

Thinkshift Communications Assessment (2015-05-05)

Version: Service Track / 0 Employees / Developed Market

B Corp Inclusion Challenge

B Corp Inclusion Challenge (US)

What % of the company is owned by the following groups?

- 0% 1-9% 10-24% 25-49% 50%+ Don't know
-
- Women and/or individuals from underrepresented populations, including low-income communities

What % of the members of your Board of Directors or other governing body are women or individuals from other underrepresented populations?

- 0% 1-9% 10-24% 25-49% 50%+ Don't know N/A

What % of your Significant Suppliers are majority owned by women or individuals from underrepresented populations?

- 0% 1-9% 10-19% 20-29% 30%+ Don't Know

What is the social and environmental screen that is used for a majority of your company's Significant Suppliers:

- No formal screening process in place
- Screened for specific negative practices (e.g. no child labor, no negative environmental impacts)
- Screened for positive practices (environmentally-friendly manufacturing process; excellent labor practices, etc)

Separate from a mission statement, has your company done any of the following to legally ensure that its social or environmental mission will be maintained over time, regardless of company ownership?

- Signed a contract or board resolution to amend or adopt a legal form that requires consideration of employees, community, and the environment (i.e. Signed B Corp Term sheet but have not yet adopted stakeholder consideration)
- Amended corporate governing documents to require the consideration of employees, community and the environment (e.g. Amended Articles of Incorporation)
- Has a specific legal entity/governance structure that preserves mission (i.e. cooperative or non-profit)
- Legal entity/governance structure preserves mission and requires stakeholder consideration (i.e. Benefit Corp or cooperative that has amended governing documents to include stakeholder consideration)
- Other - Please describe
- None of the above

Benefit Report Best Practices Questionnaire

Describe the ways in which the benefit corporation pursued general public benefit during the year and the extent to which general public benefit was created.

If applicable, describe the ways in which the benefit corporation pursued a specific public benefit that the articles of incorporation state it is the purpose of the benefit corporation to create and the extent the specific public benefit was created.

Describe any circumstances that have hindered the creation by the benefit corporation of general public benefit or specific public benefit this period.

Describe the process and rationale for selecting the third party standard used to prepare the benefit report

If applicable, provide an explanation for changing the third-party standard used to prepare the benefit report.

If applicable, provide a statement of any connection between the organization that established the third-party standard, or its directors, officers or material owners, and the benefit corporation or its directors, officers or material shareholders, including any financial or governance relationship which might materially affect the credibility of the use of the third-party standard.

In this benefit report, was assessment of the overall social and environmental performance of the benefit corporation against a third-party standard applied consistently with any application of that standard in prior benefit reports?

- NA- This is the company's first benefit report
- No
- Yes

If a difference exists in the application of the standard from prior benefit reports, provide an explanation of the reasons for it.

Provide the name of the benefit director and the benefit officer, if any, and the addresses to which correspondence to each of them may be directed. Note: some states do not mandate that a Benefit Director or Benefit Officer exist, so this question may not apply. You can find more information about the requirements of individual states here:

<http://benefitcorp.net/sites/default/files/Benefit%20Corporations%20Chart.pdf>

Benefit Director: Name

Benefit Director: Address

Benefit Officer: Name

Benefit Officer: Address

If applicable, provide a statement from the benefit director or the board of directors as to whether the benefit corporation acted in accordance with its general, and any named specific, public benefit purpose, and whether directors complied with their duty to consider the impact of decisions on stakeholders, and if in the opinion of the benefit director or board of directors they did not, a description of the ways in which they did not comply.

If applicable, provide additional information or explanations required by your state's specific benefit corporation statute.

Benefit Report Best Practices Questionnaire: Information for Investors

Provide the compensation paid by the benefit corporation during the year to its Benefit Director (if any) in the capacity of a director.

Provide the compensation paid by the benefit corporation during the year to its Benefit Officer (if any) in his/her capacity as an officer.

Governance

Governance: Mission & Engagement

GV2.1 Select the description that best describes your business. This is an unweighted question that will not impact your score, and is asked only for research/benchmarking purposes. [Not Weighted]

- Positive social/environmental impact is desirable, but not a particular focus for our business.
- Social and environmental impact is frequently considered, but it isn't a high priority.
- We consider social and environmental impact in some aspects of our business, but infrequently.
- We consistently incorporate social and environmental impact into decision-making because we consider it important to the success and profitability of our business.
- We treat our social/environmental impact as a primary measure of success for our business, and prioritize it even in cases where it may not drive profitability.

GV2.2 Does your company have a corporate mission statement, and does it include any of the following? Check all that apply. [Less Weighted]

- No written statement
- A written corporate mission statement that does not include a social or environmental commitment
- A commitment to social impact (e.g. poverty alleviation, sustainable economic development)
- A commitment to environmental stewardship and conservation
- A commitment to serve a target beneficiary group in need (e.g. low income customers, smallholder farmers)

GV2.3 Please type or paste your mission statement here. [Not Weighted]

Thinkshift's mission is to speed the shift to sustainable business. Ultimately, we aim to help create a more just, sustainable world by supporting enterprises dedicated to clean technology, resource-conserving products and services, management for social benefit, and environmental preservation.

GV2.5a Does the Board of Directors or other governing body review the company's social and environmental performance on at least an annual basis to determine if you are meeting your social or environmental objectives? [Equally Weighted]

- Yes No N/A - No Board of Directors or other governing body

GV2.10 Are there key performance indicators (KPIs) or metrics that your company tracks on at least an annual basis to determine if you are meeting your social or environmental objectives? [Equally Weighted]

- We don't track key social or environmental performance indicators
- We measure KPIs/metrics or outputs that we have identified and defined in order to determine if we are achieving our social and environmental objectives
- We measure social and environmental outcomes over time (examples: 3rd-party studies, customer or household surveys, progress out of poverty index, etc.)

Answer(s): Our key performance indicator in terms of our sustainable goals is "are we working with companies that fit the profile described in our mission statement"? We're not working with so many companies that we need to track that -- we're either doing it or we're not; it's obvious. In the past we've had one or two that didn't quite fit, but we are a 100% mission orientation right now.

Governance: Governance

GV3.1a Beyond the management team, does the company have the following governance structures in place? [Less Weighted]

- None (Owner/Manager governed)
- Advisory Board
- Board of Directors/Governing Body

GV3.2b Which of the following characteristics does your board or governing body have (check all that apply)? [Equally Weighted]

- Meets at least twice annually
- Includes at least 1 independent member
- Oversees executive compensation
- Company is a co-op and elects Board from membership
- None of the Above
- N/A - no Board of Directors or other governing body

GV3.3a Does the Board of Directors or other formal governing body include member(s) elected to represent the interests of the following stakeholder groups? Please select all that apply. [Less Weighted]

- Non-executive Employees
- Community
- Environment
- Customers
- None
- N/A - no Board of Directors or other governing body

Governance: Transparency

GV5.1b Does the company produce financials that are reviewed by the Board, other formal governing body, or independent third party? [Equally Weighted]

- Yes No

GV5.5a Does the company produce a public-facing annual report on its mission-related performance? If yes, does this report include the following? [Equally Weighted]

- None - My company does not produce a public-facing mission-related annual report
- Clear statements of your mission, its goals, and values
- Clear descriptions of your mission-related activities
- Quantifiable targets related to your mission
- Quantifiable results from your mission (e.g., lbs of carbon offset)
- Consistent variables of measurement which allow comparisons to previous years
- Third-party validation of any part of your company's mission performance

Answer(s): We consider our B Corp assessment to be third-party validation, per CA benefit corporation law.

GV5.6 Is your product or service covered by a written consumer warranty or client protection policy? [Less Weighted]
 Yes No

GV5.7 Is there a publicly-known mechanism through which customers can provide product feedback, ask questions or file complaints? [Less Weighted]
 No
 Yes, there is a mechanism for feedback to be sent privately to company
 Yes, there is a mechanism where feedback is made transparent to the public

Governance: Governance Metrics

GV1.1 On what date did your last fiscal year end? [Not Weighted]
12/31/2014

GV1.2 Reporting currency [Not Weighted]
 US Dollar - USD

GV5.3 Total Earned Revenue
From the last fiscal year
From the fiscal year before last

GV5.4 EBIT (Earnings Before Interest & Taxes)
From the last fiscal year
From the fiscal year before last

GV5.5 Net Income
From the last fiscal year
From the fiscal year before last

Community

Community: Diversity & Inclusion

CM3.2 What % of the company is owned by the following groups?

0%	1-9%	10-24%	25-49%	50%+	Don't know	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Women and/or individuals from underrepresented populations, including low-income communities
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Nonprofit organization(s)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Non-accredited investors

CM3.3 Optional unweighted metrics: Approximately what % of your company's ownership is held by individuals from the following groups?

Women	100%
Low income communities	0%
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)	0%

CM3.5 What % of the members of your Board of Directors or other governing body are women or individuals from other underrepresented populations? [Equally Weighted]

0% 1-9% 10-24% 25-49% 50%+ Don't know N/A

CM3.6 Optional unweighted metrics: Approximately what % of your Board of Directors or other governing body are from the following groups?

Women	100%
Low income communities	
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)	

CM3.11 What % of your Significant Suppliers are majority owned by women or individuals from underrepresented populations? [Equally Weighted]

0% 1-9% 10-19% 20-29% 30%+ Don't Know

CM3.12 Does the company have a written policy giving preference to suppliers owned by women or individuals from underrepresented populations? [Less Weighted]

Yes No

Community: Civic Engagement & Giving

- CM4.1c Does the following apply to the company's charitable giving and civic engagement in policy or in practice? [Equally Weighted]
- Statement on the intended social or environmental impact of company's charitable contributions
 - Cash and in-kind donations (excluding political causes)
 - Community service and pro bono service
 - Formal donations commitment (e.g. 1% for the planet)
 - Other (please describe)
 - None of the above
- CM4.5 Number of hours volunteered by full-time and part-time employees of the organization during the last fiscal year. This should include both paid and unpaid time spent volunteering during traditional work hours, either for company-organized events or for employee-initiated activities. [Not Weighted]
- Not tracked / unknown
- CM4.6a What was the % of per capita worker volunteer, community service, or pro bono time donated in the reporting period? Calculate using a 2000-hour work year: Total Hours Donated / (# FTE * 2000 hours) [Heavily Weighted]
- 0%
 - 1-2.4% of time
 - 2.5-5% of time
 - >5% of time
 - Don't know / not monitored
- CM4.7 Total amount (in currency terms) donated for charitable-giving purposes during the last fiscal year. Report with the currency specified in GV1.2 for this metric. [Not Weighted]
- CM4.8a What was the % of profits or sales that your company gave to charity during the last fiscal year? Please select the lesser of % of profits or % of sales that the company donated in each answer bucket. Please include tax deductible in-kind donations but do not include pro bono time. [Most Heavily Weighted]
- 0%
 - 1-3% of profits or <1% of sales
 - 4-9% of profits or 1-2.4% of sales
 - 10-49% of profits or 2.5-12.4% of sales
 - 50+% of profits or 12.5+% of sales
 - Don't know
- CM4.9 Which organizations does your company support? [Not Weighted]
- San Francisco Baykeeper (donation)
 - Bull Valley Agricultural Center (pro bono)
 - Operation Wounded Minds (pro bono)

Community: Local Involvement

CM5.1a We realize that for companies with more than one office, the definition of local involvement is a more complicated one to answer. Please tell us a bit about the structure of your company geographically. [Not Weighted]

One San Francisco office; around the U.S., mostly west coast.

CM5.3a What % of your company's expenses (excluding labor) was spent with independent suppliers located within 200 miles (or 322km) of the company's headquarters or main production facilities? [Equally Weighted]

<20% 20-39% 40-59% 60%+ Don't know

CM5.8 Is the majority of your company's banking services provided by an institution with any of the following characteristics? [Equally Weighted]

- A certified CDFI or national equivalent social investment organization
- A certified B Corporation
- A member of the Global Alliance for Banking on Values
- A cooperative bank or credit union
- A local bank committed to serving the community
- An independently owned bank
- None of the above

Community: Suppliers, Distributors & Product

CM6.1 Tell us about your Significant Suppliers - what type of business(es) are they and approximately how many do you source goods & services from? [Not Weighted]

Top 5 by dollar volume:
Telecommunications (phone & Internet)
Graphic design
Web programming

Total nonlabor suppliers: 17

CM6.2 This question determines the set of supplier-focused questions your company will respond to: Does your company screen and/or evaluate Significant Suppliers for social and environmental impact? [Not Weighted]

Yes No

CM6.4 What is the social and environmental screen that is used for a majority of your company's Significant Suppliers: [Equally Weighted]

- No formal screening process in place
- Screened for specific negative practices (e.g. no child labor, no negative environmental impacts)
- Screened for positive practices (environmentally-friendly manufacturing process; excellent labor practices, etc)

CM6.5a When monitoring and evaluating the on-going social and environmental performance of the majority of Significant Suppliers, which of the following apply? [Equally Weighted]

- No formal supplier monitoring and evaluation process
- Significant Suppliers are evaluated based on company's own criteria
- Significant Suppliers are evaluated based on social and environmental standards best-in-class third-party certification for your industry (ISO, SA8000, etc.)
- Company visits a majority of Significant Suppliers on-site

CM6.16a Does the company have any of the following independent contractor communication channels? [Equally Weighted]

- Formal routine process to provide independent contractors post-project or post-contract performance feedback
- Formal routine process for independent contractors to communicate post-project or post-contract feedback to the company
- None of the above
- N/A - No independent contractors used

CM6.22a During the last fiscal year, what % of revenues are generated from products that have a certification that assesses the product or production process for the product (including certifications related to social and environmental performance)? For service providers, what % your services have been reviewed and certified by an accreditation body? Select N/A if industry or service relevant accreditation does not exist. [Equally Weighted]

- 0% 1-9% 10-24% 25-74% 75-99% 100% Don't know N/A

Environment

Environment: Land, Office, Plant

- EN2.2a What % of company facilities (by square feet, both owned by company or leased) are LEED certified, satisfy the requirements of the Living Building Challenge, or other accredited green building programs? Select N/A if your company utilizes virtual office. [Equally Weighted]
- <20% 20-49% 50-79% 80%+ N/A
- EN2.4 Does the company have a company-wide recovery and recycling program that includes the following? [Equally Weighted]
- Paper
 - Cardboard
 - Plastic
 - Glass & metal
 - Composting
 - None of the above
- EN2.12 Which of the following chemical reduction methods have been implemented at the majority of your corporate facilities on a consistent basis? [Equally Weighted]
- Non-toxic janitorial products
 - Unbleached / chlorine free paper products
 - Soy-based inks or other low VOC inks
 - Organic or sustainable kitchen products
 - Other (please describe)
 - None of the above
- Other: We mostly don't use paper products--all washable plates and glasses Answer(s): Soy-based ink is not available for our printer. We use it with professionally printed pieces.
- EN2.16 What of the following recycled/sustainable input materials products are purchased for the majority of office use? [Equally Weighted]
- Recycled/sustainable input office supplies (paper, pens, notebooks, etc.)
 - Reclaimed/reused office furniture
 - Reusable/compostable catering supplies
 - Other (please specify)
 - None of the above
- EN2.17 What % of your company's printed materials use recycled paper content, FSC certified paper, or soy-based inks? Select N/A if your company does not have any printed materials or have achieved a paperless office. [Equally Weighted]
- 0% 1-24% 25-49% 50-75% >75% N/A

EN2.22a If you lease your facilities, have you worked with your landlord to implement/maintain any of the following? Select N/A if you do not lease your building. [Equally Weighted]

- Energy efficiency improvements
- Water efficiency improvements
- Waste reduction programs (including recycling)
- None of the above
- N/A

Answer(s): We asked for composting. It is now provided.

Environment: Inputs

EN3.1 Does your company monitor, record and/or report its usage of energy and water?

We do not currently monitor and record usage	We monitor and record usage (no reduction targets)	We monitor and record usage, and have specific reduction targets	We monitor usage and have met specific reduction targets during the last fiscal year	We do not currently monitor and record our usage
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Energy:
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Water:

EN3.2 Total company energy use (kWh) during the last 12 months [Not Weighted]

- Not tracked / unknown

EN3.3 Total energy used from renewable resources (kWh) during the last 12 months [Not Weighted]

- Not tracked / unknown

Answer(s): PG&E is our provider; renewable percentage is 20.6%, per this CPUC report:

<http://www.cpuc.ca.gov/NR/rdonlyres/0605598F-AE7E-43D2-BA27-1580C0F09421/0/2014Q4RPSReportFINAL3315.pdf>

EN3.4 Total water use (liters) during the last 12 months [Not Weighted]

- Not tracked / unknown

EN3.6a What % of energy use (including electricity and other energy consumption from heating, hot water, etc.) is produced from renewable sources? Please include both purchased and onsite-generated renewable energy. [Heavily Weighted]

- 0%
- 1-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- Don't know

EN3.7a Has the company increased its % use of renewable energy annually at its corporate facilities? [Equally Weighted]

- Yes
- No
- Already Maximized (100% renewable)

Answer(s): PG&E has steadily increased its renewables portfolio

EN3.8a For which of the following systems have you used energy conservation/ efficiency measures for your corporate facilities in the past year? [Equally Weighted]

- Equipment: Energy Star Appliances / Automatic Sleep Modes / After-Hour Timers / etc.
- Lighting: Natural Light / CF Bulbs / Occupancy Sensors / Daylight Dimmers / Task Lighting / etc.
- HVAC: Programmable Thermostat / Timers / Occupancy Sensors / Shade Sun-Exposed Walls / Double-Paned Windows / etc.
- Other (please specify)
- None of the above
- N/A - We utilize virtual office

EN3.10a Which of the following water conservation methods have been implemented at the majority of your corporate offices: [Equally Weighted]

- Low-flow faucets/taps, toilets/urinals, showerheads
- Grey-water usage for irrigation
- Low-volume irrigation
- Harvest rainwater
- Other (please describe)
- None

Environment: Outputs

EN4.1 Please select the option that best describe how you monitor and record the following emissions:

Company does not currently monitor and record emissions	Company monitors and records emissions (no reduction targets)	Company monitors emissions and has specific reduction targets	Company monitors emissions and has met specific reduction targets during the reporting period	Eliminated emissions of this by-product entirely
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Scopes 1 and 2 greenhouse gas (GHG) emissions

EN4.5 Waste Disposed (metric tonnes) during the last 12 months [Not Weighted]

- Not tracked / unknown

EN4.6 Waste Disposed: Recycled/Reused (metric tonnes) during the last 12 months [Not Weighted]

- Not tracked / unknown

EN4.7 Total Greenhouse Gas Emissions (metric tonnes of CO2 equivalent) in:

Scope 1:

Scope 2: 8.00

Scope 3:

EN4.17 Is hazardous waste (batteries, paint, electronic equipment, etc.) always disposed of responsibly, in a way that the company can verify? [Equally Weighted]

Yes

No

N/A - We have eliminated hazardous waste

Impact Business Models

Impact Business Models: Mission Locked

IBM1.1 Does your company have any of the following enterprise models? Select from the following socially- and environmentally-focused enterprise models that describe the specific problem your company attempts to solve. Many companies choose "None of the above models apply." If you do select one of the models below, you will be asked a series of follow-up questions in order to receive credit for the model.

Yes No

- Our products or services benefit consumers by providing one of the following: provision of basic services, health care or healthy products; education; support of general knowledge, arts, or cultural heritage; improved economic opportunity or social/economic empowerment; market access through previously unavailable infrastructure; or servicing non-profit organizations and other purpose driven enterprises with fundraising/capital/capacity-building needs.
- Our product or service conserves the environment through the following: Providing or being self-powered by renewable energy or cleaner-burning energy than market alternatives; enhancing energy and/or water efficiency; reducing waste; conserving land or wildlife; reducing toxic/hazardous substances (ie. organic); pollution prevention and remediation methods; measuring, researching, or providing information to solve environmental problems; providing financing and/or lending tied to an environmental mission
- Workers own more than 40% of our company (e.g. a worker cooperative or a company that has significant ownership by non-executive workers)
- Our company is a producer cooperative where owners are supplier members who organize production (e.g. farmer cooperative, artisanal cooperative)
- Our company focuses on alleviating poverty through its supply chain, via 1) sourcing through fair wage certified suppliers or 2) providing technical assistance/capacity building to small-scale suppliers -- individuals or cooperatives/companies with fewer than 50 workers, or 3) guaranteeing future purchases and payments with contracts.
- Our company uses a microfranchising or micro-distribution model that provides income generation opportunities for low-income individuals or individuals from chronically underemployed communities. Microfranchises have on average fewer than 10 workers, are independently owned and operated, and distribute products exclusively for the parent company. Microdistribution is a sales and revenue model that relies on network of individual sellers/retailers for whom the product comprises at least 50% of their total income.
- Our company donates at least 20% of profits or 2% of sales to charity or a non-profit foundation on an annual basis, or is at least 20% owned by a non-profit.
- Our company has targeted and hired more than 10% of total workers from chronically underemployed populations (including but not limited to low income, previously-incarcerated or discriminated individuals) and/or the company extensively trains/invests in these workers.
- Company is specifically designed to focus on or rebuild the local community
- Our production practices are designed to conserve the environment across the company's entire operations (e.g. retrofitting facilities to make them green/energy efficient, changing transportation/distribution to make environmentally efficient, monitoring & reducing water, waste, emissions and energy use)
- None of the above models apply

- IBM1.2 Separate from a mission statement, has your company done any of the following to legally ensure that its social or environmental mission will be maintained over time, regardless of company ownership? [Equally Weighted]
- Signed a contract or board resolution to amend or adopt a legal form that requires consideration of employees, community, and the environment (i.e. Signed B Corp Term sheet but have not yet adopted stakeholder consideration)
 - Amended corporate governing documents to require the consideration of employees, community and the environment (e.g. Amended Articles of Incorporation)
 - Has a specific legal entity/governance structure that preserves mission (i.e. cooperative or non-profit)
 - Legal entity/governance structure preserves mission and requires stakeholder consideration (i.e. Benefit Corp or cooperative that has amended governing documents to include stakeholder consideration)
 - Other - Please describe
 - None of the above
-

Impact Business Models: Community P&S Introduction

- IBM3.1 How do your products serve your customers? (Please select the ONE most impactful way that each product line is solving a social problem for your customers.)

Yes No

- Provides basic services to the underserved without prior access (e.g. providers of electricity or clean drinking water to rural poor communities, affordable housing projects, waste and sanitation systems or disposal)
 - Promotes health or healthy lifestyles (e.g. medical equipment, medical services and medicines, preventative health services or products, healthy living products, exercise and sporting products, prescription eyeglasses)
 - Promotes education or professional skills development (e.g. schools, textbooks, tutoring services, career leadership training, education tools, games and software)
 - Creates economic and/or empowerment opportunities by supporting low-income/under-served individuals in improving or enabling income-generating activities (e.g. financial or insurance services or benefits consulting for the under-served, new mechanisms to connect products to market)
 - Creates access to capital and capacity building for purpose-driven enterprises (e.g. impact investing, sustainability consulting, nonprofit fundraising services, products that assist in raising capital)
 - Promotes arts, media and pursuit of knowledge (e.g. independent media, artisanal crafts, photography, information services)
-

Impact Business Models: Improved Impact

- IBM9.1 Please tell us more about how your product or service increases the flow of capital and/or provide capacity building to purpose driven enterprises. [Not Weighted]

Thinkshift works exclusively with social enterprises, sustainable businesses and cleantech companies. Our brand communications work helps them grow sales, communicate their impact, attract talent, and expand their impact.

- IBM9.2 Which of the following product or service descriptions best fit your company? [Not Weighted]
- Products/services support the operations of purpose driven enterprises so that they can achieve their mission in a more efficient manner (e.g. technology services for a social service agency, marketing services for local food bank)
 - Products/services directly improve the social or environmental impact of businesses or organizations (e.g. consulting services that improve the outcomes of a social service agency, sustainability consulting)
 - Products/services primarily designed to raise capital for purpose-driven enterprises (e.g. fundraising campaigns for a social service agency)
 - These descriptions do not apply to our company's product/service (Skip the remainder of this section)

IBM140.3 How many customers/clients/beneficiaries were served through the provision of the previous products or services during the last 12 months? Please provide figures that are as accurate as possible. Estimates within +/- 5% acceptable. Do not double count.

Businesses/Non-Profits

6.00

IBM9.4 Please provide a brief description of how you track your customer/client/beneficiary figures. [Not Weighted]

We track our clients through QuickBooks. We determine whether clients meet our standards for sustainability/social benefit by looking at the impact data they collect. We generally are quite familiar with this as we are helping them communicate about it. Note: the reason our income dropped last year is that we dropped a major client that wasn't meeting our criteria, so we definitely do track.

IBM9.5 What were your total revenues last fiscal year from the above products or services? [Not Weighted]

178,932.00

IBM9.6 What % of your revenues last fiscal year were from the above products or services? This % is automatically calculated by clicking the Refresh Calculation button below. [Not Weighted]

IBM9.7 This is a calculated question based on your answer from IBM9.2: Which of the following product or service descriptions best fit your company? And, question IBM9.5: What % of your revenues last fiscal year were from the above products or services? [6x]

IBM9.8 What is the unit of measure for reporting the units sold, produced, exported or installed by the company? [Not Weighted]

N/A

IBM9.9 Amount of the product or service sold in the last fiscal year. [Not Weighted]

N/A

IBM9.10 Please describe how desired outcomes have been defined, measured and/or met by your company. If no formal outcomes measurement, select N/A below. [Not Weighted]

We set goals with our clients tied to their business development goals. So, for example, if an impact investment client wants X new funding recipients in a year, we develop a communications plan, with metrics for each element, that's designed to help meet goal. If they meet that goal, they have increased their impact, so we are contributing to positive impact in that field.

IBM9.11 Has your company defined the outcomes (separate from the outputs) it seeks through the provision of this product/service to its client base? Defined outcomes include specific targets that are based on existing literature (e.g. improved fundraising track records, ancillary benefits for customers/clients, etc.) that can be measured. [Least Weighted]

Yes No, not at this time

IBM9.12 If you answered yes above, select all of the relevant options regarding evidence on ability to meet desired outcomes. [Least Weighted]

- N/A
- There is credible secondary research that supports the link between the company's desired output(s) and the targeted societal outcome(s)
- The company has conducted or participated in its own primary research to 'support' the link between its output(s) and the target societal outcome(s) - e.g., customer surveys, stakeholder feedback forums, qualitative interviews/case studies.
- The company has participated in a study that is scientifically designed to support the link between its output(s) and the target societal outcome(s) (e.g. randomized controlled trial (RCT) or longitudinal study).
- Company's innovation or product is too early stage to have conducted primary research or have a body of secondary research to reference
- None of the above

IBM9.13 If direct research on your product/service has been performed, did the results confirm that a desired outcome is being achieved? [Least Weighted]

- Yes No, not at this time N/A

IBM9.14 Is there something different or innovative about the company's product/service that support flow of capital that has changed the industry? Is this something that is replicable, unique at the time that it was created, that has been emulated by other organizations? [Not Weighted]

Well, we like to think that all of our work is innovative! But no, we haven't created a new model.

Disclosure Questionnaire

Disclosure Questionnaire: Disclosure Industries

DQ1.1 Please indicate if the company is involved in production of or trade in any the following. Select Yes for all options that apply.

Yes No

- Any product or activity deemed illegal under host country laws or regulations or international conventions and agreements
- Gambling
- Pharmaceuticals subject to international phase-outs or bans
- Payday lending
- Pornography
- Wildlife or wildlife products regulated under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

DQ1.2 If you selected "Yes" above, please provide a detailed explanation of the company's involvement here. [Not Weighted]

Disclosure Questionnaire: Disclosure Practices

DQ2.1 Please indicate if the following statements are true regarding whether or not the company engages in the following practices. Check all that apply. If the statement is true, select "True." If false, select "False."

True False

- Company formally registered in accordance with domestic regulations
- Company has not reduced or minimized taxes through the use of corporate shells or structural means
- Company facilities are not located adjacent to or in sensitive ecosystems
- Company or company suppliers do not use any workers who are prisoners

DQ2.2 If you selected "False" above, please provide a detailed explanation of the company's engagement in these practices here. [Not Weighted]

Disclosure Questionnaire: Disclosure Outcomes

DQ3.1 Please indicate if the following statements are true regarding if the company has experienced any of the following in the past 5 years. Check all that apply. If the statement is true, select "True." If false, select "False."

- | True | False | Don't know | |
|----------------------------------|-----------------------|-----------------------|--|
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | Company and Significant Suppliers have not had an operational or on-the-job fatality |
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | Company and Significant Suppliers' sites have not experienced any accidental discharges to air, land or water of hazardous substances |
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | No construction or operation of company and Significant Suppliers' facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near your facility |
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | No material litigation against the company |
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | Company has not filed for bankruptcy |

DQ3.2 If you selected "False" above, please provide a detailed explanation of the company's experience related to the above statement here. [Not Weighted]

Disclosure Questionnaire: Disclosure Penalties

DQ4.1 Please indicate if the company has had any formal complaint to a regulatory agency or been assessed any fine or sanction in the past five years for any of the following practices or policies. Check all that apply.

- | Yes | No | |
|-----------------------|----------------------------------|--|
| <input type="radio"/> | <input checked="" type="radio"/> | Diversity and equal opportunity |
| <input type="radio"/> | <input checked="" type="radio"/> | Environmental issues |
| <input type="radio"/> | <input checked="" type="radio"/> | Financial reporting |
| <input type="radio"/> | <input checked="" type="radio"/> | Geographic operations or international affairs |
| <input type="radio"/> | <input checked="" type="radio"/> | Investments or Loans |
| <input type="radio"/> | <input checked="" type="radio"/> | Labor issues (internal and supply chain) |
| <input type="radio"/> | <input checked="" type="radio"/> | Marketing |
| <input type="radio"/> | <input checked="" type="radio"/> | Political contributions |
| <input type="radio"/> | <input checked="" type="radio"/> | Taxes |
| <input type="radio"/> | <input checked="" type="radio"/> | Bribery, fraud or corruption |

DQ4.2 If you selected "Yes" above, please provide a detailed explanation of the complaint/fine/sanction here. [Not Weighted]