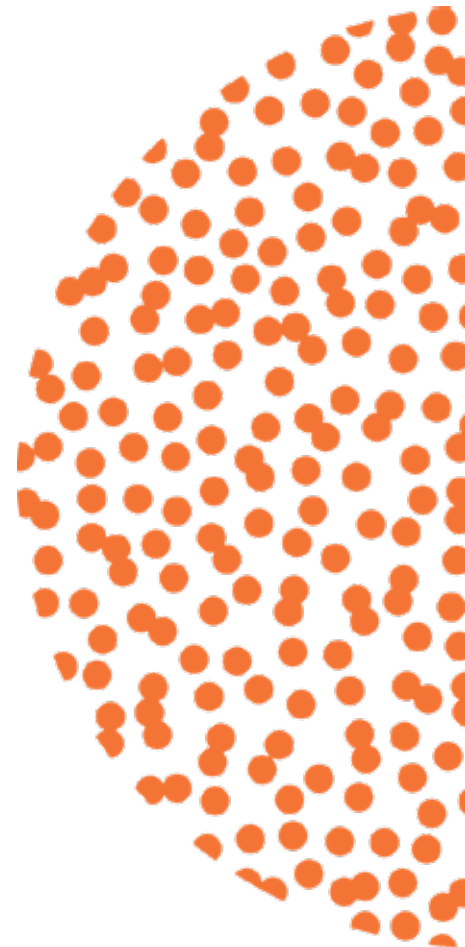
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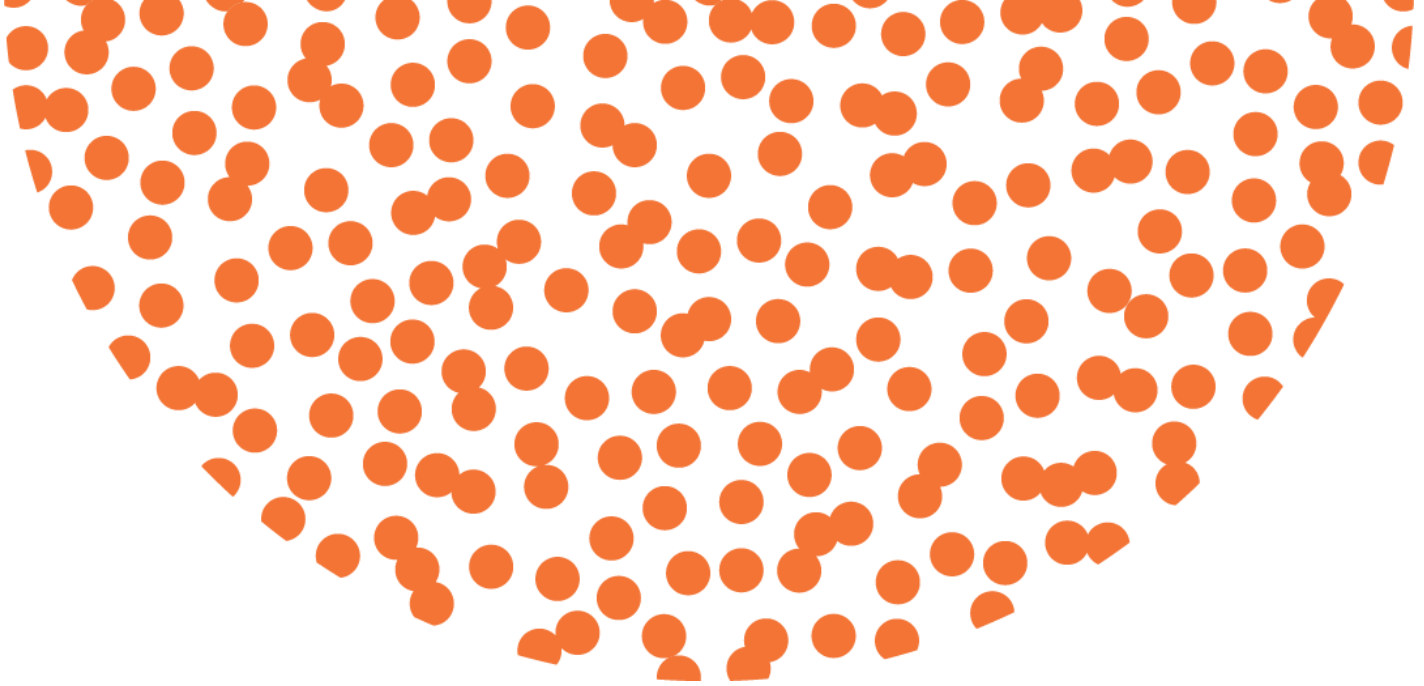
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