



## Governance

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# Mission & Engagement

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OPERATIONS  
**2.4**

## Level of Impact Focus

Describe your company's approach to creating positive impact.

This is an unweighted question that will not impact your score and is asked only for research/benchmarking purposes.

- Creating positive social or environmental impact is not a focus for our business
- We occasionally think about the social and environmental impact of some aspects of our business, but not frequently.
- We frequently consider our social and environmental impact, but it isn't a high priority in decision-making.
- 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 and environmental impact as a primary measure of success for our business and prioritize it even in cases where it may not drive profitability.

Points Available: 0.00

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## Mission Statement Characteristics

Does your company's formal, written corporate mission statement include any of the following?

A formal written corporate mission statement is one that is either publicly facing or formally shared with the employees of the company. Please check all that apply.

- No social or environmental commitment
- A general commitment to social or environmental responsibility (e.g. to conserve the environment)
- 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 sent to landfills through upcycled products)
- A commitment to serve a target beneficiary group in need (e.g. low-income customers, smallholder farmers)
- We have no written mission statement

Points Earned: 0.75 of 1.50

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## Mission Statement

Please share the text of your formal mission statement here.

Please share the text of your formal mission statement here.

Points Available: 0.00

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## Stakeholder Engagement

Has your company done any of the following to engage stakeholders about your social and environmental performance?

- We have an advisory board that includes stakeholder representation
- We have a formal stakeholder engagement plan or policy that includes identification of relevant stakeholder groups
- We have created mechanisms to identify and engage traditionally underrepresented stakeholder groups or demographics
- We have formal and regular processes in place to gather information from stakeholders (focus groups, surveys, community meetings, etc.)
- We have formal procedures to address results from stakeholder engagement, with a designated individual or team responsible for appropriate follow ups.
- We report the results of stakeholder engagement on social and environmental performance to the highest level of oversight in the company, such as the Board
- We publicly report on stakeholder engagement mechanisms and results
- Other - please describe
- No formal stakeholder engagement

Points Earned: 0.15 of 1.50

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## Social/Environmental Key Performance Indicators

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

- We 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.)
- We don't track key social or environmental performance indicators

Points Earned: 1.50 of 3.00

## Governance Structures

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

- Owner or Manager Governed (including Board of Directors with only owners/ executives)
- Management, Executive Committee, or Democratic Governance
- Non-Fiduciary Advisory Board
- Board of Directors (with at least one member who is not an executive or owner of the company)

Points Available: 1.50

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## Code of Ethics

Does your company have a written Code of Ethics policy?

- Yes
- No

Points Available: 1.50

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## Reviewed / Audited Financials

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

- Yes
- No

Points Earned: 1.50 of 1.50

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## Company Transparency

What information does the company make publicly available and transparent?

Your answers determine which future questions in the assessment are applicable to your company.

- Beneficial ownership of the company
- Financial performance (must be transparent to employees at minimum)
- Social and environmental performance (e.g. impact reports)
- Membership of the Board of Directors
- None of the above

Points Available: 1.50

## Governance Metrics

OPERATIONS  
**0.0**

This section asks for your company to provide important financial information that will be referenced later in the assessment.

### Last Fiscal Year

On what date did your last fiscal year end?

If your company has not yet completed its first fiscal year, please put your anticipated fiscal year end date.

On what date did your last fiscal year end?

Points Available: 0.00

### Reporting Currency

Select your reporting currency

- Canadian Dollar - CAD

Points Available: 0.00

### Revenue Year Before Last

Total Earned Revenue

From the fiscal year before last

If your company has not yet completed its first fiscal year, please put \$0

From the fiscal year before last

- We do not track this

Points Available: 0.00

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## Revenue Last Year

Total Earned Revenue

From the last fiscal year

This question will be used for scored calculation questions later in the assessment. Please complete for accurate scoring. If your company has not yet completed its first fiscal year, please put \$0

From the last fiscal year

We do not track this

Points Available: 0.00

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## Net Income Last Year

Net Income

From the last fiscal year

If your company has not yet completed its first fiscal year, please put \$0

From the last fiscal year

We do not track this

Points Available: 0.00

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## Net Income Year Before Last

Net Income

From the fiscal year before last

From the fiscal year before last

We do not track this

Points Available: 0.00

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**Mission Locked** - Impact Business Model

IMPACT BUSINESS MODELS  
**10.0**

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Recognizes corporate forms and amendments that preserve mission and/or considers stakeholders regardless of company ownership

## Mission Lock

Separate from a mission statement, what has your company done to legally ensure that its social or environmental performance is a part of its decision-making over time, regardless of company ownership?

This question is related to the legal requirement for Certified B Corps. Click "Learn" for more information and resources about this requirement.

- Signed a contract or Board resolution committing to adopting a legal form that requires consideration of all stakeholders (e.g. signed B Corp Agreement)
- Adopted a specific legal entity or governance structure that preserves mission over time, but does not require consideration of all stakeholders in its decision-making (e.g. cooperative)
- As a company wholly owned by another company that has not done so, amended corporate governing documents or adopted a legal entity that requires consideration of all stakeholders in its decision-making (e.g. benefit corporation, completed B Corp legal amendment)
- As an independent or publicly-owned business, amended corporate governing documents or adopted a legal entity that requires consideration of all stakeholders in its decision-making (e.g. benefit corporation, completed B Corp legal amendment)
- None of the above

Points Earned: 10.00 of 10.00

## Community

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### Community Impact Area Introduction

OPERATIONS  
**0.0**

This section identifies whether your company is designed to deliver a specific, material, positive impact for its community, and if so, opens the Community Impact Business Model section that is most applicable.

### Community Oriented Impact Business Model

Does your company's business model create a specific positive benefit for stakeholders such as charitable partners, vendors or suppliers in need, or your local community?

Your answers determine which future questions in the assessment are applicable to your company.

- Yes
- No

Points Available: 0.00

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## Community Oriented Business Models

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

Your answers determine which future questions in the assessment are applicable to your company.

- A producer-owned cooperative structure in which suppliers share control and benefits of company operations (e.g. farmer cooperative, artisanal cooperative)
- Purchasing fair or 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, or ownership to charitable causes (>2% sales, >20% profits/ownership)
- A community-focused business model that supports and builds the economic vitality of local communities
- None of the above

Points Available: 0.00

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## Local Community Based Business

Is your company a community based business, focused on serving your local economy?

Your answers determine which future questions in the assessment are applicable to your company.

- Yes
- No

Points Available: 0.00

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## Local and Independently Owned

Is your company locally and independently owned?

Your answers determine which future questions in the assessment are applicable to your company.

- Yes
- No

Points Available: 0.00

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## Formal Local Community Business Model

Will your locally-focused practices be preserved regardless of company growth or scale through a formal commitment or the design of your business model?

Answering affirmatively will opt you into additional sections of the B Impact Assessment with more specific questions about this Impact Business Model.

Yes

No

Points Available: 0.00

## Diversity, Equity, & Inclusion

OPERATIONS  
**14.7**

### Diverse Ownership and Leadership

Is your company majority-owned or -led by individuals from any of the following underrepresented groups?

Please select all that apply.

Led by a woman

Led by an individual from an underrepresented racial or ethnic minority

Led by another underrepresented individual (veterans, LGBT, etc.)

Majority owned by women

Majority owned by individuals from underrepresented racial or ethnic minorities

Majority owned by other underrepresented individuals (veterans, LGBT, etc.)

None of the above

Points Earned: 8.40 of 8.40



## Supplier Diversity Policies or Programs

Does your company have any of the following policies or programs in place to promote diversity within your supply chain?

- We track diversity of ownership among our suppliers
- We have a policy to give preferences to suppliers with ownership from underrepresented populations
- We have formal targets to make a specific percentage of purchases from suppliers with diverse ownership
- We have a formal program to purchase and provide support to suppliers with diverse ownership
- None of the above
- N/A - Collecting supplier data or having preferential treatment policies is illegal in my country of operations

Points Earned: 1.05 of 4.20

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## Supplier Ownership Diversity

What percentage of your purchases were from companies that are majority-owned by women or individuals from underrepresented populations?

- 0%
- 1-9%
- 10-24%
- 25-39%
- 40-49%
- 50%+
- Don't Know

Points Earned: 5.25 of 8.40

## Economic Impact

OPERATIONS  
**14.0**

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### Geographic Structure and Scope

We realize that for companies with more than one office, the definition of local involvement is a more complicated one to answer. Please tell us a bit about the structure of your company geographically.

We 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. Full of Kindness has only o

Points Available: 0.00

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## New Jobs Added Last Year

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 twelve months:

Last twelve months:

We do not track this

Points Available: 0.00

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## Non-accredited Investor Ownership

What percentage of the company is owned by individuals who would qualify as non-accredited investors?

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

Points Available: 7.00

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## Spending on Local Suppliers

What percentage of your company's expenses (excluding labor) was spent with independent suppliers local to the company's headquarters or relevant facilities in the last fiscal year?

Please click "Learn More" to understand how to answer this question.

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

Points Earned: 7.00 of 7.00

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## Impactful Banking Services

What characteristics apply to the financial institution that provides the majority of your company's banking services?

- Certified CDFI or national equivalent social investment organization
- Certified B Corporation
- Member of the Global Alliance for Banking on Values
- Cooperative bank or credit union
- Local bank committed to serving the community
- Independently owned bank
- None of the above

Points Earned: 7.00 of 7.00

## Civic Engagement & Giving

OPERATIONS  
**5.7**

### Corporate Citizenship Program

How does your company take part in civic engagement?

Your answers determine which future questions in the assessment are applicable to your company.

- Financial or in-kind donations (excluding political causes)
- Community investments
- Community or pro-bono service
- Advocacy for adopting improved social or environmental policies or performance
- Partnerships with charitable organizations or membership with community organizations
- Discounted products or services to qualified underserved groups
- Free use of company facilities to host community events
- Equity or ownership in the company granted to a nonprofit
- Other - please describe
- None of the above

Points Earned: 1.30 of 1.62

## Total Amount of Volunteer Service Hours

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.

Number of hours volunteered by full-time and part-time employees of the organization during the last fiscal year

We do not track this

Points Available: 0.00

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## Volunteer Service Per Capita

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

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

- 0%
- .1-.9% of time
- 1-2.4% of time
- 2.5-5% of time
- 5%+ of time
- Don't know

Points Earned: 1.08 of 3.24

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## Total Amount of Charitable Donations

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

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

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

We do not track this

Points Available: 0.00

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## % of Revenue Donated

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

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

- No donations last fiscal year
- 0.1-0.4% of revenue
- 0.5-1% of revenue
- 1.1-2.4% of revenue
- 2.5-5% of revenue
- 5%+ of revenue
- Don't know

Points Earned: 2.59 of 6.48

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## Advancing Social and Environmental Performance

How has your company worked with its stakeholders (including competitors) to improve behavior or performance on social or environmental issues in the past two years?

- We have worked with other industry players on a cooperative initiative on relevant social and environmental standards for our industry
- We have provided data or contributed to academic research on social or environmental topics
- We participate in panel presentations or other public forums on social or environmental topics
- We provide public resources for other businesses or stakeholders on improving social or environmental performance
- Other - please describe
- None of the above

Points Earned: 0.81 of 0.81

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## Supply Chain Management

OPERATIONS

**0.6**

## Significant Supplier Descriptions

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

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

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

Points Available: 0.00

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## Social or Environmental Screening of Suppliers

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

This question determines the set of supplier-focused questions your company will respond to.

- Yes
- No

Points Available: 0.00

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## Supplier Screen Topics

What does your company formally screen for regarding the social or environmental practices and performance of your suppliers?

- Compliance with all local laws and regulations, including those related to social and environmental performance
- Good governance, including policies related to ethics and corruption
- Positive practices beyond what is required by regulations (e.g. environmentally-friendly manufacturing process, excellent labor practices)
- Third-party certifications related to positive social and/or environmental performance
- Other - please describe
- We have no formal screening process in place

Points Available: 1.38

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## Supplier Evaluation Practices

What methods does your company use to evaluate the social or environmental impact of your suppliers?

- We share policies or rules with suppliers but we don't have a verification process in place
- We require suppliers to complete an assessment we designed
- We use third-party risk or impact assessment tools (Sedex, BIA)
- We conduct routine audits or reviews of suppliers at least every two years
- We have third parties conduct routine audits or reviews of suppliers at least every two years
- Other (please describe)
- None of the above

Points Available: 1.38

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## Outsourced Staffing Services

Does your company outsource support services (staffing) essential to the delivery of your services to other individuals or organizations?

Your answers determine which future questions in the assessment are applicable to your company.

- Yes
- No

Points Available: 0.00

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## Independent Contractor Practices

What are your company's policies regarding independent contractors that do not work for the company greater than 20 hours per week for longer than a 6 month period?

Independent contractors that work for the company 20+ hours per week over a 6+ month period should be considered in the Workers section.

- We have a formal routine process for independent contractors to receive post-project or -contract performance feedback
- We have a formal routine process for independent contractors to communicate post-project or post-contract feedback to the company
- Our independent contractors are verified to either work on a time-bound basis, split their time with work for other clients, or have been offered employment
- Independent contractors are paid a living wage (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

Points Earned: 0.69 of 1.38

## Local Economic Development - Impact Business Model

IMPACT BUSINESS MODELS  
**0.0**

This IBM section is applicable to companies designed to strengthen their local economy by committing a significant portion of their procurement and/or sales to remain local.

### Commitment to Local Communities

Does your company have any explicit written commitments to serving local communities?

Your answers determine which future questions in the assessment are applicable to your company.

- We have a commitment to purchase core products (at least 50% of non-labor expenses) from independent suppliers local to where the product will be used or where the company operates
- We have a commitment to serve at least 75% local and independent clients or customers
- We do not have a formal commitment regarding locally-focused practices

Points Available: 5.11

## Environment

### Environment Impact Area Introduction

OPERATIONS  
**0.0**

This section asks about your environmental footprint to determine which questions are applicable later on in the assessment. It also identifies whether your company's product/service is designed to deliver a specific, material, positive environmental impact, and if so, opens the Environmental Impact Business Model section that is most applicable.



## Type of Facilities

What kind of facilities does your business primarily operate in?

Your answers determine which future questions in the assessment are applicable to your company.

- Company-owned office space
- Leased office space
- Co-working Space
- Virtual or home offices

Points Available: 0.00

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## Environmental Business Model

Are your company's products/services or processes structured to restore or preserve the environment in any of the following ways? (Please note: the environmental impact of your day-to-day operations will be assessed in the remaining sections of the Environment Impact Area. This question is specifically asking about your products/services or innovative production processes.)

Answering affirmatively will opt you into additional sections of the B Impact Assessment with more specific questions about this Impact Business Model.

- Through an innovative 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

Points Available: 0.00

## Environmental Management

OPERATIONS

**0.0**

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## Virtual Office Stewardship

How does your company encourage good environmental stewardship in how employees manage their virtual offices?

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

Points Available: 0.00

## Air & Climate

OPERATIONS  
**0.3**

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### Monitoring Energy Usage

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

Include electricity and other energy consumption from heating, hot water, etc. Your answers determine which future questions in the assessment are applicable to your company.

- We do not currently monitor and record usage
- We monitor and record usage but have set no reduction targets
- We monitor usage and have set intensity targets (e.g. relative to dollars of revenue, volume produced, etc.) that are being monitored
- We monitor usage and have set absolute reduction targets regardless of company growth
- We have met specific reduction targets during the reporting period

Points Available: 0.82

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## Renewable Energy Usage

What percentage of energy use is produced from renewable sources?

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

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

Points Earned: 0.05 of 0.41

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## Low Impact Renewable Energy Use

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

Include electricity and other energy consumption from heating, hot water, etc. Please include both purchased and onsite-generated renewable energy.

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

Points Earned: 0.33 of 1.65

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## Monitoring Greenhouse Gas Emissions

How does your company manage its greenhouse gas emissions for at least Scope 1 and 2?

Your answers determine which future questions in the assessment are applicable to your company.

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

Points Available: 0.82

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## Water

OPERATIONS  
**0.0**

### Monitoring and Managing Water Use

Does your company monitor and manage your water usage?

Your answers determine which future questions in the assessment are applicable to your company.

- We do not currently monitor and record water usage
- We regularly monitor and record water usage but have not set any reduction targets
- We monitor and record water usage and have set specific reduction targets relative to previous performance (e.g. a 5% reduction of water usage from baseline year)
- We regularly monitor and record emissions and have set science-based targets necessary to achieve sustainable usage linked to our local watershed
- We have met specific reduction targets set during this reporting period

Points Available: 1.00

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## Land & Life

OPERATIONS  
**1.0**

## Monitoring and Reporting Non-hazardous Waste

How does your company monitor and manage your waste production?

Your answers determine which future questions in the assessment are applicable to your company.

- We do not currently monitor and record waste production
- We regularly monitor and record waste production but have not set any reduction targets
- We regularly monitor and record waste production and have set specific reduction targets relative to previous performance (e.g. a 5% reduction of waste to landfill from baseline year)
- We regularly monitor and record waste produced and have set a zero waste target
- We have met the specific reduction targets set during this reporting period
- We produce zero waste to landfill / ocean

Points Available: 1.00

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## Hazardous Waste Disposal

Can your company verify that your hazardous waste is always disposed of responsibly?

This includes batteries, paint, electronic equipment, etc.

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

Points Earned: 1.00 of 1.00

## Customers

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### Customers Impact Area Introduction

OPERATIONS  
**0.0**

This section identifies whether your company's product/service is designed to deliver a specific, material, positive impact for its customers (beyond the value normally provided from goods or services), and if so, opens the Customer Impact Business Model section that is most applicable.

### Customer Impact Business Model Introduction

Do any of your company's products/services address a social or economic problem for your customers and/or their beneficiaries?

Your answers determine which future questions in the assessment are applicable to your company.

- Yes
- No

Points Available: 0.00

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## Customer Focus of Product or Service

Is the social or economic problem addressed by your product/service one that is faced directly by your customers and/or your clients' beneficiaries?

If you answer "No" here, be sure to revisit the Environment and/or Community sections to ensure your business model impact is appropriately captured.

Yes

No, customers support in our ability to produce a positive social/economic impact, but the primary beneficiaries are other stakeholders (i.e. we donate to charities based on sales to customers, we sell fair trade products to our customers, we sell environmentally beneficial products to our customers)

Points Available: 0.00

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## Positive Impact of Product/Service

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

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

Points Available: 0.00

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## Beneficial Product Type

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

Only select the ONE most relevant option for each product line. This will guide you to a series of questions specific to the type of impact you indicate you are creating.

- 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 and 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, nonprofit 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)
- Improves market access through physical or technological infrastructure (e.g. mobile telecommunications, business technologies or software, roads, bridges, railways, ports, building and construction materials not previously available)
- None of the above

Points Available: 0.00

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## Health and Environmental Impact

Does the health impact of your product / service also have a significant positive environmental impact?

Less toxic products, for example, have a positive environmental impact in addition to a human health impact. This impact is captured in the Environment Impact Area instead of this section.

- Yes
- No

Points Available: 0.00

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## Impact on Underserved Populations

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

Answering affirmatively will opt you into additional sections of the B Impact Assessment with more specific questions about this Impact Business Model.

- Our products or services directly support underserved populations
- Our products or services support organizations that directly support underserved populations
- Don't know
- None of the above

Points Available: 0.00

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## Total Customer Organizations

Total Number of Customers

Organizations served in the last 12 months:

Organizations served in the last 12 months:

We do not track this

Points Available: 0.00

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## Total Customer Individuals

Total Number of Customers

Individuals served in the last 12 months:

Individuals served in the last 12 months:

We do not track this

Points Available: 0.00

## Customer Stewardship

OPERATIONS  
**2.2**

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## Managing Customer Stewardship

Does your company do any of the following to manage the impact and value created for your customers or consumers?

- We offer product / service guarantees, warranties, or protection policies
- We have third party quality certifications or accreditations
- We have formal quality control mechanisms
- We have feedback / customer service feedback or complaint mechanisms
- We monitor customer or consumer satisfaction
- We assess the outcomes produced for our customers through the use of our product or service
- We have written policies in place for ethical marketing, advertisement, or customer engagement
- We manage the privacy and security of client / customer data
- None of the above

Points Earned: 0.63 of 1.25

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## Monitoring Customer Satisfaction and Retention

Which of the following are true of your company with regards to customer or client satisfaction and/or retention?

- Company monitors customer satisfaction
- Company shares customer satisfaction internally within the company
- Company shares customer satisfaction publicly
- Company has specified targets for customer / client satisfaction
- In the last year, company has achieved specified targets for satisfaction
- None of the above

Points Earned: 1.25 of 1.25

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## Managing Product Impacts

Does the company do any of the following with regards to managing the potential impact their products have on customers / beneficiaries?

- Company regularly monitors customer outcomes and well-being
- Company has formal program to incorporate customer testing and feedback into product design
- Company has formal programs in place to continuously improve outcomes produced for customers (including reducing negative effects or increasing positive effects)
- Other
- None of the above

Points Earned: 0.42 of 1.25

## Serving Underserved Populations (Direct) - Impact Business Model

IMPACT BUSINESS MODELS  
**1.8**

This IBM section is applicable if your company has qualified for a previous Customer IBM, and you can verify that your positive product/service impact directly benefits low income or traditionally underserved populations.

### Underserved Beneficiaries Overview

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

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

End-users are children for 1

Points Available: 0.00

### Tracking Underserved Beneficiaries

How do you determine that the beneficiaries of your product or service are underserved?

- We collect demographic data about our beneficiaries (e.g. income level) that might qualify them as traditionally underserved
- We collect data ourselves about the access our beneficiaries have to other products or services that produce the desired outcomes
- We rely on or conduct secondary research about the markets and beneficiaries we serve to determine level of access to products and outcomes
- Other - please describe
- None of the above

Points Available: 0.00

## Underserved Beneficiary Types

Based on the results of how you track the demographics that you serve, which of the following best describe the populations that you serve?

Your answer to this unscored question is combined with other answers to automatically calculate your score in this section of the assessment.

- Low Income, Poor, or Very Poor Individuals
- Other individuals without access to positive outcomes delivered by the product or service
- Individuals at the bottom of the pyramid
- Don't Know
- N/A

Points Available: 0.00

---

## Underserved Group Demographics

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

- 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

Points Available: 0.00

---

## Revenue from Serving In Need Populations

How much revenue was generated in the last fiscal year from sales to the underserved beneficiary group identified in the question "Underserved Beneficiary Types"?

How much revenue was generated in the last fiscal year from sales to the underserved beneficiary group identified in the question "Underserved Beneficiary Types"?

- We do not track this

Points Available: 0.00

---

## % of Customers In-need

What % of customers/end beneficiaries of your product or service in the last 12 months were from an underserved population identified in the question "Underserved Beneficiary Types"?

Your answer to this unscored question is combined with other answers to automatically calculate your score in this section of the assessment.

What % of customers/end beneficiaries of your product or service in the last 12 months were from an underserved population identified in the question "Underserved Beneficiary Types"?

We do not track this

Points Available: 0.00

---

## Tracking Beneficiaries

If tracked, which unit of measure do you use to measure the amount of beneficiaries reached?

You will be asked to report the # of beneficiaries reached for each category selected

- Individuals
- Households
- Communities
- Businesses and nonprofits
- Governments
- Other - please describe
- None of the above

Points Available: 0.00

---

## Underserved Individuals

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

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

We do not track this

Points Available: 0.00

---

## Underserved Client Tracking

How would you calculate the total number of underserved customers/clients that your company has reached?

- Most customers or clients continue with us year by year, and the figures reported for the last 12 months roughly reflect the total number of beneficiaries to date
- The figures reported for the last 12 months are in addition to previous clients, and the total number of beneficiaries should be calculated by adding together the numbers for each year
- Don't know - We don't track this or don't sell direct to underserved customers or clients

Points Available: 0.00

---

## Increasing Accessibility for Underserved Groups

Does your company do any of the following to improve the access or impact of your product for the underserved populations that you serve?

- 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 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
- Product/service pricing model includes transparent pricing for all customers
- Vendor provides training on safe use and/or maintenance of the product/service
- Pricing can be verified to be equal or lower than market alternatives not targeted to underserved populations
- Product information is assessed and developed to match the literacy level and needs of end users
- Product design has unique specifications from common alternatives to make it more specific for underserved groups (e.g. smaller volume packages to reduce upfront costs)
- These product/service attributes do not apply to our company

Points Earned: 1.80 of 1.80

---

## Innovative Practices to Increase Accesssibilitiy

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

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

Services are available in pr

Points Available: 0.00

---

## BoP Clients Served

If relevant, how many individuals served in the last 12 months qualify as being at the bottom of the pyramid, with incomes below \$2.50/day? Estimates within +/- 5% are acceptable.

Do not double-count (e.g. if you report 5 households, do not also report the number of individuals in those 5 households).

If relevant, how many individuals served in the last 12 months qualify as being at the bottom of the pyramid, with incomes below \$2.50/day? Estimates within +/- 5% are acceptable.

We do not track this

Points Available: 0.00

---

## BoP Households Served

If relevant, how many customers/clients served in the last 12 months qualify as being at the bottom of the pyramid with incomes below \$2.50/day? Estimates within +/- 5% are acceptable.

Do not double-count (e.g. if you report 5 households, do not also report the number of individuals in those 5 households).

If relevant, how many customers/clients served in the last 12 months qualify as being at the bottom of the pyramid with incomes below \$2.50/day? Estimates within +/- 5% are acceptable.

We do not track this

Points Available: 0.00

---

## Percent of BoP Beneficiaries

What percentage of your customers or beneficiaries in the last 12 months qualifies as being at the bottom of the pyramid with incomes below \$2.50 per day?

Estimates within +/- 5% are acceptable. See currency converter in help text to get local currency terms.

What percentage of your customers or beneficiaries in the last 12 months qualifies as being at the bottom of the pyramid with incomes below \$2.50 per day?

We do not track this

Points Available: 14.40

---

## Revenue Products Benefiting Bottom of Pyramid

How much revenue was generated in the last fiscal year through sales to clients/customers that have been verified to live on less than \$2.50 per day?

How much revenue was generated in the last fiscal year through sales to clients/customers that have been verified to live on less than \$2.50 per day?

We do not track this

Points Available: 0.00

## Disclosure Questionnaire

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### Disclosure Industries

---

Disclosure questions on specific production and trade.

#### Disclosure Alcohol

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Alcohol

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

#### Disclosure Tobacco

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Tobacco

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Gambling

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Gambling

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Firearms Weapons

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Firearms, weapons or munitions

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Pornography

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Pornography

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---



## Disclosure Payday, Short Term, or High Interest Lending

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Payday, short-term, or high-interest lending

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Fossil Fuels

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Fossil-fuel-based oil, natural gas, or coal extraction, distribution, sale, etc.

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Mining

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Mining

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Nuclear Power or Hazardous Materials

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Nuclear power, radioactive materials or hazardous waste

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Prisons

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Prisons

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Whole Life Insurance

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Whole life insurance products

Select "Yes" only if the company earns 80%+ of its revenue from whole life insurance products.

Yes

No

Points Available: 0.00

---

## Disclosure Volunteer Placement to Orphanages

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Organizing volunteer programs to orphanages or child care organizations

Yes

No

Points Available: 0.00

---

## Disclosure Tax Advisory Services

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Tax advisory services

Yes

No

Points Available: 0.00

---

## Disclosure Animal Products or Services

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Animal-based products or services (including seafood)

Yes

No

Points Available: 0.00

---

## Disclosure Genetically Modified Organisms

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Genetically modified organisms

Please also select "Yes" if your company serves clients in this industry

Yes

No

Points Available: 0.00

---

## Disclosure Illegal Products or Subject to Phase Out

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Products or activities that are illegal under country laws or regulations where they have operated, banned in international conventions or agreements, or subject to international phase-out or regulation

Yes

No

Points Available: 0.00

---

## Disclosure Industries at Risk of Human Rights Violations

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Industries reliant upon materials at high risk of human rights infringements (e.g. conflict minerals)

Yes

No

Points Available: 0.00

---

## Other Disclosure Industries

Please indicate if your company is involved in the production, operation, trade, or sale of any the following:

Other industries that may cause social or environmental harm or are subject to stakeholder criticism or concern

Yes

No

Points Available: 0.00

---

## Company Explanation Of Disclosure Item Flags

If you selected "Yes" to any of the "Disclosure Industries" listed above, please provide a detailed explanation of the company's involvement for each affirmative response:

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

If you selected "Yes" to any of the "Disclosure Industries" listed above, please provide a detailed explanation of the company's involvement for each affirmative response:

Points Available: 0.00

## Disclosure Practices

---

Disclosure questions on sensitive practices.

### No formal Registration Under Domestic Regulations

Please indicate if your company engages in any of the following practices:

Company is not formally registered in accordance with all relevant regulations and requirements

If your company is a formally registered business, select "No."

Yes

No

Points Available: 0.00

---

## Tax Reduction Through Corporate Shells

Please indicate if your company engages in any of the following practices:

Company uses corporate shells or other structural means, such as establishing multiple corporate entities, to minimize tax payments

Yes

No

Points Available: 0.00

---

## Operates in conflict zones

Please indicate if your company engages in any of the following practices:

Company operates in conflict zones

Yes

No

Points Available: 0.00

---

## Sale of Data

Please indicate if your company engages in any of the following practices:

Company sells or provides access to consumer or user data

Yes

No

Points Available: 0.00

---

## Facilities located in sensitive ecosystems

Please indicate if your company engages in any of the following practices:

Company facilities are located adjacent to or in sensitive ecosystems

Yes

No

Points Available: 0.00

---

## Marketing of Breastmilk Substitutes

Please indicate if your company engages in any of the following practices:

Marketing of breastmilk substitutes

Yes

No

Points Available: 0.00

---

## Employs Individuals on Zero-Hour Contracts

Please indicate if your company engages in any of the following practices:

Company employs individuals on zero-hour contracts

Yes

No

Points Available: 0.00

---

## Company workers are prisoners

Please indicate if your company engages in any of the following practices:

Company uses workers who are prisoners

Yes

No

Points Available: 0.00

---

## Other Disclosure Practices

Please indicate if your company engages in any of the following practices:

Other sensitive practices that may cause social or environmental harm, or are subject to stakeholder concern

Yes

No

Points Available: 0.00

---

## Company Explanation Of Disclosure Item Flags

If you selected "Yes" to any of the "Disclosure Practices" listed above, please provide a detailed explanation of the company's engagement in each practice marked in the affirmative:

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

If you selected "Yes" to any of the "Disclosure Practices" listed above, please provide a detailed explanation of the company's engagement in each practice marked in the affirmative:

Points Available: 0.00

## Disclosure Outcomes & Penalties

---

Disclosure questions concerning litigation, relocation of communities, accidents, and on-the-job fatality.

### On-Site Fatality

Please indicate if your company has experienced any of the following in the past 5 years:

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

Yes

No

Points Available: 0.00

---

### Litigation or Arbitration

Please indicate if your company has experienced any of the following in the past 5 years:

Litigation or arbitration against company either ongoing, settled, or found against the company

Yes

No

Points Available: 0.00

---

### Company has filed for bankruptcy

Please indicate if your company has experienced any of the following in the past 5 years:

Company has filed for bankruptcy

Yes

No

Points Available: 0.00

---



## Bribery, Fraud, or Corruption

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Bribery, fraud, or corruption

Yes

No

Points Available: 0.00

---

## Anti-Competitive Behavior

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Anti-competitive behavior

Yes

No

Points Available: 0.00

---

## Financial Reporting, Taxes, Investments, or Loans

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Financial reporting, tax payments, investments, or loans

Yes

No

Points Available: 0.00

---

## Political Contributions or International Affairs

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Political contributions or international affairs

Yes

No

Points Available: 0.00

---

## Labor Issues

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Labor issues (including safety and discrimination)

Yes

No

Points Available: 0.00

---

## Breaches of Confidential Information

Please indicate if your company has experienced any of the following in the past 5 years:

Breaches of individual privacy and/or losses of individual confidential data

Yes

No

Points Available: 0.00

---

## Significant Layoffs

Please indicate if your company has experienced any of the following in the past 5 years:

Company has had layoffs of more than 20% of the workforce

Yes

No

Points Available: 0.00

---

## Hazardous Discharges Into Air/Land/Water (Past 5 Yrs)

Please indicate if your company has experienced any of the following in the past 5 years:

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

Yes

No

Points Available: 0.00

---

## Large Scale Land Conversion, Acquisition, or Relocation

Please indicate if your company has experienced any of the following in the past 5 years:

Construction or operation of company involved large scale land acquisition, convergence, or degradation (including the construction or refurbishment of dams), or resulted in the resettlement or economic displacement of 5,000 or more people

Yes

No

Points Available: 0.00

---

## Penalties Assessed For Environmental Issues

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Environmental management penalties, including animal welfare

Yes

No

Points Available: 0.00

---

## Violation of Indigenous Peoples Rights

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Infringing on indigenous people's rights, for instance by utilizing lands owned or used by indigenous peoples without full documented consent of such peoples

Yes

No

Points Available: 0.00

---

## Other Disclosure Outcomes & Penalties

Please indicate if your company has had a formal complaint to a regulatory agency or been assessed a fine or sanction in the past five years for any of the following:

Other penalties, complaints, or grievances filed or levied against the company for negative impacts on local communities, human rights, or other stakeholder concerns

Yes

No

Points Available: 0.00

---

## Company Explanation Of Disclosure Item Flags

If you selected "Yes" to any of the "Disclosure Outcomes & Penalties" listed above, please provide a detailed explanation of the company's experience related to each affirmative response:

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

If you selected "Yes" to any of the "Disclosure Outcomes & Penalties" listed above, please provide a detailed explanation of the company's experience related to each affirmative response:

Points Available: 0.00

---

## Supply Chain Disclosure

Disclosure questions concerning the significant suppliers of the company

### Suppliers in Conflict Zones

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

Operation in conflict zones

Yes

No

Don't Know

Points Available: 0.00

---

## Suppliers Negative Social Impact

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

Practices or outcomes that produced substantial negative impacts regarding human rights, labor conditions, or local communities

- Yes
- No
- Don't Know

Points Available: 0.00

---

## Suppliers Negative Environmental Impact

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

Practices or outcomes that produced substantial negative environmental impact

- Yes
- No
- Don't Know

Points Available: 0.00