

# Self-Attestation: Removing Barriers to Diversity in Supply Chains

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Research Conducted by Buy Social Canada

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The authors take full responsibility for errors or omissions and welcome your feedback and comments. We hope this document is used as an evolving tool to increase procurement from diverse-owned businesses in all of our supply chains.

We respectfully acknowledge that we live, work, and learn on unceded, traditional, and ancestral lands of Indigenous and First Nations peoples. We invite you to consider what efforts we can all take to repair and improve our relations with Indigenous people locally and globally.



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# Executive Summary

In 2015, Toronto City Council adopted the Poverty Reduction Strategy Offices 20-year Poverty Reduction Strategy to address immediate needs, create pathways to prosperity and drive systemic change for those living in poverty in the city. Within that year, AnchorTO was founded by the City of Toronto and Atkinson Foundation and would help advance the systemic change pillar of the Poverty Reduction Strategy.

AnchorTO is a network of 18 public sector institutions committed to driving forward social procurement, a practice that leverages the economic, social, environmental, and cultural impacts of purchasing to support social, economic and workforce development goals and positively impact communities. AnchorTO supports institutions in developing frameworks, tools, and policies, to strengthen the social procurement ecosystem.

Increasing the inclusion of diverse-owned and social enterprise (SE) suppliers is critical to achieve and sustain a social procurement ecosystem. Over time, efforts to be more inclusive of diverse suppliers in procurement has not met the desired goals of the City and institutional purchasers.

In part at issue is the barrier for diverse suppliers and SEs to be able to effectively engage and participate in the procurement process, possibly due to administrative requirements and financial burdens. Currently, most institutions use third-party certification organizations to identify diverse suppliers.

AnchorTO contracted Buy Social Canada to research and complete an analysis of low-barrier methods to identify and include diverse suppliers. The research found that the existing third-party certification model is based in a history of fear and risk-aversion and that to realize the goals of social procurement we must move forward with self-attestation, a model based on trust and transformation.

The key research findings and recommendations are:

- Third-party certification of diverse suppliers has created financial and administrative barriers to engaging and participating in the supply chain.
- Three models of recognizing diverse-ownership exist: (1) self-attestation, (2) evidence-based model, and (3) third-party certification. These models are best understood as a sliding scale of supplier burden and trust, with the least burden and most trust relating to self-attestation and the most burden and least trust connected to third-party certification.
- To move forward with a procurement model based in trust and transformation:
  - change the social procurement culture from risk to trust;
  - implement self-attestation for diverse-owned suppliers;
  - build relationships with diverse suppliers;
  - enhance supplier capacity and networks;
  - build purchaser tools, resources, and procedures; and
  - measure what matters by establishing and reporting metrics that focus on diverse supplier outcome indicators.

The report emphasizes that self-attestation is emerging as an industry and government standard practice to reverse a pattern of historic and structural racism and address the unintentional evolution of exclusionary practices within the diverse supplier process. Shifting away from third party certification will remove real and perceived barriers of inclusion for diverse-owned businesses and social enterprises, and support their participation and engagement in the procurement process.

# Why Research Self-Attestation and Diversity in Supply Chains?

Every purchase has an economic, social, cultural, and environmental impact. Social procurement intentionally leverages a social value outcome through existing purchases.

Social procurement uses procurement as a tool to create inclusive economies, equitable employment opportunities, and healthy communities. Social procurement continues to evolve in policy and practice.

One key objective of social procurement is to create social value through diversifying the suppliers who will benefit from purchasing decisions. There are barriers on both the demand and supply sides of procurement. To ensure that businesses owned by equity-deserving groups and social enterprises are engaged in the marketplace, we must work increase opportunities by first questioning our current procurement practices.

Over the past 25 years, social procurement has grown by challenging the status quo of traditional procurement as merely an economic transaction between buyers and sellers. This has provided purchasers with the opportunity to transform communities, achieving their economic, social, cultural, and environmental objectives, through their purchasing decisions.

*Self-attestation: Removing Barriers to Diversity in Supply Chains* contributes to the on-going design of effective social procurement policy, tools, and implementation practices by highlighting existing policy and practices, encouraging discussion, and recommending opportunities to overcome challenges to further leverage social value in our supply chains. We have included discussion questions in *Appendix D* based on the research to assist organizations to engage in conversations regarding self-attestation and diversity in their own supply chains.



# Positioning the Research

Historical evidence demonstrates that, pre-colonization, the exchange of goods and services among Indigenous communities was a means to share local values and create well-being for everyone across Turtle Island<sup>i</sup>.

Over the past 200 years, however, a marketplace which prioritized economic value evolved in the wake of colonization. Purchasing became focused on the lowest possible price. It is only in the last 25 years that social procurement, modeled from pre-colonization Indigenous trading practices, was re-introduced to leverage social value from existing purchasing. Social procurement recognizes that transactions have not merely economic effects, but also offer the opportunity build community capital.

As interest in social procurement grew, the City of Toronto and the other members of AnchorTO have made significant contributions to its policy design and implementation in Canada. Yet, the inclusion of diverse-owned businesses in the pool of contracted suppliers continues to be a challenge in the social procurement movement.

Diverse-owned businesses have traditionally been defined as a business that is 51% owned and operated by persons who identify as being from an equity deserving group.

Equity-deserving groups (sometimes referred to as equity-seeking groups), according to the definition by the University of British Columbia's Equity and Inclusion Office, are those that "identify barriers to equal access, opportunities and resources due to disadvantage and discrimination and actively seek social justice and reparation."<sup>ii</sup>

Fair, open, and transparent procurement practices that provide added value and weighting in the competitive process, without violating trade agreements, have supported efforts to diversify supply chains<sup>iii</sup>. AnchorTO members have made strides in social procurement over the last decade, implementing these recommended practices. Despite these efforts, AnchorTO recognized that diverse-owned businesses continued to be excluded from procurement opportunities and true supply chain diversity remained to be fully realized.

The issue of defining and recognizing diversity has evolved over the last half century and has resulted in a system of third-party certifiers, tasked with verifying the identity of diverse-owned businesses. Identification of diverse-owned businesses is a foundational step in the social procurement process, but AnchorTO acknowledged that the current system may pose significant barriers to inclusion. The ability for a diverse-owned business to verify its identity can affect all stages of procurement, such as awareness of opportunities, engagement in bid processes, and perceived capacity to deliver on contracts. Currently, verification of diverse-ownership is majorly required to be able to access the systems designed to encourage the inclusion of diverse-owned businesses, such as weighted points, considerations, and set-asides.

By looking at the history of supplier identity verification, we find that this procurement practice is rooted in racism and distrust. Therefore, an equity lens must be applied to all further work in the procurement field if we are to address the persisting colonial systems of identification which are slowing the progress of social procurement. The participation of diverse-owned businesses in procurement opportunities is affected by the real and perceived barriers posed by identity verification. Diversity and identity are two concepts, however, that are complex to navigate due to their increasingly intersectional nature. Therefore, it is essential that social procurement continues to evolve as well, balancing organizational risk, financial and regulatory constraints, and a serious commitment to measurable diversity and inclusion outcomes.

The objective of this research project is to first look at how to increase access to procurement opportunities for diverse-owned businesses by creating a more efficient and equitable supplier identification process. Secondly, the research explores the supports required to ensure not only the initial inclusion, but also on-going success of diverse-owned businesses across the supply chains of AnchorTO members.

We conclude that, to be successful in the inclusion of diverse-owned businesses through social procurement policy and practices, we will require a move to a culture of procurement based on trust, not just risk.

Key steps to support this change are:

- Implementation of self-attestation to verify the identity of diverse-owned businesses
- Capacity building of networks of diverse-owned businesses
- Utilization of social procurement tactics available to ensure more inclusive and diverse supply chains

## Objective

Buy Social Canada is pleased to provide this Social Procurement and Self-Identification Research Report in response to the AnchorTO Request for Partners: “to conduct research and in-depth analysis that will guide policy and program development to advance low-barrier ways to identify diverse suppliers.”

We hope that the research and recommendations contribute “a key step to growing a pool of diverse suppliers positioned to do business with institutions that is sustainable and maintained over time.”

Within this report, we first examine the key drivers behind the need for this research and then examine the historical context of the current supplier diversity and identification models. Following a review of current policy and programs, we provide a spectrum of recommendations for varying levels of government and institutional bodies to use to improve the inclusion and successful participation of diverse-owned businesses and social enterprises into the purchasing decisions of social procurement purchasers.

## Methodology

We applied a variety of approaches to this research project to understand and analyze the historic foundations of diversity identification and to assess current needs and trends. This included extensive desk research and a jurisdictional scan of current social procurement policy and practices in government and the private sector that include diversity as a social value. See *Appendix A* for the *Jurisdictional Scan* and *Appendix B* for a list of resources reviewed. We also interviewed 37 individuals across a spectrum of purchasers, third-party intermediaries, and diverse-owned businesses. We would like to thank SETSI, *Social Economy Through Social Inclusion*, and *Qatalyst Consulting* for their interview support. They helped us maintain integrity in many of the interviews and reach the necessary respondents. See *Appendix C* for a list of interviewed individuals and their affiliations.

## Statement of the problem

The owner of a Black business in Toronto articulated in an interview with the project team the fundamental historic and structural issues of why this research and analysis of social procurement are so necessary: “The unexamined power, privilege and potential of procurement in Canada from a social, gender, and racial equity lens harms our ability to cultivate social impact, and questions models of trust-based procurement.”

Recent research from Black Urbanism Toronto in collaboration with the University of Toronto School of Cities, narrows the potential problem scope even further:

One of the largest barriers for minority-owned businesses in the social procurement process is the certification requirements imposed by the City. Businesses must pay costly annual certification fees from third-party organizations in order to be eligible to bid on City Contracts. This current process is inequitable and a hindrance for small businesses that are already faced with tight budgets, cost inflation, and reduced patronage due to COVID-19.<sup>iv</sup>

Third-party certification is not singularly a City of Toronto issue, their policy merely reflects one aspect of an entire procurement-wide process that has developed over the last 60 years which attempts to diversify ownership in supply chains.

## Mission

The purpose of this research is best explained by the purpose statement of AnchorTO itself:

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Social procurement is the practice of using existing investments in infrastructure and the purchase of goods and services to generate social and economic value, such as the creation of decent work opportunities for jobseekers experiencing employment barriers, and equitable opportunities for diverse suppliers and social enterprises to do business with institutions.

Examples of this work in action include intentionally supporting minority-owned or Indigenous-led businesses through purchasing, or prioritizing purchases from high impact social enterprises. In this way, Anchors can use social procurement to keep wealth circulating locally, create additional benefits for community, and empower equity-deserving groups.

We dream of a future in which models of community wealth building are the norm, and in which all organizations and social enterprises are empowered to compete and benefit from procurement purchasing, as part of a truly inclusive and democratic economy.<sup>v</sup>

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We hope the social procurement research and recommendations below contribute to realizing this dream.

## Historical Context

Supplier diversity policy and programs emerged in the United States in 1969 following the Civil Rights Movement, while Richard Nixon was President.<sup>vi</sup> The policy required the inclusion of diverse-owned contractors or sub-contractors in specified government contracts. The inclusion of diverse-owned businesses into government contracts for goods, services, and construction would contribute to reducing racism and segregation. To support access to more diverse-owned businesses, a collaborative effort of several private sector businesses in Chicago in 1972, the *National Minority Supplier Development Council* (NMSDC) was founded in the United States. This effort was the initial step toward the development of capacity building and ownership certification programs in the USA.

In Canada, supplier diversity programs evolved in the 1990s from the corporate sector that worked across borders, and an effort from the Federal Government to increase the inclusion of Indigenous suppliers.<sup>vii</sup>

To ensure inclusion and opportunities for diverse-owned businesses in procurement, policies and programs were developed and generally aimed to:

- Give extra consideration, weighting, or credit extra bid value to diverse-owned business on an RFx evaluation or weighting
- Require prime contractors to include a specified percentage, or quota, of the sub-contracts to go to diverse-owned and -operated suppliers and sub-contractors
- Establish a specific number of or dollar value for set-aside contracts available only for diverse suppliers

The goal of these initiatives was to create an affirmative action environment that would ensure inclusion and development of diverse-owned businesses. Initially, diverse-owned referred to enterprises with 51% or greater ownership and control by individuals identifying as Black, Indigenous, and/or women. As policies evolved, the term grew to include other historically excluded and/or equity-deserving groups such as veterans, persons with disabilities, and LGBTQ+ owned businesses.

## Risk-averse procurement and the exclusion of diverse suppliers

The problem then arose of how to shift from the traditional procurement framework, which focused solely on technical aspects and lowest price, to a bid evaluation process that included social value outcomes.

The conventional risk-averse procurement model assumes that all suppliers will act solely out of self-interest and make every effort to win the bid for a contract. This has fostered a common fear among purchasers that non-diverse suppliers will exploit supplier diversity programs to their own benefit. The main motive behind this is that awarding a contract to a supplier impersonating a diverse supplier would cause great reputational damage to the purchaser. Thus, to address the risk of reputational damage, purchasers required diverse ownership to be certified by a third-party.

The concern for misrepresentation of identity or heritage has proven to be real in several instances in the 50-year history in the United States. Some companies set up diverse-owned facades during the bidding process, which dissolve once contracts have been won. Others lied about the ownership or the percentage of the subcontractors who would be performing on a contract. Not extensive, but also in the Canadian procurement context are incidences of misuse of Indigenous ownership as a “front” for contract access and the ongoing controversy over individual claims of Indigenous identity.

The difficult issue for the implementation of diversity within a social procurement policy is how to balance the fear of falsification against the goal of increased diversity opportunities in the supply chain. One Black business owner expressed in an interview with the project team what their model is for addressing the perceived problem:

We are committed to creating a more equitable and inclusive society, and so we take the risks of 'social washing' or deceit very seriously. We believe that by honestly self-identifying as a diverse or social value business we can be held accountable for our commitment to diversity and inclusion, which will ultimately create more procurement opportunities for greater diversity and inclusion.

But not all purchasers were prepared to 'take the risk of social washing' so we witnessed the design and required use of third-party certification.

## Emergence of third-party certification

To eliminate any potential false claims of diverse ownership and to address risk-averse purchasers, a set of third-party certifying groups emerged to verify the diverse ownership of businesses. These certifying bodies provide certificates of diverse ownership following a thorough evaluation process. In addition to verification, third-party certifiers also began to provide services to further the capacity of the diverse-owned business community, such as business skills building, market connections, and technical supports. This further entrenched the value of third-party certifiers in the diverse-owned business community.

The certification process normally requires submission of appropriate documentation proving identity, at least 51% ownership or 51% operational control, and requires the payment of a certification fee and an annual fee. The list of certified suppliers is made available to interested purchasers for a fee. Corporate members are predominantly from the financial sector, telecom, and big consumer goods, but very limited uptake across the business sector. The certified list is often the entry to inclusion in supply chains for government or corporations that rely on the verification provided by the certifying bodies.

The recent evolution of intersectionality of race, gender, and self-identity raises an added challenge to the current model of diversity that emerged based on public policy directive from over 50 years ago. The current system was established on the premise of a defined list of shareholders, a sole proprietor, or a business partnership with shared identities. This model fails to recognize the intersectionality of diverse ownership when there is more than one owner.

As an example, many small businesses are family-owned entities owned by two heads of households ('Mom and Pop Shops'). Hypothetically, if the business partnership is comprised of a white woman and a black man, it wouldn't fit current requirements despite being 100% diverse-owned. This is due to a failure to recognize intersectionality of ownership: the business is only 50% woman-owned and/or 50% black-owned, falling short of the 51% condition. Therefore, current requirements would exclude the exact vendors that the social procurement system is trying to include.

The initial model of inclusion of diverse-owned businesses placed the burden of proof onto the diverse supplier through use of a third-party. The suppliers sought verification of identity through a third-party certifier as the means to minimize purchasers' perceived risk of buying from potentially misrepresented diverse-owned businesses. This solution to solve purchasers' risk-averse procurement concerns soon became the dominant requirement for diversity recognition in the bid process.

However, as we see below, the actual risk of misrepresentation of diverse ownership may be in fact much less than it is projected or perceived to be. Yet, this perceived risk has fueled a model of certification which has unintentionally resulted in the *exclusion* of diverse-owned businesses.

## Canadian context

In the 2000's, efforts within Canada to improve supplier diversity and develop social procurement initiatives prompted the growth of third-party certification bodies.

As noted above, major international corporations in Canada, especially the banks and telecoms that worked across the USA border, initiated the process in Canada using what they knew: the American designed third-party certification model.<sup>viii</sup>

The City of Toronto was an early and notable advocate of social procurement and quickly became a policy leader by adopting low value purchasing inclusion programs for diverse-owned businesses. They also included third-party certification requirements, which at the time was best practice in social procurement.

With the purchaser side of the market putting in place a diversity verification model of third-party certification, the supply side responded with a reflective range of entities evolving to meet that need.

The primary bodies that certify diverse-owned businesses in Canada include:<sup>ix</sup>

- Canadian Aboriginal and Minority Supplier Council (CAMSC)
- Canadian Council for Aboriginal Business (CCAB)
- Canada's LGBT+ Chamber of Commerce (CGLCC)



- Inclusive Workplace & Supply Council of Canada (IWWSC)
- Women Business Enterprises Canada (WBE Canada)

There are other groups that offer membership for diverse-owned businesses but do not provide a third-party certification, such as:

- Afro-Caribbean Business Network (ACBN)
- Canadian Black Business Chamber of Commerce
- Black Business Association of British Columbia (BBABC)

Usually, the supplier pays a fee for certification, and the purchaser may have to pay a fee to the certifying entity for access to the list of certified suppliers. In response to more purchasers addressing a more inclusive supply chain, community-based and sector-based lists are emerging. Others, like AnchorTO member York University, is building an open use [social procurement supplier portal](#).

<b>Diverse Supplier Certifier Membership Fees</b>	
<b>Per Year as of January 2022 (Source: BUTO)</b>	
WBE Canada, Certified Women Business Enterprises	\$750
Canadian Council for Aboriginal Business	\$350 to \$1,000
Canadian Aboriginal and Minority Supplier Council	\$350 to \$750
Canadian Gay and Lesbian Chamber of Commerce	\$449
Inclusive Workplace Supply Council of Canada	\$500

All the Canadian certifying bodies are non-profits, providing additional valuable supplier services to their members such as capacity building, networking, and market opportunity information. The business models vary, with some more reliant on membership and certification related fees and others depending on consulting, training, and grants for income generation.



# Unintended Consequences of Third-Party Certification

Once the certification process was established as the norm in some procurement processes, there seemed to be confusion on the avenue for non-certified diverse-owned businesses to engage with some procurement opportunities. Small and new businesses were particularly excluded due to the burden of expensive certification fees, lengthy certification processes, lack of clarity on the process, and uncertainty of the actual value of pursuing certification.

**Therefore, the burden of proof of verifying diverse supplier identification remains with diverse-owned businesses themselves to work with or through a third-party certification body.**

This is problematic because diverse supplier programs exist to *reduce* barriers for diverse-owned businesses, but their certification requirements are now *creating* barriers. The assumption that non-diverse owned businesses would falsify their identity to access affirmative action programs has fueled the adoption of a third-party certification process that is burdensome to diverse suppliers.

The first generation of social procurement policies and programs also wanted assurance of diverse ownership and to control risk. The use of third-party verification remains a standard practice in social procurement. However, those in the supplier diversity service sector are beginning to note the negative effects of certification practices:

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Despite the numerous benefits of third-party diversity certifications, there are drawbacks as well. First and foremost, the process is time-consuming and can be quite expensive. For diverse-owned suppliers that also happen to be small businesses, the time and resources required to secure such a certification are not always available. This blocks many suppliers from participating in the process, keeping certified diverse spend and actual diverse spend from aligning.

When companies, especially large enterprises, insist that their small/diverse suppliers obtain certifications, they may be doing themselves a double disservice: Demonstrating a lack of understanding of what is required to get through the process and creating negative feelings from the suppliers where their original intent was to create goodwill.

Indirectly limiting their diverse supplier relationships to those organizations large enough to have the personnel and resources needed to complete

the process, thereby abiding by the letter but not necessarily the spirit of the diversity and inclusion movement.<sup>x</sup>

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While the intention of certification is inclusion, often that may not be the primary barrier in all situations. Certification of diverse ownership may not provide the purchaser with the information they're most interested in: supplier capacity and size. In 2021, a report by WBE Canada stated the challenges for diverse-owned businesses not addressed by the third-party certification processes: "Still, the top two barriers pertain to difficulty in finding qualified diverse suppliers and concerns about their ability to perform. Legal issues, e.g., concern over bid disputes (typically based on selection criteria), sit at the bottom of the barrier list."<sup>xi</sup>

Our research of current procurement practices, interviews with diverse businesses and suppliers confirmed that while third-party certification was initially designed to enhance inclusion of Black, Indigenous, LGBTQ+, and women into business and government supply chains, it has inadvertently and unintentionally shifted to a barrier process that excludes and negates the original inclusive purpose of the policy.

If purchasers are tracking the results of their social value contracts to include the number and the amount with diverse-owned businesses, and do not include self-identified diverse-owned businesses, the actual impact may be under counted.

The solution recommended in this report is to move from external third-party proof of diverse ownership to a self-attestation proof of diverse ownership. The use of self-attestation in social procurement is being implemented in major municipalities in the United States, including Chicago and Boston, major corporations, like Microsoft, and major procurement services, like Tealbook.

## Recognition of Diverse Ownership

Three key paths to verification of diverse ownership identification have now emerged across procurement policies and practices: self-attestation, evidence, and third-party certification. While self-attestation is emerging, the purchasers we interviewed, and the literature and policy review indicated that currently there is still strong reliance on third-party certification and evidence-based models.

We are seeing a transition toward self attestation across industry as they make the efforts to be more inclusive and use supplier sourcing like [Supplier I.O.](#), "Though not required, the vast majority of diverse suppliers in CVM's database have had their diversity status certified by a third-party certification agency".<sup>xii</sup> The preference may be third-party certification, but there is an understanding that certification may not be accessible to all.

To address the systemic racism inherent in past inclusive practices and to achieve the potential social value outcomes of diverse inclusion through social procurement our conclusion is to recommend self-attestation as the acceptable baseline of ownership identity. However, the progression toward solely self-attestation will have to evolve as the standard acceptable process to ensure increased inclusive contracting, currently that situation is still early stage, and looks more like verification is a range of puzzle components. Hopefully external verification will diminish or be eliminated as a more trust based self-attestation model becomes the accepted practice.

## Self-attestation model

An individual or business states in a letter or document or fills out a form indicating they are diverse-owned. This is a self-declared model of verification with no external proof or documentation. Corporations and governments now offer this option within their procurement processes, such as PSPC which is using self-attestation in their social procurement pilot stage<sup>xiii</sup>. One significant platform is [Supplier IO](#) which is used

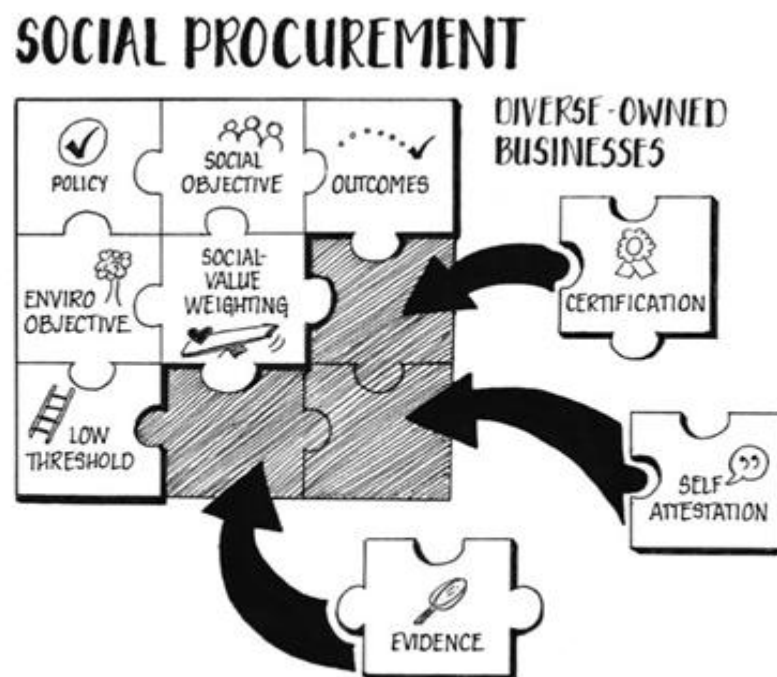


Figure 1. Yvonne Hollandy, Axiom News

by hundreds of corporations, including Canadian owned Thomson-Reuters, as a source for diverse-owned businesses. Registering on their database of over 1 million businesses can be done through self-identification. Tealbook, another supply chain service utilizes the self-attestation identify option. Corporations such as BMC and Microsoft use a simple self-identity form to register as a diverse-owned business. *Appendix B* identifies several options and models of forms that are used by purchasers.

Evidence-based model

An individual or business provides external evidence of being a diverse-owned business. Examples include driver’s license, personal legal affidavit, membership in a diverse business group (ex., Black Chamber of Commerce), or recognition by an Indigenous community or economic development entity. The purchaser may determine the specific requirements or terms of ‘evidence’ based upon the factors such as location and/or targeted group.

The recent development of the Social Procurement Portal at York University is a model that utilizes evidence-based criteria. Either through York staff review of evidence or through a partnership with the Canadian Black Business Chamber of Commerce, diverse-owned businesses and social enterprises can be listed on the directory.<sup>xiv</sup> A shared portal that lowers barriers to inclusion is a step in the right direction.

However, even the evidence-based models require evidence, and a lot of that evidence is the same as looking at someone’s government-issued ID, asking for affidavits from other community members, examining family structure. It can be as invasive as third-party certification and still there’s no guarantee that review of evidence definitively equates with someone being from an equity-deserving community.

Third-party certification model

An individual or business provides verification by an external third-party entity that reviews business incorporation documents, personal data, affidavits, legal testaments, and potentially declarations of the businesses’ operational employee data to confirm ownership and management by a recognized equity-deserving group.

There is an application process and fee for most third-party certifications (See previous table on *Diverse Supplier Certifier Membership Fees*).

The benefits and perceived risks of self-attestation

Diverse-owned businesses may receive added credit or weighted value when bidding for contracts. They may receive exclusive access to set-aside procurements that other suppliers are not invited to bid on (federal) and they may receive invitations to participate in procurements with a limited number of other vendors.

Benefits of self-attestation

Achieve the goal to Increase the inclusion of more diverse-owned businesses into the supply chain by measuring who participates in supplier lists, the bidding process and contract delivery.

The purchaser eliminates the potential of suppliers' exclusion from social procurement process when reliant only third-party definition of diverse supplier

Increases the opportunity for a larger directory of diverse-owned businesses representing broader breadth and depth of diversity and intersectoral ownership models.
A more efficient, simpler bidding process with use of a simple self-attestation form and / or registry.
Allows for the intersectionality that suppliers can identify businesses that are being formed and owned by multiple equity-deserving groups
Eliminates the cost of third-party certification for the equity-deserving suppliers
<b>Perceived risks of self-attestation versus external verification</b>
People might lie and make false claims they have no right to, however evidence exists that this risk exists in current procedures
Risk continues to be internalized by purchaser, rather than externalized. the purchaser, which is the ultimate There is no absolute assurance from a third-party certification that the supplier does meet the criteria as a diverse-owned business. The purchaser still accepts results and risks of any bid or contract misrepresentation.
The purchaser takes on the reputational risk if a supplier proves to have lied after a contract is completed, which is true under the current process.

Therefore, it is of even more importance to purchasers that vendors legitimately meet diversity requirements to receive prescribed benefits in a fair and equitable process.

The key challenge is to ensure we are awarding value to the businesses we intend to support, and the inclusion is as broad and inclusive as possible. The purchasers' challenges of "How do we determine who is a diverse-owned business?" and the supplier challenges of "How do we mitigate the cost or complicated burden of proof barriers that might be placed upon the vendor?" can both be resolved through acceptance and adaptation of self-attestation identity programs.

A diverse supplier must be certified and at least 51 percent owned, managed, and controlled by an equity-seeking community or social purpose enterprise. These communities include, but are not limited to, women, Aboriginal people, racial minorities, persons with disabilities, newcomers, and LGBTQ+ persons. <sup>xv</sup>

The purpose of the self-attestation process is to lower barriers, such as the identification process, and break away from the sole use of a third-party certification. Businesses that have been certified don't lose access to the procurement process through self-attestation, and can still access vital benefits of certification, such as training, mentorship, and networks. With reduced barriers to participation, the increased inclusion of diverse-owned businesses into the social procurement supply chain will allow AnchorTO to advance their goal of healthy communities and inclusive economies.

## Recommendations

Below is a summary of recommendations, as well as a table outlining the role and actions that government and institutions may utilize to shift current exclusive procurement practices to promote a more inclusive procurement culture.

We hope the recommendations support your journey to address the historic and structural racism underpinning the current limitations of social procurement, resulting in a more inclusive and diverse supplier base.

### **1. Change the social procurement culture from risk to trust**

The acceptance of self-attestation as the means to identify diverse-owned businesses will require a move to a trust-based procurement model. Incorporating self-attestation instead of third-party certification across the procurement process will guide a change in values. This culture shift is required to increase inclusion of diverse-owned and social enterprise businesses into supply chains.

This shift will impact multiple stakeholders, including but not limited to purchasers, diverse-owned suppliers, non-diverse suppliers, third-party certifying bodies, and diversity membership organizations. We recommend the creation of a working group that includes all affected stakeholders to ensure inclusion and collaboration.

### **2. Implement self-attestation for diverse-owned suppliers**

Transitioning to a self-attestation model will require a review and amendment of current policy and practices. It is necessary to allow diverse-owned and -operated suppliers verify their own identify throughout the bid process, from registration to award.

### **3. Build relationships with diverse suppliers**

To support inclusion of suppliers, purchasers are encouraged to implement a Request for Information (RFI). RFIs can be used to establish an accessible supplier list and simplify the registration for social value suppliers' portals. [The York University Social Value Portal](#) presents an opportunity for this and could be expanded to include self-attestation to identify diverse-owned suppliers.



Purchaser and supplier engagement events and trade shows are a valuable tool to increase engagement and strengthen relationships between social value procurement stakeholders.

#### 4. Enhance supplier capacity and networks

Inclusion on directories and/or opportunity to bid will not ensure that diverse suppliers will have the capacity to engage and deliver on contracts. Currently, third-party certification groups offer capacity building services. If self-attestation is to be widely adopted, these capacity-building services will need to continue to be offered by these bodies or elsewhere.

The use of a variety of procurement opportunity lists, marketing channels, networks, and social value portals will streamline how purchasers communicate procurement opportunities with diverse-owned businesses.

#### 5. Build purchaser tools, resources, and procedures

**Create a supplier code of conduct** for every business bidding on an RFx. It is important to establish a set of baseline ethical, social, and environmental standards that all bidders are required to meet.

**Use RFx scored supplier questionnaires in all documents** to allow for reliable assessments to advance opportunities and measure the participation of diverse – owned businesses. Purchasers that include diversity ownership in bid evaluation and contract data can evaluate and demonstrate the inclusion of diverse supplier participation and outcomes. Tracked over time progress and market shifts can be assessed, adjustments made, and greater success achieved.

**Establish penalty procedures for misrepresentation of ownership.** In policy, there will always be actors who will want to cheat the system, misrepresent their identity, and create front organizations to gain an undeserved advantage. Examples of penalties include but are not limited to exclusion from future bidding or contracting opportunities, criminal referrals for misrepresentation, and/or fraud financial penalties written into contract requirements, guarantees, or deliverables.

In the City of Chicago, any misrepresentation of diverse ownership disqualifies suppliers from accessing future contract opportunities.

**Identify and eliminate additional prequalification barriers to bid**, as certification of diverse ownership is only one of many pre-qualifications that may pose as barriers to businesses. Additional pre-bid and pre-contract conditions may include financial qualifiers, insurance, equipment standards and certifications, or bonding. Consideration the necessary requirements for levels and types of contracts can lower barriers and increase opportunities for smaller and newer vendors.

**Increase RFX weighting of diversity, equity, and inclusion** in all RFX procedures and documents between 15% and 25%

**Direct award low value contracts** to diverse-owned businesses to increase the inclusion of diverse-owned business and build supplier capacity. It is of note that low value purchasing must be coupled with additional recommendations to create widespread change for economic inclusion.

**Include and award multi-year contracts** to offer stability for suppliers to build capacity over a longer period. Procurement teams can create opportunities for smaller capacity enterprises to engage in longer term contracts by requiring prime and tier one contractors to include diverse-owned business targets into their sub-contracting and supply chains. This can be a bid evaluation consideration as well as a contract requirement, with aligned financial penalties for under-delivering and rewards for exceeding contract goals.

## 6. Measure what matters

The purpose of moving to self-attestation is to increase the inclusion of diverse-owned businesses into the bid process and the awarding of contracts. The policy framework, purchasing procedures, and contract language are all components. The results will be measured by establishing and reporting metrics that focus on diverse supplier outcome indicators from who bids, how bidders score, who wins contracts, and what are the outcomes of contracts. Metrics and measurements can be established along the entire process to ensure purchasers are able to verify and share the outcomes of diverse supplier inclusion and contracts.

## Recommendations as actions for municipalities and institutions

Recommendation	Role of the City or Institution						
	Lead	Convene	Advocate	Fund	Partner	Policy	Purchase
<b>Change the social procurement culture from one of risk to trust</b>							
Establish a trust-based procurement model by using self-attestation to identify diverse-owned suppliers	<b>X</b>		<b>X</b>			<b>X</b>	



Recommendation	Role of the City or Institution						
	Lead	Convene	Advocate	Fund	Partner	Policy	Purchase
Facilitate a working group with all stakeholders involved in social procurement		<b>X</b>	<b>X</b>		<b>X</b>		
<b>Implement self-attestation for diverse-owned suppliers</b>							
Review and amend procurement policy and practices to include self-attestation	<b>X</b>	<b>X</b>	<b>X</b>			<b>X</b>	
Allow diverse-owned and -operated suppliers to verify their own identify throughout the bid process	<b>X</b>		<b>X</b>			<b>X</b>	<b>X</b>
<b>Build the relationships with diverse suppliers</b>							
Use RFIs or similar simple registration form to create an accessible system with self-attestation		<b>X</b>				<b>X</b>	<b>X</b>
Create an accessible supplier list for purchasers	<b>X</b>			<b>X</b>	<b>X</b>		
Allow registration with self-attestation for existing supplier portals/lists/directories				<b>X</b>	<b>X</b>	<b>X</b>	
Support and host supplier-purchaser engagement events and trade shows		<b>X</b>		<b>X</b>	<b>X</b>		
<b>Enhance supplier capacity and networks</b>							
Identify gaps in supplier capacity-building services	<b>X</b>						

Recommendation	Role of the City or Institution						
	Lead	Convene	Advocate	Fund	Partner	Policy	Purchase
Support third-party certifiers continue to provide supplier capacity-building services			<b>X</b>	<b>X</b>	<b>X</b>		
Provide training and capacity-building in identified gaps		<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>		
Support third-party certifiers as support networks for the diverse-owned business community		<b>X</b>		<b>X</b>	<b>X</b>		
Streamline how purchasers communicate procurement opportunities to diverse-owned businesses	<b>X</b>		<b>X</b>		<b>X</b>	<b>X</b>	
<b>Build purchaser tools, resources, and procedures</b>							
Clarify RFx language	<b>X</b>	<b>X</b>				<b>X</b>	
Establish penalties for misrepresentation		<b>X</b>				<b>X</b>	<b>X</b>
Identify and eliminate additional pre-qualification barriers to bid						<b>X</b>	<b>X</b>
Increase RFx weighting for diversity, equity, and inclusion						<b>X</b>	<b>X</b>

Recommendation	Role of the City or Institution						
	Lead	Convene	Advocate	Fund	Partner	Policy	Purchase
Collaborate across levels of government, institutions, and crown corporations to enhance contract opportunities for diverse businesses	<b>X</b>	<b>X</b>			<b>X</b>		
Measuring what matters							
Use RFx questionnaires and contract data to measure diverse supplier participation in bid process	<b>X</b>	<b>X</b>					<b>X</b>
Establish and use reporting metrics that focus on diverse supplier outcome indicators from bidding and contracting		<b>X</b>	<b>X</b>		<b>X</b>	<b>X</b>	
Measure and share the outcomes of diverse supplier inclusion and contracts	<b>X</b>	<b>X</b>					

# Conclusion

It is the effort of the AnchorTO Self-Attestation Research project to design a framework and procedures to increase opportunities for inclusion, diversity, and equity for small and medium sized diverse-owned businesses. The Institute for Gender and the Economy explains that:

Overall, [diversity] also helps to increase flexibility in the supply chain, it can introduce additional competition that leads to more innovation and potentially higher quality goods and services, and it supports broader poverty reduction strategies.<sup>xvi</sup>

The goal of self-attestation is to increase social value outcomes, employment opportunities, and rectify historical exclusion. These benefits will outweigh the perceived risks of moving to self-attestation policy in social procurement.

There is not a simple or easy solution to prevent the real or perceived risk of deception. However, a small chance of deceit cannot dissuade the procurement community from realizing the potential benefits of self-attestation.

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The primary change required to create this shift in procurement policy and practice will be to move from a fear-based, risk-averse purchasing culture and process to an environment which begins with trust and assumes honesty on the part of suppliers.

So, rather than fearing the 1% of non-diverse owned businesses that may deceive to claim diverse ownership, procurement should rely on the 99% of diverse-owned businesses that can self-attest to their own identity.

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Offering the opportunity to lower the barriers, and merely expanding the inclusion of diverse-owned businesses, is not going to solve the problems we need to address through social procurement. We must acknowledge the importance and critical inclusion of capacity building for diverse-owned businesses to ensure their competitiveness in the public and institutional procurement processes. This role of capacity building is often provided through membership or affiliation with certifying organizations or other diverse-owned business networks. Many government programs, like the City of Toronto's *Economic Development and Culture Division*, offer small business capacity building and support.

The networking and resource services of the current third-party certifying bodies are critical for the diverse-owned business community. As one Black owned business interviewee stated, being engaged with certifiers “keeps me updated on opportunities.” The networking provided by third-party certification organizations opens opportunities beyond the public sector and offers vast opportunities to engage and contract or sub-contract with the private sector.

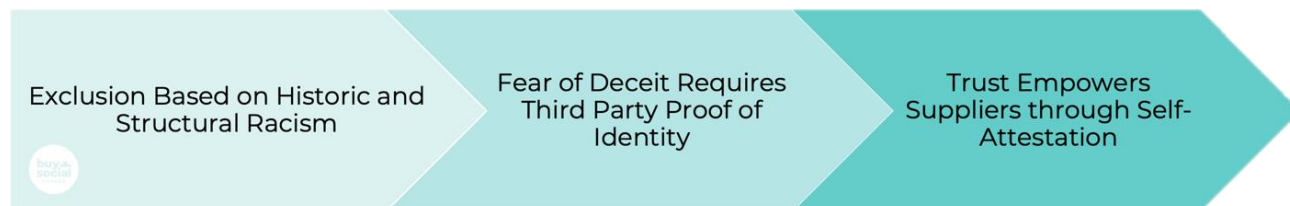


Figure 2. Buy Social Canada Historic Progression of Procurement Policy

But the change is not merely policy, we are moving an entire business model, and proposing to change the historical solutions to diversity in procurement. The challenge involves a new understanding of relationships, trust, and measurements of success.

Self-attestation is emerging as an industry and government standard practice to reverse a pattern of historic and structural racism and address the unintentional evolution of exclusionary practices within current affirmative diverse supplier processes.

Although third-party certification was once the basis of protecting and ensuring inclusion, it has become a barrier to enhanced inclusion of diverse-owned businesses for both supply and demand. The current certification models create real and perceived barriers of inclusion for diverse-owned businesses to access opportunities to participate in bidding and contracting.

Certification requirements limit public, private, and institutional purchasers to achieve the full potential of their goals of inclusion and diversity in their supply chains. The certification process is difficult and time intensive to navigate for small diverse-owned businesses.

However, the best efforts of inclusion cannot alone achieve their intended goals. Future efforts must include an amplified commitment to support the skills and capacity building for the development of diverse-owned and social enterprise businesses to reach their competitive potential.

## Next Steps:

- Inspire a procurement culture change based on trust between purchasers and diverse-owned suppliers
- Incorporate self-attestation as evidence of diverse ownership across all procurement
- Utilize appropriate social value and inclusive weighting considerations in RFx, direct awards, and community benefit models
- Nurture and strive for a collaborative ecosystem approach to inclusive procurement that includes capacity building and supportive networks for diverse-owned businesses and social enterprises
- Measure outcomes throughout the social procurement process, from registration, to bidding, to contracts, and outcomes

# Appendix A: Discussion Questions

If the topic of enhancing supplier diversity through self-attestation is of interest to your organization, we are providing a set of questions that we recommend for discussion.

1. What is the current process of supplier identification?
2. Applying an equity, diversion, and inclusion lens to the previously stated process, what barriers exist?
3. How can the previously identified barriers be mitigated?
4. Identify the risks to implementing self-attestation. Now recognize which risks are real and which are perceived.
5. Compare the previously identified risks, with the potential benefits of implementing self-attestation.
6. What is our apprehension to implementing self-attestation? Does it come from a place of distrust and risk-aversion?
7. How would you describe the values of your current procurement practices? Would you describe your approach as trusting or distrusting and why?

# Appendix B: Resources

[University of British Columbia Glossary of Terms](#)

[Accelerating Social Impact Exploring Social Procurement](#)

[Buy Social Canada Voices of Industry: A Paradigm Shift in CBAs](#)

[City of Chicago Regulations Governing Certification of Minority- and Women-Owned Business Enterprises, Veteran-Owned Business Enterprises, and Business Enterprises Owned or Operated by People with Disabilities for Non-Construction Contracts](#)

[Deloitte Preventing Procurement Fraud and Corruption](#)

[DiverseCity Counts 6: Supplier Diversity in the GTA \(2012\)](#)

[UNDP Resource Guide: Building Transparent and Open Public Procurement Systems for Achieving the SDGs in ASEAN](#)

[Diversity Inc Supplier Diversity](#)

[National Fraud Authority Procurement Fraud in the Public Sector](#)

[OECD Preventing Corruption in Public Procurement](#)

[The State of Supplier Diversity Programs in Canada](#)

[Supplier.io State of Supplier Diversity Report 2022](#)

[US Department of Commerce Minority Business Development Agency Contracting Barriers and Factors Affecting Minority Business Enterprises: A Review of Existing Disparity Studies](#)

[BMC Self-certification Form](#)

[Convatec Self-certification Form](#)

[The International Fund for Agricultural Development \(IFAD\) Supplier Certification](#)

[Microsoft Self-Certification Information](#)

[SBA Self-Certification Form](#)

[Thomson Reuters Diverse Supplier Certification](#)

[Tealbook Self-Certification](#)

[CCDI Supplier Diversity in Canada](#)

[Canadian Chamber of Commerce Supplier Diversity Handbook](#)

[Canadian Gay and Lesbian Chamber of Commerce Inclusive Procurement Guide](#)

[First Nations of Quebec and Labrador Economic Development Commission Indigenous Business Directory](#)

[University of Ottawa Action Strategies to Increase the Diversity of SME Suppliers to the Government of Canada](#)



# Appendix C: List of Interviewees

Anne Jamieson, *United Way Greater Toronto*

Austin Lui, *City of Vancouver*

Brent Brodie, *York University*

Caitlin Downie & Rachel Orser, *Regional Municipality of Wood Buffalo*

Candace Zhang, *The Ontario Non-Profit Network*

Chef Tammy Maki, *Raven Rising*

Darrell Schuurman, *Canada's LGBT+ Chamber of Commerce*

Deidre Guy, *Inclusive Workplace & Supply Council of Canada*

Isabel Cascante, *United Way Greater Toronto*

Kim Buksa, *City of Vancouver*

Lisa Myre, *University of Toronto*

Paul Chamberlain, *Toronto Enterprise Fund*

Paul-Emile McNab, *Canadian Council for Aboriginal Business*

Rosemarie Powell, *Toronto Community Benefits Network (TCBN)*

Sunder Singh, *RivInt*

Tim Laronde, *Chandos Construction*

Timo Worrall, *Johnson & Johnson*

William Mendes, *Toronto Community Housing*

Tim Fray, *Hopses Group*

Isaac Olowolafe Jr., *Dream Maker Ventures*

Soniel Gordon, *Sunny Boy Farms*

Elder Yvonne, *Ngoma*

Charles Buchanaan, *Technology Helps*

Anthony Pereira, *Aplussmoodees*

Jodi-Ann Campbell, *Malcolm's Choice*

Debiley Donn, *Entyce Naturals*

Christopher Alexander, *Zhoosh Services Enterprise*

Stephany-Sani Edwards & Ross Cadastre, *Black Business and Professional Association (BBPA)*

Ryan Oneil-Knight, *Afro-Caribbean Business Network (ACBN)*

Nerissa Alan, *Black Business Association of British Columbia (BBABC)*

Tarika Brooks, *Sisters in Solidarity*

Liza Amason, *ASE Foundation for Black Communities with Disabilities*

Pharaoh Hamid, *One Full Circle*

Devon Jones, *YAAACE Canada*

Clement Essene, *BIPOC Foundation*

Amoye Henry, *Pitch Better*

Sarah Juma, *Innovate Inclusion*

# Appendix D: Jurisdictional Scan of Social Procurement Policies in Canada

## Federal Government

### Indigenous Services Canada Directive on Government Contracts, Including Real Property Leases, in the Nunavut Area (2019)

<https://www.sac-isc.gc.ca/eng/1646147382130/1648487162865>

**Social Value Goals:** Address the under-representation of Inuit business participation in the federal procurement process.

**Tactics or Tools:** Business development grants.

### Procurement Strategy for Indigenous Business (2022)

<https://www.sac-isc.gc.ca/eng/1100100032802/1610723869356>

**Social Value Goals:** Indigenous businesses so they can: compete for federal government contracts, work on major Crown projects, have access to tools to increase their visibility to federal procurement officers, explore partnerships and joint-ventures, enter new supply chains including links to corporate Canada

**Tactics or Tools:** The Set-Aside Program for Aboriginal Business (mandatory and voluntary), joint-venturing, sub-contracting, increased communication, proof of eligibility (can be audited by AANDC), demonstrating with market research Indigenous business's capacity to provide goods or services, providing advice and guidance on incorporating Indigenous participation into procurement processes educating procurement officers on the benefits and obligations of Indigenous procurement, maintaining a network of federal procurement specialists who act as Indigenous procurement coordinators.

### Public Works and Government Services Canada Social Procurement Policy (2021)

<https://www.tpsgc-pwgsc.gc.ca/app-acq/pas-posp-eng.html>

**Social Value Goals:** Indigenous reconciliation, improved diversity, accessibility, community development, inclusion, gender equality, and ending systemic racism. Increased participation of underrepresented suppliers in PWGSC procurements. This includes businesses or social-purpose organizations owned and/or operated by underrepresented groups and targeted initiatives considered by communities, industries, or commodities. Reduce and prevent barriers to participation in procurement processes faced by underrepresented groups.

**Tactics or Tools:** TBD

## Treasury Board Directive on Procurement Management

<https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32692>

**Social Value Goals:** Procurements are managed in a manner that enables operational outcomes and demonstrates sound stewardship and best value consistent with the Government of Canada's socio-economic and environmental objectives.

**Tactics or Tools:** TBD

## Provincial and Territorial Governments

### Northwest Territories Procurement Guideline (2021)

[https://www.fin.gov.nt.ca/sites/fin/files/resources/gnwt\\_procurement\\_guidelines\\_may\\_2021.pdf](https://www.fin.gov.nt.ca/sites/fin/files/resources/gnwt_procurement_guidelines_may_2021.pdf) (1.6.2)

**Social Value Goals:** Promote waste reduction and resource conservation.

**Tactics or Tools:** Evaluation criteria, required environmental certifications, and procurement planning checklist.

### Manitoba Indigenous Procurement Policy (2020)

<https://www.gov.mb.ca/central/psc/pubs/api/Indigenous%20Procurement%20Policy.pdf>

**Social Value Goals:**

- Stimulation of Indigenous business development;
- Indirect creation of new employment opportunities;
- Increased procurement from Indigenous business through sub-contracting and/or joint ventures with non-Indigenous firms when bidding on contracts;
- Increased competitiveness;
- Relationship building between Indigenous suppliers and government buyers;
- Better understanding of the tender process by suppliers; increased knowledge of Indigenous supplier base by government buyers.

**Tactics or Tools:** Indigenous Procurement Assessment.

### Yukon First Nations Procurement Policy (2022)

[hpw-gam-2.6-yukon-first-nations-procurement-policy-may-2023.pdf](https://www.gam-2.6-yukon-first-nations-procurement-policy-may-2023.pdf)

**Social Value Goals:** Support community-based businesses and environmental sustainability. Builds a stronger economic future for Yukoners. Increases the ability of local businesses and First Nations to secure Government Contracts through changes in how Government procures Goods and Services.

**Tactics or Tools:** Social and environmental performance standards and evaluation criteria.

## Nova Scotia Sustainable Procurement Policy Template (2016)

<https://www.novascotia.ca/treasuryboard/manuals/PDF/300/30301-02.pdf>

### **Social Value Goals:**

A holistic approach to government procurement that considers the environmental, economic, and social factors related to the goods, services and construction that are procured.

**Tactics or Tools:** TBD

## British Columbia Social Impact Procurement Guidelines

<https://www2.gov.bc.ca/gov/content/bc-procurement-resources/policy-and-strategies/strategies-and-initiatives/social-purchasing>

**Social Value Goals:** Supplier diversity means creating opportunities for diverse suppliers such as Indigenous peoples and employment equity seeking groups which could include people with disabilities and other traditionally underrepresented groups. Workforce development means offering apprenticeships, skills training and other developmental support to employees, contractors, or volunteers, including diverse supplier groups.

**Tactics or Tools:** Weighting and reporting.

## Crown Corporations

### BC Hydro Indigenous Procurement Policy

<https://www.bchydro.com/work-with-us/suppliers/indigenous-procurement.html>

**Social Value Goals:** Long-term economic interests of Indigenous peoples in British Columbia

**Tactics or Tools:** Directed procurement opportunities may include the use of direct awards, select competitive procurements, and/or set asides,

### SaskPower Indigenous Procurement Policy (2015)

<https://www.saskatchewan.ca/government/partnerships-for-success/profiles/Indigenous-procurement-policy>

**Social Value Goals:** Increase Indigenous participation in SaskPower's supply chain.

**Tactics or Tools:** Corporate targets for Indigenous procurement, identifies opportunities for Indigenous suppliers, emphasis on multi-year opportunities.

## Alberta Municipal Governments

### City of Calgary Benefit Driven Procurement and Public Value in Procurement Policy (2021)

<https://www.calgary.ca/buy-sell/supply-to-city/benefit-driven-procurement.html>  
<https://www.calgary.ca/content/dam/www/cs/documents/Benefit-Driven-Procurement-Strategy.pdf>

**Social Value Goals:** Diverse, resilient, and inclusive SME business sector; opportunity and integration for marginalized groups; employment; local procurement; respond to Infrastructure Canada's requirements for Community Benefit Employment Agreements.

**Tactics or Tools:** Opportunity communication, local quote requirement, questionnaire, social value scoring criteria, project targets, RFX language, connecting City with social value enterprises.

## City of Edmonton Sustainable Procurement Policy (2022)

<https://www.edmonton.ca/sites/default/files/public-files/C556B.pdf?cb=1674667676>

**Social Value Goals:** Climate resilience, Indigenous procurement, employment

**Tactics or Tools:** Social value weighting on purchases, Below trade agreement thresholds, Self-service purchasing; and Community Benefit Agreements

## Regional Municipality of Wood Buffalo Social Procurement Program and Procurement Policy (2021)

<https://www.rmwb.ca/en/permits-and-development/resources/Documents/Procurement/RMWB-Social-Procurement-Program-December-2021-edit.pdf>

[https://www.rmwb.ca/en/mayor-council-and-administration/resources/Documents/policies/SCM-100\\_Procurement\\_Policy.pdf](https://www.rmwb.ca/en/mayor-council-and-administration/resources/Documents/policies/SCM-100_Procurement_Policy.pdf)

**Social Value Goals:** Responsible government, partnerships with rural and Indigenous communities, reconciliation, employment, equality, diversity, and inclusive, downtown revitalization

**Tactics or Tools:** Social procurement questionnaire and working group. Below trade agreement thresholds, will obtain a min. of three quotes from local businesses and local Indigenous businesses. Local business directory. Community benefit agreements.

## British Columbia Municipal Governments

### Alberni-Clayoquot Regional District Strategic Plan (2021)

[https://www.acrd.bc.ca/dms/documents/agendas/2021-board-of-directors-agendas/acrd\\_strategic\\_plan\\_2021\\_to\\_2024.pdf](https://www.acrd.bc.ca/dms/documents/agendas/2021-board-of-directors-agendas/acrd_strategic_plan_2021_to_2024.pdf)

**Social Value Goals:** Create procurement policies to enable local government expenditures that derive enhanced community benefit.

**Tactics or Tools:** TBD

### Capital Regional District Procurement Policy (2022)

<https://www.crd.bc.ca/docs/default-source/business-opportunity-policies/procurement.pdf?sfvrsn=4#:~:text=The%20CRD's%20primary%20goal%20in,%2C%20transparent%20and%20non%2Ddiscriminatory.>

**Social Value Goals:** Minimize environmental impacts and promote recycling, re-use and reduction of waste.

**Tactics or Tools:** TBD

### City of Campbell River Council Purchasing Policy (2021)

[https://www.campbellriver.ca/docs/default-source/your-city-hall/legislative-services/6---purchasing-policy---nov-2021.pdf?sfvrsn=95796e08\\_2](https://www.campbellriver.ca/docs/default-source/your-city-hall/legislative-services/6---purchasing-policy---nov-2021.pdf?sfvrsn=95796e08_2)

**Social Value Goals:** Products that do not harm the environment in their manufacturing, use or disposal and would lead to greenhouse gas reduction, waste reduction, toxic use reduction, life cycle costs. Local purchasing.

**Tactics or Tools:** TBD

### City of Nanaimo Sustainable Procurement Policy (2021)

<https://www.nanaimo.ca/docs/your-government/city-council/policies/sustainable-procurement-policy.pdf>

**Social Value Goals:** Indigenous reconciliation, barriers to employment, environmental sustainability, equity-deserving groups, circular economy.

**Tactics or Tools:** Sustainable procurement guidelines

### City of Port Alberni Procurement Policy (2022)

[Updated: June 20, 2022 \(portalberni.ca\)](#)

**Social Value Goals:**

When considering social value, consideration will be given where proponents:

- maximize inclusive employment, training and apprenticeship opportunities among, disadvantaged, equity deserving or marginalized individuals and populations;
- maximize the diversification of the supply chain by including non-profit organizations, social enterprises and small-medium enterprises;
- contribute to the strengthening of the community by supporting the social goals and objectives of the City; and
- include any social responsibility initiatives undertaken by the organization that contribute to social well being.

**Tactics or Tools:** Sustainability weighting, third party certifications and verification.

### City of Powell River Social Purchasing Policy (2021)

<https://powellriver.civicweb.net/document/38007/#:~:text=Social%20Procurement%20%2D%20The%20City's%20contracting,supplier%2C%20without%20a%20competitive%20process.>

**Social Value Goals:** Supporting social enterprises, not-for-profit businesses, and SMEs. Employment strategies, local enterprises, endemic/native materials, environmental responsibility, elimination of waste and reduced emissions, diversity and equality.



**Tactics or Tools:** Total cost of ownership.

## City of Vancouver Social Procurement State of Practice (2017)

[2017-41\\_Social Procurement State of Practice\\_Lupick.pdf \(ubc.ca\)](#)

### **Social Value Goals:**

- Provide opportunities for people with barriers to employment:
- Support social enterprises and social value businesses
- Promote Aboriginal opportunities
- Increase local supplier participation
- Promote diversity in the supply chain
- Support small and medium businesses
- Support social innovation

**Tactics or Tools:** Social impact opportunity analysis, contract weighting, supplier directory, simplify procurement process, Meet the Buyer events, advanced notification, contract unbundling, set asides, direct awarding, Solicit Bid from Targeted Suppliers, Joint Ventures, targeted employment, subcontracting,

## City of Victoria Purchasing Policy (2020)

<https://www.victoria.ca/assets/Business/Documents/Purchasing%20Policy.pdf>

**Social Value Goals:** Remove systemic barriers, equity-deserving groups, housing security, resilience,

**Tactics or Tools:** Sustainability guidelines and value-added evaluation criteria in all RFPs, social enterprise task force.

**Diversity Component:** Yes.

## Comox Valley Regional District Procurement Policy (2018)

[https://www.comoxvalleyrd.ca/sites/default/files/uploads/document/procurement\\_policy.pdf](https://www.comoxvalleyrd.ca/sites/default/files/uploads/document/procurement_policy.pdf)

### **Social Value Goals:**

- Maximize employment, training and apprenticeship opportunities among local, disadvantaged, equity-deserving or marginalized individuals and populations.
- Maximize the diversification of the supply chain by including non-profit organizations, social enterprises and small-medium enterprises.
- Contribute to the strengthening of the community by supporting the social goals and objectives of the CVRD.
- Include any corporate social responsibility initiatives undertaken by the organization that contribute to social wellbeing.

**Tactics or Tools:** TBD

## Cowichan Valley Regional District Procurement Policy (2017)

[https://www.cvrld.ca/DocumentCenter/View/83550/Procurement\\_Policy?bidId=](https://www.cvrld.ca/DocumentCenter/View/83550/Procurement_Policy?bidId=)

**Social Value Goals:** Inclusive employment, reductions in greenhouse gas emissions, sustainable initiatives, inclusion of social enterprises, living wage, local businesses.

**Tactics or Tools:** TBD

## District of Port Hardy General Purchasing Policy (2019)

<https://porthardy.civicweb.net/document/7354/General%20Purchasing%20Policy%20CP2.1.pdf?handle=E499A4E9C312450BA228CA1F76296BD1>

### **Social Value Goals:**

The District considers the environmental, social and economic sustainability value of the goods and services being purchased, with the intent to shift spending away from goods and services that negatively impact the environment and society towards products and services that are more environmentally sound, socially beneficial and economically sustainable.

Recognizing its role as a major purchaser of goods and services, the District will seek opportunities to encourage environmental and socially preferable products where possible. The District will practice economic sustainability by evaluating life cycle costs when evaluating projects.

It is the District's practice to include sustainability guidelines as value added evaluation criteria in procurement documents where practical. The evaluation criteria used will be tailored to the specific competition; however, more points may be awarded for activities that have a greater impact on social, environmental and economic sustainability.

The value-added evaluation criteria used will be tailored to the specific competition; and will be clearly stated in the procurement documents.

**Tactics or Tools:** Value added criteria, life cycle evaluation, weighting.

## District of Squamish Procurement Policy (2020)

<https://squamish.civicweb.net/filepro/documents/88525/?preview=194638>

**Social Value Goals:** Living wage, reduce greenhouse gases, materials with less embodied carbon, employment/ training among local, disadvantaged, equity-deserving or marginalized individuals and populations. Diversify supply chain by including social enterprises, First Nations suppliers, and local SMEs. Youth employment, supports Good Food Values, honour relationship with Squamish Nation

**Tactics or Tools:** TBD

## qathet Regional District Delegation of Purchasing Authority (2020)

<https://www.qathet.ca/wp-content/uploads/2020/01/BL454-Purchasing-Authority-Consolidated-June-2020-.5.pdf>

**Social Value Goals:** Environmental, social, economic, and cultural sustainability.

**Tactics or Tools:** TBD



## Regional District of Nanaimo Purchasing Policy (2020)

<https://rdn-pub.escribemeetings.com/filestream.ashx?DocumentId=14720>

**Social Value Goals:** Goods and services being purchased with the intent to shift spending away from goods and services that negatively impact the environment and society towards goods and services that are more sustainable, ethically sourced and socially beneficial to advance the RDN's progress to achieving and maintaining a healthy, resilient, and sustainable region. Social and community benefit opportunities should be identified, evaluated, and included in the project planning process wherever feasible. If social and community benefit clauses are included in a project, The RDN will endeavor to implement environmental sustainability considerations for construction projects.

**Tactics or Tools:** Third party certifications, Competitive Procurement Process evaluation criteria, weighting for social and community.

## Town of Gibsons Purchasing Policy (2022)

<https://gibsons.civicweb.net/filepro/documents/122749/?preview=122751>

**Social Value Goals:** Living wage, social enterprise, First Nations suppliers, local small enterprises, youth employment, improve relationship with Skwxwú7mesh (Squamish) and shíshálh (Sechelt) Nations.

**Tactics or Tools:** Social value weighting in bids

## Town of Qualicum Beach Social Procurement Policy (2016)

<https://qualicumbeach.civicweb.net/document/6184/>

**Social Value Goals:** supply chain diversity, employment training, local job creation, environmental sustainability, attract and retain families with young children, youth employment opportunities, employment for disadvantaged, culture and arts improvements, living wage,

**Tactics or Tools:** Triple bottom line evaluation criteria, Community Benefit Clauses, supplier pre-qualification, publish procurement opportunities in advance, email alert for local suppliers,

## Village of Cumberland Purchasing Policy (2017)

<https://cumberland.ca/social-procurement/>

**Social Value Goals:** The Village considers the environmental, social, and economic value of the goods and services being purchased with the intent to shift spending away from goods and services that negatively impact the environment and society towards products and services that are more environmentally sound and socially beneficial. Encourage and influence markets for environmentally and socially preferable products through.

**Tactics or Tools:** Village of Cumberland Social Procurement Framework, total cost of ownership evaluation, MEAT criteria, sustainability guidelines, employee education; supporting pilot testing of potential new products; and adopting innovative product standards, specifications, and contracts.

## Manitoba Municipal Government

### City of Winnipeg Social Procurement Framework (2021) and Materials Management Policy (2022)

<https://legacy.winnipeg.ca/matmgt/pdfs/SocialProcurement-Framework.pdf>

<https://legacy.winnipeg.ca/finance/findata/matmgt/policy/policy.pdf>

**Social Value Goals:** Economic opportunities for marginalized, social enterprises, supplier diversity, living wage, Indigenous reconciliation, Indigenous economic opportunities.

**Tactics or Tools:** Pre-qualified rosters, set aside contracts, social value requirements in bids, community benefit agreements.

## Nova Scotia Municipal Government

### City of Halifax Procurement Policy (2020)

<https://cdn.halifax.ca/sites/default/files/documents/business/doing-business-halifax/2020-004-ADM%20Procurement%20Policy.pdf>

**Social Value Goals:** Supplier diversity, workforce development, living wage, community benefits, environmental benefits

**Tactics or Tools:** Invitation to bid for at least one diverse or social enterprise supplier, appropriate evaluation in calls for bids to ensure Best Value is achieved, tie bid goes to Best Value.

**Diversity Component:** Yes.

## Ontario Municipal Governments

### City of Brampton Supply Chain Diversity Program

<https://www.brampton.ca/EN/City-Hall/policies-directives/Documents/Sustainable%20Procurement%20Strategy.pdf>

**Social Value Goals:** Include equity-deserving community or social purpose enterprise in supply chain.

**Tactics or Tools:** 3<sup>rd</sup> party certification

### City of Mississauga Sustainable Procurement Policy (2018)

<https://www.mississauga.ca/wp-content/uploads/2022/03/17150047/03-06-09-Sustainable-Procurement-Policy.pdf>

**Social Value Goals:** Reduce waste, reduce greenhouse gas emissions, conserve water, reduce/eliminate the use of toxins and hazardous chemicals, contribute to biodiversity preservation and habitat restoration. Social enterprise support, employment, and training for those with barriers, certified Fairtrade.

**Tactics or Tools:** Supplier code of conduct, certification requirements,

## City of Peterborough Procurement Bylaw (2022)

[https://bylaws.peterborough.ca/bylaws/getFNDoc.do?class\\_id=20&document\\_id=13812](https://bylaws.peterborough.ca/bylaws/getFNDoc.do?class_id=20&document_id=13812)

**Social Value Goals:** Local purchasing, inclusive and diverse supply chain, strengthen arts, heritage, and culture. Total cost of ownership, environmentally certified products, energy efficiency, water conservation, LEED use in new buildings.

**Tactics or Tools:** Priority given to suppliers who contribute to Social Value Objectives for low value procurement (<\$10,000)

## City of Toronto Social Procurement Policy (2016)

<https://www.toronto.ca/business-economy/doing-business-with-the-city/social-procurement-program/>

**Social Value Goals:** Supply chain diversity and workforce development for equity-deserving groups

**Tactics or Tools:** 3<sup>rd</sup> party certification.

## Institutions

### Humber College Purchasing Procedure (2022)

<https://humber.ca/legal-and-risk-management/assets/files/pdfs/procedures/Purchasing%20Procedure%20Approved%20Nov%202022%20final%20w%20SP%20Auth%20Dec.15.2022.pdf>

**Social Value Goals:** Climate resilience, employment, community development, equity-deserving owned business

**Tactics or Tools:** total lifecycle evaluation, diverse supplier events and conferences

### Toronto Metropolitan University

<https://www.torontomu.ca/financial-services/purchasing-payment/purchasing-governance/social-procurement/>

**Social Value Goals:** Indigenous and racialized-owned businesses,

**Tactics or Tools:** CAMSC certification, Buy with Impact Playbook

### York University Social Procurement Policy (2019)

<https://www.yorku.ca/secretariat/policies/policies/social-procurement-policy/>

**Social Value Goals:** Employment for local, aboriginal, and/or equity-deserving communities; diversify supply chain, inclusive economic growth.

**Tactics or Tools:** TBD

# Construction Policies and Projects

## Federal Government

### Infrastructure Canada (INFC): Community Employment Benefits Initiative (2018)

<https://www.infrastructure.gc.ca/pub/other-autre/ceb-ace-eng.html>

**Social Value Goals:** Provide employment and procurement opportunities for equity-deserving groups and social enterprises.

**Tactics or Tools:** Mandated targets for all infrastructure projects funded by the Investing in Canada Plan.

**Diversity Component:** Yes.

## Provincial Governments

### British Columbia Community Benefit Agreements (2018)

<https://www.bcib.ca/wp-content/uploads/2018/11/Community-Benefits-Agreement.pdf>

**Social Value Goals:** Develop skilled workforce, develop local workforce, support Indigenous employees transition to work.

**Tactics or Tools:** Hiring framework, education

### Ontario Infrastructure for Jobs and Prosperity Act (2015)

**Social Value Goals:** Local hiring, apprenticeships.

**Tactics or Tools:** Community consultations.

### Ontario Metrolinx Community Benefits Framework

<http://www.metrolinx.com/en/greaterregion/projects/community-benefits.aspx>

**Social Value Goals:** Local and social hiring, local and social procurement

**Tactics or Tools:** Quarterly project roundtables, quarterly public progress reports.

## Municipal Governments

### City of Surrey Community Employment Benefits Coastal Floodplain Adaptation Projects (2021)

<https://www.surrey.ca/services-payments/water-drainage-sewer/flood-control/coastal-flood-adaptation-strategy/community>

**Social Value Goals:** 20–30% of employment hours carried out by individuals who fall into at least one of the CEB Target Groups (Apprentice, Indigenous, women, person with a disability, veterans, youth, recent immigrants, SMEs, social enterprise,

LGBTQ+). 50% of purchasing from target enterprise types (small, medium or social enterprises).

**Tactics or Tools:** Contract requirement for employment hours for CEB Target Groups

### City of Toronto Community Benefits Framework (2019)

<https://www.toronto.ca/legdocs/mmis/2019/ec/bgrd/backgroundfile-134595.pdf>

In 2019, the City of Toronto passed the Community Benefits Framework. The Framework seeks to promote social and economic inclusion on projects where the City buys, builds or provides financial incentive for construction or remediation. The Framework was passed by the City in July 2019. The City will also develop a data tracking system for standardized reporting and has established an advisory group to monitor success, with the first meeting held in February 2021. In the coming months, the City will be creating smaller working groups for stakeholders and community groups who will provide support and guidance in the establishment of a City-wide framework. A report is due back to City Council in 2023.

**Social Value Goals:** Employment supports, employment for equity-deserving groups, supply chain diversity, local employment and procurement.

**Tactics or Tools:** Data tracking, standardized reporting, advisory group, working groups.

### City of Vancouver Community Benefits Agreements Policy (2018)

<https://council.vancouver.ca/20180918/documents/rr2.pdf>

**Social Value Goals:** Equity-deserving and/or local employment, social impact and/or local procurement.

**Tactics or Tools:** Required over 45,000 square metres, specific targets, toolkit, working group, reporting.

### Comox Valley Regional District Community Employment Benefit Water Treatment Plant Project (2019)

<https://bcspi.ca/wp-content/uploads/2019/01/BCSPI-Comox-Valley-Case-Study.pdf>

**Social Value Goals:** Employment hours for Indigenous peoples, apprentices, and under-represented populations.

**Tactics or Tools:** Contractor identified commitment to employment hours in bid process then reported on the project.

# Appendix E: Buy Social Canada Equity Deserving Definitions (May 2023)

## EQUITY-DESERVING DEFINITIONS

*“Equity-Deserving Groups” also referred to as equity-seeking groups; are groups who have historically been denied equal access to employment, education, and other opportunities, and includes, without limitation, the following: members of an Indigenous community; members of a visible minority group; immigrants and refugees; people with recognized disabilities; racialized communities; women; members of the 2SLGBTQQIA community; low-income residents; people with mental or physical health barriers; people facing Employment Barriers, Unemployment or Underemployment; and others experiencing barriers to economic opportunity and participation;*

Equity Deserving Groups	Individuals for Employment Definition
Indigenous Peoples	<i>First Nations, Métis, Inuit people and communities, including Urban Indigenous communities. Sometimes used interchangeably with ‘Aboriginal Peoples’.</i>
Racialized communities	<i>Refers to an individual or group of individuals including those who are non-white, including Chinese, South Asian, Black, Filipino, Latin American, Southeast Asian, Arab, West Asian, Japanese, Korean, other visible minorities, and multiple visible minorities. Racialized communities also include Indigenous People of nations outside of Canada. Often used interchangeably with “Visible minority group”.</i>
Recent Immigrants and Refugees	<i>Immigrant: A person who has been granted the right to live in Canada by immigration authorities and has resided in Canada for less than 5 years. Refugee: A person who is forced to flee from persecution or who is at risk of serious harm and who is located outside of their home country. A person who has been recognized as a refugee and who has been granted the right to live in Canada by immigration authorities.</i>
Persons with disabilities/ Disabled Persons	<i>A person with a long-term or recurring physical, mental, psychiatric, intellectual or sensory impairment which, in interaction with various attitudinal and environmental barriers, hinders their full and effective participation in society on an equal basis with others. This is a self-defined characteristic and does not require an external or formal recognition of disability.</i>
Women	<i>Self-identified</i>
Members of the 2SLGBTQQIA+ community	<i>2SLGBTQQIA+ is an acronym for Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, and plus (signifying the expansiveness of the community and all the other identities not listed in the acronym).</i>
People identifying as experiencing other	<i>A person who identifies as experiencing barriers to economic opportunity and participation. This could include but is not limited to, an individual with a</i>

barriers to economic opportunity and participation (not included in other Equity-deserving group definitions)	<p><i>previous criminal conviction, an individual who identifies as having a substance use disorder that has affected their ability to participate in the economy, a person who has experienced domestic violence that has affected their ability to participate in the economy, a person who is currently experiencing or has experienced homelessness within the last 5 years, single parents, social housing tenants, and youth aging out of the foster care system</i></p> <p><i>If an employee identifies themselves as experiencing any of the barriers to economic participation mentioned above, you may consider asking for more information on what they consider this barrier to be – this is voluntary information.</i></p>
Youth	<i>Individuals aged 29 and under</i>
Veterans	<i>A person who is serving or who has honorably served in the Canadian Armed Forces, the commonwealth or its wartime allies, or as a Regular Member of the Royal Canadian Mounted Police, or as a Peace Officer in a Special Duty Area or on a Special Duty Operation, or who has served in the Merchant Navy or Ferry Command during wartime</i>



# Appendix F: Endnotes

<sup>i</sup> An Indigenous Peoples' History of the United States – Roxanne Dunbar-Ortiz, Beacon Press, 2015

<sup>ii</sup> <https://equity.ubc.ca/resources/equity-inclusion-glossary-of-terms/>

<sup>iii</sup> Buy Social Canada Resources, various <https://www.buysocialcanada.com/learn/all-resources/>.

<sup>iv</sup> <https://www.dropbox.com/s/k56cbyqnb4y2lb2/BUTO%20%26%20U%20of%20T%20Policy%20Report%20-%20Final%20.pdf?dl=0>

<sup>v</sup> <https://www.anchor.to.ca/>

<sup>vi</sup> <https://www.diversityincbestpractices.com/medialib/uploads/2019/11/Supplier-Diversity-MIB.pdf>

<sup>vii</sup> <https://ccdi.ca/media/1066/ccdi-report-supplier-diversity-in-canada-updated-4072016.pdf>

<sup>viii</sup> <https://ccdi.ca/media/1066/ccdi-report-supplier-diversity-in-canada-updated-4072016.pdf>

<sup>ix</sup> Buy Social Canada is also a Third-Party Certification entity for social enterprises. The Certification is based on business activity and profit distribution rather than issues of race, gender, and equity deserving group identity. [www.buysocialcanada.com](http://www.buysocialcanada.com)

<sup>x</sup> <https://www.supplier.io/2022-state-of-supplier-diversity>

<sup>xi</sup> [https://wbcanada.ca/wp-content/uploads/2021/09/2021\\_08\\_18-SD-Survey-Report-Buyers-Perspective-2\\_compressed.pdf](https://wbcanada.ca/wp-content/uploads/2021/09/2021_08_18-SD-Survey-Report-Buyers-Perspective-2_compressed.pdf)

<sup>xii</sup> <https://www.thomsonreuters.com/en/resources/covid-19-small-business-resources/diverse-supplier-certification.html>

<sup>xiii</sup> <https://www.tpsgc-pwgsc.gc.ca/app-acq/pda-sdap-eng.html#a2>

<sup>xiv</sup> <https://www.globenewswire.com/news-release/2023/03/13/2626160/0/en/York-University-and-Canadian-Black-Chamber-of-Commerce-partner-to-create-positive-change-for-Black-owned-businesses-and-social-enterprises.html>

<sup>xv</sup> <https://www.toronto.ca/business-economy/doing-business-with-the-city/social-procurement-program/>

<sup>xvi</sup> Institute for Gender and the Economy