



Impact of Social Purchasing & Procurement on Social Enterprises

Consent to participate

The goal of this survey is to gather information on the impact of social purchasing and procurement on social enterprises employing or training the members of marginalized social groups. The survey, which is estimated to be 15 to 20 minutes in length, is part of a project funded by the Social Sciences at Humanities Research Council and is being conducted by a research team led from the University of Toronto.

Your organization's participation in this survey is voluntary and your responses are completely confidential. The reporting of responses will not identify either you or your organization by name. We ask you to insert your name and your organization's name below only so the leaders of the research team have a record of who has consented to participate. The information you provide will be held in confidence and securely.

If you wish to be informed of the results and/or to take part in a follow-up interview, you may leave your email address in the space provided at the end of the survey. Your contact information will only be used to send your organization the results of the overall study and to contact your organization for the interview.

Your responses will be stored on a secure server and/or an encrypted file on the researcher's computer during data collection and analysis. The online host for our survey and data is Survey Monkey, a US company which is widely used in Canada but is subject to U.S. laws including the power to access the records of internet service providers. The security and privacy policy for Survey Monkey can be found at <https://www.surveymonkey.com/mp/policy/privacy-policy/#respondents>

At the end of the study the information you provide, which cannot be linked back to your organization by anyone outside of the research team, will become part of an open-access dataset that can be shared among researchers, policy actors, and other stakeholders to advance knowledge on social procurement practices in Canada.

Except the qualifying questions, you can decline to answer any question on the survey by skipping over the question. You can withdraw from the study without explanation at any

time before the researchers begin aggregating the data from all participants. If, after completing the survey, you decide you would like to withdraw your results from the study, you may do so by emailing either Dr. Andrea Chan, andreanw.chan@mail.utoronto.ca or Professor Jack Quarter, jack.quarter@utoronto.ca. The same is true if you agree to an interview. You may also contact the University of Toronto Office of Research Ethics at ethics.review@utoronto.ca or 416-946-3273 with questions relating to your rights as a research participant.

The possible benefits of this project to your organization is that it will provide information on the value of social purchasing and procurement to social enterprises serving marginalized social groups and hopefully lead to improvements in social policies from government and corporations.

*

The research study you are participating in may be reviewed for quality assurance to make sure that the required laws and guidelines are followed. If chosen, (a) representative(s) of the Human Research Ethics Program (HREP) may access study-related data and/or consent materials as part of the review. All information accessed by the HREP will be upheld to the same level of confidentiality that has been stated by the research team.

*Please print this page to retain a copy of the consent form for your records

I (insert name),

on behalf of my
organization (insert name),

* have read and understood the survey description above and give my consent to participate in this study and for the researchers to incorporate my responses into the survey write-up and the open-access dataset under the terms described above.

Yes

No

Need more information before I can consent



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For further details about the study please contact Dr. Andrea Chan at andreanw.chan@mail.utoronto.ca or Professor Jack Quarter at jack.quarter@utoronto.ca



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Qualifying Question

** To navigate through the survey, please use the 'Prev' and 'Next' buttons at the bottom of the screen. DO NOT use the 'Back' button on your browser.*

** For this study, a social enterprise is defined as:*

A form of business, most often a non-profit or embedded within a parent non-profit, which meets social and/or environmental objectives.

** If your organization fits this definition, please answer the survey that follows from the perspective of the social enterprise, not the parent non-profit.*

Is your organization a social enterprise?

Yes

No

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Qualifying Question

* Is part of your social enterprise's core mission to provide:

- employment;
- job training; or
- microentrepreneurship support

to individuals who have faced significant challenges to finding and maintaining employment? (Select all that apply)

- Yes, employment
- Yes, job training
- Yes, micro-entrepreneurship support
- No, none of the above



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Social enterprise structure, incorporation, and business

Name of your social enterprise

In your own words, what is the PRIMARY mission of your social enterprise?

Briefly, describe your social enterprise's primary services or products

In which sector(s) does your social enterprise sell products or services (e.g., food services, construction, transportation)?



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Social enterprise structure, incorporation, and business

Does your social enterprise have a parent organization?

- No
- Yes

If Yes:

(i) What is the relationship of your social enterprise with the parent organization?

- We are an in-house program, project or department of the parent organization
- We are a separate social enterprise that works closely with the parent organization
- We are an independent social enterprise without much influence or oversight from the parent organization
- Other (please specify)

(ii) Did your parent organization regularly provide any of the following supports to your social enterprise during the previous financial (fiscal) year? (Please check all that apply)

- Personnel (time of staff, administration, management, etc.)
- In-kind (goods, materials, transportation, etc.)
- Space (offices, storage, accommodations, etc.)
- Financial (grants, loans, loss write-off, etc.)
- Other (please specify)

Is your social enterprise incorporated?

- No
- Yes

(i) If your social enterprise *is* incorporated, what is the form of incorporation?

- Non-profit corporation
- Co-operative without share capital
- Co-operative with share capital
- Business with share capital
- Business partnership
- Hybrid structure (e.g., Community Contribution Company)
- Other (please specify)

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The target group(s) of your social enterprise

To which groups are your social enterprise’s employment or job training objectives targeted?(Please select all that apply)

	Men	Women	Other (e.g., Transgender Persons, Gender Fluid)
Aboriginal / indigenous peoples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ethnic group / minority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Homeless persons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Immigrants (including temporary workers, permanent residents, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lower income individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People living with addictions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People living with developmental disabilities such as autism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People living with intellectual disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People living with psychiatric disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People living with physical disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People with a criminal record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Refugees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior / aged / elderly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sex workers (former or current)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Youth, now over 18, aging out of care from child or family services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Youth with lower educational attainment (less than completed high school)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other groups (please describe and indicate gender if applicable)

In the last financial year, about how many members of the targeted group(s) were employed, received job training, or volunteered at your social enterprise?

	None	1 to 9	10 to 24	25 to 49	50 to 99	100 or more
Employed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Received Job Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Marketing

Does your social enterprise emphasize its support of the targeted group(s) referred to previously in its marketing?

- Yes
- No

If yes, please give an example or two.

If no, why not?

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Marketing

Please check the **top three** areas in the list below that you emphasize in your marketing
(Select only up to 3)

- Quality of goods/services
- Competitive Pricing
- Employment/training of target participants
- Environmental impact
- Charitable status
- Supporting local community
- Improving financial sustainability for parent non-profit/charitable organization
- Reducing community vulnerability
- Other (please specify)

Please rate the degree of importance you feel each customer group places on your social mission when purchasing from you:

Rate from 1 to 10 for each type of customers, where 1 represents 'The mission of our organization is not at all important to purchasing decisions made by this customer type' and 10 represents 'The mission of our organization is extremely important to purchasing decisions made by this customer type'

Rate from 1 to 10

Individual customers	<input type="text"/>
Government agencies	<input type="text"/>
Non-profit organizations	<input type="text"/>
Businesses	<input type="text"/>

Other customers (please describe & rate from 1 to 10)

For the following types of customers, do they purchase from your social enterprise regularly, intermittently, or not at all? Choose only one for each row.

	Regular customer	Intermittent customer	Not a customer of your social enterprise
Individual customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-profit organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify other

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Marketing

Does your social enterprise market its services/goods online?

- Yes, currently marketing online
- Not yet, but planning to
- Has in the past, but not now
- Never before, and no current plans to market online

Can your services/goods be purchased online?

- Yes, currently sold online
- Not yet, but planning to
- Has in the past, but not now
- Never before, and no current plans to sell online

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Marketing

If yes, what goods/services does your enterprise sell online?

Please estimate what percentage your online sales are of your total sales.

- 10 % or less
- 11-25%
- 26-50%
- 51-75%
- 76-100%

About what percentage of your social enterprise's total expenses is devoted to marketing (e.g., advertisement purchases, marketing staff time)?

- 10% or less
- 11-25%
- 26-50%
- 51-75%
- 76%-100%

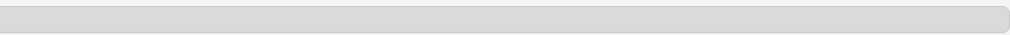
Within your social enterprise, is there at least one person whose primary position (i.e., at least half-time) is marketing?

- Yes
- No

How would you evaluate your social enterprise's marketing capacity?

1 (No capacity at all)

10 (Very strong capacity)





Impact of Social Purchasing & Procurement on Social Enterprises

Social Procurement Practices and Capacity

Has your social enterprise bid on contracts with government, either on your own or together with other organizations?

- Yes
- No (If no, why not?)



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Social Procurement Practices and Capacity

Have any of these bids for government contracts been successful?

- No
- Yes (If Yes, please describe, and if possible give the name of the awarding government agency, estimated date of the contract, and approximate value of the contract)

Have any of the requests for proposals (RFP) or requests for tenders (RFT) for government contracts that your social enterprise has bid on emphasized social criteria?

- No
- Yes (If yes, please specify the social criteria if you recall).



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Social Procurement Practices and Capacity

Has your social enterprise bid on contracts tendered by businesses, either on your own or together with other organizations?

- Yes
- No (If no, why not?)



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Social Procurement Practices & Capacity

Has your social enterprise bid on contracts tendered by businesses, either on your own or together with other organizations?

- Yes
- No (If no, why not?)

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Social Procurement Practices and Capacity

Have any of these bids been successful?

- No
- Yes. If Yes, please describe, and if possible give the name of the awarding business, estimated date of the contract, and approximate value of the contract.

Have any of the requests for proposals (RFP) or requests for tenders (RFT) for business contracts emphasized social criteria?

- No
- Yes (If yes, please specify the social criteria if you recall)



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Social Procurement Practices and Capacity

Has your social enterprise bid on contracts tendered by other types of organizations (e.g., hospitals, universities, charities, other social enterprises), either on your own or together with other organizations?

- Yes
- No (If no, why not?)



Impact of Social Purchasing & Procurement on Social Enterprises

Social Procurement Practices and Capacity

Has your social enterprise bid on contracts tendered by other types of organizations (e.g., hospitals, universities, charities, other social enterprises), either on your own or together with other organizations?

- Yes
- No (If no, why not?)



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Social Procurement Practices and Capacity

If yes, what were the type(s) of organizations (e.g., hospitals, universities, charities, other social enterprises)?

Have any of these bids been successful?

- No
- Yes. If Yes, please describe, and if possible give the name of the awarding government agency, estimated date of the contract, and approximate value of the contract.

Have any of the requests for proposals (RFP) or requests for tenders (RFT) for these other contracts emphasized social criteria?

- No
- Yes (If yes, please specify the social criteria if you recall)

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Social Procurement Practices and Capacity

Please describe the tangible benefits to your social enterprise of any successful procurement contracts.

Please describe any downsides to your social enterprise of any successful procurement contracts

Did your social enterprise have to alter its operations as a result of getting a social procurement contract?

- No
 Yes

If yes, please check all that apply:

- Changes due to environmental requirements (e.g., reduced packaging)
 Changes in working conditions (e.g., to meet contract requirements)
 Collection of additional data for reporting
 Other (please specify)

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Social Procurement Practices & Capacity

Within your social enterprise, is there at least one person with the expertise to submit bids for procurement contracts?

- Yes
- No

How would you evaluate your social enterprise's capacity to prepare a bid for a request for proposals (RFP) or request for tenders (RFT)?

1 (No capacity) 10 (Very strong capacity)

How would you rate your social enterprise's capacity to demonstrate your social value on request for proposals (RFP) or requests for tenders (RFT) that *require bidding organizations to demonstrate their social value*?

1 (No capacity) 10 (Very strong capacity)

From 1 to 10, would you be interested to see more social procurement opportunities for your social enterprise?

1 (Not at all interested) 10 (Extremely interested)

In making your own purchases, does your social enterprise give preference to other organizations with a primary social purpose (e.g., social enterprises, non-profits, co-ops)?

- Never
- Sometimes
- Always

If 'Always' or 'Sometimes', does your social enterprise have a formal social purchasing policy?

- Yes
- No



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Characteristics of your Social Enterprise

Financial information

For the following questions please answer to the best of your ability, providing your best estimate if you are unsure.

Approximately, how much financial revenue (i.e., total inflow of cash including sales, grants, donations, etc.) did your social enterprise have in the previous financial year?

- Less than \$30,000
- \$30,000 to \$99,999
- \$100,000 to \$249,999
- \$250,000 to \$499,999
- \$500,000 to \$999,999
- \$1,000,000 to \$2,499,999
- \$2,500,000 to \$4,999,999
- \$5,000,000 and up

Of that revenue, could you estimate what percent is from the sale of goods and services?

- 10% or less
- 11-25%
- 26-50%
- 51-75%
- 76-100%
- Do not know

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Human Resources

For the following questions please answer to the best of your ability, providing your best estimate if you are unsure.

Including management but not including targeted group(s), about how many full-time and part-time paid staff does your social enterprise currently have?

	None	1 to 9	10 to 24	25 to 49	50 to 99	100 to 199	200 or more
Full-time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Part-time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About how many volunteers does your social enterprise have, not including board members or targeted group(s)?

None	1 to 9	10 to 24	25 to 49	50 to 99	100 to 199	200 or more
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How many hours in total do your volunteers (not including board members) contribute in a typical week?

- 0 to 9
- 10 to 24
- 25 to 50
- 51 to 149
- 150 to 499
- 500 or more

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Final thoughts

Is there anything you would like to add or clarify?

Would you like to be presented with the results of the study once they are ready?

- No
- Yes (If Yes, please provide email address):

Would you be willing to do a follow-up phone interview on the issues raised in this survey?

- Yes
- No

If yes, please provide your contact information (telephone or email)



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Thank you for your participation. Your time and expertise are greatly appreciated.