Best Practice Guide

Recertification Process Overview

Table of Contents

1

Meet the Legal Requirement
This step is usually required to be complete much in advance of when it is time to renew your B Corp Certification. See how you can complete the legal requirement in advance of recertification.

2

Update the B Impact Assessment

Since the Assessment is an annual reporting tool, report on the most recently ended fiscal year for your recertification.

3

Prepare for the Assessment Review

This step is B Lab's verification of the Assessment answers. During this step, you may provide documentation for core questions as well as some randomly selected.

4

Final Steps

Once the Assessment is finalized, the final steps may cover transparency requirements or other performance requirements.

Meeting the Legal Requirement

To see what your legal requirement is based on your country of incorporation, please see the **Legal Requirement Tool**.

If your legal pathway was determined at the time of the most recent B Corp Certification and you have not yet sent the completed legal document to B Lab, please send documentation to verify that the legal requirement has been met. If you are unsure who to send this document to, please email support@bcorporation.net and we will connect you to the Standards Review team.

If you have not yet made the changes for the legal requirement by your recertification date, please confirm that you are pursuing completion of this requirement. We will need to confirm this step is complete before starting the Assessment Review process**. Please note that completing this in a timely manner is required to maintain the certification. Failure to complete the legal requirement before your recertification date can result in the company's B Corp Certification being made inactive.**

You may also refer to the B Corp Agreement (term sheet) signed at the end of your last certification or recertification review, which outlines the legal requirement for your company.

Update the B Impact Assessment

Complete the current version of the B Impact Assessment.

1. **Login here:** https://bimpactassessment.net to update the assessment to reflect current company practices. If you have forgotten your password or have not signed in before, you can select "Forgot My Password" which will send you a link to create/reset a password via email.

2. **Submit the B Impact Assessment for review.**
Complete at least 90% of the Impact Assessment and submit for review, using the instructions found **here**. On the submission page, you will be able to review the Certification Requirements and the Verification process steps, if you haven't seen them recently.

3. **Refer to your previous assessment** by either downloading a PDF from the assessment platform, or by looking at your company's B Impact Report on the **B Corp Directory.**

4. **After submitting the assessment for review,** a B Lab Review Team member will send instructions for uploading supporting documentation to the B Impact Assessment platform. If necessary, and in many cases, we will schedule a call to review the assessment together and the documents that were provided for verification.

Tips for Assessment Takers:

Make sure you are on the right track of the assessment.
Take a look at your previous assessment and see that you have opted into the same industry, sector and company size. If you have grown in employee size from the previously verified assessment, please contact support@bcorporation.net so we can update the assessment track best to your current employee size.

What was the previous Impact Business Model that you have opted into?
Check your latest rated **B Impact Report** for this information and reference **page 4**.

What additional information do you need internally?
Add **team members** who are supporting the process as the assessment can include different stakeholders.

Use the *Explain This*, *Show Example* and *In Practice* resources in each question when available to have thorough understanding of the Assessment Question.

B Impact Assessment Outline

Reference your last rated B Impact Report to see what areas were verified. These should be the same areas that you can target with updated responses. The sections in the light blue are Business Models that often do not change. To make sure you are seeing the correct Business Models, reference the B Impact Report.

*Keep in mind that if your track is specific to your industry and has an Addenda, this will look differently.

Governance	Workers	Community	Environment	Customers
Mission & Engagement	Financial Security	Diversity, Equity and Inclusion	Environmental Management	Customer Stewardship
Accountability + Transparency	Health, Wellness & Safety	Economic Impact	Air & Climate	Basic Services
Mission Lock	Career Development	Civic Engagement and Giving	Water	Education
	Engagement and Satisfaction	Supply Chain Management	Land & Life	Arts, Media, & Culture
	Worker Ownership	Workforce Development	Renewable Energy	Economic Empowerment
		Supply Chain Alleviation	Land Conservation	Serving those in need
		Micro-Franchise Poverty Alleviation	Toxin Reduction	
		Micro-Distribution Poverty Alleviation	Environmental Education	
		Local/National Economic Development		
		Producer Cooperative		
		Designed to Give		

Assessment Review

How to Prepare:

After you submit the assessment for review, a standards analyst will reach out to begin the Assessment Review and Verification of the assessment. Here are some ways to expect the Assessment Review to be conducted

Assessment Review Call:
A B Lab Standards Analyst will reach out to schedule a time to review the B Impact Assessment over the phone.

This call typically takes 60 to 90 minutes. This is a time for the company and a B Lab Standards Analyst to review questions or answers that may have been unclear and adjust the self-assessment to ensure that it captures the company's unique circumstances and impact as accurately as possible. This call typically results in score adjustments.

Desk Review:
A B Lab Standards Analyst may reach out to conduct the Assessment Review via email and the Assessment platform.

If your score falls below 80 points:

Recertification is an opportunity for companies to measure the improvements implemented over the last several years. Companies should be encouraged to implement improvements, as the BIA is updated every three years to improve the standards, and it gets more sophisticated for analyzing companies.

If your assessment is below the 80 points at the time of submission we may ask you to make these improvements in advance. We recommend reaching out to the B Corp community in your region and on the B Hive to help you with specific areas.

Documentation:
Whether it is through a phone call or desk review companies are required to provide supporting documentation to validate their assessment responses. A company must upload supporting documentation for six to eight randomly selected questions. These documents must be provided before the Assessment Review Call takes place, otherwise B Lab may postpone the call until documentation has been provided.

Tips for Documentation:
There are a variety of questions that require documentation. The purpose of providing documentation is to verify that the question option selected applies to the policies and practices of the company. Please note that answer options selected should reflect established and routine practices and policies of the company. Credit cannot be awarded for future and one-time initiatives.

When providing documentation, we recommend using these guiding questions about the nature of the documents you will be providing for verification:

- Is a primary source provided (Policies, Supplier Invoices, Articles of Incorporations, employee handbook)?

- For questions involving a calculation, is the raw data related to metrics provided?

- For questions about a written or formal policy, simply engaging in one of the behaviors mentioned does not count. Is the policy documented and available for employees, customers or appropriate stakeholders?

- For questions with external metrics (such as ethnic diversity) is the information from a reliable and credible source?

- Do the document(s) provided verify each question option selected?

- Is the document representing all the data points? (i.e total salary of bonuses is provided in addition to each bonus provided)

- Does the document need to be redacted to protect employee identities and privacy? Please note irrelevant sensitive information can be redacted and all documents will be purged at the time of recertification

While the Assessment is the best way to verify business practices, there are also other aspects of the B Corp Certification that can be brought up along the process related to transparency and accountability.

Disclosure Questionnaire
Background Check
Site Review - If your company has been selected for this you will be notified separately. Please see this article for more information about site reviews.

Disclaimer: While this is a comprehensive discussion about recertification process, we strongly encourage companies to do this in a timely manner. Here are some criteria that will ensure that your B Corp Certification remain in good standing in the B Corp community. Failure to do any of these in a timely manner may result in making your B Corp Certification inactive.

✓ Completing the legal requirement by the deadline set at the time of certification.
✓ Submitting the Assessment at the time of recertification.
✓ Remaining engaged in the recertification process (such as keeping scheduled calls, contacting the verification team when you have questions about the process)
✓ Making material progress on the verification steps
(providing documents in a timely manner, showing Board commitment to the legal requirement)

If you have any questions about the status of your recertification, please reach out to support@bcorporation.net