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## Purpose

This report is intended to guide the strategic development of a collaborative project of the Social Enterprise Network of Central Ontario (Georgian College) and Ashoka Foundation, funded by the Ontario Trillium Foundation. The project “will support the growth of social enterprises, and provide knowledge and tools for purchasers, to both explore and apply new models of community benefit purchasing. It’s rooted in Central Ontario aligning with the footprint of Georgian’s seven campuses and surrounding communities. This initiative will enhance people's economic well-being and sets out to positively impact over 400 people in communities across the region over the next two years.” (Ashoka Canada press release August 18, 2020).

Due to the ongoing public health crisis surrounding COVID-19, project partners committed to conducting a scoping study to assess the local context needs, desires and aspirations of social enterprises and institutions in the regions of intended activity. This report provides the program team’s recommendations for program design based on survey and interview responses developed through this process.

## Methodology

In order to assess the context in which the program is intended to intervene, two (2) stakeholder engagement tools were developed. First, a stakeholder survey tool was designed by the program team and the project evaluator to assess respondents’ roles, aspirations and familiarity with community benefit purchasing (Appendix 1). The survey was disseminated

through existing SENCO communications channels, namely a SENCO email newsletter to members of the Social Enterprise Sector Development Groups (SESDGs). The survey included an option for respondents to request a semi-structured interview with program contractors to discuss the participants' context, priorities and aspirations for participation in this multi-year initiative.

## Survey Observations

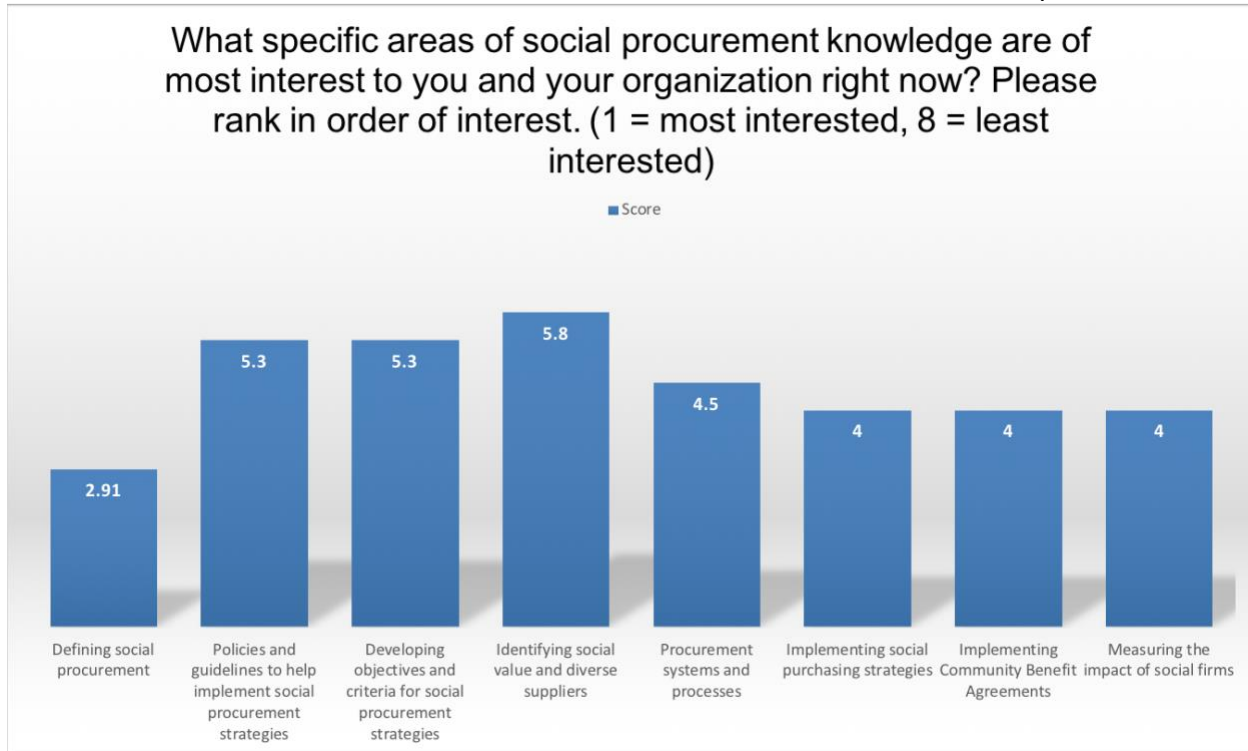
In total, thirteen (14) responses to the scoping survey were recorded using a web-based collector between July 22 and August 30, 2020.

- Most (n=9) responses were recorded from firms that claimed to be either 'social procurement purchasers' (n=5) or 'mostly a purchaser, but sometimes a supplier' (n=4).
- Five (5) respondents each listed 'Barrie and surrounding areas', and 'Owen Sound / Grey County' as their primary region of activity; two (2) listed 'Orillia and surrounding area', one listed 'Muskoka and surrounding area', and one respondent skipped this question
- Respondents on the whole disagreed that social procurement was a new concept for their organizations; only one (1) agreed that it was new to them. Most (7/10; 3 respondents skipped this section) agreed that they have 'strong awareness and general understanding'.

Respondents provided the following as definitions of 'social procurement' (2 respondents skipped this question):

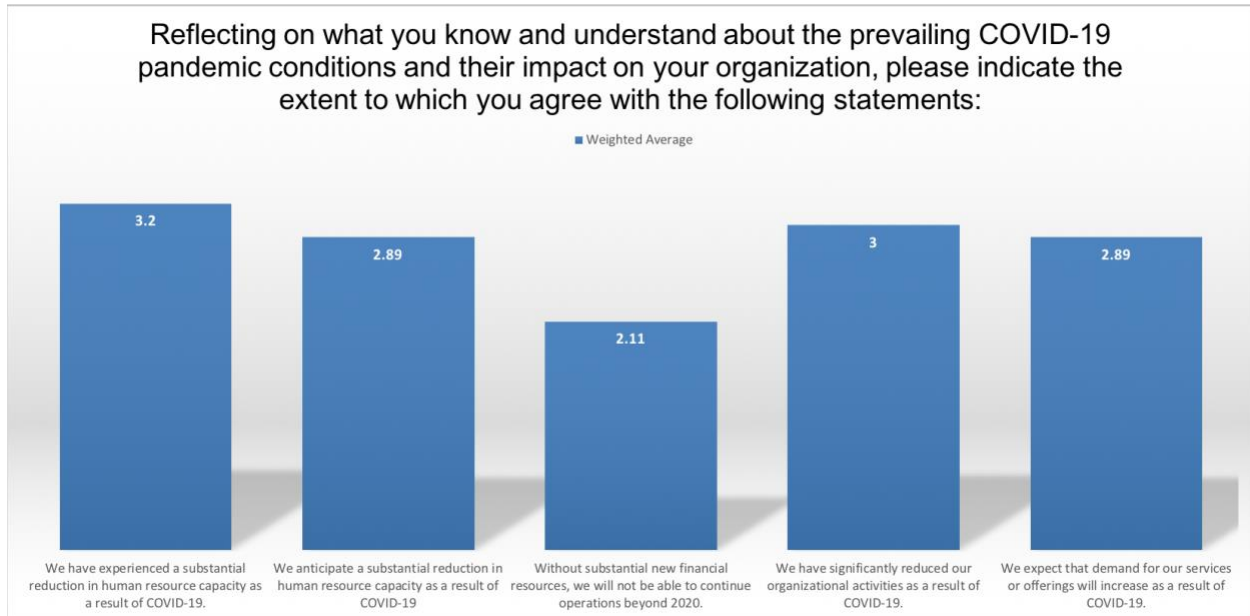
- *Procuring goods and services that not only serve the function of the specific good or service but also procuring the good or service brings about a positive or regenerative result in terms of social, environmental and economic impact for the local (and potentially global) community. Procurement that is not social results in detrimental effects and costs that typically go unmeasured in association with the goods or services in our communities*
- *Purchasing in a way that will help/give back to the community*
- *Responsible purchasing for the benefit of communities and their members, including a biodegradability aspect.*
- *Being mindful of the social repercussions (both positive and negative), and including them in your assessment when deciding to purchase goods or services.*
- *Making sure that where and how we spend money provides social and environmental benefit*
- *Using your purchasing power with intent and a social purpose value*
- *Acquiring goods and services considering the "social" impact of the products, not just quality and price.*

- *Considering the impact of purchasing decisions*
  - *When obtaining goods or services the purchaser looks through multiple factors including the social impact the transaction could have and not just the lowest bid.*
  - *Taking into consideration the environmental and social impact that procurement monies can have in their environment.*
  - *Social procurement decisions build community capital, not just economic capital, and it generates intentional community benefits.*
  - *Leveraging spending to create greater social impact and outcomes.*
- As to higher levels of readiness and commitment to social procurement, respondents were mostly split in their self-assessments: about half of the respondents agreed that they are 'equipped and ready' to adopt social procurement, that they have invested resources in social procurement strategies, and that they are currently purchasing through social firms.
  - Three (3) respondents agreed that they were part of a social firm, and supply to public institutions
  - Asked to prioritize specific areas of procurement knowledge or practice that would best support their development from a list of eight (8), the most popular (in descending order) were:
    - 'identifying social value and diverse suppliers'
    - 'developing objectives and criteria for social procurement strategies'
    - 'policies and guidelines to help implement social procurement strategies'



- From a list of nine (9) potential resources, respondents thought that the following would be most helpful to them (in descending order):
  - ‘a social enterprise supplier list’
  - ‘impact measurement reports’
  - ‘proof of concept to share with my leadership/staff’
- Asked to identify their most significant hurdle to social procurement from a list of five options, ‘identifying social enterprises in our region’ was the most common response (n=3). Three (3) respondents wrote in their own responses to this prompt:
  - “Funds for procurement, social or otherwise”
  - “Finding institution's [sic] that value our outcomes and want to procure our services”,
  - “Measurement of impact on our community”
- Responding to a prompt regarding the best means or methods of program delivery, one- or two-hour live online workshops were the most preferred, followed by in-person half- of full-day workshops/events in Barrie or Collingwood.
- Respondents reported substantial changes in their operations due to COVID-19. More than half reported a substantial reduction in human resource capacity and/or a substantial reduction in activities. Almost half anticipated further human resource reductions. Two respondents reported that without new financial resources, their ability

to continue beyond 2020 was not assured, yet half also anticipated that demand for services/offerings would increase as a result of COVID-19.



- A final prompt asked respondents to write-in “ideas or feedback to share on how we can support your organization to cope with the COVID-19 pandemic”. The responses were as-follows:
  - “We are in the planning and design phase, so not immediately impacted by COVID currently”
  - “on going training support, promotion of Soc. Ent. and Socially responsible organizations in general and the benefits of looking local for suppliers”
  - “give us the tools”
  - Help getting the word out and promoting us as a social enterprise, as a provider of social procurement services, promote social procurement in the public and private sector, virtual networking opportunities
  - “You already have with the IRP and the flexible changes that were made. Thank you. But other connections or opportunities to resources whether financial or other are always welcome.”
  - “Just keep doing the excellent job you have been doing. Please keep connecting us all together with ideas and resources. Thank you!”
  - “Resources ongoing supports”
  - “Ensure [lead contractor] and SENCO are being invested in by the college”

## Interview Observations

Between July 20 and August 20, the lead contractor on this project was able to complete four (4) semi-structured interviews with survey respondents.

Interviews focused on providing survey respondents with an opportunity to discuss and provide feedback on the ways the forthcoming project activities could assist them in pursuing or developing social procurement strategies.

The interviewer focused on the following topics of discussion:

1. *Current knowledge and experience with social procurement*
2. *Social procurement knowledge areas of interest*
3. *Relevant tools or resources for social procurement*
4. *Ideal delivery methods for prospective participants*
5. *Identifying Social Procurement experts to recruit as speakers/informants*

From these interviews, the contractor observed the following:

1. In all interviews, a 'Social supplier list' was noted as a key requirement to move forward into social procurement.
2. Interviewees expressed a wide range of understanding and engagement in social procurement, suggesting the importance of developing a common understanding of social procurement region-wide.
3. Most interviewees were interested in virtual delivery of the session series. It was noted however that virtual delivery may reduce/limit participants' interactions with experts and partners.
4. All interviewees suggested municipal leaders or leading businesses who they believe should be engaged in the project (e.g. Bruce Power, City of Owen Sound).
5. As a result of the conversation with each interviewee, large projects in development in their communities came up, with the question "how can these projects tie into social procurement?"
6. Two interviewees expressed concern and dislike for suppliers being required to certify or pay to be on a supplier list
7. One interviewee (with the most experience in social procurement) expressed interest in one on one coaching with experts/partners to support their early stage conversations with a public Housing Corporation.
8. Construction projects came up in every interview.

9. One interviewee highlighted the importance of impact measurement and storytelling of local projects would be essential for their area to understand and move into social procurement.
10. A community benefit agreement tool was mentioned by two interviewees as a tool they would be interested to learn more about through a case study.

## Conclusions and Recommendations

Reflecting on the survey and responses, the following observations and recommendations are made to inform the design and early-stage implementation of the project:

*1: The original project design remains essentially well founded.*

There was no substantial evidence suggesting that COVID-19 has reduced the demand or potential for this sector development project. While respondents' operations have been negatively impacted by COVID-19 in some significant ways, social procurement is still seen as an important topic and a good opportunity to maximize the positive impacts of public/institutional spending.

*2: Prioritize the creation of an accessible, detailed regional directory or listing of social enterprises to meet the needs of public/institutional procurement processes.*

This resource was cited as a high priority in the interviews and survey. If such a resource can be developed soon, it could serve as a helpful resource for social purchasers and vendors in the coming years. In terms of design and maintenance, respondents were clear that such a directory should be reasonably accessible to both vendors and purchasers, with a focus on low barriers to entry for vendors. This directory should also include information about all listed firms, including their social and economic objectives (e.g. diverse suppliers, work integration social enterprises, economic opportunities for people in a specific community)

*3: Deliver early-stage capacity development opportunities and workshops online, but consider moving to in-person workshops as and when public health context improves.*

Interview and survey respondents preferred online delivery for this opportunity, but there appears to be some readiness to meet in-person in the near future.

*4: Early-stage project activities should focus on developing consistent regional understandings of social procurement practices, including a focus on how to document and communicate social enterprise impacts, and how to assess social value as part of procurement.*

While respondents suggested that they were familiar with social enterprise and procurement concepts and ideas, respondents indicated that there is significant need for shared, practical tools to assist in the implementation of procurement processes, and the ongoing documentation of the social impacts.

*5: As part of project start-up, reach out to all major institutions and employers in region to invite them to join this ongoing regional discussion.*

Some interviewees noted that employers like Bruce Power, or the City of Collingwood could be engaged through this project to help establish more social procurement capacity in the region. Reflecting on the lack of survey responses outside Barrie, Owen Sound and Orillia, early-stage outreach to communities and institutions who may not yet have been reached is a priority.

*6: Consider tailoring some project activities to specific economic sectors like housing & construction.*

All interviewees brought up construction projects as a key potential vehicle for social procurement. Some of these conversations considered how upcoming planned developments in their communities could be achieved using social procurement practices. Construction and other primary industries may thus serve as ideal, timely case studies on how to establish social procurement processes, and how to measure their social impact.

*7: Consider using a combination of case studies, associated practical tools, and specialized coaching to build community capacity for social procurement.*

Interviewees expressed strong interest in case studies and examples of community benefit agreements as key items to help them learn about the practicalities of this work. Survey responses likewise prioritized 'developing objectives and criteria for social procurement strategies', and 'policies and guidelines to help implement social procurement strategies' alongside 'impact measurement reports' and, 'proof of concept to share with my leadership/staff'. While case studies and practical examples may serve all these functions, one interviewee also suggested that customized coaching in a very specific project might be very helpful.



## APPENDIX 1: SCOPING SURVEY TOOL

## Introduction and Consent

**The Social Enterprise Network of Central Ontario (SENCO) housed at Georgian College is working to support Central Ontario suppliers and purchasers advance their practice in community benefit purchasing or social procurement. In completing the below survey you become a co-creator in this process and, we hope, a participant or attendee.**

**We have also included a few questions to check in with you on the impact of COVID-19. We have included several open-ended questions for your feedback; please do not hesitate to share anything you think might help us design and deliver events or other opportunities to help you learn and engage in social procurement.**

**This survey is being administered by a third-party evaluator. While we are asking for some identifying information about you and your organization, your responses to our questions will be kept confidential: other than the evaluator, no-one will know exactly who you are.**

**Any personal/contact information you do give us today will be used only to develop a contact list for SENCO to use for later communications about SENCO offerings through this project. If you do not wish to know or receive this kind of information, please do not include it when asked.**

**If you have any further questions feel free to reach out to Elly Green: [elly@ellygreen.com](mailto:elly@ellygreen.com) .**

\* 1. Having read the above introduction, do you agree to participate in this survey?

Yes

No

**Who are you?**

2. What is your name?

3. What organization, or kind of organization, do you work with or for?

4. What is your email address? (please only include an email address if you would like SENCO to send you follow-up information about this survey, program, and forthcoming opportunities)

## Social Procurement Overview

5. How do you define 'social procurement'?

\* 6. Considering your current or potential social procurement strategies and activities, how would you define your own role?

- Social Procurement Purchaser
- Social Procurement Supplier
- Mostly a purchaser, but sometimes a supplier
- Mostly a supplier, but sometimes a purchaser
- Other (please specify)

\* 7. What region in SENCO's network do you most often operate in?

- Owen Sound / Grey County
- Collingwood / South Georgian Bay
- Orangeville and Shelburne / Dufferin County
- Other (please specify)
- Barrie and surrounding area
- Orillia and surrounding area
- Muskoka and surrounding area

## Social Procurement from your perspective.

8. Reflecting on your current knowledge and experience with social procurement, please indicate the extent to which you agree with the following statements

|   | Strongly Disagree     | Disagree              | Agree                 | Strongly Agree        | N/A                   |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Social procurement is an entirely new concept for me and my organization.   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My organization and I have a strong awareness and general understanding of social procurement strategies.         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My organization and I are equipped and ready to adopt social procurement methods or strategies.                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My organization and I have invested in social procurement by dedicating resources, including staff, to this work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My organization and I are currently procuring from social firms.  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am part of a social firm, and we supply public institutions with our products.                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

9. What specific areas of social procurement knowledge are of most interest to you and your organization right now? Please rank in order of interest. (1 = most interested, 8 = least interested)



Defining social procurement



Policies and guidelines to help implement social procurement strategies



Developing objectives and criteria for social procurement strategies



Identifying social value and diverse suppliers



Procurement systems and processes



Implementing social purchasing strategies



Implementing Community Benefit Agreements



Measuring the impact of social firms

10. Please indicate how helpful the following tools or resources for social procurement development would be to you and your organization right now.

|  | Not helpful at all    | Not likely to be helpful | Somewhat helpful      | Helpful               | Very Helpful          |
|--|-----------------------|--------------------------|-----------------------|-----------------------|-----------------------|
| A case study on successful social procurement implementation | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| A definition article, slide deck or toolkit to share         | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| A template or example of a social procurement policy         | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| An organizational assessment guide                           | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| A social enterprise supplier list                            | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| RFP examples with social procurement integration             | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Community Benefit Agreement examples                         | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Impact Measurement reports                                   | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proof of concept to share with my leadership/staff           | <input type="radio"/> | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

11. From the following list, please identify the most significant hurdle or gap you and your organization are facing as it comes to social procurement

- Learning what social procurement is and how to discuss it within our organization.
- Identifying social enterprises in our region
- Creating a policy or strategy
- Finding relevant case studies or examples to emulate
- Applying a social procurement lens to internal processes (e.g. adding to RFPs)
- Other (please specify)

12. At this time we plan to create 8-10 sessions/presentations. Which of the following delivery methods would suit you and your team best over the next twelve (12) months? Please rank in order of preference (1= most preferred, 5 = least preferred).



2-hour in-person, interactive small group sessions (Barrie/Collingwood area)



1-hour in-person lecture series (Barrie/Collingwood area)



In-person workshop/event; half- or full-day (Barrie/Collingwood area)



1- or 2-hour live online workshops



1- or 2-hour recorded lectures/interviews, with follow-up discussion group opportunities online or in writing



## Pandemic Impacts

13. Reflecting on what you know and understand about the prevailing COVID-19 pandemic conditions and their impact on your organization, please indicate the extent to which you agree with the following statements:

|  | Strongly disagree     | Disagree              | Agree                 | Strongly agree        | N/A                   |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| We have experienced a substantial reduction in human resource capacity as a result of COVID-19.      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| We anticipate a substantial reduction in human resource capacity as a result of COVID-19             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Without substantial new financial resources, we will not be able to continue operations beyond 2020. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| We have significantly reduced our organizational activities as a result of COVID-19.                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| We expect that demand for our services or offerings will increase as a result of COVID-19.           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. How can we support you? If you have ideas or feedback to share on how we can support your organization to cope with the COVID-19 pandemic, please let us know here:

## Closing

15. As part of this preliminary scoping process, SENCO is conducting confidential interviews with prospective participants, partners and stakeholders. Would you like to participate in an interview to discuss the best ways for SENCO to meet your needs for social procurement capacity building? If so, please indicate 'yes' below and SENCO will contact you using the information you provided on page 2 above (if you did not provide any information there, you can provide an email address here). By selecting 'yes', you will also indicate your consent for your survey responses to be reviewed by the interviewer in advance of the interview. Interview and survey responses will remain confidential to SENCO and program evaluators.

Yes

No

16. Please provide your email address here if you are interested in a follow-up interview with SENCO on the topic of social procurement needs and opportunities.

17. Thanks for your responses! Before you go, is there anything else you want to say, anything you think we may have missed?