



**Software for Good, GBC**  
softwareforgood.com

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## ANNUAL BENEFIT REPORT

This Annual Benefit Report ("Report") is made this 14th day of March, 2016 (the "Effective Date") by Software for Good, GBC, a Minnesota general benefit corporation ("Software for Good") for the 12-month period ending on December 31, 2015.

### Submitted to:

Minnesota Secretary of State - Business Services  
Retirement Systems of Minnesota Building  
60 Empire Drive, Suite 100  
St. Paul, MN 55103

building software for organizations whose mission or product benefit the public, typically towards social and environmental causes.

**(2)(ii.B) Creation of General Benefit.** Software for Good has created general public benefit in the following ways:

### 304A.301, Subd. 1

The name of the public benefit corporation in question is Software for Good, GBC. We are located at the address of 11 4th St NE, #300, Minneapolis, MN 55413 and can be reached by phone at (612) 207-6622 and by email at casey@softwareforgood.com.

1. Built an Android app to simplify supply chain management for fair trade coffee farmers. (Acopio, 663 hours)
2. Created a web application for a nonprofit helping youth fight climate change. (iMatter, 1307 hours)
3. Developed a social network to connect nonprofits working on energy policy. (RE-AMP, 122 hours)
4. Engineered an iOS app to support clinical trials around genetic testing. (UMN, 793 hours)
5. Developed a mobile app for a social enterprise launching a charity-focused giving platform. (Divi Up, 2310 hours)
6. Built a laboratory system for bioengineering companies working on cancer vaccines. (Biovest, 1283 hours)
7. Designed an accessible web application for touch screen kiosks to promote sustainability. (Lowertown, 132 hours)

### 304A.301, Subd. 3

**(1)(i) Board of Directors Certification.** The Software for Good board of directors certifies that a third-party standard has been designated.

**(1)(ii)** The Software for Good board of directors certifies that B Lab is an independent third-party standard.

**(1)(iii)** The Software for Good board of directors approved the report.

**(2)(i) Third-Party Standard.** The standard chosen for the 12-month period ending on December 31, 2015 is the nonprofit organization B Lab whose main office address is 155 East Lancaster Avenue, 2nd Floor, Wayne, PA 19087.

**(2)(ii.A) Pursuit of a General Public Benefit.** With regard to the period covered by the report, Software for Good has pursued a general public benefit by

**(2)(ii.C) Circumstances that hindered efforts.** Circumstances that hindered efforts to pursue or create general public benefit:

1. The market for custom software development fluctuates significantly from month to month.
2. Budgets for this type of work tend to be small.



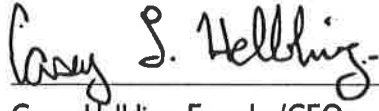
**(3) Selection of Third-Party Standard.** The board chose the third-party standard based on market

analysis and recommendations from other benefit corporations in Minnesota. This is the first year this standard has been used for Software for Good.

*Signature page to follow*

**SIGNATURE**

**IN WITNESS THEREOF**, this Report has been executed and delivered as of the date first above written.



Casey Helbling, Founder/CEO  
Software for Good

2016.03.14

Date

Generated at March 14, 2016 11:44:00.



# Software For Good, GBC

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## 2015 BENEFIT REPORT

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Created from the 2015 B Impact Assessment on the version designed for:  
Service companies, 10-49 employees, Developed Markets - U.S.

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**Lab**

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Thank you for your interest in Software For Good, GBC's 2015 Benefit Report.

Software For Good, GBC is a legally-incorporated benefit corporation in the state of MN<sup>1</sup>. A benefit corporation is a corporation that has voluntarily met the highest standards of corporate purpose, accountability, and transparency. Benefit corporations have a corporate purpose to create a material positive impact on society and the environment, have expanded the fiduciary duty of their directors to include consideration of stakeholder interests, and are required to report on their overall social and environmental performance.

**In this report you will find:**

- B Impact Report: a quantitative summary of this company's overall social and environmental performance assessed against the third party standard B Impact Assessment (BIA) in relation to each key stakeholder group and as compared to certain benchmarks
- Benefit Report Narrative: a set of narrative responses to questions required by the benefit corporation statute, including a discussion of why this benefit corporation chose the BIA as their reporting and impact management tool
- B Impact Assessment: answers to each BIA question assessing the company's positive impact on its workers, community, customers, and the environment

If you have any questions about benefit reports or benefit corporations generally, please visit [benefitcorp.net](http://benefitcorp.net) or email [thelab@bcorporation.net](mailto:thelab@bcorporation.net).

<sup>1</sup>Benefit corporations (or benefit LLCs) are different from Certified B Corporations (aka B Corps). The most important difference from the perspective of a reader of this report is that benefit corporations, unlike Certified B Corporations, are not required to have their performance validated or certified by a third party.

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# Software For Good, GBC

## 2015 B Impact Report

	Company's Points	Ordinary Businesses** UNVERIFIED	B Corps*** CERTIFIED
<b>Overall B Impact Score</b>	<b>87 pts</b>	<b>51 pts****</b>	<b>97 pts****</b>
<b>Governance</b>	<b>17</b>	<b>6</b>	<b>14</b>
Corporate Accountability	12	3	10
Transparency	6	3	4
<b>Workers</b>	<b>27</b>	<b>20</b>	<b>26</b>
Compensation, Benefits & Training	19	15	17
Worker Ownership	3	1	3
Work Environment	5	4	5
<b>Community</b>	<b>27</b>	<b>15</b>	<b>44</b>
Community Practices	26	10	20
Suppliers & Distributors	5	2	4
Local Involvement	9	3	6
Diversity	2	1	3
Job Creation	1	1	2
Civic Engagement & Giving	9	2	5
<b>Customers</b>	<b>6</b>	<b>5</b>	<b>18</b>
Consumer Products & Services	6	5	18
Serving Those In Need	2	N/A	N/A
Products or Services	4	N/A	N/A
<b>Environment</b>	<b>10</b>	<b>6</b>	<b>13</b>
Environmental Products & Services	N/A	2	8
Environmental Practices	10	N/A	N/A
Land, Office, Plant	8	3	5
Inputs	1	1	3
Outputs	1	1	1
Suppliers & Transportation	0	0	3

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\*\* Median score of Ordinary Businesses that have completed the B Impact Assessment (BIA).

\*\* Median score of all Certified B Corporations that have completed a minimum verified score of 30 on the BIA.

\*\*\*\* For Ordinary Businesses and Certified B Corps: Total Impact Scores will not equal the sum of the sub-scores as each reflect a median score.

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# Benefit Report Narrative

Benefit corporation statutes require a benefit report to include narrative responses to a specific set of questions. Below are our responses to those statutory questions.

Software For Good, GBC selected the B Impact Assessment (BIA) as the third party standard to prepare this benefit report because it is the most widely-used impact measurement and management tool in the world. It is used by more than 30,00 businesses to measure, compare, and improve their overall social and environmental performance, as well as by an increasing number of investors, business associations, and government entities serious about understanding and benchmarking the impact of the companies in which they invest and with which they do business. The BIA is governed by the nonprofit B Lab and meets the statutory requirement that a third party standard must be comprehensive, credible, transparent, and independent. More information about the BIA and B Lab is available at [bimpactassessment.net](http://bimpactassessment.net).

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

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

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

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

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

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

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

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

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

**Provide the name of the benefit director and the benefit officer, if any, and the addresses to which correspondence to each of them may be directed. Note: some states do not mandate that a Benefit Director or Benefit Officer exist, so this question may not apply. You can find more information about the requirements of individual states here: <http://benefitcorp.net/sites/default/files/Benefit%20Corporations%20Chart.pdf>**

Benefit Director: Name

Benefit Director: Address

Benefit Officer: Name

Benefit Officer: Address

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

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

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# B Impact Assessment

## Governance

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### Governance: Mission & Engagement

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

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

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

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

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

Our mission is to make the world a better place by building great software for companies doing great things. We specialize in web and mobile applications for progressive and forward thinking clients. We believe we can positively effect change by helping like- minded companies be successful. Software for Good subscribes to the triple bottom line model (3P or 3BL) – People, Planet and Profit. We believe that we can only be successful if the individual pieces of the 3P model are successful. For that reason we constantly strive to do more to support each element. As an employee of Software for Good, it is your job to help the company be a better steward of its people, the planet and to make an honest profit.

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GV2.4a **Which type of employee training does your company provide regarding its social and environmental mission? Check all that apply:** [Equally Weighted]

- 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

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

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

GV2.7 **What portion of management had a formal written performance evaluation/review in the last year that included social and/or environmental goals?** [Equally Weighted]

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

GV2.8a **In the last year, how did the company solicit specific feedback from its stakeholders (excluding employees and investors) regarding the company's social and environmental performance? Check all that apply:** [Less Weighted]

- No formal stakeholder engagement
- Annual stakeholder meeting
- Online stakeholder forum (e.g. social media or blogs with public comments enabled)
- Third party or anonymous surveys
- Other (please describe)

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

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

Answer(s): We track the amount of pro bono work we do - and stay carbon neutral with carbon offsets.

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Governance: Governance

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

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

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

- Meets at least twice annually
- Includes at least 1 independent member
- Includes at least 50% independent members
- Oversees executive compensation
- 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 other governing body

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

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

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## Governance: Ethics

GV4.1a **Does the company maintain any of the following financial controls? Check all that apply.** [Equally Weighted]

- None
- Segregation of Accounts Receivable and Accounts Payable duties
- Segregation of check writing and check signing privileges
- Limited access to accounting software systems to appropriate personnel
- Limited access to credit/ATM cards to appropriate personnel
- Inventory management system with routine management or third-party reviews
- 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

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GV4.2 **Is there a written whistleblower policy for workers to raise complaints / issues without fear of reprisal?** [Less Weighted]

Yes  No

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## Governance: Transparency

GV5.1a **Does the company produce financials that are verified annually by an independent source through an Audit or Review?** [Equally Weighted]

No  
 Yes, through a review  
 Yes, through an audit

GV5.2a **Does the company have a formal process to share financial information (except salary info) with its full-time employees?** [Equally Weighted]

No  
 Yes - the company shares basic revenue/cost numbers 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 an Open Book Management process  
 In addition, company has an intentional education program around shared financials

GV5.3a **Do all full-time employees have access to written information that identifies all material owners and investors of the company?** [Equally Weighted]

Yes  No

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

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

GV5.6 **Is your product or service covered by a written consumer warranty or client protection policy?** [Less Weighted]

Yes  No

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GV5.7 **Is there a publicly-known mechanism through which customers can provide product feedback, ask questions or file complaints?** [Less Weighted]

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

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### Governance: Governance Metrics

GV1.1 **On what date did your last fiscal year end?** [Not Weighted]

12/31/2013

GV1.2 **Reporting currency** [Not Weighted]

US Dollar - USD

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## Workers

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### Workers: Worker Metrics

WR1.1 **This is a REQUIRED question that determines the set of additional questions your company will respond to regarding your salaried or hourly workers: Are more than 50% of the workers paid on an hourly basis? [Not Weighted]**

Yes  No

WR1.2 **Number of Total Full-Time Workers**

Current Total Full-Time Workers	13.00
Total Full-Time Workers 12 months ago	9.00

WR1.3 **Number of Total Part-Time Workers**

Current Total Part-Time Workers	2.00
Total Part-Time Workers 12 months ago	0.00

WR1.4 **Number of Total Temporary Workers**

Current Total Temporary Workers	3.00
Total Temporary Workers 12 months ago	2.00

WR1.7 **Select from the list below any compensation structures used to pay employees. [Not Weighted]**

- Annual Salary
- Hourly Salary
- Performance / Project based Contract (i.e. Independent Contractor)
- Tips + Hourly Wage
- Commission + Base Salary
- Tips / Commissions / Bonuses that account for >80% of income

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### Workers: Compensation & Wages

WR2.1 **Total Wages (including bonuses) [Not Weighted]**

720,770.00

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WR2.2 What is the company's lowest wage (calculated on an hourly basis)? Please exclude students and interns in this calculation. [Not Weighted]

30.00

WR2.5 What % above living wage did your lowest-paid full-time, part-time, temporary workers and independent contractors (excluding interns) receive during the last fiscal year? If workers are paid at or below living wage, select 0%. [Equally Weighted]

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

WR2.7a What multiple is the highest compensated individual paid (inclusive of bonus) as compared to the lowest paid full-time worker? [Equally Weighted]

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

WR2.9a Based on a company referenced compensation study in the past 2 years, how does your company's compensation structure (excluding executive management) compare with the market? [Equally Weighted]

- Have not referenced a compensation survey
- Below market
- At market
- Above market

WR2.10 Which of the following are true about the company's bonus plan: [Less Weighted]

- No formal bonus 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

WR2.12 What % of full-time and part-time employees, excluding founders and executives, received a bonus in the last fiscal year? [Equally Weighted]

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

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## Workers: Compensation & Wages (Salaried)

WR2.8a What was the average % increase in wage/salary (per capita) paid to non-executive workers in the last fiscal year? [Equally Weighted]

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

WR2.11a 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. [Equally Weighted]

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

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## Workers: Worker Benefits

WR3.1a **Does the company's healthcare plan available to all full-time workers include any of the following practices? Select all that apply.** [Heavily Weighted]

- Co-insurance of 80%+ covered by healthcare plan
- Company pays 80%+ of individual premium
- Company pays 80%+ of family coverage premium
- Out-of-pocket maximum for individual coverage of \$2000 or less (net of company HSA or equivalent contribution)
- Annual deductible for individual coverage of \$1000 or less (net of company HSA or equivalent contribution)
- Co-payment of \$20 or less per primary care visit paid for by worker
- Prescription drug coverage where workers pay \$10 or less for generic drugs, \$30 or less for brand name drugs and \$50 or less for non-formulary drugs
- None of the above

WR3.2a **What % of full-time workers take advantage of the health care plan offered by company?** [Equally Weighted]

- <70%  70-79%  80-89%  90-99%  100%

Answer(s): No formal health plan offered to employees. Employees are given up to \$300 a month to purchase their own insurance.

WR3.3 **At what juncture do your part time/flex time employees qualify for full time health care benefits?** [Equally Weighted]

- No benefits beyond what is provided under national law
- 30+ hours per week
- 25-30 hours per week
- 20-24 hours per week
- 15-19 hours per week
- <15 hours per week
- N/A - Company has no part-time/flex-time employees

Answer(s): Employees over 30 hours a week are given up to \$300 a month to purchase their own health insurance.

WR3.5 **What % of hourly and salaried part-time workers who work more than 20 hours a week are enrolled in the private healthcare plan offered by your company?** [Equally Weighted]

- Company does not have an active health insurance plan
- 0%
- 1-39%
- 40-59%
- 60-79%
- 80%+
- N/A - No part-time workers

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WR3.6a **Is there an Employee Retirement Plan, e.g., Pension, Profit Sharing, 401(k), available for all tenured workers (tenured as defined as with the company for 1+ years for salaried workers and 1,000+ hours for hourly workers) that is:** [Equally Weighted]

- No retirement plan
- Unfunded
- Partially funded/partial match
- Fully funded/full match
- Plan includes Socially-Responsible Investing option
- Government-sponsored retirement plan

WR3.12 **What additional benefits are offered to full-time tenured workers (tenured defined as with the company for 1+ years or life of the company)?** [Heavily Weighted]

- No additional benefits
- Dental insurance
- Short-term disability
- Long-term disability
- Structured account mechanism for qualified medical expenses (e.g. HSA, HRA, FSA)
- Domestic partner, civil union, and/or same-sex marriage spousal benefits
- Life insurance
- Other benefits (please describe)

Other: SIMPLE IRA, \$300 reimbursement to purchase own health insurance, bicycle commuting reimbursement

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### Workers: Worker Benefits (Salaried)

WR3.7a **What is the minimum number of paid days off (including holidays) provided annually to full-time tenured workers (defined as those with the company for 1+ years or life of company)?** [Equally Weighted]

- 0-15 work days
- 16-20 work days
- 21-25 work days
- 26-30 work days
- >30 work days

WR3.8a **What is the minimum number of days of paid maternity leave offered to salaried workers? Only include leave that is equivalent to 100% post-tax salary, either paid by your company, insurance or government programs. Include in your calculation leave that is required by government and any additional leave that is provided by your company.** [Equally Weighted]

- None
- 1-29 days
- 30-59 days
- 60-89 days
- 90-119 days
- 120+ days

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WR3.9 What is the minimum number of days of paid paternity leave offered to full-time tenured workers (tenured defined as with the company for 1+ years or life of the company)? This only includes leave that is 100% paid, either by your company or by government programs. [Less Weighted]

- None  
 1-10 work days  
 11-25 work days  
 26+ work days

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### Workers: Training & Education

WR4.1a What % of positions above entry level have been filled with internal candidates in the last 12 months? (Exclude material owners in your calculation) [Equally Weighted]

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

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### Workers: Training & Education (Salaried)

WR4.2a Excluding newly hired workers, what % of full-time and part-time workers received the following types of formal training during the last 12 months?

- | 0%  | 1-24%                 | 25-49%                | 50-74%                | 75%+                             | Don't know            |
|---|-----------------------|-----------------------|-----------------------|----------------------------------|-----------------------|
| <input type="radio"/>   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Skills-based training to advance core job responsibilities  |                       |                       |                       |                                  |                       |
| <input type="radio"/>   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| 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) |                       |                       |                       |                                  |                       |
| <input type="radio"/>   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Training on life skills for personal development (i.e. literacy, personal financial planning, etc.)   |                       |                       |                       |                                  |                       |

WR4.3a What % of full-time workers have participated in external professional development opportunities or lifelong learning opportunities (paid for in advance, reimbursed or subsidized by the company) in the past fiscal year? [Equally Weighted]

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

WR4.4 What % of full-time workers received advancement or reimbursement for continuing education opportunities (e.g. GED, college credits, industry-recognized accreditation, etc.) in the last fiscal year? Please only include opportunities that are at least \$1,500 in value or last for 3 or more months in time value. [Equally Weighted]

- 0  1-5%  6-15%  >15%

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### Workers: Worker Ownership

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WR5.1 **What % of all full-time employees (including founders and executives) own stocks, stock equivalents and stock options, or participate 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.** [Equally Weighted]

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

WR5.2 **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.** [Equally Weighted]

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

WR5.4 **What % of the company is owned by full-time workers (excluding founders/executives)? Select N/A if your company is a consumer/shared services cooperative, a producer cooperative or a nonprofit.** [Heavily Weighted]

0%  1-4%  5-24%  25-49%  50+%  N/A

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### Workers: Management & Worker Communication

WR6.1 **Is there an established, formal, consistent process for providing performance feedback to all tenured employees which? Please check all that apply.** [Heavily Weighted]

- 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

WR6.2 **Does your company have a written employee handbook that workers have access to and includes the following information?** [Less Weighted]

- No written employee handbook
- A non-discrimination statement
- 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

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WR6.5 **Which of the following employee metrics are regularly collected, monitored and made transparent to all employees?** [Less Weighted]

- Retention and turnover metrics
- Diversity metrics
- None

WR6.6 **Which of the following does your company's termination policy require (except in situations requiring immediate dismissal / with cause)?** [Equally Weighted]

- No written notice required
- Written notice of worker performance only
- Written notice of worker performance and a stated probationary period

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### Workers: Management & Worker Communication (Salaried)

WR6.4a **What is the average tenure of your current workforce?** [Equally Weighted]

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

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### Workers: Job Flexibility/Corporate Culture (Salaried)

WR7.2a **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.** [Equally Weighted]

- 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

WR7.3 **Do company policies, in writing and in practice, support any of the following flexible workplace practices in the past 12 months? Please check all that apply.** [Equally Weighted]

- We have managers or executives who work part-time or in a job-share
- We have managers or executives who telecommute
- We hire new people into permanent positions that are telecommuting
- We hire 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

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WR7.4a **Which of the following supplementary benefits are offered to employees? Please check all that apply.** [Heavily Weighted]

- Onsite childcare
- Offsite subsidized childcare
- Health & wellness program
- Counseling services
- Other (please describe)
- None

Other: Nice Ride + Bike Tuneup program + Commuting program

WR7.6a **Are career development and promotion policies and practices available? Please choose all that apply.** [Less Weighted]

- Employees who seek to take a short-term leave/sabbatical with his/her job guaranteed upon return
- Employees who seek to take a long-term leave/sabbatical where efforts will be made to find a place for him/her upon return
- Employees who desire to make lateral moves or change career direction or pace
- None of the above

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## Community

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### Community: Job Creation

CM2.1 **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: 2.00

Prior 12 months:

CM2.2b **By what % has your worker base grown over the last 12 months?** [Heavily Weighted]

0% (Has not grown on a net basis)  1-14%  15-24%  25%+

CM2.4a **What was the attrition rate at the company for full-time and tenured part-time workers (excluding workers terminated with cause) for the last 12 months?** [Heavily Weighted]

>10%  5-10%  2.5-4.9%  0-2.4%

CM2.5 **What % of workers (including full-time and part-time and temporary workers) belong to the following groups?**

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

0%

1-9%

10-19%

20-29%

30%+

Don't Know

Individuals residing in a low income area

>10%

5-10%

2.5-4.9%

0-2.4%

Other chronically underemployed populations (e.g. at risk youth, formerly incarcerated, homeless, etc.)

CM2.6 **What % of your workers are employed in company facilities located in low-income communities?** [Equally Weighted]

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

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### Community: Diversity

CM3.1 **Number of total full-time and part-time female employees. Enter 0 if None. Select N/A only if there are no workers.** [Not Weighted]

5.00

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

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

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

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

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

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

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

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

CM3.10 What is the ratio of average compensation of women versus men in managerial and non-managerial roles in the company?

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<0.8 (0 - 0.79)	0.8+ (0.8 - 0.94)	0.95+	Don't know	N/A - Only one gender represented		
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Managers
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Non-managers

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

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

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

Yes  No

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## Community: Civic Engagement & Giving

CM4.1b **Does your company have the following charitable giving practices implemented in practice or written in policy?** [Equally Weighted]

- 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

Other: We allow developers to suggest pro bono projects to support (and open source software to build).

CM4.2a **Are full-time employees granted in writing any of the following paid or non-paid time-off hours options for volunteer service?** [Equally Weighted]

- Non-paid time off
- Paid time off
  - 20 hours or more a year of paid time off
  - Do not offer paid or non-paid time off

CM4.3 **What % of employees took paid time off for volunteer service last year?** [Equally Weighted]

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

CM4.4 **Does your company monitor and record volunteer hours of company workers?** [Less Weighted]

- 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

CM4.5 **Number of hours volunteered by full-time and part-time employees of the organization during the last fiscal year. This should include both paid and unpaid time spent volunteering during traditional work hours, either for company-organized events or for employee-initiated activities.** [Not Weighted]

2,000.00

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CM4.6a **What was the % of per capita worker volunteer, community service, or pro bono time donated in the reporting period? Calculate using a 2000-hour work year: Total Hours Donated / (# FTE \* 2000 hours) [Heavily Weighted]**

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

Answer(s): 2000 hours donated / (13 FTEs \* 2000 )

CM4.8a **What was the % of profits or sales that your company gave to charity during the last fiscal year? Please select the lesser of % of profits or % of sales that the company donated in each answer bucket. Please include tax deductible in-kind donations but do not include pro bono time. [Most Heavily Weighted]**

- 0%
- 1-3% of profits or <1% of sales
- 4-9% of profits or 1-2.4% of sales
- 10-49% of profits or 2.5-12.4% of sales
- 50+% of profits or 12.5+% of sales
- Don't know

CM4.9 **Which organizations does your company support? [Not Weighted]**

Minnesota Ovarian Cancer Alliance, Cystic Fibrosis Foundation, Carbon Fund, Fair Trade USA, Girls in Tech, Metro Independent Business Alliance, etc

CM4.10 **Which of the following volunteer and charitable giving practices did your company employ in the last fiscal year? [Equally Weighted]**

- 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
- Company provides or pays for training for workers to serve in external leadership positions (e.g. nonprofit Board of Directors)
- Other innovative engagement practices (please describe)
- None of the above

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CM4.11a Indicate whether your company has worked and advocated for specific positive institutional, industry or regulatory reforms in the past two years at any of the following levels? [Equally Weighted]

- Private, within the industry
- Local
- Municipal
- State/Provincial
- National
- International
- None of the above

Answer(s): Metro IBA TPT issues,  
MNvest  
etc.

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### Community: Local Involvement

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

We are headquartered in Minneapolis, MN. We do work nationally - DC, San Francisco, Arizona, etc. We don't officially have any out of state offices although we have a couple developers who work remote.

CM5.2a Is the majority (over 50%) of the company's ownership located locally to at least two-thirds of the company's workforce? [Equally Weighted]

Yes  No  Don't know

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

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

CM5.7 Does the company have the following written local purchasing or hiring policies in place? [Equally Weighted]

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

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

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

Answer(s): we bank at <https://sunrisebanks.com/>

They're great.

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## Community: Suppliers, Distributors & Product

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

This is a weird question for a Software Development company (we don't have any suppliers). I suppose we could consider Apple as a supplier since we lease/purchase computers and monitors from them. If I open up the definition of 'supplier' to all organizations we purchase stuff from (include snacks for the break room, etc) the list gets way longer. We very frequently purchase locally produced snacks (including grassfed meat sticks from local farmers.) We also purchase our workspace tables from a reclaimed wood facility in central Minnesota.

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

Yes  No

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

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

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

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

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

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

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

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

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## Environment

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Environment: Land, Office, Plant

EN2.2a **What % of company facilities (by square feet, both owned by company or leased) are LEED certified, satisfy the requirements of the Living Building Challenge, or other accredited green building programs? Select N/A if your company utilizes virtual office.** [Equally Weighted]

<20%  20-49%  50-79%  80%+  N/A

EN2.4 **Does the company have a company-wide recovery and recycling program that includes the following?** [Equally Weighted]

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

EN2.12 **Which of the following chemical reduction methods have been implemented at the majority of your corporate facilities on a consistent basis?** [Equally Weighted]

- Non-toxic janitorial products
- Unbleached / chlorine free paper products
- Soy-based inks or other low VOC inks
- Organic or sustainable kitchen products
- Other (please describe)
- None of the above

EN2.16 **What of the following recycled/sustainable input materials products are purchased for the majority of office use?** [Equally Weighted]

- Recycled/sustainable input office supplies (paper, pens, notebooks, etc.)
- Reclaimed/reused office furniture
- Reusable/compostable catering supplies
- Other (please specify)
- None of the above

EN2.17 **What % of your company's printed materials use recycled paper content, FSC certified paper, or soy-based inks? Select N/A if your company does not have any printed materials or have achieved a paperless office.** [Equally Weighted]

0%  1-24%  25-49%  50-75%  >75%  N/A

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EN2.18 **Does your company have a formal program or policy in place to reduce the environmental footprint caused by commuting? Examples include use of public transportation, carpooling, biking, virtual office, telecommuting, etc.** [Equally Weighted]

Yes  No

EN2.19 **Has the company implemented written policies that reduce corporate travel, thereby lowering its carbon footprint?** [Equally Weighted]

- Yes, company has written policy limiting corporate travel
- Yes, company uses web/virtual meeting technology or other strategies to reduce in-person meetings
- No, company does not have any of the above travel policies or practices
- N/A - Company does not engage in any business-related travel

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

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

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## Environment: Inputs

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

We do not currently monitor and record usage

We monitor and record usage (no reduction targets)

We monitor and record usage, and have specific reduction targets

We monitor usage and have met specific reduction targets during the last fiscal year

We do not currently monitor and record our usage



Energy:



Water:

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

Not tracked / unknown

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

Not tracked / unknown

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

Not tracked / unknown

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EN3.5 **What % of energy use has been saved due to conservation and efficiency improvements for your corporate facilities? Please refer to electricity use and other energy consumption from heating, hot water, etc. [Heavily Weighted]**

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

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

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

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

Yes  No  Already Maximized (100% renewable)

Answer(s): We lease a space in a larger building and can't control the type of energy the landlord purchases.

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

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

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

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

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Environment: Outputs

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

- |   |   |   |   |  |
|---|---|---|---|--|
| <input type="radio"/> Company does not currently monitor and record emissions | <input type="radio"/> Company monitors and records emissions (no reduction targets) | <input type="radio"/> Company monitors emissions and has specific reduction targets | <input type="radio"/> Company monitors emissions and has met specific reduction targets during the reporting period | <input type="radio"/> Eliminated emissions of this by-product entirely |
|---|---|---|---|--|

Scopes 1 and 2 greenhouse gas (GHG) emissions

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

Not tracked / unknown

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

Not tracked / unknown

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

Scope 1:

Scope 2:

Scope 3:

EN4.11b What % of Scopes 1 and 2 GHG emissions has been saved due to efficiency improvements implemented by your company? [Equally Weighted]

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

EN4.12 If your company purchased certified carbon credits in the reporting period, what % of GHG emissions were off-set? [Less Weighted]

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

Answer(s): We offset 144 Metric Tonnes with credits from CarbonFund.org. They said this /should/ offset 100% of our emissions ... so I chose 75%-99% to be safe.

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

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

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# Impact Business Models

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Impact Business Models: Social Enterprise

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

Yes No

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

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IBM1.2 **Separate from a mission statement, has your company done any of the following to legally ensure that its social or environmental mission will be maintained over time, regardless of company ownership?** [Equally Weighted]

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

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### Impact Business Models: Community P&S Introduction

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

Yes No

- Promotes health or healthy lifestyles (e.g. medical equipment, medical services and medicines, preventative health services or products, healthy living products, exercise and sporting products, prescription eyeglasses)
- Creates access to capital and capacity building for purpose-driven enterprises (e.g. impact investing, sustainability consulting, nonprofit fundraising services, products that assist in raising capital)

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### Impact Business Models: Serving Those In Need

IBM11.1 **Does your company's product or service explicitly target users/customers/end beneficiaries from underserved communities?** [Not Weighted]

- Yes  No - Skip the remaining questions in this section and proceed to the next page

IBM11.2 **Describe the beneficiaries or end-users of your products or services and how you characterize them as underserved.** [Not Weighted]

We targeted the general population who had risk factors for metabolic syndrome and pre-diabetes.

IBM11.3 **Which of the following best describe a majority of your underserved customer/client base?** [Not Weighted]

- Majority of customers/clients are underserved individuals
- Majority of customers/clients are businesses
- Majority of customers/clients are nonprofits

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IBM11.4 Which of the following underserved populations does your business explicitly target? If you are a business-to-business focused company, or if you serve nonprofits, think of who the ultimate beneficiaries are. Check all that apply. [Not Weighted]

- Low-income, poor or very poor (including low-income minorities and other underserved populations)
- Minority, disabled, and other underserved (but not low-income)
- None of the above - Skip the rest of the questions in this section

IBM159.5 If relevant, select which of the following impoverished communities your company serves:

- |            | Urban | Rural | Peri-urban |
|------------|-------|-------|------------|
| Low Income |       |       |            |
| Poor       |       |       |            |
| Very poor  |       |       |            |

IBM11.6 If relevant, which of the following beneficiary groups is your product/service targeting? (Note: Not all populations are themselves under-served groups.) [Not Weighted]

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

IBM11.7 Which of the following statements are true about your in-need customers/ clients? [Not Weighted]

- 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

IBM11.8 How much revenue is generated through sale to above selected beneficiary group(s) or nonprofits? [Not Weighted]

- Not tracked / unknown

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IBM11.9 **What % of customers/end beneficiaries of your product or service are from an underserved population identified above? If you serve nonprofits, please respond with the % of your revenues generated from services provided to the nonprofits selected above in the last fiscal year.** [Not Weighted]

3%

IBM11.10 **This is a calculated question based on your answers from IBM11.3 (who are your direct clients), IBM11.4: (who are you targeting), and question IBM11.9 (what % of your revenues does this represent?)** [Not Weighted]

IBM159.12 **How many customers/clients served qualify in the above-selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.**

Individuals

Households

Communities

Businesses/Non-Profits

Governments

IBM11.14 **Which of the following products/services attributes assist in targeting the above selected underserved communities:** [Least Weighted]

- 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)

IBM11.15 **Use the field below to describe any innovative technology, distribution or pricing models selected above.** [Not Weighted]

We call it our "Robinhood model" of pricing. Our more conventional clients get conventional rates. Low income, or "Good" clients get preferred pricing.

IBM159.16 **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

Households

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IBM11.17 **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)** [Heavily Weighted]

Not tracked / unknown

IBM11.18 **How much revenue is generated through sale to clients/customers that live on less than \$2/day?** [Not Weighted]

0.00

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## Impact Business Models: Flow of Capital and Capacity Building

IBM9.2 **Which of the following product or service descriptions best fit your company?** [Not Weighted]

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

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

429,642.00

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

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

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

Yes  No, not at this time

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

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

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

- Yes  No, not at this time  N/A

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## Disclosure Questionnaire

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### Disclosure Questionnaire: Industries

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

Yes No

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

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

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### Disclosure Questionnaire: Practices

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

True False

- Company formally registered in accordance with domestic regulations
- Company has not reduced or minimized taxes through the use of corporate shells or structural means
- Company facilities are not located adjacent to or in sensitive ecosystems
- Company or company supplier does not employ workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138 ) and company keeps personnel records that include evidence of the date of birth of each
- Overtime work for hourly workers is voluntary (not compulsory)
- Company or company suppliers do not use any workers who are prisoners
- Company allows workers to freely associate and to bargain collectively for the terms of one's employment

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

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Disclosure Questionnaire: Outcomes

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

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

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

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Disclosure Questionnaire: Penalties

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

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

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

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