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## Ingeus UK Ltd

Service with Minor Environmental Footprint

250-999 Employees

2017-05-26

As a wholly owned subsidiary of Ingeus Global Group, Ingeus UK Ltd is required to make its full B Impact Assessment transparent. The PDF contains a completed B Impact Assessment that has been reviewed by B Lab with Ingeus UK Ltd for its certification as a B Corporation. Answers to questions that would reveal sensitive information (e.g. that would advantage competitors or prejudice litigation) are covered such as:

# 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: Low)

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.

*The world is changing incredibly fast, creating new opportunities for many people but leaving others behind. Ingeus helps govern*

#### Mission Training (Score Value: Medium)

Which type of employee training does your company provide regarding its social and environmental mission?

Please check all that apply.

- ☐ No social or environmental mission
- ☐ No training on the company's social and environmental mission
- ☐ Only informal inclusion in orientation, training and/or instruction
- ☒ Specific, formal training integrated into new employee and new manager training
- ☒ Specific, formal training integrated into ongoing employee and manager training
- ☐ Workers articulate goals and achievements on social and environmental metrics as an individual or part of a workplace team
- ☐ All supervisors and managers receive training on how to communicate social and environmental goals to employees and implement accountability for results

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

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

- ☐ No
- ☐ Yes - The Board receives a general update on the company's social and/or environmental performance
- ☒ Yes - The Board reviews key performance indicators (KPIs) on the company's social and/or environmental performance
- ☐ N/A - No Board of Directors or equivalent governing body

### Managers with Responsibilities to Mission (Score Value: Medium)

What proportion of full-time managers have social or environmental mission-related responsibilities or expectations outlined in their job description?

- ☐ 0%
- ☒ 1-49%
- ☐ 50-99%
- ☐ 100%

### Social/ Environmental Management Reviews (Score Value: Medium)

What portion of management had a formal written performance evaluation/review in the last year that included social and/or environmental goals?

- ☒ 0
- ☐ 1-49%
- ☐ 50-99%
- ☐ 100%

### Mission-driven Executive Job Descriptions (Score Value: Medium)

Is the compensation of your CEO and those who directly report to the CEO tied to achieving specific social and environmental metrics or objectives?

Please check all that apply.

- ☒ No
- ☐ Yes, CEO/President compensation
- ☐ Yes, other senior management team member(s) compensation

### 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?

Please check all that apply.

- ☐ No formal stakeholder engagement
- ☒ Meetings or other engagement mechanisms with local community members
- ☐ Meetings or other engagement mechanisms with social or environmental advocacy groups
- ☐ Online stakeholder forum to provide/report social or environmental concerns or feedback
- ☒ Third party or anonymous surveys
- ☐ Other (please describe)

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

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

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## Governance Structures (Score Value: Low)

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 quarterly
- ☐ Includes at least 1 independent member
- ☐ Includes at least 50% independent members
- ☐ Oversees executive compensation
- ☒ Reports members names and relation to company transparently to public
- ☐ Has an Audit Committee with at least 1 independent member
- ☐ Has a Compensation Committee with at least 1 independent member
- ☐ Company is a cooperative and elects Board from membership
- ☐ None of the above
- ☐ N/A - Company has no Board of Directors or equivalent

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

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

## Ethics

### Financial Controls (Score Value: Low)

Does the company maintain any of the following financial controls?

Please check all that apply.

- ☐ None
- ☒ IT systems have different password protection systems that are changed periodically with different access levels according to the position of the staff member accessing the data
- ☒ Fraud risk assessment is conducted at least annually and any internal control deficiencies identified are communicated to BoD and senior management.
- ☒ Lines of financial reporting, responsibilities and limits for the authorization, approval and verification of disbursements are all documented in writing
- ☒ Document financial control activities, which at the minimum cover controls around cash disbursement, accounts receivable, accounts payable, and inventory management

### Anti-Corruption Practices (Score Value: Low)

Which of the following anti-corruption reporting and prevention systems are in place?

- ☒ Written employee whistle-blowing policy provides legal protection to workers, with strict confidentiality easily accessible ; circulated to all employees
  - ☒ Helpline or anonymous mechanism to report grievances/concerns
  - ☒ Individual or department oversight with direct access to Board of Directors
  - ☐ Other (please describe)
  - ☐ None of the above
- 

### Instruction on Code of Ethics (Score Value: Low)

Which of the following describes how your company instructs employees regarding your Code of Ethics about behavioral expectations, bribery and corruption?

Please check all that apply.

- ☐ No Code of Business Conduct (or equivalent policy) or training on the Code
  - ☒ We instruct the Board of Directors on the Code at least annually
  - ☒ We instruct all newly hired workers on the Code
  - ☒ We instruct managers on the Code on an on-going basis
  - ☒ We instruct all non-managerial workers on the Code on an ongoing basis
  - ☒ We communicate changes to the Code whenever it is updated
  - ☐ Other (please describe)
- 

### Code of Ethics (Score Value: Low)

Which of the following aspects are covered in your Code of Ethics?

- ☒ Bribes in any form, including kickbacks or gifts, on any portion of contract payments or soft dollar practices are prohibited
- ☒ Formal oversight policy covering direct or indirect political contributions, charitable donations and sponsorships
- ☒ Financial and in-kind contributions to political parties, politicians, lobby groups, charitable organizations and advocacy groups are publicly disclosed
- ☒ Other (please describe)

*Code of Conduct also addresses key ethical behaviours in line with Company values (eg 'Do the Right Thing'), such as honest*

- ☐ None of the above
  - ☐ N/A - No Code of Ethics
- 

### Breached Code of Ethics Breachment Policy (Score Value: Low)

In cases where there are material breaches to the company's Code of Ethics, does the company have formal written guidelines in place for taking the following actions?

- ☐ Breaches, including case details, are reported publicly
  - ☒ Reported breaches are investigated promptly via an independent party
  - ☒ Employees are dismissed or disciplined if found in breach
  - ☒ Contracts with business partners in breach are terminated
  - ☒ Company makes improvements to anti-corruption program based on reported cases
  - ☐ Other (please describe)
  - ☐ None of the above
  - ☐ N/A - No Business Code of Conduct
-

## Conflict of Interest Questionnaire (Score Value: Low)

Is there an annual conflict of interest questionnaire filled out by all board members and officers?

Include members of other governing body if not a Board.

- ☒ Yes  
☐ No  
☐ N/A - No Board of Directors or equivalent
- 

## Transparency

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### Audited Financials (Score Value: High)

Does the company produce financials that are audited annually by an internationally accredited Certified Public Accountant (CPA)?

- ☒ Yes  
☐ No
- 

### Financial Transparency with Employees (Score Value: High)

Does the company have a formal process to share financial information with its full-time employees?

Exclude compensation data. Please check all that apply.

- ☐ No  
☒ Yes - the company shares financial information if employees ask for them  
☒ Yes - the company discloses all financial information (except salary info) at least yearly  
☐ Yes - the company discloses all financial information (except salary info) at least quarterly  
☐ Yes - The company has complete transparency of financial information and formally empowers all employees and departments to actively participate in financial planning (i.e. Open Book Management)  
☐ Yes- In addition to sharing financials the company also has an intentional education program around shared financials
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### Ownership Transparency with Employees (Score Value: High)

Do all full-time employees have access to written information that identifies all material owners and investors of the company?

- ☒ 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
- 

## Governance Metrics

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

On what date did your last fiscal year end?

2016-12-31

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## Reporting Currency (Score Value: Not Scored)

Reporting currency

*British Pound - GBP*

## 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

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

Scored) EBIT (Earnings Before Interest & Taxes)

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

Scored) EBIT (Earnings Before Interest & Taxes)

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

Net Income

## 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

## Workers

### Worker Metrics

**Majority Hourly vs. Salaried Workers** (Score Value: Not Scored)

Are the majority of your employees paid on a fixed salary or a daily/hourly wage?

This is a REQUIRED question that determines the set of additional questions your company will respond to regarding your employee impact. The answer to this question affects questions you'll encounter further on in your assessment.

- ☒ Fixed Salary
- ☐ Daily/Hourly Wage

**# of Full Time Workers** (Score Value: Not Scored)

Number of Total Full-Time Workers

Current Total Full-Time Workers

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

677

**# of Full Time Workers Last Year** (Score Value: Not Scored)

Number of Total Full-Time Workers

Total Full-Time Workers 12 months ago

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

1015

**# of Part Time Workers** (Score Value: Not Scored)

Number of Total Part-Time Workers

Current Total Part-Time Workers

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

125

**# of Part Time Workers Last Year** (Score Value: Not Scored)

Number of Total Part-Time Workers

Total Part-Time Workers 12 months ago

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

178

**# of Temporary Workers** (Score Value: Not Scored)

Number of Total Temporary Workers

Current Total Temporary Workers

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

42

**# of Temporary Workers Last Year** (Score Value: Not Scored)

Number of Total Temporary Workers

Total Temporary Workers 12 months ago

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

**Compensation & Wages**

**Total Wages** (Score Value: Not Scored)

Total Wages (including bonuses)

**Lowest Paid Wage** (Score Value: Not Scored)

What is the company's lowest wage calculated on an hourly basis?

Please exclude students and interns in this calculation.

8.45



### **% Above the Living Wage** (Score Value: High)

What % above living wage did your lowest-paid worker (excluding interns) receive during the last fiscal year?

- ☐ 0% or below
  - ☒ 1-14%
  - ☐ 15-24%
  - ☐ 25%+
  - ☐ N/A - No living wage data available for country of operations
- 

### **High to Low Pay Ratio** (Score Value: High)

What multiple is the highest compensated individual paid (inclusive of bonus) as compared to the lowest paid full-time worker?

- ☐ >20x
  - ☐ 16-20x
  - ☒ 11-15x
  - ☐ 6-10x
  - ☐ 1-5x
- 

### **Market Compensation Comparison** (Score Value: High)

Based on a company referenced compensation study in the last two years, how does your company's compensation structure (excluding executive management) compare with the market?

- ☒ Don't Know: Have not referenced a compensation survey
  - ☐ 1st quartile (0-24th percentile)
  - ☐ 2nd quartile (25-49th percentile)
  - ☐ 3rd quartile (50-74th percentile)
  - ☐ 4th quartile (75-100th percentile)
- 

### **Bonus Plan Characteristics** (Score Value: Medium)

Which of the following are true about the company's bonus plan:

- ☒ Bonuses are given but there is no formal plan
  - ☐ Formal guidelines on the structure of the bonus plan (e.g. eligibility, profit/revenue target tied to the bonus pool, allocation criteria) are disseminated and accessible to all workers
  - ☐ All full-time and part-time workers are eligible in the plan
  - ☐ None of the above
- 

### **Employees Receiving a Bonus** (Score Value: High)

What % of full-time and part-time employees, excluding founders and executives, received a bonus in the last fiscal year?

- ☐ 0%
  - ☒ 1-24%
  - ☐ 25-49%
  - ☐ 50-74%
  - ☐ 75-99%
  - ☐ 100%
  - ☐ N/A
-

## Initiatives To Increase Wages/Benefits (Score Value: High)

If it is not possible to verify a living wage in your country, has your company participated in any leadership initiatives to increase wages or benefits to workers provided in your country/industry?

Examples include commissioning a living wage calculation. Select N/A if living wage already exists.

- ☐ Yes
- ☐ No
- ☒ N/A - Living wage already exists

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## Compensation & Wages (Salaried)

### Non-executive Wage Increases (Score Value: High)

Subtracting for inflation increase, what was the average % increase in wage/salary paid to non-executive workers in the last fiscal year?

Select 0% if average increase was at or below inflation rate.

- ☒ 0-2%
- ☐ 3-5%
- ☐ 6-15%
- ☐ >15%
- ☐ N/A - No workers last year

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### Bonus Plan Characteristics (Score Value: High)

In the last fiscal year, the company's bonus plan for non-executives represented what % of the company's salary base?

Please select 0% if your company did not have bonuses issued.

- ☐ No bonus payout, or no bonus plan
- ☐ <1%
- ☒ 1-5%
- ☐ 6-15%
- ☐ >15%

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## Benefits

### Government Provision Of Healthcare (Score Value: Not Scored)

Which of the following best describes the provision of healthcare in the country where the majority of employees reside?

- ☒ Universal Provision of Basic Healthcare Services (e.g. United Kingdom)
- ☐ Government Mandated or Provided Health Insurance Programs (e.g. Switzerland)
- ☐ None of the Above

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### Healthcare Coverage (Score Value: High)

What % of employees are eligible for health care benefits either through company or government plan?

- ☐ <75%
- ☐ 75-84%
- ☐ 85-94%
- ☒ 95%+

### **Additional Supplementary Benefits** (Score Value: High)

Are any of the following benefits provided to employees to supplement government programs?

- ☐ Disability coverage/ accident insurance
  - ☒ Life insurance
  - ☐ Financial services (credit or savings programs)
  - ☒ Private dental insurance
  - ☒ Private supplemental health insurance
  - ☐ Other (describe)
  - ☐ None of the above
- 

### **Paid Secondary Caregiver Leave** (Score Value: High)

What is the minimum number of weeks tenured workers are offered paid secondary caregiver leave, either through the company or a government plan?

- ☐ None
  - ☒ Up to 2 weeks
  - ☐ 2 to 5 weeks
  - ☐ Greater than 5 weeks
- 

### **Healthcare Eligibility for Part Time Workers** (Score Value: Medium)

How many hours per week must a part-time employee work in order to qualify for the previously-selected benefits?

- ☐ No benefits beyond what is provided under national law
  - ☐ 30+ hours per week
  - ☐ 25-30 hours per week
  - ☐ 20-24 hours per week
  - ☒ <20 hours per week
  - ☐ N/A - No part-time workers
- 

### **Retirement Programs** (Score Value: High)

Do employees have access to any of the following savings programs for retirement?

- ☐ Government-sponsored pension plans
  - ☒ Private Pension or Provident Funds
  - ☒ Plan specifically includes Socially-Responsible Investing option
  - ☐ None of the above
- 

### **Worker Benefits (Salaried)**

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#### **Number of Paid Days Off** (Score Value: High)

How many paid days off (including holidays) do full-time employees receive annually?

- ☐ 0-15 days
  - ☐ 16-22 days
  - ☐ 23-29 days
  - ☒ 30-35 days
  - ☐ 36+ work days
-

## **Paid Primary Caregiver Leave for Salary Workers** (Score Value: High)

What is the minimum number of weeks salaried workers receive paid primary caregiver leave, either through the company or the government?

- ☐ 0-5 weeks
- ☐ 6-11 weeks
- ☐ 12-17 weeks
- ☒ 18-23 weeks
- ☐ 24+ weeks

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## **Training & Education**

### **Intern Hiring Practices** (Score Value: Low)

Which of the following is true of intern hiring practices?

Check all that apply. If there is no third party living wage calculated for your country of operations, please do not select "payment of a living wage."

- ☐ There is a formalized policy/program outlining the objectives of internships or internship programs for participants
- ☐ Company partners with education institutions to provide internship opportunities
- ☐ Interns are paid a living wage
- ☐ Interns receive formal performance reviews
- ☐ Interns have a formal opportunity to provide feedback on experience
- ☐ Interns have been hired on as full time permanent employees in the past two years
- ☐ Intern tenures are restricted to not exceed 1 year if interns are not currently enrolled in school
- ☐ None of the above apply to my intern programs
- ☒ N/A - Company does not employ interns

### **Internal Promotions** (Score Value: Low)

What % of positions above entry level have been filled with internal candidates in the last 12 months?

Exclude material owners in your calculation.

- ☐ 0%
- ☐ 1-24%
- ☒ 25-49%
- ☐ 50-74%
- ☐ 75%+

### **Internal Promotions** (Score Value: Low)

What % of employees have been internally promoted within the last 12 months?

Exclude material owners in your calculation.

- ☐ 0%
- ☐ 1-5%
- ☒ 6-15%
- ☐ >15%

### **Paid Professional Development Days** (Score Value: Low)

How many paid days of professional development do the majority of full time workers receive (in a single year)?

- ☐ No formal policy
- ☐ 0 days
- ☒ 1-4 days
- ☐ 5-9 days
- ☐ 10+ days

## Management Training (Score Value: Low)

Do new and existing managers get regular training and coaching on the following?

Check all that apply.

- ☒ Providing ongoing praise and corrective feedback
- ☒ Conflict negotiation and resolution
- ☒ Group dynamics and optimal team functioning
- ☒ Performance evaluation systems
- ☒ Other (please describe)

*Coaching, effective communication and presentation skills, inspiring and motivating teams, problem solving, managing d*

- ☐ None of the above

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## Training & Education (Salaried)

### Skills-Based Training Participation (Score Value: Low)

Excluding newly hired workers, what % of full-time and part-time workers received the following types of formal training during the last 12 months?

Skills-based training to advance core job responsibilities

- ☐ 0%
- ☐ 1-24%
- ☒ 25-49%
- ☐ 50-74%
- ☐ 75%+
- ☐ Don't know

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### Providing Cross-Job Skills Training (Score Value: Low)

Excluding newly hired workers, what % of full-time and part-time workers received the following types of formal training during the last 12 months?

Skills-based training on cross-job functions (i.e. training beyond regular job responsibilities, e.g. public speaking training or management training for non-managers)

- ☐ 0%
- ☒ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ 75%+
- ☐ Don't know

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### Life Skill Training Participation (Score Value: Low)

Excluding newly hired workers, what % of full-time and part-time workers received the following types of formal training during the last 12 months?

Training on life skills for personal development (i.e. literacy, personal financial planning, etc.)

- ☐ 0%
- ☐ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ 75%+
- ☒ Don't know

### External Professional Development Participation (Score Value: Low)

What % of full-time workers have participated in external professional development opportunities or lifelong learning opportunities in the past fiscal year?

Include only those that are paid for in advance, reimbursed or subsidized by the company.

- ☐ 0%
- ☐ 1-24%
- ☒ 25-49%
- ☐ 50-74%
- ☐ 75%+
- 

### Subsidized Educational Opportunities (Score Value: Low)

What % of full-time workers received advancement or reimbursement for continuing education opportunities in the last fiscal year?

Continuing education opportunities include GED, college credits, industry-recognized accreditation, etc.

- ☐ 0
- ☒ 1-5%
- ☐ 6-15%
- ☐ >15%
- 

### Outplacement Services (Score Value: Low)

For what % of terminated full-time employees are formal outplacement services provided?

Exclude employees terminated with cause.

- ☐ 0%
- ☐ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☒ 75%+
- 

## Worker Ownership

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### % Participation in Employee Ownership (Score Value: High)

What % of all full-time employees have been granted stock, stock options or stock equivalents (including participation in an ESOP or other qualified ownership plans) in the company?

Select N/A if your company is a consumer/shared services cooperative, a producer cooperative or a nonprofit.

- ☐ 0%
- ☒ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ 75-99%
- ☐ 100%
- ☐ N/A
-

## Employee Ownership (Score Value: High)

What % of the company is owned or formally reserved as part of a written plan for full-time workers and management (including founders/executives)?

Select N/A if your company is a consumer/shared services cooperative, a producer cooperative or a nonprofit.

- ☒ 0%
  - ☐ 1-24%
  - ☐ 25-49%
  - ☐ 50-74%
  - ☐ 75-99%
  - ☐ 100%
  - ☐ N/A
  - ☐ Don't Know
- 

## % of Company Owned by Non-Executive Employees (Score Value: High)

What % of the company is owned by full-time workers who are non-executive employees and non-founders?

Select N/A if your company is a consumer/shared services cooperative, a producer cooperative or a nonprofit.

- ☒ 0%
  - ☐ 1-4%
  - ☐ 5-24%
  - ☐ 25-49%
  - ☐ 50%+
  - ☐ N/A
  - ☐ Don't Know
- 

## Management & Worker Communication

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### Employee Review Process (Score Value: Medium)

Is there a formal consistent process for providing performance feedback to all tenured employees which includes any of the following?

Check all that apply.

- ☒ Is conducted on at least an annual basis
  - ☒ Includes peer and subordinate input
  - ☒ Provides written guidance for career development
  - ☒ Includes social and environmental goals
  - ☒ Clearly identifies achievable goals
  - ☒ Follows a 360-degree feedback process
  - ☐ None of the above
-

### Employee Handbook Information (Score Value: Low)

Does your company have a written employee handbook that workers have access to and includes any of the following information?

Check all that apply.

- ☐ No written employee handbook
  - ☒ A non-discrimination statement
  - ☒ An anti-harassment policy
  - ☒ Statement on work hours
  - ☒ Pay and performance issues
  - ☒ Policies on benefits, training and leave
  - ☒ Grievance resolution
  - ☒ Disciplinary procedures and possible sanctions
  - ☐ Statement regarding workers' right to bargain collectively and freedom of association
  - ☒ Prohibition of child labor and forced/compulsory labor
- 

### Employee Satisfaction (Score Value: Medium)

What percent of your employees are 'Satisfied' or 'Engaged'?

Select N/A if satisfaction or engagement is not formally surveyed.

- ☐ N/A
  - ☐ <65%
  - ☒ 65-80%
  - ☐ 81-90%
  - ☐ >90%
- 

### Employee Metric Transparency (Score Value: Low)

Which of the following employee metrics are regularly collected, monitored and made transparent to all employees?

- ☒ Retention and turnover metrics
  - ☒ Diversity metrics
  - ☐ None
- 

### Termination Policy (Score Value: Medium)

Which of the following is included in your company's termination policy?

Exclude situations requiring immediate dismissal / with cause.

- ☐ No written notice required prior to termination
  - ☐ Required written notice of worker performance only
  - ☒ Required written notice of worker performance and a stated probationary period
  - ☐ N/A - No written termination policy
- 

## Management & Worker Communication (Salaried)

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### Average Tenure (Score Value: Low)

What is the average tenure of your current workforce?

- ☐ <12 months
  - ☐ 1-3 years
  - ☒ 3-5 years
  - ☐ >5 years
- 

## Job Flexibility/Corporate Culture

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## Health and Wellness Initiatives (Score Value: Medium)

Do company policies support any of the following health and wellness initiatives above insurer-provided programs?

Check all that apply.

- ☐ Company does not offer any formal health and wellness initiatives
- ☒ Company sponsors and encourages workers to participate in health and wellness activities during the workweek (i.e. walking or steps programs)
- ☒ Company offers incentives for workers to complete health risk assessments or participate in health and wellness activities (e.g., a fund for exercise equipment, subsidized gym membership, etc.)
- ☐ Over 25% of workers have completed a health risk assessment in the last 12 months
- ☒ Employees have access to behavioral health counseling services, web resources or Employee Assistance Programs
- ☒ Spouses, partners, or children of employees provided access to behavioral health counseling services, web resources or Employee Assistance Programs
- ☒ Company has policies and programs in place to prevent ergonomic-related injuries in the workspace
- ☐ Management receives reports on aggregate participation in worker wellness programs
- ☐ Other (please describe)

## Job Flexibility/Corporate Culture (Salaried)

### Worker Flexibility Options (Score Value: Medium)

Does the company offer any of the following job flexibility options, whenever feasible, in writing and in practice for the majority of workers?

Please check all that apply.

- ☒ Part-time work schedules at the request of workers
- ☒ Flex-time work schedules (allowing freedom to vary start and stop times)
- ☒ Telecommuting (working from home one or more days per week)
- ☒ Job-sharing
- ☐ None of the above

### Workplace Flexibility in Practice (Score Value: Medium)

Which of the following flexible workplace practices occurred in the past 12 months?

Please check all that apply.

- ☐ Managers or executives worked part-time or in a job-share
- ☒ Managers or executives are in a telecommuting position
- ☒ We hired new people into permanent positions that are telecommuting
- ☒ We hired new people into permanent positions that are part-time or job-share
- ☒ We have transitioned staff into part-time, job-share, or telecommuting positions
- ☐ Other (please describe)
- ☐ None of the above

### Supplementary Benefits (Score Value: Medium)

Which of the following supplementary benefits are offered to employees?

Please check all that apply.

- ☐ Onsite childcare
- ☒ Offsite subsidized child care
- ☒ Counseling services
- ☐ Free or subsidized meal
- ☐ Policy to support breastfeeding mothers
- ☒ Other (please describe)

*Lifestyle discounted platform*

- ☐ None

## Career Development Policies (Score Value: Low)

Which of the following are true of career development and promotion policies and practices?

- ☒ Employees who seek to take a short-term leave/sabbatical will have his/her job guaranteed upon return
- ☒ Efforts will be made to find a place for employees who seek to take a long-term leave/sabbatical upon return
- ☒ Employees are able to make lateral moves or change career direction or pace when possible
- ☐ None of the above

---

## Worker Business Models Introduction

### Impact Business Model: Worker Ownership (Score Value: Not Scored)

Is your company structured to benefit its employees in the following way?

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

- ☐ Ownership structures that provide significant equity (>40%) and empowerment to all employees (i.e. employee-owned companies/cooperative)
- ☒ No

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## Community

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### Job Creation

#### New Jobs Added Last Year (Score Value: Not Scored)

Number of full-time and part-time jobs that have been added to your company's payroll. Enter 0 if none or if your company has no workers.

Last 12 months:

-391

#### New Jobs Added Year Before Last (Score Value: Not Scored)

Number of full-time and part-time jobs that have been added to your company's payroll. Enter 0 if none or if your company has no workers.

Prior 12 months:

#### Job Growth Rate (Score Value: High)

By what % has your worker base grown over the last 12 months?

- ☒ 0% (Has not grown on a net basis)
- ☐ 1-5%
- ☐ 6-15%
- ☐ >15%

#### Departed Employees (Score Value: Not Scored)

Number of full-time and part-time workers that departed/left the company during the last 12 months.

Enter 0 if None. Select N/A only if there are no workers.

620

#### Attrition Rate (Score Value: High)

What was the attrition rate at the company for full-time and tenured part-time workers for the last 12 months?

Exclude workers terminated with cause.

### Workers from Low-Income Areas (Score Value: High)

What % of workers (including full-time and part-time and temporary workers) are verified/self-identified to be a part of the following groups?

Individuals residing in a low income area

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

### Workers from Underemployed Groups (Score Value: High)

What % of workers (including full-time and part-time and temporary workers) are verified/self-identified to be a part of the following groups?

Other chronically underemployed populations (e.g. individuals who are formerly incarcerated or homeless)

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

### Facilities in Low-Income Communities (Score Value: High)

What % of your workers are employed in company facilities located in low-income communities?

- ☐ <10%
- ☐ 10-19%
- ☒ 20-29%
- ☐ 30%+
- ☐ Don't Know

## Diversity & Inclusion

---

### Female Employees (Score Value: Not Scored)

Number of total full-time and part-time female employees.

Enter 0 if None. Select N/A only if there are no workers.

507

### Nonprofit Ownership (Score Value: Medium)

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

Nonprofit organization(s)

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

### Ownership Diversity (Score Value: Medium)

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

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

- ☐ 0%
- ☐ 1-4%
- ☐ 5-14%
- ☐ 15-24%
- ☐ 25%+
- ☒ Don't know

### Non-accredited Investor Ownership (Score Value: Medium)

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

Individuals that qualify as non-accredited investors

- ☐ 0%
- ☐ 1-4%
- ☐ 5-14%
- ☐ 15-24%
- ☐ 25%+
- ☒ 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

### 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

### 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.)

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

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

66

### 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

### 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

### 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.)

33

### Management from Underemployed Groups (Score Value: Medium)

What % of management are women and/or individuals from underrepresented populations, including low-income communities?

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

### Female Management (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of management is from the following groups?

Women

### Managers from Low-Income Areas (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of management is from the following groups?

Low income communities

### Managers from Underrepresented Groups (Score Value: Not Scored)

Optional unweighted metrics: Approximately what % of management is from the following groups?

Other underrepresented populations (eg - minorities, LGBT community, individuals with disabilities, etc.)

### Ethnic Diversity Compared to Area (Score Value: Medium)

Does the % of ethnic minorities employed at your company equal or exceed the % of ethnic minorities in your metro area?

Percentage should be based on census or other government demographic data.

- ☐ No
- ☒ Yes
- ☐ N/A- Ethnic data is not available or illegal to be tracked in your area

### Managing Gender Pay Equity Managers (Score Value: Medium)

Is average compensation for men and women equal in comparable managerial and non-managerial roles?

Managerial

Allow a 5% margin of error while calculating. For more information on calculating, see Explain.

- ☒ Yes
  - ☐ No
  - ☐ Don't know
  - ☐ N/A - Only one gender represented
- 

### Managing Gender Pay Equity for Non-Managers (Score Value: Medium)

Is average compensation for men and women equal in comparable managerial and non-managerial roles?

Non-managerial

Allow a 5% margin of error while calculating. For more information on calculating, see Explain.

- ☒ Yes
  - ☐ No
  - ☐ Don't know
  - ☐ N/A - Only one gender represented
- 

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

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: Medium)

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
- 

### Diversity and Inclusion Training (Score Value: Medium)

Does the company provide specific content in worker training on inclusion and diversity issues related to any of the following specific underrepresented groups?

Check all that apply.

- ☒ Gender inclusiveness
- ☒ Minorities
- ☒ LGBT community
- ☒ Individuals with disabilities
- ☒ Other underrepresented groups (please describe)

*In line with the UK Equality Act 2010 we comply with the nine Protected Characteristics; age, gender, disability, gender re*

- ☐ None of the Above
- 

### Civic Engagement & Giving

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### Corporate Citizenship Program (Score Value: Medium)

Does your company have a formal corporate citizenship program (with allocated resources) in place that includes the following:

- ☒ Statement on the intended social or environmental impact of company's charitable contributions
- ☒ Cash and in-kind donations (excluding political causes)
- ☒ Volunteer and pro bono service
- ☐ Formal donations commitment (e.g. 1% for the planet)
- ☒ Matching individual workers' charitable donations
- ☒ Allowing workers and/or customers to select charities to receive company's donations
- ☐ Other (please describe)
- ☐ None of the above

### Volunteer Service Policies (Score Value: Medium)

Are full-time employees granted in writing any of the following options for volunteer service?

- ☐ Non-paid time off
- ☒ Paid time off
- ☐ 20 hours or more a year of paid time off
- ☐ Workers offered incentives for volunteerism (office parties, competitions with prizes, etc.)
- ☐ Do not offer paid or unpaid time off

### % of Employees Volunteer Service (Score Value: Medium)

What % of employees took paid time off for volunteer service last year?

- ☐ 0%
- ☒ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ >75%
- ☐ Don't know

### Tracking Volunteer Service (Score Value: Medium)

Does your company monitor and record volunteer hours of company workers?

- ☐ We do not currently monitor and record our hours contributed
- ☒ Our company monitors and records hours contributed (no increase targets)
- ☐ Our company monitors hours contributed and has specific increase targets
- ☐ Our company monitors hours contributed and has met specific increase targets during the reporting period

### 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.

1615

### 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.

### % of Revenue Donated (Score Value: 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?

*Year after year our people continue to surpass all expectations with their generosity and commitment when it comes to giving back.*

### Community Service and Charitable Practices (Score Value: Medium)

Which of the following volunteer and charitable giving practices did your company employ in the last fiscal year?

Check all that apply.

- ☐ Company contributed the majority of its cash, service and in-kind donations to local markets it sourced from or operates in
- ☐ Company has public facing partnership with a service/charitable organizations
- ☐ Company provided facilities for community events or trainings
- ☐ Other innovative engagement practices (please describe)
- ☒ None of the above

### Advocacy for Social and Environmental Standards (Score Value: Medium)

Has your company worked with policymakers and/or stakeholders (including competitors) to develop or advocate for increased adoption of social and environmental standards or voluntary practices in your industry in the past two years?

- ☐ Yes, company has offered support in name and/or signed petitions
- ☐ Yes, company has provided active staff time or financial support
- ☐ Yes, company has directly introduced, testified, made recommendations or provided expertise to advance standards
- ☐ Yes, company has worked with other industry players on a cooperative initiative
- ☐ Yes, and efforts resulted in a specific institutional, industry or regulatory reform
- ☐ Other (please describe)
- ☒ None of the above



## Local Involvement

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### 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.

*Ingeus helps to create strong societies in which citizens have the independence, knowledge and know-how to thrive. Our business*

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### Local Purchasing and Hiring Policies (Score Value: High)

Does the company have the following written local purchasing or hiring policies in place?

- ☒ No written local purchasing or hiring policy in place
  - ☐ Written preference at each facility to purchase from local suppliers
  - ☐ Ready-to-use lists of preferred local suppliers/vendors for specific facilities
  - ☐ Written preference for hiring and recruiting local managers
  - ☐ Incentives for staff to live within 20 miles of local company facility
  - ☐ Other (please describe)
- 

### Spending on Local Suppliers (Score Value: 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
- 

### Local Ownership (Score Value: High)

Is the majority (over 50%) of the company's ownership located locally to the majority of the company's workforce?

- ☐ Yes
  - ☒ No
  - ☐ Don't know
- 

### Impactful Banking Services (Score Value: 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

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### 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

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### 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

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### Land, Office, Plant

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#### 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
- 

#### Previously Constructed Buildings (Score Value: Medium)

What % of the square footage of all company facilities is located in previously constructed buildings?

Select N/A if your company utilize virtual office.

- ☐ 0%
  - ☐ 1-24%
  - ☐ 25-49%
  - ☐ 50-74%
  - ☐ 75-99%
  - ☒ 100%
  - ☐ N/A
-

## Recycling Programs (Score Value: Medium)

What % of your facilities on a square foot basis have a facility-wide recycling program that has ongoing collection of at least all standard materials in your area?

See Explain This for definition.

- ☐ <20%
- ☐ 21-40%
- ☐ 41-60%
- ☐ 61-80%
- ☒ >80%

## 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

## Environmental Purchasing Policy Topics (Score Value: Medium)

Does the company have a written and circulated environmentally preferable purchasing (EPP) policy that includes any of the following?

- ☐ Building and construction
- ☐ Carpets
- ☐ Cleaning
- ☐ Electronics
- ☐ Fleets
- ☐ Food or food services
- ☐ Landscaping
- ☐ Meetings and conferences
- ☐ Office supplies
- ☐ Paper
- ☐ Product input materials
- ☐ Other (please describe)
- ☒ N/A - No environmentally preferable purchasing policy

N/A

### Reducing Impact of Travel/Commuting (Score Value: Medium)

Does your company have any programs or policies in place to reduce the environmental footprint caused by travel/commuting?

- ☐ Employees are subsidized/incentivized for use of public transportation, carpooling, or biking to work
- ☒ Facilities are designed to facilitate use of public transportation, biking, or cleaner burning vehicles (e.g. electric chargers)
- ☒ Employees are encouraged to use virtual meeting technology to reduce in person meetings
- ☐ Company has a written policy limiting corporate travel
- ☐ None of the above

### Indoor Air Quality Monitoring (Score Value: Medium)

Does the company monitor indoor environmental quality to ensure a healthy and comfortable work space, avoiding "Sick Building Syndrome"?

Select N/A if you have no facilities.

- ☐ Yes
- ☒ No
- ☐ NA

### Indoor Air Quality Audits (Score Value: Medium)

Do you conduct an annual indoor air quality audit of your facilities that includes the following?

Select all options that apply.

- ☐ No smoking within 25 feet of building entrances
- ☐ Compliance with the following criteria in ASHRAE Standard 62.1 1010, Ventilation for Acceptable Indoor Air Quality: Ventilation rates for applicable spaces meeting combined outdoor air rate in cfm per person shown in Table 6.1 (Compliance may be shown through CO2 measurement, BMS data or volumetric measurements.)
- ☐ Compliance with Table 5.1, Air Intake Minimum Separation Distances
- ☐ Compliance with Operations and Maintenance Section 8 via documented O&M records
- ☐ HVAC Filters - ASHRAE 52.1 2007 MERV rating of at least 8, with no air by pass
- ☐ Temperature and relative humidity levels in compliance with ASHRAE Standard 55
- ☐ Written IAQ Compliant response policy
- ☒ None of the above

### 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 our usage
- ☐ We monitor and record usage (no reduction targets)
- ☐ We monitor and report usage, and have specific reduction targets
- ☐ We monitor and record, set reduction targets and report progress on targets annually to a voluntary public reporting program
- ☐ We have met or exceeded those targets in the last FY

### 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 report usage, and have specific reduction targets
- ☐ We monitor and record, set reduction targets and report progress on targets annually to a voluntary public reporting program
- ☐ We have met or exceeded those targets in the last FY

### 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

### Energy Use Reductions (Score Value: Medium)

Have conservation and efficiency improvements led to energy savings for your facilities? If so, by how much?

Please calculate based on changes from last year or annualized from a base year, referring to electricity use and other energy consumption from heating, hot water, etc.

- ☐ 0%
- ☐ 1-4%
- ☐ 5-9%
- ☐ 10-14%
- ☐ 15-20%
- ☐ >20%
- ☒ Don't know

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

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 each of your corporate facilities/locations (by majority of square feet) 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
- 

## 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: Medium)

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:

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

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

---

### Carbon Intensity (Score Value: Medium)

What is your current Carbon Intensity for Scopes 1 and 2 (measured in metric tons of CO2/\$million of revenue), not including the use of carbon credits or offsets?

- ☐ >100
- ☐ 81-100
- ☐ 61-80
- ☐ 41-60
- ☐ 21-40
- ☐ 1-20
- ☐ 0
- ☒ Don't know

### Greenhouse Gas Emissions Reduced (Score Value: Medium)

What % of Scopes 1 and 2 GHG emissions has been saved due to efficiency improvements implemented by your company?

- ☐ 0%
- ☐ 1-4%
- ☐ 5-9%
- ☐ 10-14%
- ☐ 15-20%
- ☐ >20%
- ☒ Don't Know

### % GHG Emissions Offset (Score Value: Low)

If your company purchased certified carbon credits in the reporting period, what % of GHG emissions were off-set?

- ☐ 0%
- ☐ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ 75-99%
- ☐ 100%
- ☐ Don't know
- ☒ N/A - No carbon offsets purchased

### Hazardous Waste Disposal (Score Value: Medium)

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

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### 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

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## Customer Models Introduction

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### 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?

*In line with our explicit social purpose of supporting people to improve their lives and achieve better outcomes, Ingeus works w*

---

### 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:

79342

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

Total Number of Customers  
Organizations:

2104

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## Health & Wellness Improvement

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## Health Product Description (Score Value: Not Scored)

Which of the following best describes your health related product or service?

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

- ☐ Our product reduces health risk, such as by producing healthy alternatives to products that are traditionally unhealthy or toxic to consumers (healthy food alternatives that meet rigorous government standards, BPA free, etc.)
- ☒ Our product/service contributes to the positive development of individual health and well-being (wellness programs, sporting equipment)
- ☐ Our product/service supports healthcare through improving the efficiency or access to healthcare systems (health insurance, drug tracking, hospital equipment, etc.)
- ☐ Our product/service directly provides healthcare that cures or prevents illness/disability
- ☐ None of the above

## Severity Of Health Issue Addressed (Score Value: Not Scored)

What is the severity of the health issue or issues addressed by your product/service?

Please click on the Help Text icon for instructions The answer to this question affects questions you'll encounter further on in your assessment.

- ☐ Low
- ☐ Mid
- ☒ High
- ☐ My product/service enables healthcare that cures or prevents illnesses/disabilities of all kinds
- ☐ My product/service does not address a particular ailment, it contributes to overall positive health outcomes
- ☐ Don't know

## Extent of Positive Health Outcomes (Score Value: Not Scored)

Which of the following best describes the extent to which your product/service contributes to the positive health outcome?

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

- ☐ My product/service has been demonstrated to effectively and substantially address the stated health problem, independent of other factors
- ☒ My product contributes to the stated positive health outcome, but does so dependent upon other resources/circumstance outside of our control

## Revenue from Health Product/Service (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.

216657

## 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

3541

## 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

1453

## 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

1

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

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

All participants are tracked via our CRM system, Iaptus, from programme start through to completion. Data is submitted to the

## Verification of Health Outcomes (Score Value: High)

How do you verify that your product 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 Health Product/Service (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 Health Products (Score Value: Not Scored)

Is there something different or innovative about the company's health product/service 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?

Ingeus' approach to delivering 'Healthier You', the NHS Diabetes Prevention Programme (NDPP), reflects a highly innovative pa

## 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

## Education

### Education Product/Service Overview (Score Value: Not Scored)

Please tell us more about how your product or service promotes education or professional development and advancement.

Ingeus is the second largest provider of the National Citizen Service (NCS), a flagship government programme that provides a t

## Education Product/Service Description (Score Value: Not Scored)

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

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

- ☐ Products/services offer or promote access to general knowledge (e.g. books, generalized information)
- ☐ Products/services support education or education/professional development initiatives (e.g. educational toys, grading software)
- ☐ Products/services provide ongoing professional development and advancement of knowledge (training programs for professionals, service learning, textbooks, specialized research or scientific journals)
- ☒ Products/ services provide essential educational credentials and academic development (primary or secondary school, accredited trade schools and career training, etc.)
- ☐ 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

15193

## 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

547

## 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

1

## Duration of Education Program (Score Value: Not Scored)

If relevant, provide the average length in number of days of your education program. Provide a brief description on how you calculated this.

*Youth Services- The programme runs for 28 days (based on 4 consecutive weeks) during summer holidays. Skills Division- On a*

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

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

*Skills Division - All learners tracked via our CRM system, Maytas, from programme start through to completion. Information inc.*

## Revenues from Education (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.

8826332

## Verification of Education (Score Value: Medium)

How do you verify that your product 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 Education Product/Service (Score Value: Medium)

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 Educational Product/Service (Score Value: Not Scored)

Is there something different or innovative about the company's education product/service 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?

*Prior to launching our Youth Services division we conducted extensive research in partnership with The Mix to ensure that the p*

## Negative Impact Management (Score Value: Medium)

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

- ☐ Yes
- ☒ No

## Economic Empowerment for the Underserved

### Economic Empowerment Product/Service Overview (Score Value: Not Scored)

Tell us more about how your product or service provides or improves economic opportunity and empowerment for individuals and/or communities.

*As a provider of people centered services we strive to ensure that all our services (be they employment programmes, assisting*

### Economic Empowerment Product/Service Description (Score Value: Not Scored)

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

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

- ☐ Products/services create economic opportunity for low-income/under-served individuals as a by-product and are designed for another purpose (e.g. worker benefits consulting, affordable quality day care)
- ☒ Products/services create core economic opportunity for low-income/under-served individuals (e.g. financial literacy, micro insurance, urban planning, legal services for under-served, employment firms)
- ☐ 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

60585

### 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

104

### 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

3

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

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

*Every interaction or intervention is captured via our CRM system, IngeusWorks. Analysts track cohorts of participants as they n*

### Revenue from Economic Empowerment (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.

76937100

### Verification of Economic Opportunity/Empowerment (Score Value: Medium)

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
- ☐ We cannot provide verification of our outcomes at this time.
- ☐ Our product is too early stage to have research or studies that link our product to positive outcomes

### Efficacy of Economic Empowerment (Score Value: Medium)

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 Economic Empowerment (Score Value: Not Scored)

Is there something different or innovative about the company's products/services 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?

*We provide integrated professional health support alongside our employability services. This approach has subsequently been*

### Negative Impact Management (Score Value: Medium)

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.

*The end-users of services delivered by Ingeus in the UK are - long term unemployed, - long term unemployed with health issue.*

### 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 to 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

*Offenders and ex-offenders*

- ☐ 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)?

77153757

### % 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.

74



### **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

79342

### **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

3

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

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

*Our tracking process involves a comprehensive and integrated service from initial referral/engagement until outcomes have been achieved.*

### **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.

*We have commissioned a number of research projects to support the development of our services and have developed new on*

### **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.

*Does not apply*

### Disclosure Practices

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#### 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/Suppliers Employ Under Age 15 (Or Other ILO Minimum Age) (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 workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138 ) and/or company does not keep personnel records that include evidence of the date of birth of each

- ☐ Yes  
☒ No

#### Overtime For Hourly Workers Is Compulsory (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."  
Overtime work for hourly workers is compulsory

- ☐ 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
- 

### Company prohibits freedom of association/collective bargaining (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 prohibits workers from freely associating and bargaining collectively for the terms of one's employment

- ☐ 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.

*Does not apply*

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## Disclosure Outcomes

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### 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.

*Does not apply*

### 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 Regarding Company's Employee Safety (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.  
Employee safety or workplace conditions

- ☐ 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.

*Does not apply*

## 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

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#### 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*

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# Inclusive Economy Challenge

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## Inclusive Economy Challenge (Developed Markets)

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### Majority Hourly vs. Salaried Workers (Score Value: Not Scored)

Are the majority of your employees paid on a fixed salary or a daily/hourly wage?

This is a REQUIRED question that determines the set of additional questions your company will respond to regarding your employee impact. The answer to this question affects questions you'll encounter further on in your assessment.

- ☒ Fixed Salary
- ☐ Daily/Hourly Wage
- 

### % Above the Living Wage (Score Value: High)

What % above living wage did your lowest-paid worker (excluding interns) receive during the last fiscal year?

- ☐ 0% or below
- ☒ 1-14%
- ☐ 15-24%
- ☐ 25%+
- ☐ N/A - No living wage data available for country of operations
- 

### Additional Supplementary Benefits (Score Value: High)

Are any of the following benefits provided to employees to supplement government programs?

- ☐ Disability coverage/ accident insurance
- ☒ Life insurance
- ☐ Financial services (credit or savings programs)
- ☒ Private dental insurance
- ☒ Private supplemental health insurance
- ☐ Other (describe)
- ☐ None of the above
- 

### Financial Services for Employees (Score Value: Not Scored)

Does the company provide any of the following financial products, programs, or services that help to meet financial health needs of employees?

- ☐ Direct deposit
- ☐ Access to free or affordable banking services and/or payroll cards, e.g. free ATM debit card
- ☐ Financial management tools or coaching
- ☐ Emergency or short-term savings programs
- ☐ Low-interest or interest free loans
- ☐ Debt management, refinancing, or loan payment contributions
- ☐ Employer match for deposits into savings accounts
- ☐ Issue paychecks off schedule on a need basis
- ☐ Tax preparation services
- ☐ Other (please describe)
- ☐ None of the above
-

### Initiatives To Increase Wages/Benefits (Score Value: High)

If it is not possible to verify a living wage in your country, has your company participated in any leadership initiatives to increase wages or benefits to workers provided in your country/industry?

Examples include commissioning a living wage calculation. Select N/A if living wage already exists.

- ☐ Yes
- ☐ No
- ☒ N/A - Living wage already exists

### % of Company Owned by Non-Executive Employees (Score Value: High)

What % of the company is owned by full-time workers who are non-executive employees and non-founders?

Select N/A if your company is a consumer/shared services cooperative, a producer cooperative or a nonprofit.

- ☒ 0%
- ☐ 1-4%
- ☐ 5-24%
- ☐ 25-49%
- ☐ 50%+
- ☐ N/A
- ☐ Don't Know

### Inclusive Hiring Practices (Score Value: Not Scored)

Does your company do any of the following with regards to an inclusive recruiting and hiring process?

- ☐ Company includes statement in all job postings with a commitment to diversity, equity, and/or inclusion
- ☐ Company does not ask about incarceration history during application process
- ☐ Company conducts anonymous or "blind" reviews of applications and/or resumes without reviewing names or identifiable characteristics
- ☐ Company actively recruits through organizations or services that are designed for individuals from underrepresented populations
- ☐ Company conducts analysis of job description language and job requirements to confirm or improve diversity, equity and inclusion
- ☐ None of the above

### Worker Flexibility Options (Score Value: Medium)

Does the company offer any of the following job flexibility options, whenever feasible, in writing and in practice for the majority of workers?

Please check all that apply.

- ☒ Part-time work schedules at the request of workers
- ☒ Flex-time work schedules (allowing freedom to vary start and stop times)
- ☒ Telecommuting (working from home one or more days per week)
- ☒ Job-sharing
- ☐ None of the above

### Diversity & Inclusion Trainings (Score Value: Not Scored)

Does the company provide specific content in worker training on diversity, equity, and inclusion that includes any of the following topics?

- ☐ Discrimination and harassment training
- ☐ Definitions of diversity, equity and inclusion, as well as other key concepts related to an inclusive workplace
- ☐ Unconscious bias training
- ☐ Structural /institutional inequalities training
- ☐ Cultural awareness, competency, and/or resolving inter-cultural conflict training
- ☐ Empathy and/or emotional intelligence training
- ☐ Management / leadership for diversity, equity and inclusion
- ☐ Other (please describe)
- ☐ None of the above

### Management of Diversity, Equity, and Inclusion (Score Value: Not Scored)

Does your company do any of the following to manage and improve the diversity, equity, and inclusion of your workplace?

- ☐ Company anonymously surveys employees on gender identity, race/ethnicity, disability status and/or other demographic factors to measure the diversity of its workforce
- ☐ Company has set specific, measurable diversity improvement goals that are reviewed by senior executives and/or a Board of Directors
- ☐ Company has conducted a pay equity analysis by gender, race/ethnicity, and/or other demographic factors and, if necessary, implemented equal compensation improvement plans or policies
- ☐ Company analyzes job satisfaction, promotion, retention rates, and/or benefits by different demographic groups
- ☐ Company analyzes diversity, equity and inclusion data to metrics for individuals who identify as part of multiple underrepresented groups in addition to a single group, i.e. intersectionality
- ☐ None of the above
- ☐ N/A - Company is not legally allowed to collect demographic data

### Inclusive Work Environments (Score Value: Not Scored)

Does your company do any of the following to create an equitable and inclusive workplace for employees?

- ☐ Company has designated an individual or group explicitly responsible for diversity, equity and inclusion (i.e. a Diversity Manager and/or Diversity Committee)
- ☐ Company has voluntary employee resource or affinity groups to provide employee support and promote inclusion
- ☐ Company facilities are designed to meet accessibility requirements for individuals with physical disabilities
- ☐ Facility restrooms are gender neutral or gender inclusive
- ☐ Company has programs in place to provide mentorship, apprenticeships, internships, etc. for individuals from underrepresented groups
- ☐ Company accommodates learning and/or emotional disabilities in work processes and workplace policies
- ☐ Other (please describe)
- ☐ None of the above

### Management from Underemployed Groups (Score Value: Medium)

What % of management are women and/or individuals from underrepresented populations, including low-income communities?

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

### Ownership Diversity (Score Value: Medium)

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

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

- ☐ 0%
- ☐ 1-4%
- ☐ 5-14%
- ☐ 15-24%
- ☐ 25%+
- ☒ Don't know

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

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: Medium)

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.)

### Product and Marketing Inclusion and Accessibility (Score Value: Not Scored)

Does your company do any of the following to make your products and/or marketing materials more inclusive or accessible?

- ☐ Company's public website meets accessibility standards for individuals with disabilities, such as the Web Content Accessibility Guidelines 2.0
- ☐ Company has a written marketing and communications policy addressing diversity, equity, and inclusion
- ☐ Company monitors language and images in its marketing and communications to avoid bias and reflect diversity, equity, and inclusion
- ☐ Company formally incorporated inclusion and accessibility into the design process for products/services themselves
- ☐ Company has external feedback mechanisms to improve inclusion and accessibility of marketing and communications
- ☐ Other (please describe)
- ☐ None of the above

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

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 each of your corporate facilities/locations (by majority of square feet) 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

### GHG Inventory (Score Value: Not Scored)

Have you conducted an inventory of GHG emissions for the following aspects of your company in order to identify the most intensive sources and set strategies for improvement?

- ☐ Yes, for Scope 1 (emissions from sources that are owned or controlled by the company)
- ☐ Yes, for Scope 2 (indirect emissions from the consumption of purchased electricity, heat or steam)
- ☐ Yes, for Scope 3 (Other indirect emissions)
- ☐ Yes, for entire product life cycle
- ☐ No
- ☐ Don't Know

### GHG Targets and Improvement (Score Value: Not Scored)

Which of the following describes the way the company manages its greenhouse gas emissions for at least Scope 1 and 2?

- ☐ We do not currently monitor and record emissions
- ☐ We regularly monitor and record emissions but have not set any reduction targets
- ☐ We regularly monitor and record emissions and have set specific reduction targets relative to previous performance (e.g. 5% reduction of GHGs from baseline year)
- ☐ We regularly monitor and record emissions and have set specific science based targets necessary to achieve global goals address climate change
- ☐ We have met the specific reduction targets set during this reporting period

### % GHG Emissions Offset (Score Value: Low)

If your company purchased certified carbon credits in the reporting period, what % of GHG emissions were off-set?

- ☐ 0%
- ☐ 1-24%
- ☐ 25-49%
- ☐ 50-74%
- ☐ 75-99%
- ☐ 100%
- ☐ Don't know
- ☒ N/A - No carbon offsets purchased

### 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

### 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?

*Not at this time*

### Participation in the Inclusive Economy Challenge (Score Value: Not Scored)

Have you finished indicating the metrics your company will be focusing on for the Inclusive Economy Challenge?

Once you have used the Improvement star to mark the metrics your company is targeting, confirm them here to receive relevant improvement resources from B Lab.

- ☐ Yes, send us resources
- ☐ Not yet, we're still deciding