

---

## **Thinkshift Communications**

Service with Minor Environmental Footprint

0 Employees

2017-05-03

# Full Impact Assessment

---

## Governance

---

### Mission & Engagement

---

#### Level of Impact Focus (Score Value: Not Scored)

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.

- 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.
- 

#### Mission Statement Characteristics (Score Value: Medium)

Does your company have a corporate mission statement, and does it include any of the following?

Please check all that apply.

- No written statement
  - A written corporate mission statement that does not include a social or environmental commitment
  - A general commitment to social and/or environmental responsibility and stewardship
  - A commitment to a specific positive social impact (e.g. poverty alleviation, sustainable economic development)
  - A commitment to a specific positive environmental impact (e.g. reducing waste to landfill with upcycled products)
  - A commitment to serve a target beneficiary group in need (e.g. low income customers, smallholder farmers)
- 

#### Mission Statement (Score Value: Not Scored)

Please type or paste your mission statement here.

*Our mission is to drive sustainable business forward by helping sustainable enterprises grow and expand their influence. Susta*

---

#### Board Review of Social/Environmental Performance (Score Value: High)

Does the Board of Directors or equivalent governing body review the company's social or environmental performance on at least an annual basis?

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

#### Stakeholder Engagement (Score Value: Medium)

In the last year, how did the company solicit specific feedback from its external stakeholders (excluding employees and investors) regarding the company's social and environmental performance?

Check all that apply.

- No formal stakeholder engagement
  - Annual stakeholder meeting
  - Online stakeholder forum to provide/report social or environmental concerns or feedback
  - Meetings or other engagement mechanisms with local community members
  - Meetings or other engagement mechanisms with social or environmental advocacy groups
  - Community/environmental representation on an advisory board.
  - Third party or anonymous surveys about social/environmental performance
  - Other (please describe)
-

## Social/Environmental Key Performance Indicators (Score Value: High)

Are there key performance indicators (KPIs) or metrics that your company tracks at least annually to determine if you are meeting your social or environmental objectives?

- 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 impact assessments, progress out of poverty indexing, beneficiary outcome surveys, etc.)

---

## Corporate Accountability

### Governance Structures (Score Value: Medium)

What is the company's highest level of corporate oversight?

The answer to this question affects questions you'll encounter further on in your assessment.

- Owner/Manager only
- Non-Fiduciary Advisory Board
- Board of Directors or Equivalent

---

### Governing Body Characteristics (Score Value: Medium)

Which of the following apply to your company's Board of Directors or equivalent governing body?

Please check all that apply.

- 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 equivalent

---

### Governing Body Stakeholder Representation (Score Value: Medium)

Which of the following stakeholder groups or relevant independent experts have voting seats on the Board of Directors or equivalent governing body?

Select all that apply.

- Executive employee representative
- Non-executive employee representative
- Community expertise (e.g. local university representative)
- Environmental expertise (e.g. environmental nonprofits)
- Customers
- None of the above
- N/A - no Board of Directors or other governing body

---

## Transparency

### Reviewed / Audited Financials (Score Value: High)

Does the company produce financials that are reviewed or audited by the Board, other formal governing body, or independent third party?

- Yes
- No

## Impact Reporting (Score Value: High)

Does the company publicly share information on its social and/or environmental performance? If so, how?

- No public reporting on social or environmental performance
- Specific quantifiable social and/or environmental indicators or outcomes are made public
- Company sets public targets and shares progress to those targets
- Information is shared/updated annually
- Information is presented in a formal report that allows comparison to previous time periods
- Information adheres to a comprehensive third party standard (ex. GRI or B Impact Assessment)
- A third party has validated the information shared
- Impact reporting is integrated with financial reporting

## Client Protection Warranty (Score Value: Medium)

Is your product or service covered by a written consumer warranty or client protection policy?

- Yes
- No

## Public Feedback Channel (Score Value: Medium)

Is there a publicly-known mechanism through which customers can provide product feedback, ask questions, or file complaints?

- No
- Yes, there is a mechanism for feedback to be sent only privately to company
- Yes, there is a mechanism where feedback is made transparent to the public

## Governance Metrics

---

### Last Fiscal Year (Score Value: Not Scored)

On what date did your last fiscal year end?

2016-12-31

### Reporting Currency (Score Value: Not Scored)

Reporting currency

### Revenue Last Year (Score Value: Not Scored)

Total Earned Revenue  
From the last fiscal year

This question will be used for scored calculation questions later in the assessment. Please complete for accurate scoring. The answer to this question affects questions you'll encounter further on in your assessment.

### Revenue Year Before Last (Score Value: Not Scored)

Total Earned Revenue  
From the fiscal year before last

### Earnings Before Interest & Taxes Last Year (Score Value: Not Scored)

EBIT (Earnings Before Interest & Taxes)  
From the last fiscal year

### Earnings Before Interest & Taxes Year Before Last (Score Value: Not Scored)

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

**Net Income Last Year** (Score Value: Not Scored)

Net Income  
From the last fiscal year

---

**Net Income Year Before Last** (Score Value: Not Scored)

Net Income  
From the fiscal year before last

---

**Mission Locked**

---

**Mission Lock** (Score Value: Very High)

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)
  - 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
- 

**Community**

---

**Diversity & Inclusion**

---

**Ownership Diversity** (Score Value: High)

What % of the company is owned by the following groups?  
Women and/or individuals from underrepresented populations, including low-income communities

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

**Nonprofit Ownership** (Score Value: High)

What % of the company is owned by the following groups?  
Nonprofit organization(s)

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

**Non-accredited Investor Ownership** (Score Value: High)

What % of the company is owned by the following groups?  
Individuals that qualify as non-accredited investors

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

---

**Female Ownership** (Score Value: Not Scored)

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

100

---

**Low-income Ownership** (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of your company's ownership is held by individuals from the following groups?  
Low income communities

0

---

**Ownership from Underrepresented Groups** (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of your company's ownership is held by individuals from the following groups?  
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)

0

---

**Board of Directors Diversity** (Score Value: High)

What % of the members of your Board of Directors (or equivalent) are women or individuals from other underrepresented populations?

- 0%
- 1-9%
- 10-24%
- 25-49%
- 50%+
- Don't know
- N/A - No board of directors or equivalent

---

**Female Directors** (Score Value: Not Scored)

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

100

---

**Directors from Low-income Communities** (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of your Board of Directors or other governing body are from the following groups?  
Low income communities

0

**Minority Directors** (Score Value: Not Scored)

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

Minority/previously excluded populations

0

**Directors from Underrepresented Populations** (Score Value: Not Scored)

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

Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)

0

**Supplier Ownership Diversity** (Score Value: High)

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

**Supplier Diversity Policy** (Score Value: High)

Does the company have a written policy giving preference to suppliers owned by women or individuals from underrepresented populations?

- Yes
- No
- N/A: Such policies are illegal in my country of operations

**Civic Engagement & Giving**

---

**Community Service Policy** (Score Value: High)

Does the following apply to the company's charitable giving and civic engagement in policy or in practice?

- 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

**Total Amount of Volunteer Service Hours** (Score Value: Not Scored)

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.

148.5

### Volunteer Service Per Capita (Score Value: High)

What was the % of per capita worker volunteer, community service, or pro bono time donated in the reporting period?

Calculate by total volunteer hours / total hours worked, generally 2000 hours per FTE.

- 0%
- .1-.9% of time
- 1-2.4% of time
- 2.5-5% of time
- >5% of time
- Don't know / not monitored

---

### Total Amount of Charitable Donations (Score Value: Not Scored)

Total amount (in currency terms) donated to registered charities in the last fiscal year.

Report with the currency specified in "Reporting currency" for this metric.

2100

---

### % of Revenue Donated (Score Value: Very High)

What was the equivalent % of revenue donated to charity during the last fiscal year?

Please include tax deductible in-kind donations but do not include pro bono time.

- No donations last FY
- 0.1-0.4% of revenues
- 0.5-1% of revenues
- 1.1-2.4% of revenues
- 2.5-5% of revenues
- 5%+ of revenues
- Don't know

---

### Charitable Organizations Supported (Score Value: Not Scored)

Which organizations does your company support?

*San Francisco Baykeeper, Bull Valley Agricultural Center, Green Film Festival*

---

### Local Involvement

#### Geographic Structure and Scope (Score Value: Not Scored)

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.

*We have one office. We work with enterprises throughout the U.S., but mostly in Northern California.*

---

#### Spending on Local Suppliers (Score Value: Very High)

What % of your company's expenses (excluding labor) was spent with independent suppliers local to the company's headquarters or relevant production facilities?

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



## Impactful Banking Services (Score Value: Very High)

Is the majority of your company's banking services provided by an institution with any of the following characteristics?

- 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

---

## Suppliers, Distributors & Product

### Significant Supplier Descriptions (Score Value: Not Scored)

Please select the types of companies that represent your Significant Suppliers:

All companies have significant suppliers, which are defined as the largest suppliers of the company amounting to approximately 80% of non-labor costs. Select all that apply.

- Product Manufacturers
- Professional Service Firms (Consulting, Legal, Accounting)
- Independent Contractors
- Marketing/Advertising
- Office Supplies
- Benefits Providers
- Technology
- Raw materials
- Farms
- Other

---

### Social or Environmental Screening of Suppliers (Score Value: Not Scored)

Does your company screen and/or evaluate Significant Suppliers for social and environmental impact?

This question determines the set of supplier-focused questions your company will respond to. The answer to this question affects questions you'll encounter further on in your assessment.

- Yes
- No

---

### Supplier Screen Topics (Score Value: High)

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 negative practices or regulatory non-compliance (e.g. no child labor)
- Screened for positive practices beyond what is required by regulations (environmentally-friendly manufacturing process; excellent labor practices, etc.)

---

### Supplier Evaluation Practices (Score Value: High)

When monitoring and evaluating the on-going social and environmental performance of the majority of Significant Suppliers, which of the following apply?

- 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

## Independent Contractor Practices (Score Value: High)

Which of the following describe your relationships with all your company's independent contractors?

- Formal routine process for independent contractors to receive post-project/contract performance feedback
- Formal routine process for independent contractors to communicate post-project or post-contract feedback to the company
- Independent contractors are verified to either work on a time-bound basis, or else split their time with work for other clients. Contractors not meeting either criteria have been offered employment.
- Independent contractors are paid a living wage (when calculated as hourly wage when living wage data is available)
- We have independent contractors, but have not engaged in any of these practices
- N/A - We haven't used independent contractors in the last year

## Revenue from Certified Products (Score Value: High)

What % your services have been reviewed and certified by an accreditation body? Select N/A if industry or service relevant accreditation does not exist.

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

## Community Business Models Introduction

---

### Community Oriented Business Models (Score Value: Not Scored)

Is your company structured to benefit community stakeholders in any of the following ways?

The answer to this question affects questions you'll encounter further on in your assessment.

- A producer-owned cooperative structure in which suppliers share control and benefits of company operations (e.g. farmer cooperative, artisanal cooperative)
- Purchasing fair/direct trade to improve livelihoods for underserved groups in your supply chain
- A micro-distribution or micro-franchising model that provides economic opportunities to underserved groups
- A formal standing commitment to donate a significant portion of sales/profits/ownership to charitable causes (>2% sales, >20% profits/ownership)
- Providing high quality jobs and/or professional development for individuals with chronic barriers to employment (workforce development programs)
- A community-focused business model that supports and builds the economic vitality of local communities
- None of the above

## Environment

---

### Environment Introduction

---

#### Type of Facilities (Score Value: Not Scored)

What kind of facilities does your business primarily operate in?

The answer to this question affects questions you'll encounter further on in your assessment.

- Company owned office space
- Leased office space
- Co-working Space
- Virtual/ Home Offices

### Land, Office, Plant

---

**Green Building Standards** (Score Value: Medium)

What % of company facilities (by area, both owned by company or leased) are certified to meet the requirements of an accredited green building program?

- <20%
  - 20-49%
  - 50-79%
  - 80%+
  - N/A - Company has virtual office
- 

**Recycling Programs** (Score Value: Medium)

Does the company have a company-wide recovery and recycling program that includes the following?

Please check all that apply.

- Paper
  - Cardboard
  - Plastic
  - Glass & metal
  - Composting
  - None of the above
- 

**Environmental Management Systems** (Score Value: High)

Does your company have an environmental management system that includes any of the following?

Please check all that apply.

- Policy statement documenting the organization's commitment to the environment
  - Assessment undertaken of the environmental impact of the organization's business activities
  - Stated objectives and targets for environmental aspects of the organization's operations
  - Programming designed, with allocated resources, to achieve these targets
  - Periodic compliance and auditing to evaluate programs conducted
  - None of the above
- 

**Chemical Reduction Methods** (Score Value: Medium)

Which of the following environmentally preferred products have been purchased for the majority of your corporate facilities?

- Non-toxic janitorial products
  - Unbleached / chlorine free paper products
  - Soy-based inks or other low VOC inks
  - Recycled/environmentally preferred office supplies (paper, pens, notebooks, etc.)
  - Other (please describe)
  - None of the above
- 

**Virtual Office Stewardship** (Score Value: High)

Which of the following are true of how your company encourages good environmental stewardship in how employees manage their virtual offices?

- There is a written policy encouraging environmentally preferred products and practices in employee virtual offices (recycling, etc.)
  - Company shares resources with employees regarding environmental stewardship in home offices (i.e. energy efficiency, recycling, etc.)
  - Policy in place for the safe disposal of e-waste and other hazardous materials purchased for employee home offices.
  - Employees are provided with a list of environmentally preferred vendors for office supplies
  - None of the above
  - N/A
-

**Facility Improvement with Landlord** (Score Value: Medium)

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.

- Energy efficiency improvements
- Water efficiency improvements
- Waste reduction programs (including recycling)
- None of the above
- N/A - Company does not lease majority of facilities

---

**Inputs**

**Monitoring Energy Usage** (Score Value: Medium)

Does your company monitor, record and/or report its energy usage?

- 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

**Monitoring Water Usage** (Score Value: Medium)

Does your company monitor, record and/or report its water usage?

- We do not currently monitor and record our 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

**Total Energy Use** (Score Value: Not Scored)

Total energy used (Gigajoules) during the last 12 months:

**Total Renewable Energy Use** (Score Value: Not Scored)

Total energy used from renewable resources (Gigajoules) during the last 12 months:

**Total Water Use** (Score Value: Not Scored)

Total water use (liters) during the last 12 months

**Low Impact Renewable Energy Use** (Score Value: High)

What % of energy use is produced from low-impact renewable sources?

Include electricity and other energy consumption from heating, hot water, etc.

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

**Increasing Renewable Energy** (Score Value: Medium)

Has the company increased its % use of low impact renewable energy annually at its corporate facilities?

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

**Facility Energy Efficiency** (Score Value: Medium)

For which of the following systems have you used energy conservation/ efficiency measures for your corporate facilities in the past year?

- 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
- 

**Water Conservation Practices** (Score Value: Medium)

Which of the following water conservation methods have been implemented at the majority of your corporate offices:

- Low-flow faucets/taps, toilets/urinals, showerheads
  - Grey-water usage for irrigation
  - Low-volume irrigation
  - Harvest rainwater
  - Other (please describe)
  - None
  - N/A: My company has a virtual office
- 

**Outputs**

---

**Monitoring Greenhouse Gas Emissions** (Score Value: High)

Please select the option that best describe how you monitor and record the following emissions:  
Scopes 1 and 2 greenhouse gas (GHG) 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
  - N/A
- 

**Total Waste Disposed** (Score Value: Not Scored)

Waste Disposed (metric tonnes) during the last 12 months

---

**Total Waste Recycled** (Score Value: Not Scored)

Waste Disposed: Recycled/Reused (metric tonnes) during the last 12 months

---

**Total Scope 1 GHGs** (Score Value: Not Scored)

Total Greenhouse Gas Emissions (metric tonnes of CO2 equivalent) in:  
Scope 1:

---

## Total Scope 2 GHGs (Score Value: Not Scored)

Total Greenhouse Gas Emissions (metric tonnes of CO2 equivalent) in:  
Scope 2:

8

---

## Total Scope 3 GHGs (Score Value: Not Scored)

Total Greenhouse Gas Emissions (metric tonnes of CO2 equivalent) in:  
Scope 3:

---

## Hazardous Waste Disposal (Score Value: High)

Is hazardous waste always disposed of responsibly, in a way that the company can verify?

This includes batteries, paint, electronic equipment, etc.

- Yes  
 No  
 N/A - We have eliminated hazardous waste
- 

## Environmental Models Introduction

---

### Environmental Business Model (Score Value: Not Scored)

Are your company's products or process structured to restore or preserve the environment in any of the following ways?

The answer to this question affects questions you'll encounter further on in your assessment.

- Through a manufacturing, wholesale or agriculture process which is designed to significantly reduce environmental impact compared to typical practices for the industry  
 Through a product or service that preserves, conserves, or restores the environment or resources  
 None of the above
- 

## Customers

---

### Customer Models Introduction

---

#### Customer Impact Business Model Introduction (Score Value: Not Scored)

Does your product/service address a social or economic problem for or through your customers?

The answer to this question affects questions you'll encounter further on in your assessment.

- Yes  
 No
- 

### Customer Products & Services Introduction

---

#### Positive Impact of Product/Service (Score Value: Not Scored)

How would you describe the positive outcome for customers created by your product/service?

*We help our clients expand their impact through communications programs that enable them to reach and engage with more p*

---

## Beneficial Product Type (Score Value: Not Scored)

Which of the following most closely matches the outcome and/or problem solved for your customers as defined above?

Only select the ONE most relevant option for each product line. This will guide you to a series of questions specific to the type of impact you indicate you are creating. The answer to this question affects questions you'll encounter further on in your assessment.

- Access to products/services that fulfill basic human needs for individuals without prior access (e.g. providers of electricity clean drinking water to rural poor communities, affordable housing projects, waste and sanitation systems or disposal)
- Improved or Maintained Health/Wellness (e.g. medical equipment, medical services and medicines, preventative health services or products, healthy living products, exercise and sporting products, prescription eyeglasses)
- Improved Education or Skills Development (e.g. schools, textbooks, tutoring services, career leadership training, educational tools, games and software)
- Increased economic opportunity for underserved groups (e.g. financial or insurance services or benefits consulting for the underserved, new mechanisms to connect products to market)
- Increased operational success or capital for purpose driven or underserved enterprises (e.g. impact investing or fundraising platforms, non-profit accounting services)
- Increased social and/or environmental impact for businesses or other organizations (e.g. sustainability consulting)
- Increased Access to Arts, Media, or Culture (e.g. independent media, artisanal crafts, photography, information services)
- None of the above

## Total Customer Individuals (Score Value: Not Scored)

Total Number of Customers  
Individuals:

## Total Customer Organizations (Score Value: Not Scored)

Total Number of Customers  
Organizations:

7

## Support for Underserved/Purpose Driven Enterprises

---

### Flow of Capital Overview (Score Value: Not Scored)

Please tell us more about how your product or service increases the flow of capital and/or provide capacity building to purpose driven enterprises.

*Clients get increased valuation, expanded influence, new and increased business, and better brand recognition. We have a hist*

### Flow of Capital Product Description (Score Value: Not Scored)

Which of the following product or service descriptions best fit your company?

This question is used to calculate your base impact business model score. The answer to this question affects questions you'll encounter further on in your assessment.

- Products/services support the operations of purpose driven enterprises or organizations (e.g. accounting services for non-profit organizations)
- Products/services support the operations of underserved enterprises, such as women/ minority owned or small to medium sized community businesses that lack access to services (e.g. incubators for urban businesses)
- Products/services that directly raise capital for purpose-driven enterprises or underserved businesses (e.g. fundraising campaigns for a social service agencies)
- These descriptions do not apply to our company's product/service (Skip the remainder of this section)

## Individuals Served (Score Value: Not Scored)

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.  
Individuals

## Households Served (Score Value: Not Scored)

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.  
Households

**Communities Served** (Score Value: Not Scored)

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.  
Communities

**Organizations Served** (Score Value: Not Scored)

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

9

**Governments Served** (Score Value: Not Scored)

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.  
Governments

**Client Tracking Methods** (Score Value: Not Scored)

Please provide a brief description of how you track your customer/client/beneficiary figures.

*There aren't that many--we can easily count them. We do not attempt to track the people, communities, etc. that our clients re*

**Revenue from Flow of Capital** (Score Value: Not Scored)

What were your total revenues last fiscal year from the previous products or services?

The answer to this question affects questions you'll encounter further on in your assessment.

211748

**Verification of Support for Underserved/Purpose Driven Enterprises** (Score Value: High)

How do you verify that your product or service contributes to the outcome previously selected?

Select all that apply.

- We have a track record of successful, verified positive outcomes and have created case studies based on these.
- There is secondary research that supports the link between our type of product and the stated outcome.
- We conduct our own direct research to track the outcomes produced for all our customers, such as impact-related survey
- We have third party certifications or verifications that verify the efficacy of our product/service in delivering outcomes
- We have performed, commissioned, or partnered with scientifically designed impact or outcome assessments to systematically learn about our product's impact
- Our product is too early stage to have research or studies that link our product to positive outcomes
- We cannot provide verification of our outcomes at this time.

**Efficacy of Flow of Capital** (Score Value: High)

If direct research on your product/service has been performed, did the results confirm that a desired outcome is being achieved?

- Yes
- No
- NA

**Innovative Support for Underserved/Purpose Driven Enterprises** (Score Value: Not Scored)

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, and that has been emulated by other organizations?



**Negative Impact Management** (Score Value: High)

Does your company also measure and manage the negative or unintended outcomes generated by this business model?

- Yes
- No

---

**Serving In Need Populations**

**Impact on Underserved Populations** (Score Value: Not Scored)

Does your product/service benefit underserved populations, either directly or by supporting organizations that directly serve them?

- Yes
- No

**Underserved Beneficiaries Overview** (Score Value: Not Scored)

Describe the beneficiaries or end-users of your products or services and how you characterize them as underserved.

**Underserved Beneficiary Types** (Score Value: Not Scored)

If your beneficiaries are underserved individuals, which of the following underserved populations do they belong to? If you serve organizations that serve the underserved, which of the following populations are your client's beneficiaries?

Select the option that most accurately reflects the majority of underserved beneficiaries. The answer to this question affects questions you'll encounter further on in your assessment.

- Low income, poor, or very poor
- Other populations underserved in your product/service category, which can include minorities, veterans, disabled individuals
- Individuals who are not underserved in your product/service category (do not continue)

**Impact on Underserved Populations Description** (Score Value: Not Scored)

Which of the following best describes how your product/service benefits underserved populations previously described?

The answer to this question affects questions you'll encounter further on in your assessment.

- My product/service helps the financial viability of purpose-driven enterprises, which in turn allows them to continue to serve their underserved target population (ex. marketing or accounting services for a social service agency)
- My product/service directly helps purpose driven enterprises improve positive impact for their underserved beneficiaries, but is not designed specifically for that underserved population (e.g. teaching curriculum sold to low income schools)
- My product/service directly helps purpose driven enterprises improve positive impact for their underserved beneficiaries, and is specifically designed to benefit that underserved population (e.g. teacher training/curriculum specifically designed address challenges of teaching low income students)
- My product/service is directly used by the previous underserved populations (e.g. products marketed to or designed for the underserved)

**Low-Income Communities Served** (Score Value: Not Scored)

If relevant, select which of the following impoverished communities your company serves:

Low Income

- Urban
- Rural
- Peri-urban

**Poor Communities Served** (Score Value: Not Scored)

If relevant, select which of the following impoverished communities your company serves:

Poor

- Urban
- Rural
- Peri-urban

**Very Poor Communities Served** (Score Value: Not Scored)

If relevant, select which of the following impoverished communities your company serves:

Very poor

- Urban
- Rural
- Peri-urban

**Underserved Group Demographics** (Score Value: Not Scored)

If relevant, which of the following beneficiary groups is your product/service targeting?

Not all beneficiary populations are themselves under-served groups.

- Young children (younger than 5 years old)
- Children and adolescents (5 years of age or older but younger than 18)
- Adults
- Elderly/older adults
- Persons with disabilities
- Minority/previously excluded populations
- Women
- Pregnant women
- Other at risk populations
- None of the above

**Underserved Client Tracking** (Score Value: Not Scored)

Which of the following statements are true about your in-need customers/ clients?

- Most customers/clients continue with us year by year and latest figures for the year roughly reflect the total number of beneficiaries to date
- Customers/clients we reach each year are in addition to previous customers/clients and total number served should be calculated by adding together the numbers for each year
- Don't know - we don't sell direct to customers/clients

**Revenue from Serving In Need Populations** (Score Value: Not Scored)

How much revenue is generated through sale to the previously selected beneficiary group(s) or nonprofit(s)?

**% of Customers In-need** (Score Value: Not Scored)

What % of customers/end beneficiaries of your product or service are from an underserved population identified previously? If you serve purpose driven enterprises, please respond with the % of your revenues generated from services provided that benefited the previously selected underserved in the last fiscal year.

The answer to this question affects questions you'll encounter further on in your assessment.

**In-Need Individuals Served** (Score Value: Not Scored)

How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.

Individuals

**Underserved Households** (Score Value: Not Scored)

How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.

Households

**In-Need Communities Served** (Score Value: Not Scored)

How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.

Communities

**In-need Organizations Served** (Score Value: Not Scored)

How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.  
Businesses/Non-Profits

---

**Underserved Government Entities** (Score Value: Not Scored)

How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.  
Governments

---

**Client Tracking Methods** (Score Value: Not Scored)

Please provide a brief description of how you track your customer/client/beneficiary figures.

---

**Increasing Accessibility for Underserved Groups** (Score Value: High)

Which of the following products/services attributes assist in targeting the previously selected underserved communities:

- Product/service is accompanied by a zero-interest or below-market financing option (directly from company or through finance partner) with small repayment amounts to provide the poor access to purchase
  - Company utilizes a cross-subsidization model whereby higher pricing for middle and high-income clients facilitates offering lower/subsidized pricing for low income clients/customers
  - Product/service pricing model includes transparent pricing for all customers
  - Vendor provides training on safe use and/or maintenance of the product/service
  - These product/service attributes do not apply to our company (Skip the remainder of this section)
- 

**Innovative Practices to Increase Accessibility** (Score Value: Not Scored)

Use the field below to describe any innovative technology, distribution or pricing models selected previously.

---

**Poor Clients Served** (Score Value: Not Scored)

If relevant, how many customers/clients served in the last 12 months qualify as poor or very poor, with incomes below \$2/day? Do not double-count (e.g. if you report 5 households, do not also report the number of individuals in those 5 households). Estimates within +/- 5% acceptable.  
Individuals

---

**Low-Income Households Served** (Score Value: Not Scored)

If relevant, how many customers/clients served in the last 12 months qualify as poor or very poor, with incomes below \$2/day? Do not double-count (e.g. if you report 5 households, do not also report the number of individuals in those 5 households). Estimates within +/- 5% acceptable.  
Households

---

**Percent of Beneficiaries Poor or Very Poor** (Score Value: Very High)

What % of customers/beneficiaries qualify as poor or very poor with incomes below \$2.00 per day?  
Estimates within +/- 5% are acceptable. See currency converter in help text to get local currency terms.

---

**Revenue Products Benefiting Bottom of Pyramid** (Score Value: Not Scored)

How much revenue is generated through sale to clients/customers that live on less than \$2/day?

---

## **Disclosure Questionnaire**

---

Disclosure Industries

---

**Illegal Product/Activity** (Score Value: Not Scored)

Please indicate if the company is involved in production of or trade in any the following. Select Yes for all options that apply. Any product or activity deemed illegal under host country laws or regulations or international conventions and agreements

- Yes
  - No
- 

**Gambling** (Score Value: Not Scored)

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

- Yes
  - No
- 

**Internationally Banned Pharmaceuticals** (Score Value: Not Scored)

Please indicate if the company is involved in production of or trade in any the following. Select Yes for all options that apply. Pharmaceuticals subject to international phase-outs or bans

- Yes
  - No
- 

**Involved In Payday Lending** (Score Value: Not Scored)

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

- Yes
  - No
- 

**Disclosure Pornography** (Score Value: Not Scored)

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

- Yes
  - No
- 

**Disclosure Wildlife Regulated Under CITES** (Score Value: Not Scored)

Please indicate if the company is involved in production of or trade in any the following. Select Yes for all options that apply. Wildlife or wildlife products regulated under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

- Yes
  - No
- 

**Company Explanation Of Disclosure Item Flags** (Score Value: Not Scored)

If you selected "Yes" previously, please provide a detailed explanation of the company's involvement here.

If this does not apply to you, please enter "Does not apply" in the text area below.

---

**Disclosure Practices**

---

**No formal Registration Under Domestic Regulations** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company is not formally registered in accordance with domestic regulations

- Yes
  - No
-

**Tax Reduction Through Corporate Shells** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company has reduced or minimized taxes through the use of corporate shells or structural means

- Yes
- No

**Facilities located in sensitive ecosystems** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company facilities are located adjacent to or in sensitive ecosystems

- Yes
- No

**Company workers are prisoners** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company uses workers who are prisoners

- Yes
- No

**Conduct Business in Conflict Zones** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company exploitatively operates in conflict zones

- Yes
- No

**Employs Individuals on Zero-Hour Contracts** (Score Value: Not Scored)

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 "Yes." If false, select "No."

Company employs individuals on zero-hour contracts

- Yes
- No

**Company Explanation Of Disclosure Item Flags** (Score Value: Not Scored)

If you selected "Yes" previously, please provide a detailed explanation of the company's engagement in these practices here.

If this does not apply to you, please enter "Does not apply" in the text area below.

---

**Disclosure Outcomes**

**On-Site Fatality** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Company has had an operational or on-the-job fatality

- Yes
- No

**Hazardous Discharges Into Air/Land/Water (Past 5 Yrs)** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Company sites have experienced accidental discharges to air, land or water of hazardous substances

- Yes
- No

**Forced Relocation Of People Due To Company Operations** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Construction or operation of company facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near your facility

- Yes
- No

**Material Litigation** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Material litigation or arbitration against company

- Yes
- No

**Company has filed for bankruptcy** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Company has filed for bankruptcy

- Yes
- No

**Material Breaches of Confidential Information** (Score Value: Not Scored)

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 "Yes" If false, select "No".

Company has had material breaches of individual's confidential information

- Yes
- No

**Company Explanation Of Disclosure Item Flags** (Score Value: Not Scored)

If you selected "True" previously, please provide a detailed explanation of the company's experience related to the previous statement here.

If this does not apply to you, please enter "Does not apply" in the text area below.

---

**Disclosure Penalties**

**Penalties Assessed Regarding Diversity/Equal Opportunity** (Score Value: Not Scored)

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.

Diversity and equal opportunity

- Yes
- No

**Penalties Assessed For Environmental Issues** (Score Value: Not Scored)

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.

Environmental issues

- Yes  
 No
- 

**Penalties Assessed Regarding Financial Reporting** (Score Value: Not Scored)

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.

Financial reporting

- Yes  
 No
- 

**International Affairs Penalties** (Score Value: Not Scored)

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.

Geographic operations or international affairs

- Yes  
 No
- 

**Penalties Assessed Regarding Investments Or Loans** (Score Value: Not Scored)

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.

Investments or Loans

- Yes  
 No
- 

**Penalties Regarding Labor Issues (Including Supply Chain)** (Score Value: Not Scored)

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.

Labor issues (internal and supply chain)

- Yes  
 No
- 

**Penalties Assessed Regarding Company's Marketing** (Score Value: Not Scored)

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.

Marketing

- Yes  
 No
- 

**Penalties Assessed Regarding Political Contributions** (Score Value: Not Scored)

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.

Political contributions

- Yes  
 No
-

**Penalties Assessed Pertaining To Company Taxes** (Score Value: Not Scored)

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.

Taxes

- Yes
- No

**Bribery, Fraud Or Corruption Penalties Assessed** (Score Value: Not Scored)

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.

Bribery, fraud or corruption

- Yes
- No

**Company Explanation Of Disclosure Item Flags** (Score Value: Not Scored)

If you selected "Yes" previously, please provide a detailed explanation of the complaint/fine/sanction here.

If this does not apply to you, please enter "Does not apply" in the text area below.

---

**Supplier Disclosure**

**Workers Under the Age of 15** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers. Significant Suppliers employ workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138 )

- Yes
- No
- Don't Know

**Workers Who are Prisoners** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.

Significant suppliers use any workers who are prisoners

- Yes
- No
- Don't Know

**Operational Fatality** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.

Significant Suppliers have had an operational or on-the-job fatality

- Yes
- No
- Don't Know

**Accidental Hazardous Substances** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.

Significant Suppliers' sites have experienced accidental discharges to air, land or water of hazardous substances

- Yes
- No
- Don't Know



**Resettlement or Economic Displacement** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Construction or operation of Significant Suppliers' facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near their facility

- Yes
  - No
  - Don't Know
- 

**Land Acquisition** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Construction or operation of Significant Suppliers involved large scale land acquisition

- Yes
  - No
  - Don't Know
- 

**Land Conversion or Degradation** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Construction or operation of Significant Suppliers involved large scale land conversion and/or degradation

- Yes
  - No
  - Don't Know
- 

**Construction or Refurbishment of Dams** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Construction or operation of Significant Suppliers involved the construction or refurbishment of dams

- Yes
  - No
  - Don't Know
- 

**Material Fines or Sanctions** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Significant Suppliers have had material fines or sanctions in the last five years regarding the issues indicated in the goal Disclosure Penalties.

- Yes
  - No
  - Don't Know
- 

**Business in Conflict Zones** (Score Value: Not Scored)

Please indicate if any of the following statements are true regarding your company's significant suppliers.  
Significant Suppliers exploitatively operate in conflict zones

- True
  - False
  - Don't Know
- 

**Other Disclosures**

---

**Other Disclosures** (Score Value: Not Scored)

Are there any other sensitive aspects of the business that are necessary to disclose?

If this does not apply to you, please type "does not apply" in the area below.

*does not apply*

---

# Inclusive Economy Challenge

---

## Inclusive Economy Challenge (US)

---

### Ownership Diversity (Score Value: High)

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

Women and/or individuals from underrepresented populations, including low-income communities

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

### Board of Directors Diversity (Score Value: High)

What % of the members of your Board of Directors (or equivalent) are women or individuals from other underrepresented populations?

- 0%
  - 1-9%
  - 10-24%
  - 25-49%
  - 50%+
  - Don't know
  - N/A - No board of directors or equivalent
- 

### Supplier Ownership Diversity (Score Value: High)

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
- 

### Supplier Screen Topics (Score Value: High)

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 negative practices or regulatory non-compliance (e.g. no child labor)
  - Screened for positive practices beyond what is required by regulations (environmentally-friendly manufacturing process; excellent labor practices, etc.)
-

### Low Impact Renewable Energy Use (Score Value: High)

What % of energy use is produced from low-impact renewable sources?

Include electricity and other energy consumption from heating, hot water, etc.

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

### Facility Energy Efficiency (Score Value: Medium)

For which of the following systems have you used energy conservation/ efficiency measures for your corporate facilities in the past year?

- 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

### Mission Lock (Score Value: Very High)

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 Amended Articles of Incorporation)
- Has a specific legal entity/governance structure that preserves mission (i.e. cooperative)
- 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

### Inclusive Business Model (Score Value: Not Scored)

Is your company's business model designed to create a more inclusive economy? If so, which of the following best describes your business model?

- Our product or service is designed to address a specific social problem for underserved individuals, such as access to basic services, health care, education, or economic opportunities
- Our company is at least 40% owned by all of our non-executive workers or suppliers
- Our company focuses on alleviating poverty through its supply chain or distribution networks (for instance through fair trade purchasing or micro-enterprise models)
- Our business model is designed to support and build the economic vitality of our local community through local sourcing, banking, service, ownership, etc.
- Our company has a formal program to hire and train people with chronic barriers to employment.
- Our company has a charitable giving business model focused on donating at least 2% of our revenues specifically to create economic opportunities for under-served groups
- Our product/service promotes climate justice by reducing greenhouse gas emissions
- None of the above

**Other Inclusive Practices** (Score Value: Not Scored)

Recognizing that any list of key metrics will always be incomplete, and the metrics from the BIA as a whole can always be improved, are there other key inclusive metrics that you would like to improve upon?

*We would like to diversify our subcontractor pool.*

---

**Benefit Report Best Practices Questionnaire**

**Public Benefit Description** (Score Value: Not Scored)

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.

*Because we are a communications firm that works exclusively with sustainable businesses and activist nonprofits, all of our wo*

**Specific Benefit Description** (Score Value: Not Scored)

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.

*Our purpose is to create a general public benefit.*

**Extenuating Circumstance** (Score Value: Not Scored)

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

*None.*

**Process For Selecting Third Party** (Score Value: Not Scored)

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

*We use the B Impact Assessment because a) we are a B Corp and b) we believe it is the most complete and rigorous generally*

**Explanation For Change In Third Party** (Score Value: Not Scored)

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

*n/a*

**Connection Between Org And Standards Body** (Score Value: Not Scored)

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.

*n/a*

**Third Party Standard Used** (Score Value: Not Scored)

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

**Different Standards Application** (Score Value: Not Scored)

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

**Benefit Director Name** (Score Value: Not Scored)

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** (Score Value: Not Scored)

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: Address

---

**Benefit Officer Name** (Score Value: Not Scored)

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 Officer: Name

---

**Benefit Officer Address** (Score Value: Not Scored)

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 Officer: Address

---

**Statement From Benefit Director** (Score Value: Not Scored)

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.

---

**Additional Explanation** (Score Value: Not Scored)

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

*The report must include the name of each shareholder that owns 5 percent or more of the outstanding shares of the corporation.*

---

**Benefit Report Best Practices Questionnaire: Information for Investors**

---

**Compensation For Benefit Director** (Score Value: Not Scored)

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

---

**Compensation For Benefit Officer** (Score Value: Not Scored)

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

---