

# SUPPLIER GUIDE TO SOCIAL PROCUREMENT





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Canada







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Scale Collaborative supports social change organizations to become financially resilient, scale and increase their impact. Scale takes an ecosystem approach to building social enterprise, social procurement and social finance sectors on Vancouver Island and beyond.

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# **SUPPLIER GUIDE TO SOCIAL PROCUREMENT**

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# About Buy Social Canada

Buy Social Canada brings together socially driven purchasers and social value suppliers to build business relationships that use the marketplace to generate social benefits for communities across the country. We work with community, private sector, and governments to support the development of policy and resources to strengthen local and regional social procurement initiatives. We offer a recognized, Canada-wide social enterprise certification program that opens the door to an emerging social impact network.

Social procurement, simply put, is leveraging a social value from your existing procurement.

We always welcome feedback from anyone using our materials and guides to support their continued development. Please let us know how we can support your efforts and enhance our offerings.

For further information on Buy Social Canada please visit our website at [www.buysocialcanada.com](http://www.buysocialcanada.com) or contact: [tori@buysocialcanada.com](mailto:tori@buysocialcanada.com)

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# About this Supplier Guide

*The Supplier Guide to Social Procurement* is designed to support social value suppliers to prepare for and effectively engage with purchasers.

The Supplier Guide is both a journey through the procurement process, and a hands-on tool kit for social value suppliers to understand and recognize social procurement opportunities and to prepare for procurement.

Although this Supplier Guide can stand alone in its content, we recommend that you read through the existing Buy Social Canada *Guide to Social Procurement* as a precursor to the Supplier Guide. Understanding the demand-side considerations of social procurement and being familiar with the definitions are necessary to get the best value from the Supplier Guide. The Supplier Guide to Social Procurement focuses exclusively on the actual preparation to support and encourage supplier capacity to engage in the procurement process. Related learning materials and resources are available at [www.buysocialcanada.com](http://www.buysocialcanada.com).

There is an emerging consideration by many purchasers and other stakeholders to include a social value in their existing purchasing. Here are some of the factors driving social procurement:

- All levels of government and institutions are increasingly asking suppliers to deliver social value as well as quality, competitive prices and environmental goals. They want to achieve the ‘best value’ for taxpayers when purchasing and choosing suppliers.

- For businesses, social procurement is an opportunity to integrate a social value into their business practices, potentially gain a competitive edge, and contribute to the communities where they work.
- Investors increasingly want to invest in businesses that deliver financial performance and social value.
- Employees want to work for businesses that have a social purpose beyond profit maximization.
- Consumers increasingly want to buy from businesses that align with their values.
- As we witness this increase in social procurement, the purpose of this Supplier Guide is to help the social value suppliers build their capacity and capability to engage with these purchasers. Purchasers need your product or service; demonstrating and sharing your social value strengthens your business case to meet their demands.

## Who is this For?

For the purpose of this Supplier Guide we will use the term *social value supplier* to refer to social enterprises and other suppliers who incorporate social value into their business and want to access procurement opportunities.<sup>(1)</sup>

- A social enterprise is a business that seeks to achieve a defined social, environmental or cultural purpose; it generates a significant portion of its income from selling goods or services, and the majority of net-profits are re-invested

1. To apply for Social Enterprise certification go to: <https://www.buysocialcanada.com/social-enterprise-certification>

in the purpose. Buy Social Canada offers a social enterprise certification to show purchasers that this definition is met.

- You may be another type of social value supplier: a Social Purpose Organization, a Co-operative or a private business wanting to achieve social value outcomes through the sales or delivery of your product or service.

## **FOR THE SOCIAL VALUE SUPPLIERS USING THIS SUPPLIER GUIDE**

Procurement, and especially social procurement, takes time to understand. Being knowledgeable about the process, opportunities, and how to get contracts is critical for social value suppliers to succeed in this marketplace. Getting your organization 'supplier ready' is a journey, and you may be just starting out or already partway along.

Buy Social Canada can provide the tools, resources and training to get you ready and be competitive in the market. Your enterprise will need to build on these tools and create a culture of working in a blended value business model; the integration of social value and commercial success. Your organizational governance model, quality of products and services, buyer response, pricing and social value outcomes are all essential components to being successful in a social value marketplace.

Our intention is that you will use the resources in this guide to build your supplier skills and capacity, and be able to demonstrate that you are ready to deliver contracts for government, institutions or corporate purchasers.

The Supplier Guide outlines the key issues and situations to be familiar with as you enter deeper into procurement relationships and competitive bidding. Understanding the principles and key approaches will help support you to gain access to this market.



As you explore these opportunities for your products and services, you will encounter everything imaginable from purchasers. From on the one side you may hear, *'We've been waiting for you to show up!'* to *'We only base our decisions on the price'*. So, don't be surprised at how much education you will be providing to purchasers on *'Why there is value in social procurement.'*

## How to Use this Guidebook

Each section of the Supplier Guide will have an explanation of that specific step in the process, the learning materials, and provide relevant worksheets and practice exercises to support you through the procurement process. Online training programs to complement the Guide will be regularly offered or provided bespoke on-demand.

### Want to become a social procurement ready supplier?

- Read the Supplier Guide to Social Procurement
- Complete the end of chapter worksheets
- Register for the online training program at:  
[www.buysocialcanada.com/super](http://www.buysocialcanada.com/super)
- The Supplier Guide is arranged as a journey that begins and flows through a planned progression. While we encourage you to read the guidebook from start to finish, you can also access the appropriate materials on an as-needed basis.

The chapters reflect a 5-stage learning process along the Social Procurement Supplier Journey on page 12.

**CULTURAL CAPITAL**  
*Culture • Diversity • Respect*



**SOCIAL CAPITAL**  
*Family • Institutions • Networks*



**COMMUNITY  
CAPITAL**



**HUMAN CAPITAL**  
*Skills • Learning • Training*



**ECONOMIC CAPITAL**  
*Income • Finances • Capital*



**PHYSICAL CAPITAL**  
*Natural • Manufactured • Property*

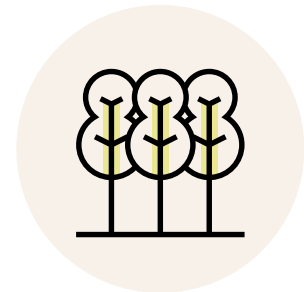
# Introduction

## Social Procurement

Every purchase has an economic, environmental and social impact, whether intended or not. Social procurement is about capturing those impacts and seeking to make intentional positive contributions to both the local economy and overall vibrancy of the community. Social procurement integrates social value into your purchasing criteria, along with cost, quality, and environment.<sup>(2)</sup>

Social procurement changes your purchasing from an economic transaction to a means to build healthy community. Instead of merely addressing lowest price and quality, social procurement seeks to build community capital with every purchase.

Community capital is the foundation of healthy communities. There are five kinds of community capital: cultural, physical, human, economic and social. As a social value supplier you contribute to some or all of these capitals. Social procurement is the means to increase community capital creation.



Social procurement leverages a social value from existing purchases and contracts.

2. [www.buysocialcanada.com](http://www.buysocialcanada.com)

## Concentric Circle Model

The more integrated a social value is within a business, the more community capital is generated. Social procurement harnesses the full value that exists in a purchasing decision to support local, community-serving businesses and organizations, and keeps this 'wealth' re-circulating for the benefit of the whole community.<sup>(3)</sup>

By reinvesting profits back into the mission, social enterprises prioritize mission over profit.

When practising social procurement, the spectrum of available suppliers for a given product in a given area varies. On the concentric circle model, you will find social enterprise in the centre target. By reinvesting profits back into the mission, social enterprises prioritize mission over profit. Other social value suppliers can also be found in the model, including social purpose businesses, co-operatives, local businesses, diverse ownership, or businesses with social enterprise within their supply chain.

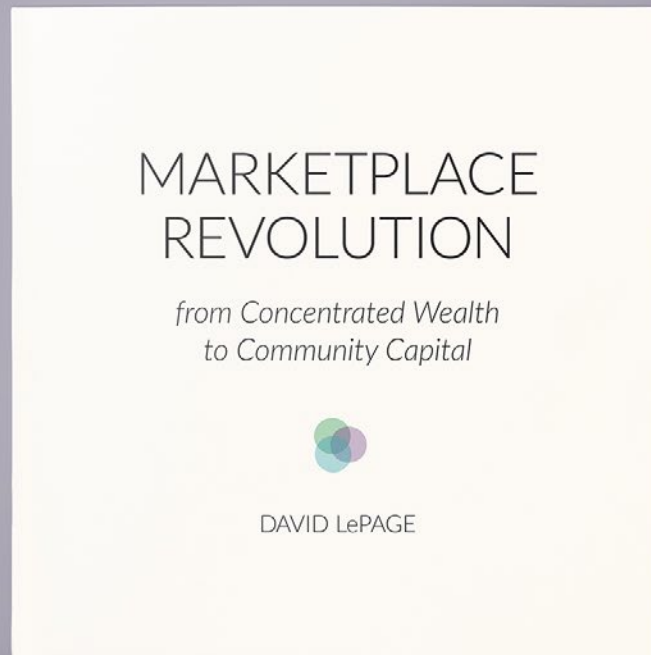


Concentric Circle Model

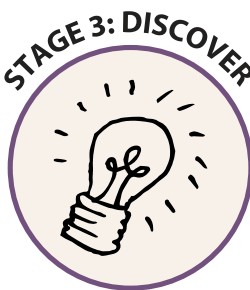
3. A Guide to Community Capital; BALLE: [https://community-wealth.org/sites/clone.community-wealth.org/files/downloads/tool-BALLE-guide\\_to\\_community\\_capital.pdf](https://community-wealth.org/sites/clone.community-wealth.org/files/downloads/tool-BALLE-guide_to_community_capital.pdf)



Further information on the Concentric Circle Model and community capital can be found in *Marketplace Revolution – from Concentrated Wealth to Community Capital* by David LePage (2020) and in the Guide to Social Procurement (2018).<sup>(4)</sup>



4. <https://www.buysocialcanada.com/marketplace-revolution>



## Social Procurement

### SUPPLIER JOURNEY

**Stage 1: Learn** – you will get a basic understanding of what procurement is and how it works.

**Stage 2: Identify Opportunities** – will provide you with the knowledge of how to find who is purchasing Goods and Services and what the opportunities in Construction projects are.

**Stage 3: Discover** – is all about prospecting for opportunities that match your offerings and tips to identify and build relationships that can lead to new opportunities.

**Stage 4: Respond** – takes you through the process of getting your proposal ready to best present your Business Proposition and your Social Value.

**Stage 5: Deliver** – is more than just meeting the contract for goods or services, it's about how to communicate your social value outcomes and tell your story.

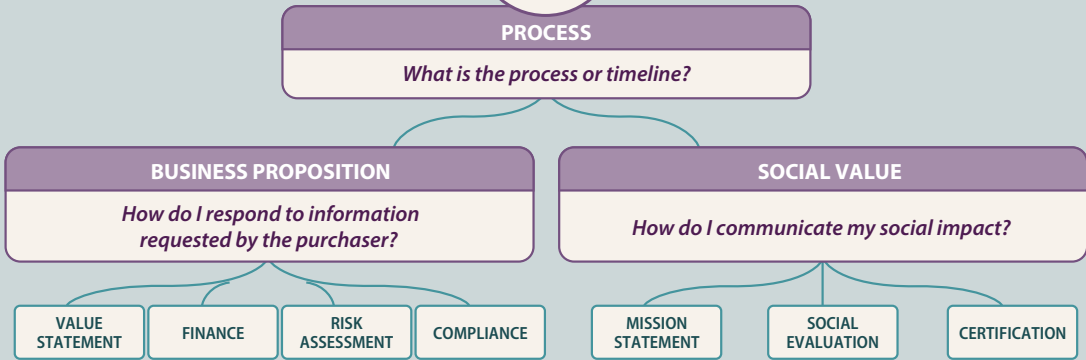
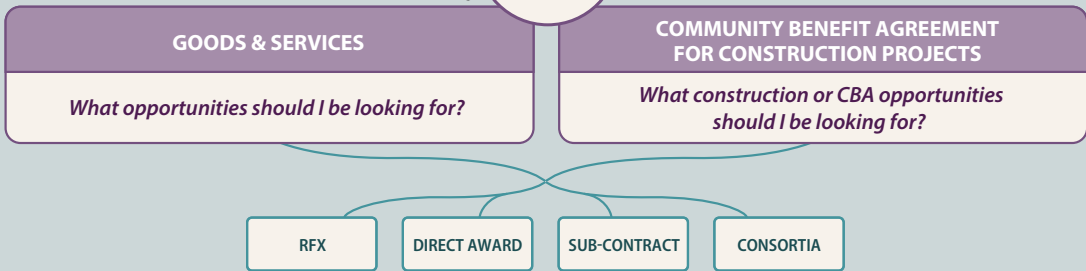
These stages can be followed sequentially with each building on the last, or you can take them as and when you require knowledge on a particular topic. You will find all worksheets referred to in the text at the end of each chapter.



**STAGE 1: LEARN**

**UNDERSTANDING THE PROCUREMENT PROCESS**

*What is Procurement?  
Is Procurement right for my organization?*



## STAGE 1: LEARN



### UNDERSTANDING THE PROCUREMENT PROCESS

*What is procurement?  
Is Procurement right for my organization?*

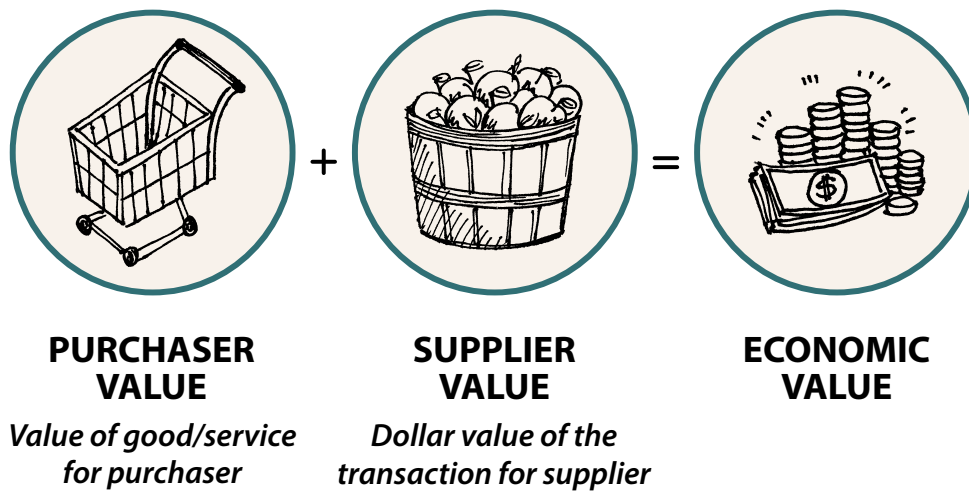


# Stage 1: Learn

## Understanding the Procurement Process

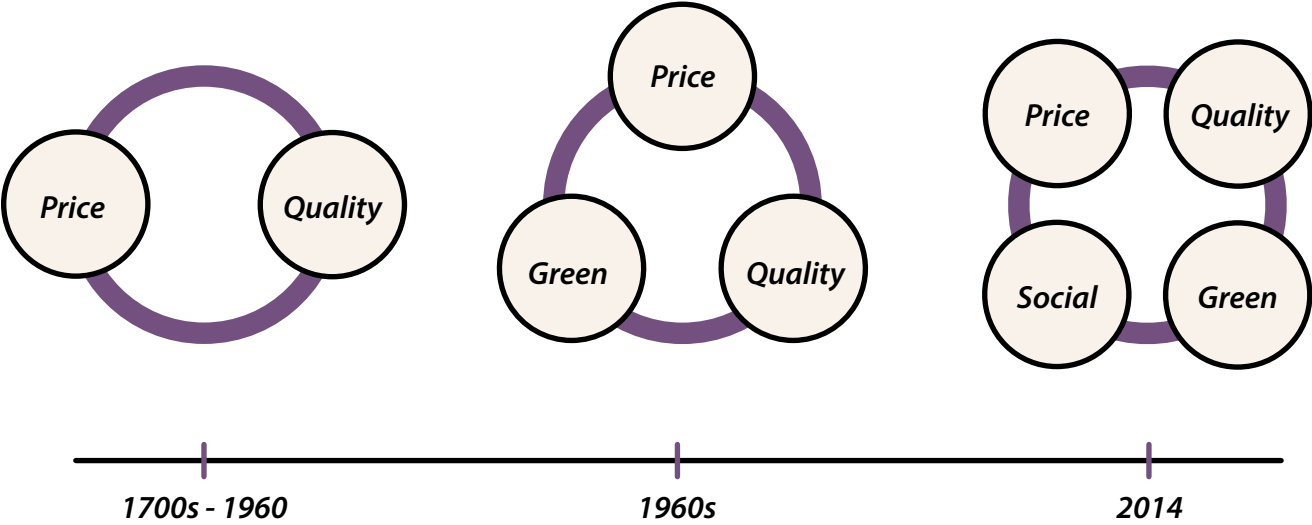
What is Procurement? Procurement is the process that a buyer, the purchaser, uses to acquire the goods and services they need. Traditionally, purchases have been based primarily on getting what is needed for the lowest price possible. When only financial value is considered, lowest price means the most 'value' for the purchaser, sometimes at the expense of highest quality and very often at the expense of the environment and social impacts.

At that level, procurement is viewed entirely through the lens of 'economic value'. The process is merely an economic transaction.



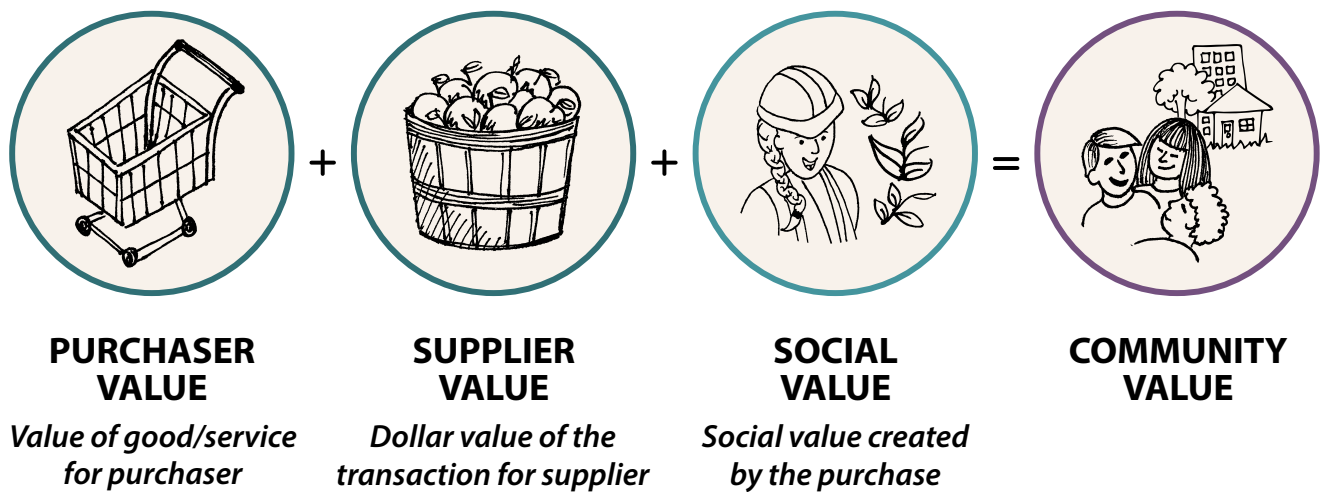
Traditional Procurement Model

Since the 1960s, there has been rising awareness of the impact business and economy have on the environment. Since then, procurement processes have increasingly taken into consideration the environmental impact of their purchase. More recently, there is acknowledgement that ALL purchases have an impact, on the financial bottom line, on quality, on the environment AND on the social outcomes as well.



Evolution of Selection Criteria in Procurement Practices

Emerging best practice recognizes this impact and works to intentionally and strategically align purchasing to not just reduce the negative impacts but to generate positive outcomes. When a social value is added to purchaser and supplier value, there is a shift from a focus on purely economic value to broader community value. This is social procurement.




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Social Procurement Model

In Canada, governments alone spend \$200 billion dollars annually through procurement processes.



## Understanding Your Potential Purchaser

As a social value supplier, you sell goods and services in the same market as every other business. The difference is, that when you sell to buyers, you create social value through your environmental, cultural or social purpose. Your opportunities increase when you can compete on all four elements: price, quality, environment, and social.

When you sell directly to individual consumers, that is called retail sales, or a business-to-consumer transaction, or “*B to C*” for quick reference. This would be the sales model for thrift stores, coffee shops, and restaurants.

When you sell to governments, institutions, another business, or to corporations, it is called business-to-business transaction, and referred to as “*B to B*”. Or as a subset, specifically with government, “*B to G*”. This would often be the sales model for catering, office cleaning, courier services, etc.

In Canada, governments alone spend \$200 billion dollars annually through procurement processes, with approximately 80% taking place at local and regional level — that is \$160 billion dollar market opportunity before considering what is spent by corporations, anchor institutions (Universities, Schools, Hospitals, etc.), and the non-profit sector.<sup>(5)</sup>

The B to B transactions are usually undertaken by a designated purchaser or group, using a defined and specific process, which is *procurement*. Most larger purchasers will have written policy and procedures that they have to adhere to within their organization. In addition, most Government purchasing is subject to international trade agreement regulations, which is why selling to any public buyer requires additional knowledge.

It is this latter process, B to B, that we are addressing in this guide. This process can appear to be complex, confusing, and time consuming. This guide will demystify and simplify the potential complexity, teach you the skills you need to identify your opportunities and show you how to respond to opportunities effectively.

5. <https://www.buysocialcanada.com/marketplace-revolution>

Accessing those opportunities will take on many models, methods, and often require relationship building outside the formal procurement process. Success in gaining procurement contracts becomes both a science (dotting i's, crossing t's, pricing competitively, delivering, etc.) and an art (matching up with the appropriate opportunities, crafting good proposals, sharing your story and demonstrating your social value).

If you have a non-profit background, you may have experience in applying for grants. That skill set is well put to use with procurement. However, there are significant differences in the purposes and process:

	GRANTS	PROCUREMENT
OBJECTIVE	DELIVER A PROGRAM	PROVIDE A GOOD OR SERVICE
<b>Competitive Process</b>	<ol style="list-style-type: none"> <li>1. Application intake</li> <li>2. Applications evaluated against pre-determined criteria</li> <li>3. Grant awarded</li> <li>4. Opaque</li> </ol>	<ol style="list-style-type: none"> <li>1. Proponent responds to request for quote, proposals, etc.</li> <li>2. Bids evaluated against pre-determined criteria</li> <li>3. Contract awarded</li> <li>4. Transparent</li> </ol>
<b>Financial Implications</b>	<ol style="list-style-type: none"> <li>1. May not fund total amount</li> <li>2. Many organizations are funded</li> <li>3. You get what you get</li> </ol>	<ol style="list-style-type: none"> <li>1. Fund total amount with allowable profit</li> <li>2. One or few proposals are selected</li> <li>3. You can negotiate the terms of the agreement</li> </ol>
<b>Decision-makers</b>	Grants administrators, citizen committees	Finance and procurement staff
<b>Evaluation</b>	Committee scoring, public voting, external reviewers	Best value for money; may include environmental and social considerations
<b>Governance</b>	Contribution agreement	Contract
<b>Time Horizons</b>	Annual* (can be longer)	Depends on contract, could be a one-time product purchase or multi-year service contract



## Is Procurement Right for Your Organization?

Prior to moving forward with bidding on contracts, it is important to take time to reflect and collect:

- **Reflect** on your current and future offer to buyers and assess your capacity to deliver on different types of contracts. This will help inform your strategy for moving forward and your unique value proposition. (Worksheet 1)
- **Start** to collect in one place the information that demonstrates your value proposition. This becomes the basis for submitting bids and or partnering and we will add to it throughout this guidebook as well as each time you submit a bid. (Worksheet 5)



Worksheet 1

# PROCUREMENT READINESS CONSIDERATIONS

REQUIRES	CONSIDER	SCORE 1 – 5* AND STEPS TO IMPROVE
<b>Mission</b>		
<b>You have a clear organizational purpose</b>	Your organization’s primary purpose is a social, cultural and/or environmental mission that provides a public or community benefit. This is clearly articulated.	score:
<b>Market</b>		
<b>You sell goods or services in the marketplace</b>	Your product or service offering is clear	score:
<b>Your goods and/or service is priced competitively</b>	You have a clear understanding of the cost it takes to deliver your product, and your pricing is competitive and sustainable.	score:
<b>You have a track record in providing your product or service to other businesses</b>	You have buyers and a market for your product or service, as well as the experience and capability to deliver B2B contracts.	score:

REQUIRES	CONSIDER	SCORE 1 – 5* AND STEPS TO IMPROVE
<p><b>You know your competitors</b></p>	<p>Your offer provides a distinct advantage in terms of price, quality, environment and/or, of course, social.</p>	<p>score:</p>
<p><b>You have the capability to contract</b></p>	<p>You have a good understanding of the minimum and maximum contract sizes you are able and willing to take on and deliver successfully.</p>	<p>score:</p>
<p><b>You are visible and have a professional presence</b></p>	<p>Your website and materials are accurate and up to date.</p>	<p>score:</p>
<b>Manage</b>		
<p><b>You have robust governance and a skilled team</b></p>	<p>You have stable leadership, a solid governance model, and the business acumen necessary to win and deliver contracts.</p>	<p>score:</p>
<p><b>You have the capacity to deliver</b></p>	<p>Your team and resources are available to grow and deliver on desired contracts. There are options for capacity building and collaborations.</p>	<p>score:</p>



REQUIRES	CONSIDER	SCORE 1 – 5* AND STEPS TO IMPROVE
<b>Money</b>		
<p><b>The financial aspects of your business practices are in place</b></p>	<p>You have active accounting, billing, record keeping processes.</p>	score:
<p><b>You have potential to access the financial resources</b></p>	<p>You have connections with a bank or other options that will allow you to gain access to finance</p>	score:
<b>Measure</b>		
<p><b>You can explain and demonstrate your social value</b></p>	<p>You can measure and share your blended value, business and social value, story.</p>	score:
<b>Total Score</b>		

*\*Score yourself 1 to 5 where 5 is highest. If you are unsure you can leave blank and continue.*

# STAGE 2: IDENTIFY OPPORTUNITIES



## GOODS & SERVICES

*What opportunities should I be looking for?*

## COMMUNITY BENEFIT AGREEMENT FOR CONSTRUCTION PROJECTS

*What construction or CBA opportunities should I be looking for?*

RFX

DIRECT AWARD

SUB-CONTRACT

CONSORTIA

## Stage 2: Identify Opportunities

Identify Opportunities is critical for determining your procurement prospects. In this section we explore and explain how to identify who are your potential purchasers and to understand how they purchase. The key questions you need to identify are:

1. Who will buy your product or service?
2. How do they make their purchasing choices?
3. What is the process?
4. Who will buy your product or service?

*“Go fishing where  
the fish are.”*

– Common marketing adage

A key step in identifying opportunities is ensuring that the potential purchaser has a need or desire for your product or service. Before trying to sell to a potential buyer, make sure they have a need or specific interest in your offering.

Start with: when you look at your product or service offering, which buyers need your particular offering?

Here are some examples of matching products and services and social value outcomes to buyers.

- **Landscaping:** Causeway Landscaping has a multi-year contract providing lawn care and snow removal services with Ottawa Housing employing social housing residents.
- **Corporate gifts:** Social enterprises are a significant part of Saul Good’s Gifts supply chain, including products and the gift box assembly is done by Starworks, employing persons from the Development Disabilities Association.

## Social Procurement, the key opportunity for social value suppliers

- **Interpretation services:** DIVERSEcity sells their translation services to government agencies creating training and employment for Immigrants.
- **Employment services:** EMBERS, Building Up and BUILD Inc provide labour to the construction industry, which needs temporary labour on a daily basis, employing persons facing barriers to employment.
- **Junk removal:** Redemptive Developments and CleanStart BC sell their services to social housing providers who need discarded furniture and materials hauled away, creating employment for persons facing barriers to employment.
- **Catering:** HAVE Café, D.I.C.E.D. Culinary, and Potluck Catering provide catering to events, corporate lunches, etc., while providing employment training and jobs to persons facing barriers to employment.
- **Commercial cleaning:** The Cleaning Solution provides small businesses and non-profits with office cleaning and recycling needs; their staff have barriers to employment, including mental health challenges so they have designed their operations to fit their staff.
- **Recycling:** The Bidders' Project sorts waste and recycling at the Vancouver Convention Centre and other commercial sites and events, creating employment and engagement for persons facing barriers to employment.

### TIP!

The marketplace sees trillions of dollars of transactions annually. It is a HUGE pool to wander in to. As a social value supplier, to enhance your specific opportunities, we recommend you take a major segmentation of the market and target the purchaser who is committed to including a social value component to their buying process. You will be competing in a smaller 'pool', but your market position and advantage increases dramatically. Social procurement provides a specific opportunity to social value suppliers, as you already deliver on both product/service AND social value.

The table below describes the different types of B to B buyers, and their key considerations, beyond product and service needs.

TYPE OF BUYER	CONNECTION TO SOCIAL VALUE AND PROCUREMENT	KEY CONSIDERATIONS
<p><b>Federal and Provincial Governments</b></p>	<p>Governments have often been leaders in social procurement practices and policy due to their consideration of ‘best value for taxpayer’ with combined financial, environmental, and social returns. Governments can incorporate environmental and social policy objectives into their procurement needs resulting in improved service delivery and cost effectiveness across governmental departments and programs.</p> <p>Governments are significant spenders and the policies they enact create changes across the market.</p>	<ul style="list-style-type: none"> <li>• Alignment with public facing social value objectives</li> <li>• Subject to compliance with trade agreements and requirements of openness, fairness and transparency</li> <li>• Procurement processes tend to be more complicated and complex and therefore, time-consuming</li> <li>• Big bureaucracies can be difficult to navigate; personal relationships may be harder to develop</li> </ul>
<p><b>Local Governments</b></p>	<p>Local governments often partner with higher levels of government to deliver on larger infrastructure projects. They also are direct spenders into local communities and are able to align their spending to community priorities more clearly.</p>	<ul style="list-style-type: none"> <li>• Subject to trade agreements</li> <li>• Fewer bureaucratic layers</li> <li>• local government purchasers can be contacted to discuss your business and social value offering</li> </ul>
<p><b>Crown Corporations</b></p>	<p>Crown corporations are a wholly owned subsidiary of the government. For social procurement purposes, their hybrid-status is often a great advantage since they have the mission of government and the flexibility of private business. Social procurement has evolved significantly because of the interest and willingness of Crown corporations to engage with social value suppliers.</p>	<p>May or may not be subject to trade agreements</p>
<p><b>Private corporations</b></p>	<p>More and more corporations and other businesses are becoming involved in social procurement. We are witnessing a trend of ‘purpose’ focused businesses that are integrating their social value goals or their corporate social responsibility objectives into their purchasing.</p>	<ul style="list-style-type: none"> <li>• Can make quick and direct decisions on some purchases</li> <li>• Not restricted by trade agreements and other regulatory issues</li> <li>• Can be primarily focused on price and efficiency to maximize profits and keep any ‘social’ considerations to CSR and charitable activities</li> </ul>

TYPE OF BUYER	CONNECTION TO SOCIAL VALUE AND PROCUREMENT	KEY CONSIDERATIONS
<b>Non-Profits</b>	A significant market opportunity is selling to the non-profit and charitable sector. There has been a culture of buying the cheapest product or service to allow the non-profit to spend maximum dollars on their service delivery, however this is shifting.	<ul style="list-style-type: none"> <li>• Price remains a key consideration</li> <li>• Values and mission aligned buying can further their impact and be reportable to their Board and stakeholders</li> </ul>
<b>Institutional Purchasers</b>	Another potential purchaser in your opportunities' assessment are institutional purchasers, represented by the universities, colleges, schools, and hospitals. This area of purchasing is also emerging as a growing portion of social procurement opportunity because of the potential alignment of their community serving objectives and their existing purchasing.	<ul style="list-style-type: none"> <li>• Many institutions have a significant economic, social and environmental footprint in the communities where they exist</li> <li>• Can be large organizations within smaller communities</li> <li>• Growing awareness and connection with the local impacts of their purchasing decisions</li> </ul>
<b>Consumers</b>	Consumers are not a major focus of this Guide, but if you are a social value supplier in the retail space, there is a growing awareness from consumers to be aware of the impact of their buying decisions. Is it local? Is it part of the circular economy movement? Is the purchase creating a social value?	<ul style="list-style-type: none"> <li>• Storytelling and consistent messaging is key to connecting with value-driven consumers</li> <li>• There will be many different market niches and associated sales strategies</li> </ul>

Within each of the entities above, there are people who are tasked with day-to-day buying, awarding contracts and overseeing the competitive bid process. These job titles tend to be responsible for buying on behalf of organizations:

- Office Manager
- Buyer
- Assistant Buyer
- Contract Manager
- Purchasing Agent or Officer
- Procurement Specialist

- Director of Procurement or Purchasing
- Chief Financial Officer (CFO)
- Chief Administrative Officer
- CAO

### **HOW DO THEY MAKE THEIR PURCHASING DECISIONS?**

Purchasers are responsible for:

- The purchasing process and decisions they make to all stakeholders: the suppliers, community, organization and potentially, stakeholders such as taxpayers
- Finding good quality services, products and companies to deliver contracts according to department or business department needs
- Managing contacts and vendors to ensure quality, budget, timeframe and additional outcomes, including environmental and social objectives
- Being able to meet needs within the allocated budget and timeframe
- Reporting out on purchase decisions, budget implications, and delivery





## Leah, Buyer at City of Victoria

### Why is social procurement or social value important to you?

I champion this approach to addressing the multiple issues that local government is responsible for, linking our current spending to achieve social or community outcomes just seems like such a logical approach. (Why didn't we think of this before?). I believe encouraging (and challenging) business to adopt strategies that achieve social value outcomes, such as inclusive employment practices, living wages, and advanced health, safety, and training, is not a big ask. We collect taxpayer dollars, so we should be spending those dollars in ways that support the desired outcomes of other municipal programs and objectives.

### What is your approach?

We are in the early stages of implementing Social Procurement. At this point, we are looking for “*low hanging fruit*” (unbundling requirements where we know a vendor exists, focusing on low-dollar opportunities) and internal training and capacity building. We are also including social value in the evaluation criteria for RFPs and looking for opportunities to broaden the requirements and associated points value. A key resource for us is the “*Social Value Directory*”, a resource for businesses to identify themselves as delivering social value and for internal staff to connect with those businesses.

### What are the key things you look for when buying from/contracting with a vendor that provides social value?

1. We want to engage with both non-profit and for-profit businesses who provide social value. So not only are we looking to engage Social Enterprises, B Corps, 3Cs (Community Contribution Companies), but also we want to encourage our traditional suppliers and contractors to let us know about the good work they are already doing or to spark a shift towards them incorporating social value as part of their normal operations.



1. We recognize intersectionality and we don't rank equity seeking groups. This means, in our policy the equity seeking groups are listed alphabetically and are valued equally. We also recognize that people in our community may belong to or identify with more than one equity seeking group. That said, in an evaluated competition the more social value objectives that a business achieves, the higher their score would be in that category.
2. We also need to balance the ability for large businesses and small and medium businesses to provide social value. The way vendors respond is important. We will score a proposal high if there are three elements: a program or policy, actions, and measurement. As we build out our program, we will have specific elements we are asking for, and each RFP is different. But generally, if you speak to program, actions and measurement you will get a high score in that category regardless of the size of your company

**Do you have any advice to social purpose businesses looking to do business with you?**

- Connect with us. Most broader public sector agencies (government, institutions, Crown Corporations) have a different way of posting competitions, so you may need to research this a bit. But, register in BCBid and on all the individual platforms (*BIDS* for the City of Victoria). Watch the types of competitions they are posting and look for opportunities to participate. If you see an opportunity but have questions, call or email the buyer. Help educate us on what you can offer, because it can help us consider ways to unbundle requirements in the future.
- Connect with the local construction associations. They can help connect you with general contractors so you can participate as a sub-contractor or supply chain resource.





## Tim, President of Chandos Construction

### Why is social procurement or social value important to you?

Chandos launched with a vision to build a company that would lead a change in the Canadian construction industry. We are one of North America's most innovative and collaborative builders. We are 100% employee owned and a certified B Corporation. We incorporate social procurement to ensure a portion of project investments is put back into the community we're building in.

This strategy allows us to:

- Provide employment opportunities for local people and those with barriers to employment
- Expand and support local businesses
- Reduce poverty and strain on Canadian social system
- Eliminate social isolation and incorporate local purchasing
- Reduce our environmental footprint

### What is your approach?

We have created an internal social procurement directory within our Chandos intranet consisting of pre-vetted social benefit vendors.

We encourage both office and field teams to use this directory where possible for services they need to hire.

The directory is divided by district and by category of service for vendors.

- The following criteria are what we have used to build our social procurement directory consisting of Certified Social Enterprises and Indigenous Businesses:
  - *B Corp Certification*
  - *Registered Indigenous Business*
  - *Certified Aboriginal Business*
  - Buy Social Canada *Certified Social Enterprise*
  - *Registered Charity*
  - *Alberta Nont-for-Profit*
  - British Columbia Non Profit
  - Ontario Non Profit

**What are the key things you look for when contracting a vendor that provides social value?**

We appreciate the story and purpose behind the organizations we buy from. The more impact we can have on the community with our dollars, the better. A clearly defined list of service offerings for a social vendor makes it much easier for our staff to understand where it is possible to buy from a social enterprise, otherwise the vendor may be overlooked. It has been easy to switch our buying of goods and services to social vendors when the service offering is the same quality or better.

**Do you have any advice to social purpose businesses looking to do business with you?**

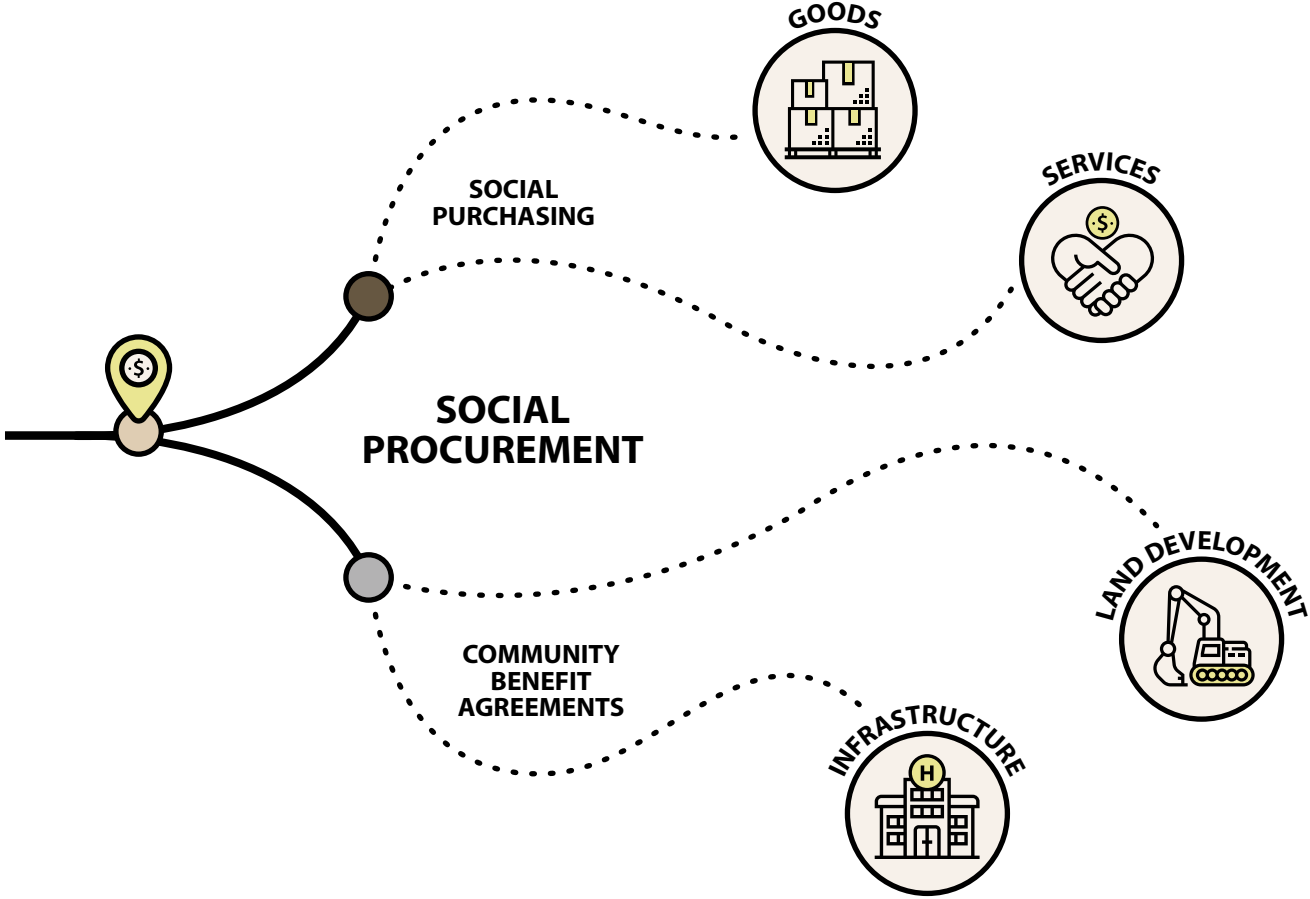
Don't hesitate to reach out to us.



# What is the Process?

In social procurement there are two main avenues of procurement

- Social Purchasing within the purchase of goods and services, where purchase consideration and weighting criteria includes quality, price, environment, and the social value.
- A Community Benefit Agreement is an agreement between government, community and developers to create community benefits as part of an infrastructure or development construction project. This often includes targets around local and social hiring and purchasing. The scale of these projects and budgets create an opportunity for social value suppliers who offer relevant employment services or can situate their products within the supply chain of the project.



Pathways for Implementing Social Procurement

Whether you are bidding directly as a goods or services vendor, or sub-contracting with a larger bidder, there are 3 ways that purchasers choose their suppliers:

- Small buys
- Direct awards
- Competitive bids

## Small Buys

Even though government purchasers must comply with both external trade agreements and most purchasers have internal policies, ALL purchasers have a level of discretion in their purchasing. Usually this falls under a financial threshold, set by an internal policy. The types of purchases can be things like office supplies, hardware, software, catering, courier services, printing, gifts and so on. These purchases tend to be distributed, small, quick (the kind that can be purchased on a credit card) and do not require a contract.

However, the dollar amount of small buys, when added up, is significant. For example, the City of Victoria spends over \$4 million annually through credit cards, with a maximum for each purchase at \$5,000.

Being known as a valued and reliable customer, to the people making these daily buying decisions is key to accessing small buy opportunities.

## Direct Awards

A direct award is when a business is given a contract and is not required to bid competitively. There are certain rules that outline when a direct award can be given:

- The dollar amount is under the financial threshold outlined by internal policies or trade agreement

- The award is provided to an organization that is exempt from internal policies and/or trade agreements
- The supplier is on a pre-qualified list of suppliers

The purchasers' choice could be based on any variation of research and knowledge:

- Who they already know and have a positive experience buying from
- A new supplier they want to try working with because potentially they offer
  - Better product or service
  - Better price
  - An added social value



Trade agreements have financial thresholds that are usually between \$5,000 to \$25,000

This model of purchasing occurs predominantly in the private sector, since government procurement is guided by both their own internal public policy to ensure open, transparent and fair opportunity processes, and externally on the requirement to adhere to the regulatory framework of the trade agreements.

The internal policy of government will often allow some direct awards, but almost always under certain financial thresholds; usually in the \$5,000 to \$25,000 range. The trade agreements vary, but thresholds are often in the area of \$75,000 for goods and services and \$200,000 for construction.

However, there are some trade agreement exceptions available to governments to do direct awards. The most relevant exception to be aware of and to potentially use as a contracting option is the non-profit exceptions included in many of the trade agreements. Under this exception a government entity can give a direct award of a contract to a non-profit supplier, regardless of the goods, services or size of contract. See the Buy Social Canada [Trade Agreement Primer](#) to get further information on the financial thresholds and particulars on the direct award exceptions.

The private sector choices made using direct award will likely reflect the company's priorities. If a company has a social procurement commitment, a corporate social responsibility policy or is compelled to demonstrate community engagement or other social or environmental impacts, they may give greater consideration to the supplier that can deliver on price, quality and social value.

Because direct awards are 'closed' and not 'open', relationship engagement and management are key to gaining such contracts. And delivering on time, on budget, with competence and being pleasant to work with, are key to keeping them. In summary, along with best value available, it's relationships, relationships, relationships!

## Competitive Procurement

Competitive procurement is when the purchaser lets the market know what they are wanting to buy and asks suppliers to submit a bid. Almost all government purchasing, and a significant portion of larger corporate purchasing, is done through open, transparent competitive bidding processes. Generally, this is a public process with clear goals, contract requirements and defined selection process criteria. The process can vary, but generally:

- Purchaser publishes a request for a product or service with defined criteria
- Suppliers submit their bids based upon the requirements
- Purchaser evaluates and selects from the bids
- The contract award is announced

Governments have multiple means and platforms to post their procurement needs. Some competitive bid processes are limited to invited bidders, or available only to pre-qualified applicants.

For smaller or less experienced social value suppliers this process may seem daunting, especially when you see something like a 57-page Request for Proposals (a recent federal RFP we saw

was 244 pages!). But stay calm — we'll walk you through how to be an effective and competitive bidder.

A bid request document is referred to as an RFX, “*Request for {Insert Some Variation on Potential Purchasing Opportunity}*”.

RFX are the documents that purchasers use to solicit a range of information and sometimes actual bids from suppliers.



### RFX encompasses a wide variety of forms. They can include:

- **RFI – Request for Information:** Generally seeking to find out who might be a potential supplier or to find information that will influence a future bid process
- **RFQ – Request for Qualification:** A purchaser is seeking to find potential bidders for a specific project who meet certain criteria; or they may be looking for potential suppliers to be on a list of ‘pre-qualified’ suppliers or ‘short list’ for future RFP
- **RFP – Request for Proposals:** the most common form of a buyer soliciting bids for specific goods or services.
- **RFQ** can also be a **Request for Quotes**, similar to RFP process but could be limited to just price for a specified product or service.
- **NRFP – Negotiated Request for Proposals:** An RFP without an identified price in the bid documents.

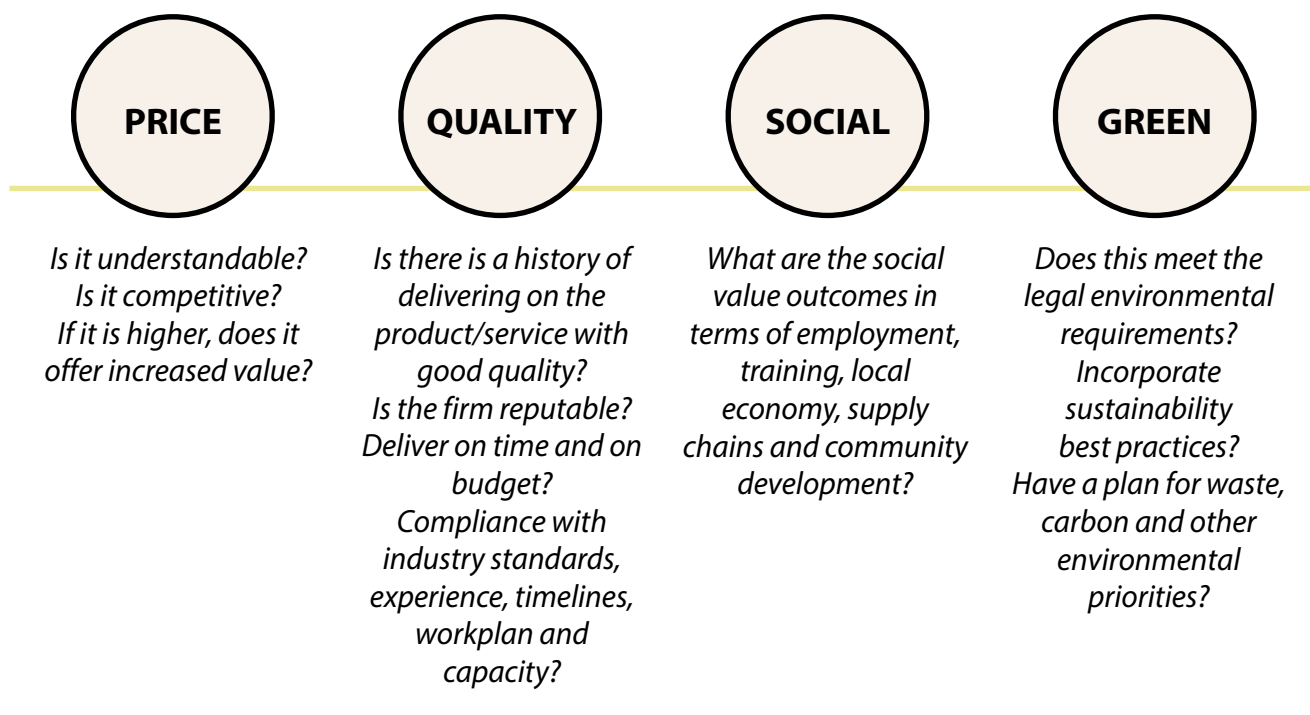
The purchaser’s process to prepare an RFX happens in a variety of ways. Even as a potential supplier, you may have the opportunity to influence that process. Always be ready to participate in consultations or to respond to an RFI that may be inquiring of potential bidders what they would prefer as the criteria.

The most common bid request document you will see is an RFP, Request for Proposal. The RFP documents are sometimes challenging for small social value suppliers who are busy with all the aspects of running a business and delivering on social value outcomes. But if the opportunity is appropriate then the effort is worth the potential value of the contract.



There are lots of standard pieces for you to provide in any formal bid, and they should be prepared ahead of time to have on hand and accessible. The list of key materials is later in this Supplier Guide, but includes items like business number, board members, team resumes, list of experience, references, etc.

Within the RFX documents, especially in an RFP, there are four major categories that the purchaser will potentially evaluate each bid on: Price, Quality, Social, and Green.



RFX Evaluation Categories

## RFX Weighting

Purchasers will often inform bidders of the criteria within each of these four categories, and the weighting, or value, that each category will have in relationship to their overall decision making. You want your bid to be solid in each category to attain the best possible score in each category, ending up with the most competitive bid.

As mentioned, an RFP is the most common form you will see and may come from any type of buyer who is soliciting bids from potential suppliers. In Stage 4 of this Guide we will walk through responding to an RFP in particular, since it is likely the most dominant document you will have to respond to.

In addition to small spends, direct awards and competitive bidding, there are also opportunities in sub-contracting and collaborating with others to submit a bid. This is where smaller social value suppliers can engage in Community Benefit Agreements and infrastructure contracts.

It can be tempting to try and keep your options open when thinking about who will buy, and who will need your products or services, and to think everyone is a potential buyer. However, by researching and knowing your potential buyers, you can focus your efforts.

## Sub-contracting Options

For large contracts and infrastructure projects, the primary vendor will need to sub-contract goods and services. This is a promising business development approach and requires a combination of relationship building and responding to RFPs. In some cases, you might be written into an RFP in order to increase the chances of a successful bid. In other cases, you might be a sub-contractor post bid award.

Remember, your social value offer as a sub-contractor may be a very important added value for a larger contractor looking to gain an advantage in preparing their bid for a large project RFP.

In the following diagram, the different contractor types and responsibilities are outlined according to Tier: 1, 2 or 3.

## TIER 1



### General Contractor

*The general contractor is contracted by the owner or developer. They are responsible for project oversight, delivery and budget.*

## TIER 2



### Sub-contractor

*Responsible for a specific portion of the project, such as ironworkers, masonry workers, electrical systems providers, etc.*



### Supplier

*Provide a full range of service, from raw materials such as cement, to catering, cleaning and temporary labour as required by the general contractor.*



### Labour

*Includes workforce procured for temporary services, apprenticeships, etc. as required by the general contractor.*

## TIER 3



### Supplier/Vendor

*Supply the products required by sub-contractors in delivery of their contract with the general contractor.*



### Labour

*Labour procured by sub-contractors includes temporary workers, apprentices, etc. as required by the sub-contractors.*



### Sub-sub-contractor

*Responsible for a specific, smaller component of the sub-contractor's deliverables, such as drywall, excavation, temporary labour, etc.*

With social criteria increasingly making its way into a range of RFxs, contractors may seek out social value suppliers that can help them deliver social value. This is where your social value proposition can deliver additional results.

If a major construction project includes a Community Benefit Agreement (CBA) or a Community Employment Benefits (CEB) requirement, then the general contractors will be required to sub-contract to social value suppliers to meet their contract requirements. See the Buy Social Canada Social Value Menus and the Guide to Social Procurement to support you in understanding CBAs and CEBs and the opportunities they offer.<sup>6</sup>

Warning! If considering a sub-contracting opportunity, be careful to establish clear contracting terms and conduct due diligence to ensure that your enterprise is not being used as ‘bid candy’ or for social washing purposes.

## Consortia/Partnerships

Some opportunities will be too large for some firms to bid on independently or require a mix of different skills and capacities; a potential vendor will look for collaborators or joint venture partners.

Groups of smaller social value suppliers or social value suppliers and traditional businesses can work together to pool resources and collaborate on service delivery or products. This can be in either a subcontractor relationship where one enterprise is the contract holder, or it can be in consortia. This arrangement can often compete better for contracts rather than going it alone, especially where the collaboration enhances or complements individual skills.

You should build relationships at the earliest opportunity and ideally well in advance of tender opportunities going live. However, this may not always be possible. Either way, it is crucial to ensure that the working relationship is clearly scoped out and agreed upon, before embarking on any partnership



6. <https://www.buysocialcanada.com/marketplace-revolution>

arrangement, and to ensure that you have assessed your readiness for collaboration.

Shared work arrangements require time and commitment. Trust needs to be actively built and can only be done through open and honest communication. A good understanding of each organization's aims and objectives are essential to developing a clear mission and sense of purpose for any joint venture.

### **Benefits of collaborative working can include:**

- A deeper or broader offer to the purchaser
- Financial savings through shared overheads and development costs
- A wider geographical reach of your services or products
- Mitigating risk liability and exposure by sharing risk across the partners
- An ability to network and learn from each other

As much as we like to work together and be collaborative, a key aspect of defining the relationship between the respective collaborators is the production of a written agreement. This may be in the form of a Memorandum of Understanding (MoU) or a Contract for Services Agreement. The document itself can be a useful tool for facilitating effective collaboration and the process of compiling it will be crucial to gaining a shared understanding of roles and responsibilities.

A contract between the collaborators is a more enforceable document, as an MOU may not hold the same legal significance if there is a breach of the agreement.

### **Tips!**

- Are you ready to collaborate with others? Ask yourself questions such as whether you are ready to share information with others openly, and whether you understand what collaboration would involve.

- Seek out and engage with potential partners or collaborators at the earliest possible opportunity.
- Honesty and transparency are crucial in early discussions. Consider collaborators' motivations, objectives and financial requirements relating to the potential collaboration.
- A written document such as an MoU or Contract for Services Agreement is important to cover the terms of reference for the collaboration and ensure agreement on purpose, aims, and operations.
- Keep track of any issues and challenges faced along the way and review these for continuous improvement.
- Warning: Be careful of using the term 'partners' as it can infer certain legal relationships that may be beyond the scope of a shared work arrangement.

### **Who are your potential collaborators?**

Here are some questions to ask to determine if collaboration or joint venture with another supplier can provide the best approach to contracting.

- Who are the other organizations or businesses that complement your offering, fill gaps you have, or for whom you might help make more competitive?
- Do you have existing relationships with these suppliers to explore this option?
- Do you have a compelling offer that would help engage new potential collaborators?
- Does the contract opportunity support and allow collaborative delivery?
- Will a collaboration expand opportunities for all parties?



At Buy Social Canada when approaching a new contract we will consider what our team strengths and capacity are, then look to our network to build the best team possible for the project.

On this Supplier Guide to Social Procurement and the broader *SUPER – Social Procurement Supplier Readiness Project*, we partnered with Scale Collaborative and Digital Storytellers. They bring unique strengths to the project so we can deliver above and beyond our individual capacity.



*Worksheet 2*

# OPPORTUNITY ASSESSMENT WORKSHEET

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TYPE OF BUYER		WHAT MAKES THEM AN ATTRACTIVE PROSPECT?	WHAT MAKES YOU ATTRACTIVE TO THEM?
Federal and Provincial Governments	B to G		
Local Governments	B to G		
Crown Corporations	B to G		
Institutional Purchasers	B to B		
Private Corporations	B to B		
SMEs and Non Profits	B to B		
Consumers	B to C		



**Describe your 5 value propositions:**

**1. Price**

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**2. Quality**

---

**3. Social**

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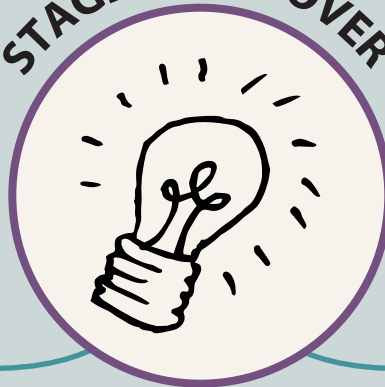
**4. Environment**

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**5. Unique**

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**STAGE 3: DISCOVER**



**PROSPECTING**

*Where do I look?*

**RELATIONSHIPS**

*Whom shall I connect with and how?*

# Stage 3: Discover

## Where Do I Look and Who Should I Connect With?

After identifying the procurement opportunities and who might purchase your goods or services, now we can break down the Discover phase of the process. Discover is all about prospecting for specific opportunities that match your offerings. Prospecting is the effort and process to find the buyer of your product or service through marketing, networking and scanning.

We will cover these 3 avenues that will open up opportunities:

- Maintain a strong market presence
- Network and build relationships with potential buyers
- Search online for promising opportunities

### MARKETING

Not only do you want to discover opportunities, but you want to be discoverable, and you want those searching to like what they see. You want purchasers to understand, through clear, demonstrative and purposeful storytelling, your social value creation. But first it is helpful to understand the differences between B to C and B to B buying and marketing.

B TO C TENDENCIES	B TO B TENDENCIES
YOUR CUSTOMER CHARACTERISTICS	
Customer knows that they want	Business can be anticipating future need, of others
Small volumes	Large volumes
Large market size	Smaller, targeted market size

<b>B TO C TENDENCIES</b>	<b>B TO B TENDENCIES</b>
Less concentrated	More concentrated
May be intermediaries in distribution (retail)	Direct distribution
Informal buying process	More formal buying process
More emotional	Less emotional
One decision maker	May have many layers of decision makers
Fixed price	Negotiated price
No reciprocity	Tends to be reciprocity
<b>CORE MARKETING STRATEGY</b>	
Sale promotions, public relations, advertising and social media, emotional and personal messaging	Mass marketing, Relationship-based selling

Even though relationship-based selling is the core of a B to B strategy, your brand and website, including SEO (search engine optimization) help potential purchasers find you. You want to make finding and purchasing from you as easy and barrier-free as possible.

If you meet the requirements, you can display your Buy Social Canada social enterprise certification as a way to convey your social value creation. Another important way is to tell your story. This can be in person with your ‘pitch,’ online across various social media platforms and mediums and through your brand.



## Why Become Buy Social Canada Certified?

### Demonstrate your social value to potential buyers and stakeholders

- You will be listed on the Buy Social Canada website Directory and the Construction Social Enterprise Directory, or the Gift Social Enterprise Directory, if appropriate.
- You will have access to use the Buy Social Canada logo and supporting materials.
- Certification actively recognized by the City of Vancouver, York University, SAP Technologies, Chandos Construction and more.

### Build your capacity

- Buy Social Canada staff will provide direct support (2 hours of free consulting support and a discount for project specific advice and consulting services).
- Access to Buy Social Canada events as a vendor or exhibitor.

### Join and support the network of social enterprises across Canada

- Be part of the growing voice advocating with government and business to increase social procurement policy and practice.

### Guidelines for certification

- You are a business with an embedded mission to achieve social, cultural or environmental aims through the sale of goods and services.
- At least 50% of your revenue comes from selling goods and/or services in the marketplace.
- At least 50% of your profits go back into executing its social, cultural or environmental mission.



Find out more and apply for certification today at:

[www.buysocialcanada.com/social-enterprise-certification](http://www.buysocialcanada.com/social-enterprise-certification)

Your brand is more than your logo, it is the culture of your business and how it is represented in graphics, words and actions. Consistent branding powerfully conveys who you are to your buyers across touch points. These touch points include materials like print and digital brochures of your services, social media posts, blog articles and more.

Investing in your marketing and brand presence doesn't need to be expensive, for example you can use an SEO widget within WordPress if that is your website platform, but it should be invested in with care. Don't hesitate to invest in an effective marketing strategy and plan, just be careful you and the consultant understand your budget and your value proposition.

Do not forget the power and potential of being visible in community. Options include wrapping vehicles, sponsoring events, supporting your employees to volunteer and give back, and just being visibly present.

## **NETWORKING**

Events, networking and relationship building are core to procurement, and especially important to social procurement. This recommendation is grounded in the experience from across the globe, from colleagues operating Ready-for-Business in Scotland, Social Traders in Australia, and locally, with the Vancouver Social Procurement Roundtable.

While bid websites are an essential tool for viewing tender opportunities and building up market knowledge, you should also actively seek to build relationships with key staff from purchasing authorities. Ideally, you come to mind when a buyer is searching for a good or service. Networking also gives you an opportunity to influence the purchasing process and tailor your offering to meet the needs of buyers.

Depending on your business's capacity you might want to identify Tier 1 and Tier 2 suppliers in your industry and other social value suppliers for subcontracting and collaborative opportunities.



## **Start with Who You Know**

One of the easiest ways to strengthen relationships and increase sales is through your existing buyer base. Start by asking your current purchasers if they are interested in additional or larger orders from you.

In addition, will they introduce and or recommend you to their network of business and corporate collaborators? This may also be a good time to ask if they would act as a reference for future bids.

## **Connect with "Like Minded" Buyers**

As a social value supplier one of your key markets will be the emerging circle of purpose businesses. These businesses have already indicated an interest in social procurement principles and processes. Some of the likely targets are certified B Corporations, Co-operatives, Non-Profits, and similar businesses and organizations in your service area.

Buy Social Canada has a list of Social Purchasing Partners as well as regional roundtables and structured networking events to directly connect you with purchasers.

## **Step into the Unknown**

As discussed earlier, purchasers may Direct Award a contract to suppliers, depending on the contract size, their policies, and regulated exceptions. Ensure that buyers are aware of your business and value offering so you don't miss out. This can require networking with people you may not know yet and there are initiatives and organizations whose primary purpose is to help you make such connections.

## **Networking Events**

- Join the local Chamber of Commerce (or equivalent) and attend monthly events
- Join relevant industry associations and attend conferences and or sponsor a booth

- Make the most of any engagement activities hosted by buyers or ‘Meet the Buyer’ events where the supplier and buyer relationship is actively facilitated. Most provinces have a concierge or ‘doing business with government’ program.
- Office of Small and Medium Enterprises (OSME) is designed to support suppliers do business with the federal government. With regional offices across Canada, they offer resources, training and networking events

### Call Directly

- Connect through LinkedIn or other platforms
- Ask people you know for an introduction
- Find contact details on their website. Government websites often publicly post contact information, and for corporations, admin assistants and receptionists are often buyers as well as can direct you to the right person
- Call the buyer directly and ask questions related to their purchasing

\*Some offices have a ‘no solicitation’ policy, so use your cold calling carefully and strategically.

### Searching Online

Many bids are posted online, but not all of them are listed and listed on limited sites.

Most governments will post their RFX onto web-based procurement platforms, depending on the size of contract. This is required to maintain fair, transparent and competitive processes. There are different sites depending on level of government, geography and industry. You will need to become familiar with the sites most relevant to you. Here are the most common.



## **FEDERAL GOVERNMENT**

- Merx [www.merx.com](http://www.merx.com)
- Canada Buys [www.canadabuys.canada.ca](http://www.canadabuys.canada.ca)
- Buy and Sell [www.buyandsell.gc.ca](http://www.buyandsell.gc.ca)

## **PROVINCIAL GOVERNMENTS**

- *BC Bid* (British Columbia)
- *Bid on a Government Contract* (Yukon)
- *Alberta Purchasing Connection* (Alberta)
- *SaskTenders* (Saskatchewan)
- *Government Tenders* (Manitoba)
- *Contract Event Opportunities* (Northwest Territories)
- *Nunavut Tenders Listing* (Nunavut)
- *Ontario Tenders Portal* (Ontario)
- *Le système électronique d'appel d'offres du gouvernement du Québec (SEAO)* (Quebec). (User can select their preferred language.)
- *New Brunswick Opportunities Network (NBON)* (New Brunswick)
- *NS Tenders* (Nova Scotia)
- *Tenders* (Prince Edward Island)
- *Public Procurement Agency* (Newfoundland and Labrador)

## **LOCAL GOVERNMENTS**

- Civic Info (BC)
- On local government websites

## **CONSTRUCTION**

- *Bid Central*
- *BuildWorks Canada*
- *Bids and Tenders*

Register in relevant sites ASAP as there can be requirements and approvals that can create a time lag. There may be a cost required. Remember, bidding on contracts is not a last-minute process!

On most sites, you can select key words that trigger email alerts on relevant bid opportunities. We recommend picking as many key words to start as it is a learning curve to find the right tags to identify the most relevant bids.

### **Tips!**

- You can find forward-looking and backward-looking procurement reports across departments. These will allow you to review what has been purchased and what will be purchased.
- When exploring government opportunities use publicly available resources such as *Buy and Sell Contract History* to find what contract opportunities have previously gone to market and when they could go to tender again.
- You can run a search for local authorities or other public bodies' contract registers.
- You can also use a search engine to find forward purchasing plans (often part of annual procurement reports) if available. Forward plans and contracts registers can help you understand what contracts may go out to tender in the future.
- Keep a record of current and past contracts that are of interest to you. Look to pull out the key information such as winning bidder, value, service specification, length of contract, renewal date etc.
- Research competitor organizations to establish who you are competing against and identify their key competencies and weaknesses against your own organization.
- *Buyandsell.gc.ca* lists contract history and identifies contracts by the Goods and Services Identification Number (GSIN) code.<sup>(7)</sup>

7. <https://buyandsell.gc.ca/procurement-data/goods-and-services-identification-number/gsin>



The sooner you find out about potential tender opportunities, the sooner you can prepare for them. When submission dates are a matter of weeks from the date of publication, it is essential that you are keeping track of contract notices, giving yourself the best chance of success.

*Worksheet 3*

# POTENTIAL PURCHASERS

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**List potential purchasers of your products or services**

---

**Why are they worth reaching out to? (Buying history, size of contract, competitors, etc)**

---

**What is their social value alignment? (policy, directives, strategic plan)**

---

**How could you connect with them?**

---

**Name a next step to engage with the purchaser**

---

*Worksheet 4*

# TO BID OR NOT TO BID?

So now you have found an opportunity! Answer these questions to assess whether or not the opportunity is worth taking further. This can save you valuable time and prevent you from allocating resources to a bid process that may not be worthwhile.

The more 'yes', the better. However, do not take any 'no's' to stop you from bidding but as considerations. Take a moment and write a next step beside each 'no' that would shift it to a 'yes'.

ASK YOURSELF...	YES/NO	NEXT STEPS
Do they need your product or service?	<input type="radio"/> Y <input type="radio"/> N	
Is your business known to them?	<input type="radio"/> Y <input type="radio"/> N	
Does your business meet the buyer's requirements?	<input type="radio"/> Y <input type="radio"/> N	
Do you have relevant experience that demonstrate your ability to deliver on the contract?	<input type="radio"/> Y <input type="radio"/> N	
Do you have references that will vouch for your past work?	<input type="radio"/> Y <input type="radio"/> N	

ASK YOURSELF...	YES/NO	NEXT STEPS
Do you have the capacity to put in a good proposal?*	<input type="radio"/> Y <input type="radio"/> N	
Is the dollar amount plus the odds of winning the bid, worth the work to put in this proposal?	<input type="radio"/> Y <input type="radio"/> N	
Is the dollar amount enough to cover all your costs and provide a margin?	<input type="radio"/> Y <input type="radio"/> N	
Do you feel competitive when you consider who you are bidding against? **	<input type="radio"/> Y <input type="radio"/> N	
Do you bring a competitive or unique advantage?	<input type="radio"/> Y <input type="radio"/> N	
Do you have the capacity to deliver the contract, currently?	<input type="radio"/> Y <input type="radio"/> N	
Could you gain the capacity to deliver (quickly) if you were awarded the contract?	<input type="radio"/> Y <input type="radio"/> N	
Do you anticipate challenges in delivering on the contract?	<input type="radio"/> Y <input type="radio"/> N	

ASK YOURSELF...	YES/NO	NEXT STEPS
If so, are they surmountable?	<input type="radio"/> Y <input type="radio"/> N	
Does this bid present an opportunity for your business to grow?	<input type="radio"/> Y <input type="radio"/> N	
<b>Number of YES's</b>		
<b>Number of NO's</b>		

**Decide**

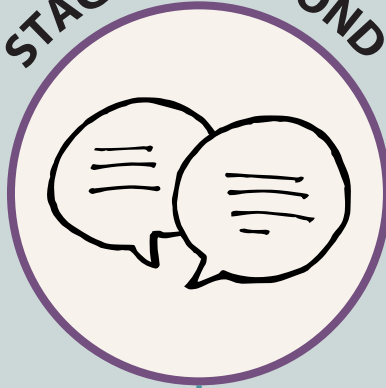
If it's not the right opportunity, don't bid — there will be others and your time could be spent engaging with buyers on other opportunities!

If it is the right opportunity, consider how to position your enterprise competitively.

*\*Some bids are very time consuming and complex to write. Scope all the bid requirements prior to starting. Most of the bid will be standard forms with Schedules or Appendices that outline the specific project or contract; don't be daunted with the number of pages in an RFx, focus on the requirements and the bid specific issues.*

*\*\*On bid sites, there is a place for companies to indicate their interest in submitting a bid. Researching competing businesses can provide you with valuable information on who and what the buyers might be looking for.*

# STAGE 4: RESPOND



## PROCESS

*What is the process or timeline?*

## BUSINESS PROPOSITION

*How do I respond to information requested by the purchaser?*

VALUE STATEMENT

FINANCE

RISK ASSESSMENT

COMPLIANCE

## SOCIAL VALUE

*How do I communicate my social impact?*

MISSION STATEMENT

SOCIAL EVALUATION

CERTIFICATION



## Stage 4: Respond

### So, You are Ready to Bid

- You are confident in your product or service
- You understand your capacity to deliver
- You know how to price your product or service
- You have identified the types of contracts you want
- You have researched your buyer's need and values
- You have identified specific opportunities and decided to bid

Once you have decided to respond to an opportunity, be sure to allocate resources and time to prepare for the meeting or to prepare your written bid. For the balance of this section in the Supplier Guide, we will use the term 'bid' to refer to any offer that you make to deliver your services or product to a buyer, whether through a formal RFX process, in a one-on-one sales meeting, or over lunch.

Remember: The purpose of your bid is to provide a solution to the buyer's needs or problem that offers the 'best value for money spent'.

### **BID PROCESS**

A 'bid' is a combination of technical writing and an advertisement for your organization. Your bid is a combination of science and art.

If you come from the non-profit sector, you may have experience in writing government grants, and those skills will be well put to use here.

As you review and put together your bid, you can clarify any questions directly with the buyer. On public bid sites, there is a place for questions to be posted and responded to transparently.

Wherever possible, you should always aim to make it **simple** and straightforward for the buyer to read and understand your bid submission. The best way to do that is to reflect the structure of the RFX in your response. If the RFX has a prescribed order and structure, then use it. If not, structure your response following the same order as the questions in the RFX. Use bullet points for key aspects and messages you want to get across in each question.

## WRITING YOUR BID

These are common components of bids:

- **Title page:** make sure you include all the information requested on your title page, and if there is any place to invest in graphic design, it is to make your title page, and therefore your bid, stand out
- **Cover letter:** highlight why your business can deliver competitively on quality and pricing, and add significant value through your social and community benefits
- **Table of Contents:** pretty standard, and the last thing to check is that the Table of Contents (TOC) headings and page numbers all line up
- **Executive Summary:** less personal than a cover letter and an opportunity to highlight the key points in your bid
- **Company profile:** the opportunity to tell the story about your business, how you came about, what your work history is, any awards you have received, growth and so on. Your company profile can be updated regularly and used repeatedly for many different bids.
- **Summary of the understanding of the work:** demonstrate that you understand what are the key issues and project objectives that the buyer wants to achieve
- **Proposed methodology or workplan:** describe the steps for completing the work, chart out the project activities over the length of the project, broken down by month or week



- **Project team:** overview, with list of key personnel and sub consultants, including an organizational chart and bios or resumes for key staff members. It is critical that each resume follows the same standardized format and keep resumes to 1-2 pages, maximum
- **Summary of relevant project experience:** similar size, scope and technical nature dates, budgets and references. Buyers want to know that you have done similar work and can deliver on their project. Describe your ability to deliver the buyer's required product or service:
  - Expertise and skills
  - Capacity of people, equipment and delivery
  - Experience providing to other buyers with similar objectives

It is good practice to collect references from each project upon completion, and to add to an overarching body of work that you can pull from depending on what you are bidding on. Similar to company profile, this may take work up front but can be used repeatedly in subsequent bids

- **Budget:** Includes a pricing table or total fee for the proposal. Pricing may be asked to be submitted separately and often bids will outline what they would like included in the budget.
  - When there is a set budget you will have to determine if you can deliver effectively within that dollar amount.
  - If there is no budget indicated, you will have to price your offer based upon your experience in similar projects:
    - Use the deliverables to establish the personnel hours, equipment costs, your overhead expenses, and your social costs and/or a profit margin. Then when you have done the scientific side, add the 'art' side with a 'guestimate' as to what the market will bear, what the competition might bid, and what the buyer may be willing to pay.
- **Social, community and environmental values/requirements:** Tell your story and shine!



## **ADDITIONAL CONSIDERATIONS**

### **Value Statement**

The key term when considering your pricing strategy is ‘value for money’, the balance between quality, price, environmental considerations, and social outcomes. You must take note of the criteria weighting in the tender documentation and be able to clearly show how your tender proposition achieves value for money for the purchaser, whilst also allowing yourself room to make a profit or cover your social costs directly related to delivering on the contract. This will require a degree of flexibility depending on the scoring methodology and the competitiveness of your market.

It is crucial to have a full understanding of your costs associated with delivering the contract, both direct and indirect. You must allow some margin for profit, factoring in any increase in costs over the lifetime of the contract. How much of a profit margin you allow will depend on a number of factors such as the level of competition, complexity of product and service etc. Your own situation will also have a bearing, as you may be more inclined to seek a higher margin when you have a good pipeline of opportunities, and vice versa when you have a gap in delivery.

### **Risk Assessment**

Most bids will request that you identify what the risks, the dangers or elements are, that might interfere with the success of the project. The risk assessment will also require you to indicate your means to mitigate, or address, any of the risk factors. Risks might be timelines shift, key personnel leave, research indicates a need to change direction of the project, etc.

### **Compliance**

Most often compliance issues are required for any technical specifications identified in the RFX, such as environmental regulations, liability and other insurances, third party certifications, and any project regulated issues. Review the business

and technical requirements early on since you may need time to ensure that you can comply and produce supporting documentation.

## **Social Value Proposition**

As mentioned above, social value considerations by purchasers is the social value suppliers' potential advantage. Remember, you will always have to meet the standards of quality and price, but your social value outcomes are the core and differentiating part of your business proposition. Only you will be able to define and express this component of the proposal because you know your social objectives, your experiences, and your projected outcomes from delivery of this potential contract.

## **Your Story**

It is valuable to have pre-prepared a complete 'story' of the who, what and why of your organization and enterprise, including:

- History: why and how do you exist?
- What is your mission?
- What is your social value goal?
- What is the blend, the relationship, of your business service or product delivery to achieving your social value goal?
- Share stories. What change are you making in the world?
- Impact measurement. How are you measuring this change? What impact measurement can you share from other initiatives or contracts?

## **Project Specific Social Value Outcomes**

Review the purchaser's values and goals and highlight any cross-over where doing business with you will help them achieve their own objectives beyond the contract, by:

- Projecting social value outcomes for this specific
- Align social value outcomes with purchaser's values and requirements
- Outline the social value outcomes you will deliver, measure and report on if you get this contract
- Demonstrate specific outcomes connected to key social procurement themes: employment, skills & training, social value supply chain and community development

## Outcome Examples

### Desired outcomes for Employment

Increased employment opportunities for youth/women/ Indigenous Peoples/low-income groups/people with disabilities/ people living in sub-standard housing

### Desired outcomes for Skills & Training

- Increased apprenticeships and training available to targeted individuals
- Increased training with recognized qualifications available to targeted individuals
- School & Higher Education engagement

### Desired outcomes for Supply Chain

- Greater supplier diversity
- More procurement from Social Enterprises (SEs), Not-For-Profits (NFPs), local/ regional
- Small and Medium-sized Enterprises (SMEs)
- Provision of affordable and/or specifically designed retail and public spaces to SEs, NFPs and local SMEs

### Desired outcomes for Community Development

- Community Engagement and Consultation processes throughout a project's planning and implementation
- Provision of community services/ cultural contributions

## Sample Bid

Here is a sample bid from 2018. We are using this to highlight things to think about, speak to and consider as you write your own bids.

### DOCUMENT: COVER LETTER

**TYPICAL WEIGHTING:**

**0 POINTS**

#### REQUIREMENTS

- Should identify primary contact.
- Should contain company name, address, website, telephone number, email address and primary contact person.
- Must be signed by the person or persons authorized to sign on behalf of the company.
- Should acknowledge all addendums issued for this Request for Proposal.

#### CONSIDERATIONS

- This is very business-like and outlines what is included in the proposal.
- Ensure that the cover letter includes all the requirements.
- This is your first impression, so feel free to incorporate some storytelling while keeping it short and succinct.

### DOCUMENT: QUALIFICATIONS AND EXPERIENCE

**TYPICAL WEIGHTING:**

**25 POINTS**

#### REQUIREMENTS

- Provide qualifications and resumé of the team leader and any key staff or any key sub-consultants who will be involved in the project (collectively “*the team*”). Provide the name of designated backup person for the team leader.
- The proposal shall demonstrate the knowledge and experience of the team leader as well all team members that may be necessary to complete the work. Proponents must demonstrate they have expertise and experience in projects of similar deliverables, scope, size, and complexity, and are familiar with the challenges of the project.
- Provide portfolio examples of relevant successfully completed projects by the team that are similar to the scope of work requested by the RFP, highlighting each team member’s previous experience in their area of specialty.
- Provide a minimum of three (3) references from clients that the Proponent has served, particularly referencing projects that the team leader and team members have worked on; highlighting similar previous experiences.

#### CONSIDERATIONS

- This section looks similar across many proposals. Once you develop it, it can be regularly updated and pasted in.
- 25 points is significant, so the time spent here is well rewarded.

## DOCUMENT: PROJECT UNDERSTANDING AND METHODOLOGY

**TYPICAL WEIGHTING:**

**30 POINTS**

### REQUIREMENTS

- Proponents should outline an approach to the undertaking of the project reflecting a clear understanding of the Scope of Work.
- Proponents should provide their methodology and work plan to achieve the program objectives and timelines.
- Demonstrate your understanding of the project by describing key issues and potential resolutions that are appropriate for the Participants' context.
- Outline your abilities to use creative solutions, innovations, methodology or other traits that will allow your firm to successfully complete this project.
- Provide an indication of the time commitment and availability for the team leader and team members for this project.
- Provide cost control procedures, Proponent's method for monitoring the project timeframe, quality of workmanship and budget.

### CONSIDERATIONS

This section will be specific to each bid and where most of your time should be spent.

## DOCUMENT: SUSTAINABILITY

**TYPICAL WEIGHTING:**

**10 POINTS**

### REQUIREMENTS

Provide information about the proponent's efforts that align with the City's/Company's \_\_\_\_\_ Strategy/Policy.

### CONSIDERATIONS

- This section highlights social/environmental value propositions.
- Your response needs to speak directly to the policy and strategies that may be referenced. There may be a link to additional documents that outline such strategies.



## DOCUMENT: FEE PROPOSAL

**TYPICAL WEIGHTING:**

**15 POINTS**

### REQUIREMENTS

Proponents should provide a fee proposal including the makeup of the total cost for this project including:

- a schedule of hourly rates should additional services be required;
- list of expected expenses, disbursements and any other probable costs; and
- all applicable value added taxes.

### CONSIDERATIONS

- If there is a pre-set budget, the fee proposal will outline how the funds will be allocated, and will be reflected by a lower point weighting.
- Open budget requests may weight the Fee Proposal much higher.

## DOCUMENT: PRESENTATION/ INTERVIEW

**TYPICAL WEIGHTING:**

**20 POINTS**

### REQUIREMENTS

An evaluation committee may provide up to the three highest evaluated Proponents the opportunity to give a presentation and or interview. Proponents should be prepared to discuss:

- Why would you/your team be the best fit to delivery this project?
- A short presentation of your work plan.
- Discuss unique challenges you foresee in delivering this project.
- What positive impacts do you see this project delivering?
- What is your vision of success after completion of this project?

### CONSIDERATIONS

- Some RFPs include an interview.
- Practice, practice!

## **PRE-SUBMISSION FINAL REVIEW**

Double, well actually, triple-check the requirements for submission. Be sure that you allow time to review your proposal before you submit it.

### **How to submit**

- Check the date and time due when you first review the opportunity. Put a note in your calendar for 24-48 hours before the deadline to ensure you have time to review your response
- Try to submit early in case of any unforeseen issues

### **Content Review**

- Review all of the questions and ensure your answers meet the requirements
- Confirm your messages are clear and consistent
- Compliance check list (Examples):
  - Insurance requirements
  - Certifications attached
  - References of similar projects

### **Practical Review**

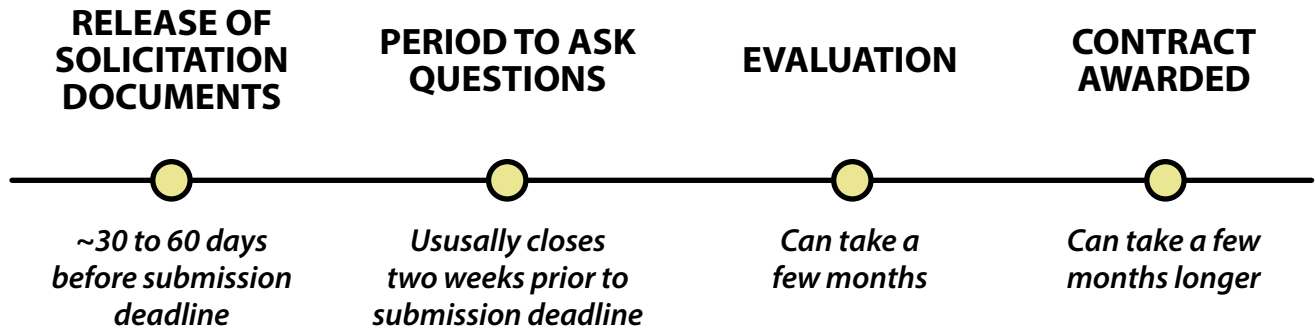
- Check the submission matches all the technical specifications:
  - Font, format, page and word limits
  - Spelling, grammar and formatting

### **Submit on Time**

Many businesses with great bids are automatically disqualified because they encountered technical difficulties, courier delays, Internet outage, or other reasons which resulted in late submission. Late submissions are not permitted under the rules of fairness and competition.

**TIP:** It is very important to consider, that when you put in a bid it is referred to as ‘contract one’, which means you are making an offer to contract, and it is an official and legal process.

And now you wait... fingers crossed!



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Competitive Bid Timeline for Corporations or Government

## POST-RESPONSE FEEDBACK

Gaining feedback on your bid is an important learning process in order to improve your performance and be better prepared for the next bid opportunity. Both successful and unsuccessful suppliers and bidders have a right to know the reasons for their success or rejection and are entitled to ask for feedback in writing.

Purchasers will have different methods of providing feedback and some will be more forthcoming than others. You may have to be persistent in order to obtain this, so be sure that you understand what you are looking for in case you need to follow up by telephone or email. Re-read your bid prior to requesting feedback and try to reconcile this with any initial feedback received.

If you feel the feedback you receive is not detailed enough, you can request additional feedback from the contracting authority. You may request your scores for each question and any comments attached, or for a conversation.

You may wish to ask for information relating to:

- The strengths and weaknesses of your bid
- Your score breakdown for each section of the bid
- The highest and lowest scores for each section and your ranking within those.
- How did you compare to competitors?

It is important to remain objective when seeking feedback to learn as much as possible and maintain a positive working relationship with the buyer.

But hopefully, you put forward a winning bid and have been awarded the contract. Congratulations! Now get ready to deliver!

Worksheet 5

# PREPARE YOUR BID LIBRARY

These documents may be asked as part of the bid process. Once you have compiled them all, they are easy to access and reuse in subsequent bids, reducing the time it takes to submit.

TYPE OF DOCUMENT	READY?	DETAILS OR LOCATION
<b>Readiness with Standard Documents</b>		
Business Identification Number	<input type="checkbox"/>	
Charitable Number (if appropriate)	<input type="checkbox"/>	
G.S.T. / P.S.T.	<input type="checkbox"/>	
Provincial Taxation Numbers	<input type="checkbox"/>	
Last Fiscal Year Financial Statements or Audit	<input type="checkbox"/>	
<b>Insurance and Liability Readiness Documents</b>		
Proof of Commercial General Liability Insurance	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• Amount of Liability</li> <li>• Professional Liability (Errors and Omissions) Insurance</li> <li>• Automobile Liability Insurance</li> </ul>	<input type="checkbox"/>	
Proof of Provincial Workers Insurance (WSIB) along with proof of up-to-date assessment payment (a "Clearance Letter")	<input type="checkbox"/>	
Industry Specific Health & Safety Certificates	<input type="checkbox"/>	

TYPE OF DOCUMENT	READY?	DETAILS OR LOCATION
<b>Expertise Readiness Documents</b>		
Resumes of Key Personnel- all designed	<input type="checkbox"/>	
List of Board Members and Short Biographies	<input type="checkbox"/>	
Previous Clients' Reference Letters (at least 2)	<input type="checkbox"/>	
Previous Project Descriptions and Outcomes	<input type="checkbox"/>	
<b>Organizational Direction and Preparedness Readiness Documents</b>		
Mission and Vision	<input type="checkbox"/>	
History	<input type="checkbox"/>	
Social Value Proposition Impact Measurements	<input type="checkbox"/>	
<b>Document Design:</b> <ul style="list-style-type: none"> <li>• Title page designed</li> <li>• Table of Contents and Page Numbers</li> <li>• Appendices</li> </ul>	<input type="checkbox"/>	

*Worksheet 6*

# SOCIAL VALUE PROPOSITION

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**VALUE PROPOSITION FOR EMPLOYMENT:**

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**VALUE PROPOSITION FOR SKILLS & TRAINING:**

---

**VALUE PROPOSITION FOR SUPPLY CHAIN:**

---

**VALUE PROPOSITION FOR COMMUNITY DEVELOPMENT:**

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## STAGE 5: DELIVER



DEMONSTRATE SOCIAL OUTCOMES

REPORTING

SHARE YOUR STORY



# Stage 5: Deliver

When you put in your bid, you made a commitment that you will provide both the business value and the social outcomes proposed. In short, you are ready to ‘deliver the goods.’ And, the reason you got the contract is because you are delivering goods or services that you are skilled at delivering already, your price was competitive, your environmental practices sound, and you have clear and achievable social value outcomes. This chapter will focus on specific areas that may be unique or require additional attention related to:

1. Negotiating contracts
2. Doing the work
3. Storytelling about the work you are doing
4. Measuring the impact of the work you are doing

## Negotiating Contracts

First, you will enter into a legal contract; be sure to have a written and signed contract with all of the details clear between all the parties involved. The contract can be negotiated and will formalize the work, timelines, specific deliverables/outcomes and budget. The complexity of the process will depend upon the scope and context of the work.

Many contracts are standardized, however if there is a clause you are uncomfortable with, you can request an amendment, or an email clarifying the intention of the clause. Keep all contract negotiations in writing and saved as part of the contract record.

This is also a good time to confirm any MOU or Partnership Agreements with contractors, sub-contractors or collaborators.

Ensure that any contract has an exit clause in case things go sideways. You should understand any cancellation parameters and notification requirements held by the purchaser.

If you are unsure about any part of a contract, seek legal counsel prior to signing.

## Doing the Work

Once the contract is signed, time to deliver! As acknowledged, you got the contract because you are offering what the contractor was looking for. In delivering, here are some tips to set you up for success:

- Build a strong relationship with your contractor through regular updates and professional communications; this contract may help build a relationship that will lead to other opportunities.
- If this contract offers a growth opportunity for your organization, build in some time to hire and train prior to contract start date.
- Invest in systems that can help you manage the project effectively and efficiently.
- If there is a challenge that impacts the project delivery, outcomes or budget, communicate this with your contractor partner sooner rather than later; provide solutions to problems.
- How things look matter. Make sure any reporting looks professional, is accurate, and reflects the specific contract requirements.

## It's Time to Share Your Story

Whether it's engaging customers, internal and external stakeholders, or the wider community, social enterprises need to be able to tell well-crafted stories to touch hearts, shift minds, and get audiences to take action.

As you progress through the delivery of the project you will want to share with your contractor and your stakeholders what you're achieving in terms of social value outcomes as the project progresses.

### You can tell your story a multitude of ways

- Fine tune your story as a narrative version of your elevator pitch
- Share your story on your website so your potential and existing buyers can better understand your social value creation
- Post on social media. This can be written, via photos or through video.

# Storytelling Workshop

Learn how to craft your story through the ***SUPER Storytelling Workshop***

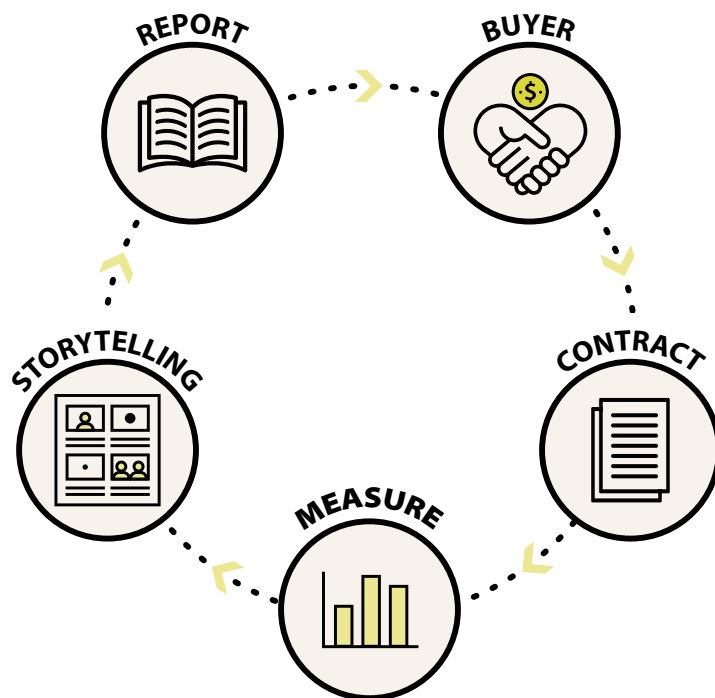
- Use the Story Canvas to identify compelling impact stories, including honing in on your purpose, audience, key messages, people and places, and tone.
- Become familiar with narrative structures useful for shaping social enterprise stories and communicating social, environmental and economic impact.
- Explore examples of social enterprises sharing stories in the context of social procurement.
- Learn basic tools and techniques for sharing your story using digital storytelling.

## Measurement

Outcome reporting and impact measurement are huge fields with many different tools and approaches, and outside the scope of this particular Guide. For those with non-profit sector experience, evaluations and measurement is a standard requirement of funders. Within procurement, impact measurement may be included as part of the contract requirements. The reporting will demonstrate the value add that your enterprise provides and provides you with storytelling content.

Good luck on landing your next contract, giving you the opportunity to increase your community value! Let us know if we can help.

– The Buy Social Canada Team



The best advice is to ‘measure what matters’ to all of your stakeholders: within your organization (Board, staff and members), your business clients and the broader community. Here are a couple links to sites that can help you pursue this level of reporting.

- Demonstrating Value: [www.demonstratingvalue.org](http://www.demonstratingvalue.org)
- Common Approach: [www.carleton.ca/commonapproach](http://www.carleton.ca/commonapproach)
- Social Value Canada: [www.socialvalue-canada.org](http://www.socialvalue-canada.org)

# Glossary

## Best Value

The optimal combination of total cost, performance, economic, environmental and social sustainability.

## Bid

Includes a proposal submitted in response to a Request for Proposal and a written formal offer, submitted in response to an invitation to supply goods/services/infrastructure, where the specifications and conditions of the goods or services are known and disclosed in the request.

## Buyer

The individual, organization or business who is purchasing a good or service.

## Community Value

The positive social, cultural and/or environmental change that happens as a result of procurement.

## Contract

Agreement between supplier and purchaser of goods, services or construction, including a purchase order, formal agreement or other document evidencing the obligation, and any amendments.

## Contracting Authorities

Commissioners, procurement officers/managers and purchasing authorities.

## Contractor

Refers to a broad range of organizations, including social enterprise, non-profits, small and medium enterprise and larger contractors that compete to deliver goods and/or services on a contractual basis to a contracting authority.

## Direct Award

When a contract is awarded to a contractor without a competitive process.

## Infrastructure

Infrastructure is the basic physical and organizational structures required by a community to function. It includes water and electricity systems, roads, schools, hospitals, and airports. Infrastructural development entails high-cost investment but is essential to a community's social and economic prosperity.

## Goods and Services Identification Number (GSIN)

The federal government uses these codes to identify generic product descriptions for its procurement activities.

## Low value purchase

A purchase that is not regulated by trade agreements or other regulations. The supplier choice is made by the buyer with their individual criteria. These often include catering and gifts.

## P-card (Purchasing Card)

Physical cards or online accounts that use the credit card payment system but the accounts are paid in full by the account holder each month. Used by governments for low value purchases.

## Procurement

The process of acquiring and delivering products, services and physical works. It is also often a business function within government and large organizations.

## **Purchaser**

A public, private or non-profit organization that is acquiring products or services. Referred to as the 'demand side' of the marketplace.

## **Request for Proposal (RFP)**

Invitation for providers of a good or service to bid on the right to supply that product or service where the requirement for goods or services cannot be specified, or alternative solutions or offers are being solicited. Proposals are evaluated using pre-determined criteria, where the selection of a supplier is not made solely on the basis of the lowest price.

## **Request for Quote (RFQ)**

similar to an RFP, but RFQs are more heavily focused on cost estimate and how the respondents would meet the requirements of a certain job. The RFQ is usually the step right before submitting an RFP, which is a more involved and complicated submission.

## **RFx**

A catch-all term that captures all references to Request for Information (RFI), Request for Proposal (RFP), Request for Qualification (can be used to refer to Request for Quote) (RFQ), and Request for Bid (RFB).

## **Social Enterprise**

A business with an embedded mission to achieve social, cultural or environmental aims through the sale of goods and services. At least 50% of the business' revenue comes from selling goods and/or services in the marketplace and at least 50% of the business' profits go back into executing its social, cultural or environmental mission.

## **Social Procurement**

Leveraging a social value through existing purchasing. Social procurement is an umbrella term that encompasses the social purchasing of

goods and services as well as Community Benefit Agreements that leverage social value through infrastructure and development projects.

## **Social Value**

Social value refers to the impacts of programs and organizations on the wellbeing of individuals and communities. Social enterprises and social purpose businesses can generate social value by innovating products and services that meet community needs and participating in social procurement.

## **Social Value Supplier**

Social enterprises and other suppliers who incorporate social value into their business and want to access procurement opportunities.

## **Sub-contractor**

A business or person that carries out work for a company as part of a larger project.

## **Supplier**

The organization that is providing the products or services to the Buyer. Referred to as the 'supply side' of the marketplace.

## **Tier 1 Supplier**

The general contractor or lead supplier who holds the contract with the owner for the delivery of a product, service or construction. This supplier may contract to other suppliers to deliver on the contract.

## **Tier 2 Supplier**

Sub-contracted by a Tier 1 supplier for a specialized product or service.

## **Tier 3 Supplier**

Sub-contracted by a Tier 1 supplier for a specialized product or service.





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