



**Office of the Minnesota Secretary of State**  
**Minnesota Public Benefit Corporation / Annual Benefit Report**  
*Minnesota Statutes, Chapter 304A*



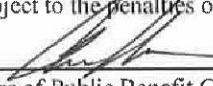
Read the instructions before completing this form  
**Must be filed by March 31**  
**Filing Fee: \$55 for expedited service in-person, \$35 if submitted by mail**

The Annual Benefit Report covers the 12 month period ending on December 31 of the previous year.  
**Notice: Failure to file this form by March 31 of this year will result in the revocation of the corporation's public benefit status without further notice from the Secretary of State, pursuant to Minnesota Statutes, Section 304A.301**

1. Corporate Name: (Required) thedatabank, gbc
2. The public benefit corporation's board of directors has reviewed and approved this report.
3. In the field below, enter the information required by section 304A.301 subd. 2 or 3 for the period covered by this report, (see instructions for further information); Note: Use additional sheets if needed. (Required)

see attached

4. I, the undersigned, certify that I am the chief executive officer of this public benefit corporation. I further certify that I have signed this document no more than 30 days before the document is delivered to the secretary of state for filing, and that this document is current when signed. I further certify that I have completed all required fields, and that the information in this document is true and correct and in compliance with the applicable chapter of Minnesota Statutes. I understand that by signing this document I am subject to the penalties of perjury as set forth in Section 609.48 as if I had signed this document under oath.

  
 \_\_\_\_\_  
 Signature of Public Benefit Corporation's Chief Executive Officer

March 14, 2018  
 \_\_\_\_\_  
 Date (Must be dated within 30 days before the report is delivered to the Secretary of State for Filing)

**Email Address for Official Notices**

Enter an email address to which the Secretary of State can forward official notices required by law and other notices:

chris@thedatabank.com

Check here to have your email address excluded from requests for bulk data, to the extent allowed by Minnesota law.

List a name and daytime phone number of a person who can be contacted about this form:

Susan Schneek 612-455-3570  
 Contact Name Phone Number

**Entities that own, lease, or have any financial interest in agricultural land or land capable of being farmed must register with the MN Dept. of Agriculture's Corporate Farm Program.**

Does this entity own, lease, or have any financial interest in agricultural land or land capable of being farmed?  
 Yes  No

## 2018 Annual General Benefit Report & Filing

Office of the Minnesota Secretary of State

March 13, 2018

(1, i) thedatabank, gbc uses the B Lab certification process as our independent third-party standard. Our most recent certification (2017) can be found here:

<https://www.bcorporation.net/community/thedatabank-gbc-general-benefit-corporation>  
and is attached.

“B Lab is an independent nonprofit organization that serves a global movement of people using business as a force for good™.” B-Lab created the B Impact Assessment and Certification process in 2006 to independently assess and verify overall social and environmental performance, public transparency, and legal accountability of companies that voluntarily go through the assessment and certification process.

(1, iii) thedatabank's board approved this third party process in 2010 when we first went through certification and approved the attached report in 2017.

(2, A, B) thedatabank has created general public benefit by providing technology and services to over 150 nonprofit organizations in Minnesota and across the country that are working to create positive social benefit in their communities. We also create general public benefit by operating our business in a responsible, sustainable way as evidenced in our B Lab report. Some specific ways we have created general public benefit include:

- Provided software and services to Construction Careers Foundation to support their mission of creating educational opportunities for individuals to become aware of and enter in to a career path within the union construction trades industry.
- Provided software and services to Ramsey County Workforce Development that has helped increase the percentage of minority and disadvantaged workers hired on government funded construction projects.
- Provided software and services to Minnesota Environmental Partnership to engage their supporters in efforts that have increased government funding and support for various environmental initiatives in the state.

- Provided software and service to the Twin Cities Metro Independent Business Alliance to support local independent businesses and the Buy Local movement to help increase membership over 40% since 2015.
- Donated over \$69,000 in products and services in 2017 to various Minnesota based nonprofits including: Impact Hub, Twin Cities Media Alliance, e-democracy, Science Debate, MNvest, Heartland Democracy Center, Habitat for Humanity, and the Social Enterprise Alliance.
- As a small business we create general public benefit by providing a diverse and safe workplace that creates sustainable employment with living wages, good benefits and investments in employee development.
- We were also named in 2017 “Best for the World” by B Labs as being in the top 10% of all certified B-corps in the areas of workers, community and overall.

These are just a few examples of the many ways thedatabank directly creates general public benefit through our work, and indirectly through working with over 150 social sectors organizations across the country.

(2, C) thedatabank has consistently been hindered in our efforts to create general public benefit through the lack of easily attainable business financing to grow our business. While this is a problem that exists for most small businesses, it is particularly difficult in our experience to for profit companies with social missions.

Respectfully Submitted,

A handwritten signature in black ink, appearing to read "Chris Hanson", written in a cursive style.

Chris Hanson, CEO & Cofounder

# thedatabank, Gbc. (General Benefit Corporation)

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## 2017 BENEFIT REPORT

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Created from the 2017 B Impact Assessment on the version designed for:  
Service companies, 10-49 employees, Developed Markets - U.S.

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# thedatabank, Gbc. (General Benefit Corporation)

## 2017 B Impact Report

	Company's Points	Ordinary Businesses** UNVERIFIED	B Corps*** CERTIFIED
<b>Overall B Impact Score</b>	<b>130 pts</b>	<b>51 pts****</b>	<b>97 pts****</b>
<b>Governance</b>	<b>16</b>	<b>6</b>	<b>14</b>
Corporate Accountability	3	3	10
Transparency	3	3	4
<b>Workers</b>	<b>28</b>	<b>20</b>	<b>26</b>
Compensation, Benefits & Training	16	15	17
Worker Ownership	5	1	3
Work Environment	6	4	5
<b>Community</b>	<b>42</b>	<b>15</b>	<b>44</b>
Community Practices	21	10	20
Suppliers & Distributors	1	2	4
Local Involvement	8	3	6
Diversity	3	1	3
Job Creation	4	1	2
Civic Engagement & Giving	5	2	5
<b>Customers</b>	<b>38</b>	<b>5</b>	<b>18</b>
Consumer Products & Services	38	5	18
Serving Those In Need	12	N/A	N/A
Products or Services	N/A	N/A	N/A
<b>Environment</b>	<b>5</b>	<b>6</b>	<b>13</b>
Environmental Products & Services	N/A	2	8
Environmental Practices	4	N/A	N/A
Land, Office, Plant	4	3	5
Inputs	0	1	3
Outputs	1	1	1
Suppliers & Transportation	N/A	0	3

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

\*\*\* Median scores of all Certified B Corporations that have received a minimum certified score of 80 on the BIA

\*\*\*\* For Ordinary Businesses and Certified B Corps, Total B Impact Scores will not equal the sum of the sub-scores since each reflects a median score

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## B Impact Assessment

### Governance

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#### Governance: Mission & Engagement

GV1.1 **Select the description that best describes your business.** [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.

GV1.2 **Does your company have a corporate mission statement, and does it include any of the following?** [Less Weighted]

- 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)

GV1.3 **Please type or paste your mission statement here.** [Not Weighted]

To create strategic information solutions that help organizations leverage their relationships to make the world safe, sustainable and just. We do this by taking our clients' challenges as our own, living in them, and providing actionable insights and tools to realize their vision.

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GV1.4a **Which type of employee training does your company provide regarding its social and environmental mission?** [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

GV1.5a **Does the Board of Directors or equivalent governing body review the company's social or environmental performance on at least an annual basis?** [Equally Weighted]

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

GV1.7 **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  1-49%  50-99%  100%

GV1.8a **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?** [Less Weighted]

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

GV1.10 **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?** [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 impact assessments, progress out of poverty indexing, beneficiary outcome surveys, etc.)

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Governance: Corporate Accountability

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GV2.1a **What is the company's highest level of corporate oversight?** [Less Weighted]

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

GV2.2a **Which of the following apply to your company's Board of Directors or equivalent governing body?** [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 - No Board of Directors or equivalent

GV2.3a **Which of the following stakeholder groups or relevant independent experts have voting seats on the Board of Directors or equivalent governing body?** [Less Weighted]

- 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

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## Governance. Ethics

GV3.1a **Does the company maintain any of the following financial controls?** [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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GV3.2 Does the company have a written whistleblower policy? [Less Weighted]

Yes  No

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### Governance: Transparency

GV4.1a 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

GV4.2a Does the company have a formal process to share financial information with its full-time employees? [Equally Weighted]

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

GV4.3a Do all full-time employees have access to written information that identifies all material owners and investors of the company? [Equally Weighted]

Yes  No

GV4.5b Does the company publicly share information on its social and/or environmental performance? If so, how? [Equally Weighted]

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

GV4.6 Is your product or service covered by a written consumer warranty or client protection policy? [Less Weighted]

Yes  No

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GV4.7 **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 only privately to company
- Yes, there is a mechanism where feedback is made transparent to the public

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**Governance: Governance Metrics**

GV5.1 **On what date did your last fiscal year end?** [Not Weighted]

12/31/2015

GV5.2 **Reporting currency** [Not Weighted]

- US Dollar - USD

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## Workers

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### Workers: Worker Metrics

WR1.1 **Are the majority of your employees paid on a fixed salary or a daily/hourly wage?** [Not Weighted]

Fixed Salary  Daily/Hourly Wage

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

Current Total Full-Time Workers 14.00

Total Full-Time Workers 12 months ago 10.00

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

Current Total Part-Time Workers 1.00

Total Part-Time Workers 12 months ago 1.00

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

Current Total Temporary Workers 0.00

Total Temporary Workers 12 months ago 0.00

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### Workers: Compensation & Wages

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

581,612.00

WR2.2 **What is the company's lowest wage calculated on an hourly basis?** [Not Weighted]

18.00

WR2.5 **What % above living wage did your lowest-paid worker (excluding interns) receive during the last fiscal year?** [Equally Weighted]

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

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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 last two years, how does your company's compensation structure (excluding executive management) compare with the market?** [Equally Weighted]

- 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)

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

- 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

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)

WR2.5.8a **Subtracting for inflation increase, what was the average % increase in wage/salary 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

WR2.5.11a **In the last fiscal year, the company's bonus plan for non-executives represented what % of the company's salary base?** [Equally Weighted]

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

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### Workers: Benefits

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

- Coinsurance 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
- Explicit policy of transgender inclusive healthcare coverage
- None of the above

WR3.2a **What % of full-time workers are enrolled in a health care plan offered by your company?** [Equally Weighted]

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

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

- No additional health insurance benefits provided by the company to part time workers
- 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 employees

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

- No additional health insurance benefits provided by the company to part time workers
- 0%
- 1-39%
- 40-59%
- 60-79%
- 80%+
- N/A - No part-time workers working more than 20 hours per week

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WR3.6a **Does your company have an Employee Retirement Plan available for workers? If so, which of the following apply?** [Equally Weighted]

- Retirement plan is not available for all tenured workers
- Retirement plan is available with no company match
- Partially matched of 4% or less
- Partially matched greater than 4%
- Full match of 4% or less
- Full match greater than 4%
- Plan includes Socially-Responsible Investing option

WR3.12 **What additional benefits are offered to full-time tenured workers?** [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: Transit stipend, tuition reimbursement

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### Workers: Worker Benefits (Salaried)

WR3.5.7a **What is the annual minimum number of paid days off (including holidays) for full-time employees?** [Equally Weighted]

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

WR3.5.8a **What is the minimum number of weeks salaried workers receive paid primary caregiver leave, either through the company or the government?** [Equally Weighted]

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

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WR3.5.9 **What is the minimum paid secondary caregiver leave offered to tenured workers either through the company or the government?** [Less Weighted]

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

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## Workers: Training & Education

WR4.1 **Which of the following is true of intern hiring practices?** [Equally Weighted]

- 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

WR4.1a **What % of positions above entry level have been filled with internal candidates in the last 12 months?** [Equally Weighted]

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

WR4.1b **What % of employees have been internally promoted within the last 12 months?** [Equally Weighted]

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

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## Workers: Training & Education (Salaried)

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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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Skills-based training to advance core job responsibilities
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input 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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Training on life skills for personal development (i.e. literacy, personal financial planning, etc.)

WR4.5.3a What % of full-time workers have participated in external professional development opportunities or lifelong learning opportunities in the past fiscal year? [Equally Weighted]

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

WR4.5.4 What % of full-time workers received advancement or reimbursement for continuing education opportunities in the last fiscal year? [Equally Weighted]

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

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### Workers: Worker Ownership

WR5.1 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? [Equally Weighted]

0%

1-24%

25-49%

50-74%

75-99%

100%

N/A

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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)?** [Equally Weighted]

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

WR5.4 **What % of the company is owned by full-time workers who are non-executive employees and non-founders?** [Heavily Weighted]

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

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### Workers: Management & Worker Communication

WR6.1 **Is there a formal consistent process for providing performance feedback to all tenured employees which includes any of the following?** [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

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

- 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

WR6.3a What percent of your employees are 'Satisfied' or 'Engaged'? [Heavily Weighted]

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

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 is included in your company's termination policy? [Equally Weighted]

- 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

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

WR6.5.4a 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

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WR7.5 **Do company policies support any of the following health and wellness initiatives above insurer-provided programs?** [Equally Weighted]

- 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)

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

WR7.5.2a **Does the company offer any of the following job flexibility options, whenever feasible, in writing and in practice for the majority of workers?** [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

WR7.5.3 **Which of the following flexible workplace practices occurred in the past 12 months?** [Equally Weighted]

- 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

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WR7.5.4a Which of the following supplementary benefits are offered to employees? [Heavily Weighted]

- Onsite childcare
- Offsite subsidized childcare
- Health & wellness program
- Counseling services
- Policy to support breastfeeding mothers
- Other (please describe)
- None

Other: transit/ parking benefits

WR7.5.6a Which of the following are true of career development and promotion policies and practices? [Less Weighted]

- 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

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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: 5.00  
Prior 12 months: 0.00

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 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) are verified/self-identified to be a part of the following groups?**

0%	1-9%	10-19%	20-29%	30%+	Don't Know	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Individuals residing in a low income area
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other chronically underemployed populations (e.g. individuals who are formerly incarcerated or homeless)

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 & Inclusion

CM3.1 **Number of total full-time and part-time female employees.** [Not Weighted]

6.00

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

0%	1-9%	10-24%	25-49%	50%+	Don't know	
<input type="radio"/>	<input checked="" 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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Nonprofit organization(s)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Individuals that qualify as non-accredited investors

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

Women	5%
Low income communities	0%
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)	0%

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

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

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

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

CM3.10 Is average compensation for men and women equal in comparable managerial and non-managerial roles?

Yes	No	Don't know	N/A - Only one gender represented	
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Managerial
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Non-managerial

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

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

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

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

CM3.18 **Does the company provide specific content in worker training on inclusion and diversity issues related to any of the following specific underrepresented groups?** [Equally Weighted]

- Gender inclusiveness
- Minorities
- LGBT community
- Individuals with disabilities
- Other underrepresented groups (please describe)
- None of the Above

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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

CM4.2b **Are full-time employees granted in writing any of the following options for volunteer service?** [Equally Weighted]

- 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

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

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

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CM4.4a **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.** [Not Weighted]

1,200.00

CM4.6a **What was the % of per capita worker volunteer, community service, or pro bono time donated in the reporting period?** [Heavily Weighted]

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

CM4.8a **What was the equivalent % of revenue donated to charity during the last fiscal year?** [Most Heavily Weighted]

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

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

Twin Cities Daily Planet  
Heartland Democracy Center  
e-democracy.org  
Science Debate  
Apple Pie Alliance  
Twin Cities Metro Independent Business Alliance  
Small Business Minnesota  
Social Enterprise Alliance (SEA)  
Collectivity Cooperative  
MNvest.org  
Impact Hub MSP  
Our Revolution Minnesota  
The Warming House

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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
- Other innovative engagement practices (please describe)
- None of the above

CM4.11 **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?** [Equally Weighted]

- 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

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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 have one office location.

CM5.2 **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
- 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)

CM5.3a **What % of your company's expenses (excluding labor) was spent with independent suppliers local to the company's headquarters or relevant production facilities?** [Equally Weighted]

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

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CM5.4a **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

CM5.8 **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

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### Community: Suppliers, Distributors & Product

CM6.1 **Please select the types of companies that represent your Significant Suppliers:** [Not Weighted]

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

CM6.2 **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 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.)

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

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

CM6.16 **Which of the following describe your relationships with all your company's independent contractors?** [Equally Weighted]

- 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

CM6.22a **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: Environment Introduction

EN1.27 **What kind of facilities does your business primarily operate in?** [Not Weighted]

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

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### Environment: Land, Office, Plant

EN2.2a **What % of company facilities (by area, both owned by company or leased) are certified to meet the requirements of an accredited green building program?** [Equally Weighted]

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

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

EN2.6a **Does your company have an environmental management system that includes any of the following?** [Heavily Weighted]

- 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

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EN2.12 Which of the following environmentally preferred products have been purchased for the majority of your corporate facilities? [Equally Weighted]

- 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

EN2.14a Which of the following are true of how your company encourages good environmental stewardship in how employees manage their virtual offices? [Heavily Weighted]

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

EN2.18 Does your company have any programs or policies in place to reduce the environmental footprint caused by travel/commuting? [Equally Weighted]

- 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

EN2.22a If you lease your facilities, have you worked with your landlord to implement/maintain any of the following? [Equally Weighted]

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

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Environment: Inputs

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EN3.1a **Does your company monitor, record and/or report its energy usage?** [Equally Weighted]

- 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

EN3.1b **Does your company monitor, record and/or report its water usage?** [Equally Weighted]

- We do not currently monitor and record our usage
- We monitor and record usage (no reduction targets)
- We monitor and record usage, and have specific reduction targets
- We monitor usage and have met specific reduction targets during the last fiscal year

EN3.2 **Total energy used (Gigajoules) during the last 12 months:** [Not Weighted]

- Not tracked / unknown

EN3.3 **Total energy used from renewable resources (Gigajoules) 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

EN3.5 **Have conservation and efficiency improvements led to energy savings for your facilities? If so, by how much?** [Heavily Weighted]

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

EN3.6a **What % of energy use is produced from low-impact renewable sources?** [Heavily Weighted]

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

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

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

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-Paneled Windows / etc.
- Other (please specify)
- None of the above
- N/A - We utilize virtual office

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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
- N/A: My company has a virtual office

Environment: Outputs

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

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

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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
- N/A - No carbon offsets purchased

EN4.17 **Is hazardous waste 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: Mission Locked

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)
- 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: Worker Business Models Introduction

IBM2.2 **Is your company structured to benefit its employees in the following way?** [Not Weighted]

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

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### Impact Business Models: Customer Models Introduction

IBM15.1a **Does your product/service address a social or economic problem for or through your customers?** [Not Weighted]

- Yes  No

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### Impact Business Models: Customer Products & Services Introduction

IBM16.2 **How would you describe the positive outcome for customers created by your product/service?** [Not Weighted]

Our initial product released in 1998 was a web accessed fundraising management system used by organization to manage their fundraising activity. Subsequently we have added additional capacity building tools such as volunteer recruitment and management, meeting and event management, and advocacy management tools all geared to helping social sector organizations be successful in their mission.

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IBM16.3a Which of the following most closely matches the outcome and/or problem solved for your customers as defined above? [Not Weighted]

- Access to products/services that fulfill basic human needs for individuals without prior access (e.g. providers of electricity or clean drinking water to rural poor communities, affordable housing projects, waste and sanitation systems or disposal)
- 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, education 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

IBM116.4 Total Number of Customers

Individuals:	0.00
Organizations:	150.00

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## Impact Business Models: Support for Underserved/Purpose Driven Enterprises

IBM40.1 Please tell us more about how your product or service increases the flow of capital and/or provide capacity building to purpose driven enterprises. [Not Weighted]

Our software platform is specifically designed to help our clients build organizational capacities in the following areas: Financial, Advocacy, Networks, Volunteers, Operations, Marketing, and Programs. Our software solutions are custom designed and configured based on an in-depth analysis of each client's specific mission, goals and strategies. For example: Our system can help build financial capacities by helping the client better understand who their current donors are, create campaign strategies based on that understanding, produce and send appeals, and track and analyze responses to those appeals.

Each client solution provides analysis and reporting directly tied to their goals and strategy so they can understand at any given moment where they are, what's working and what isn't working.

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IBM40.2 Which of the following product or service descriptions best fit your company? [Not Weighted]

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

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

Businesses/Non-Profits 1,000.00

IBM40.4 Please provide a brief description of how you track your customer/client/beneficiary figures. [Not Weighted]

We don't track specifically but we know that for each of our 150 clients, each client benefits numerous other nonprofits.

IBM40.5 What were your total revenues last fiscal year from the previous products or services? [Not Weighted]

1,074,022.11

IBM40.6 This is a calculated question based on your previous answers: "What were your total revenues last fiscal year from products or services that support purpose-driven enterprises?" and "Total revenue from the last fiscal year" [Not Weighted]

IBM40.7 This is a calculated question based on your previous answers: "Which of the following product or service descriptions best fit your company?" and "What % of your revenues last fiscal year were from products or services that support purpose-driven enterprises?" [6x]

IBM40.12 How do you verify that your product or service contributes to the outcome previously selected? [Least Weighted]

- 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 surveys
- 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.

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IBM40.13 **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  NA

IBM40.14 **Is there something different or innovative about the company's product/service that support flow of capital that has changed the industry? Is this something that is replicable, unique at the time that it was created, and that has been emulated by other organizations?** [Not Weighted]

We were the first company in the U.S. to offer web-based fundraising software in 1998. We were the first company to offer web-based advocacy software in 2000. Web or SaaS software has become the standard in the sector.

IBM40.17 **Does your company also measure and manage the negative or unintended outcomes generated by this business model?** [Least Weighted]

Yes  No

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### Impact Business Models: Serving In Need Populations

IBM59.1 **Does your product/service benefit underserved populations, either directly or by supporting organizations that directly serve them?** [Not Weighted]

Yes  No

IBM59.2 **Describe the beneficiaries or end-users of your products or services and how you characterize them as underserved.** [Not Weighted]

IBM59.3 **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?** [Not Weighted]

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)

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**IBM59.4 Which of the following best describes how your product/service benefits underserved populations previously described? [Not Weighted]**

- 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)

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

	Urban	Rural	Peri-urban
Low Income			
Poor			
Very poor			

**IBM59.6 If relevant, which of the following beneficiary groups is your product/service targeting? [Not Weighted]**

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

Other: Our business serves nonprofits that are working with all of these types of populations but we do not target specifically.

**IBM59.7 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

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IBM59.8 **How much revenue is generated through sale to the previously selected beneficiary group(s) or nonprofit(s)?**  
[Not Weighted]

428,811.04

IBM59.9 **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.**  
[Not Weighted]

40%

IBM59.10 **This is a calculated question based on your previous answers: "Which of the following best describes how your product/service benefits underserved populations described previously?" and "What % of customers/end beneficiaries of your product or service are from an underserved population identified previously?"** [Not Weighted]

IBM159.12 **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

1,000.00

IBM59.13 **Please provide a brief description of how you track your customer/client/beneficiary figures.** [Not Weighted]

We know how many organizations use our system but we don't track how many beneficiaries they may have.

IBM59.14 **Which of the following products/services attributes assist in targeting the previously 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)

IBM59.17 **What % of customers/beneficiaries qualify as poor or very poor with incomes below \$2.00 per day?** [Heavily Weighted]

Not tracked / unknown

IBM59.18 **How much revenue is generated through sale to clients/customers that live on less than \$2/day?** [Not Weighted]

Not tracked / unknown

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Impact Business Models: Community Business Models Introduction

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IBM4.1a **Is your company structured to benefit community stakeholders in any of the following ways?** [Not Weighted]

- 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

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### Impact Business Models: Local Economic Development

IBM9.1 **Is your company a community based business, focused on serving your local economy?** [Not Weighted]

Yes  No

IBM9.3 **How many of the previous statements in the previous question are true about your business?** [6x]

- 3 or fewer of the 7 previous statements
- 4 of the 7 previous statements
- 5 of the 7 previous statements
- 6 of the 7 previous statements
- 7 of the 7 previous statements

IBM9.5 **During the last fiscal year, how much in revenues was generated through sales to local consumers?** [Not Weighted]

Not tracked / unknown

IBM9.7 **How do you verify that your product contributes to the outcome previously selected?** [Least Weighted]

- 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 surveys
- We have third party certifications or verifications that verify the efficacy of our product/service in delivering outcomes
- 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.
- We have performed, commissioned, or partnered with scientifically designed impact or outcome assessments to systematically learn about our product's impact

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IBM9.8 **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  N/A - No direct research conducted

IBM9.9 **Does your company also measure and manage the negative or unintended outcomes generated by this business model?** [Least Weighted]

Yes  No

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## Impact Business Models: Designed to Give

IBM13.1a **Are any of the following true regarding your charitable giving structure?** [Most Heavily Weighted]

- 20% or more of my company is owned by a non-profit organization
- We are formally committed to donate more than 20% of profits to charity each year.
- We are formally committed to donate the equivalent of 5% of revenues or more to charitable partners each year (including in-kind product donations).
- We are formally committed to donate the equivalent of 5% or more of our time through pro-bono services
- We have created and provide the majority of funding for a non-profit foundation, of which at least 10% of company profits (or 2% of sales) are donated each year
- None of the above

IBM13.2 **How much was donated during the last fiscal year?** [Not Weighted]

78,000.00

IBM13.3b **Based on the above structures and commitments in place, what is the equivalent % of company revenues that were donated or distributed to non-profit partners in the last fiscal year?** [Most Heavily Weighted]

- 0-4.9% revenues
- 5-7.4% revenues
- 7.5-9.9% revenues
- 10-12.4% revenues
- 12.5%+ revenues

IBM13.4 **Does your company do any of the following?** [Less Weighted]

- Play a leadership role with recipient charitable organizations (e.g. board or advisory board participation)
- Use a 3rd party screen to ensure that recipient organizations meet specific guidelines to qualify for donations
- Use a 3rd party screen to ensure that recipient organizations are efficiently allocating resources (i.e. Guidestar, Charity Navigator)
- Company screens charitable partners based on their own criteria
- None of the above

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IBM13.6 **Has your company defined the outcomes (separate from the outputs) it seeks through your donations?** [Least Weighted]

Yes  No

IBM13.9 **Does your company also measure and manage the negative or unintended outcomes generated by this business model?** [Least Weighted]

Yes  No

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### Impact Business Models: Environmental Models Introduction

IBM59.1 **Are your company's products or process structured to restore or preserve the environment in any of the following ways?** [Not Weighted]

- 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

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## Disclosure Questionnaire

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### Disclosure Questionnaire: Disclosure Industries

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

Yes No

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

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

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### Disclosure Questionnaire: Disclosure Practices

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

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### Disclosure Questionnaire: Disclosure Penalties

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

- | Yes                   | No                               |  |
|-----------------------|----------------------------------|--|
| <input type="radio"/> | <input checked="" type="radio"/> | Diversity and equal opportunity                |
| <input type="radio"/> | <input checked="" type="radio"/> | 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" previously, please provide a detailed explanation of the complaint/fine/sanction here. [Not Weighted]

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### Disclosure Questionnaire: Supplier Disclosure

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DQ5.1 Please indicate if any of the following statements are true regarding your company's significant suppliers.

True	False	Don't Know	
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant Suppliers employ workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138 )
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant suppliers use any workers who are prisoners
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant Suppliers have had an operational or on-the-job fatality
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant Suppliers' sites have experienced accidental discharges to air, land or water of hazardous substances
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Construction or operation of Significant Suppliers' facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near their facility
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Construction or operation of Significant Suppliers involved large scale land acquisition
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Construction or operation of Significant Suppliers involved large scale land conversion and/or degradation
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Construction or operation of Significant Suppliers involved the construction or refurbishment of dams
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant Suppliers have had material fines or sanctions in the last five years regarding the issues indicated in DQ4.1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Significant Suppliers exploitatively operate in conflict zones

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### Disclosure Questionnaire: Other Disclosures

DQ6.1 Are there any other sensitive aspects of the business that are necessary to disclose? [Not Weighted]



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*Steve Simon*

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Secretary of State