

Sustainability Advantage Assessment (2016-12-14)

Version: Service Track / 0 Employees / Developed - Global Market

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B Corp Inclusion Challenge

B Corp Inclusion Challenge (Developed Markets)

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

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

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

What % of the members of your Board of Directors (or equivalent) are women or individuals from other underrepresented populations?

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

What % of your Significant Suppliers are majority owned by women or individuals from underrepresented populations?

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

What is the social and environmental screen that is used for a majority of your company's Significant Suppliers:

- No formal screening process in place
 Screened for negative practices or regulatory non-compliance (e.g. no child labor)
 Screened for positive practices beyond what is required by regulations (environmentally-friendly manufacturing process; excellent labor practices, etc.)

Separate from a mission statement, has your company done any of the following to legally ensure that its social or environmental mission will be maintained over time, regardless of company ownership?

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

Other: When I die, Sustainability Advantage dies. I have left explicit instruction for the Executors of my estate to wind down Sustainability Advantage rather than sell it.

Governance

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]

1. To inspire and enable business leaders to integrate sustainability strategies into company strategies and to perform at the level defined by the Future-Fit Business Benchmark goals. (see www.futurefitbusiness.org)
2. To provide useful resources for legions of sustainability champions so that they have the competence and confidence to accelerate the transformation toward a flourishing global society within a sustainable environment.

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

GV1.8a 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)

Other: Continuous discussions with users of my resources about how to improve their usefulness for sustainability champions. Continuous discussions with event organizers and participants about whether my talks were useful and how well I am walking the talk.

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.)

Governance: Corporate Accountability

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

GV2.2b Which of the following apply to your company's Board of Directors or equivalent governing body? [Equally Weighted]

- Meets at least twice annually
- Includes at least 1 independent member
- Oversees executive compensation
- Company is a co-op 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

Governance: Transparency

GV4.1b Does the company produce financials that are reviewed by the Board, other formal governing body, or independent third party? [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

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

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]

 Canadian Dollar - CAD

GV5.3 Total Earned Revenue

From the last fiscal year 45,338.00

From the fiscal year before last 40,866.00

GV5.4 EBIT (Earnings Before Interest & Taxes)

From the last fiscal year 11,899.00

From the fiscal year before last 2,010.00

GV5.5 Net Income

From the last fiscal year 9,531.00

From the fiscal year before last 2,010.00

Community

Community: Diversity & Inclusion

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

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

CM3.11 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

Community: Civic Engagement & Giving

CM4.1c Does the following apply to the company's charitable giving and civic engagement in policy or in practice? [Equally Weighted]

- Statement on the intended social or environmental impact of company's charitable contributions
 Cash and in-kind donations (excluding political causes)
 Community service and pro bono service
 Formal donations commitment (e.g. 1% for the planet)
 Other (please describe)
 None of the above

Other: I have a "10% for People and Planet" giving policy. I make monetary donations amounting to at least 10% of Sustainability Advantage's annual REVENUE to individuals and NGOs working on pressing social and environmental issues.

CM4.5 Number of hours volunteered by full-time and part-time employees of the organization during the last fiscal year. [Not Weighted]

1,000.00

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

Answer(s): Just counting my 60 pro bono talks in 2015 @ an average of 4 hours / talk, I donated 240 hours, which is 240 hrs / 2000 hrs = 12% of my time ... and that's just the tip of the pro bono iceberg.

CM4.7 Total amount (in currency terms) donated to registered charities in the last fiscal year. [Not Weighted]

16,923.00

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
- 1.1-2.4% of revenues
- 2.5-5% of revenues
- 5%+ of revenues
- Don't know

Answer(s): That is the total of:

Monetary donations to registered charities: \$2,852 (see above)

+ Monetary donations to non-charity NGOs and social entrepreneurs: \$2,507

+ Value of pro bono talks: \$5,214

+ Value of donated books: \$6,350

= Total donations = \$16,923

This is 37% of my \$45,338 revenue.

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

The charities include TNS Canada, Heart & Stroke, Canadian Centre for Policy Alternatives, and WWF. Political contribution went to the Green Party. I also support LeadNow, Council of Canadians, Stratlead, the Masters in Strategic Leadership for Sustainability (MSLS) in Sweden, and Republic of Change.

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]

I am a sole proprietor and work from my home office in Whitby, Ontario.

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

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

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.)

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

Answer(s): My years of experience as an IBM manager reinforced the value of continuous two-way feedback between employees and managers. In my 10 years as manager of Leadership Development in IBM Canada, I trained managers on how to conduct effective feedback sessions and pioneered a "Fit-For-You" card that helped managers receive input from employees on how the managers could create a work environment that would enable employees to perform at their best. I have applied my 34 years of IBM experience to my Sustainability Advantage sole proprietorship and my interactions with contractors.

1. Feedback to contractors

I use independent contractors for help with my website, social media, computer system. After every project, we exchange emails and / or have phone calls to debrief how it went for both of us. These feedback sessions are usually triggered by the contractor's invoice. After some projects, I confirm my delight with their performance by adding a bonus to my invoice payment.

2. Feedback from contractors

Feedback includes two-way communication, as described above. We use a standard two part format to our feedback sessions: "What worked well?" and "What could we do better next time?" My relationship with contractors is excellent because of our candid and constructive feedback dynamics.

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

Answer(s): 5% of my revenue came from royalties on book sales through New Society Publishers (NSP) who only use FSC certified paper. (They also became a certified B Corp in 2016.)

Environment

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
-

Environment: Land, Office, Plant (Virtual Office)

EN2.5.14a Which of the following are true of how your company encourages good environmental stewardship in how employees manage their virtual offices? [Heavily Weighted]

- 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
-

Environment: Inputs

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

Answer(s): Electricity: As a Sole Proprietor working from a home office, I have two electricity targets.

- 1) Use 100% renewable energy, either self-generated or by purchasing RECs from Bullfrog Power. This is my most important electricity target and I have met it every year since 2002, including 2015.
- 2) Use 6,000 kWh of electricity or less each year for household operations. I met that target in 2014 (5,358 kWh), but in 2015 we used 6,304 kWh.

Natural Gas: As a Sole Proprietor working from a home office, I have two natural gas targets.

- 1) Use 100% green gas, by purchasing RECs from Bullfrog Power. This is my most important natural gas target and I have met it every year since 2010, including 2015.
- 2) Use 3,500 m3 of natural gas or less each year for household operations. I missed that target in 2014 (4,007 m3) but upgraded our high efficiency furnace and met it in 2015 (3374 m3).

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

Answer(s): Water: As a Sole Proprietor working from a home office, I have two water targets:

1) Maintain my annual consumption below 150 m3 per year. This is my most important water target, because it affects the water availability in my local watershed, and in 2014 and 2015, met that target. I used 88 m3 and 128 m3 of water, respectively.

2) Offset my water usage in this watershed with water credits from Sustainability Credits from Enviro-Stewards that make more potable water available in other water sheds. I did.

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

148.34

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

148.34

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

128,000.00

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

Answer(s): All my electricity and natural gas consumption is offset by purchasing green electricity and green gas RECs from Bullfrog Power.

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

Other: Please see the separate 72 Eco-Efficiency Initiatives document at sustainabilityadvantage.com/documents/72initiatives.pdf

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

Other: Please see the separate 72 Eco-Efficiency Initiatives document at sustainabilityadvantage.com/documents/72initiatives.pdf

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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
					Scopes 1 and 2 greenhouse gas (GHG) emissions

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

1,040.00 Answer(s): I compost all vegetable and fruit waste and use it in our garden. In addition, our weekly sorted garbage picked up by the municipal collection service is approximately:
 1 blue box of recyclable paper and cardboard @ 8Kg
 1 blue box of recyclable cans, glass and plastics @ 6 Kg
 1 green bag of compostable organic waste @ 2 Kg
 1 bag of other non-recyclable waste that goes to a regional energy from waste facility @ 4 Kg
 Total of about 20 kg / week = 1,040 kg / year = 1.040 metric tonnes / year. None of this went to landfill sites; it was all recycled, reused, or converted to energy.

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

1,040.00 Answer(s): (See above)

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

Scope 1:	0.00
Scope 2:	0.00
Scope 3:	15.31

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

Answer(s): I dispose of it (batteries, paint, chemicals, electronics) at a special community waste depot.

Impact Business Models

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

Other: When I die, Sustainability Advantage dies. I have left explicit instruction for the Executors of my estate to wind down Sustainability Advantage rather than sell it.

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

Answer(s): Among others, these two options are later listed as possible outcomes from this business model:

- Improved Education or Skills Development (e.g. schools, textbooks, tutoring services, career leadership training, education tools, games and software)
- Increased social and/or environmental impact for businesses or other organizations (e.g. sustainability consulting)

I could build a case that my products and services do this, but it would be very similar to my “Environmental Products and Services” business model. Therefore, to avoid redundancy and dilution of that business model, I answered “no” to this question.

Impact Business Models: Customer Products & Services Introduction

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:	1,000.00
Organizations:	80.00

Impact Business Models: Education

IBM37.2 Which of the following product or service descriptions best fit your company? [Not Weighted]

- Products/services offer or promote access to general knowledge (e.g. books, generalized information)
- Products/services support education or education/professional development initiatives (e.g. educational toys, grading software)
- Products/services provide ongoing professional development and advancement of knowledge (training programs for professionals, service learning, textbooks, specialized research or scientific journals)
- Products/ services provide essential educational credentials and academic development (primary or secondary school, accredited trade schools and career training, etc.)
- These descriptions do not apply to our company's product/service (Skip the remainder of this section)

IBM37.6 What were your total revenues last fiscal year from the previous products or services? [Not Weighted]

45,338.00

IBM37.7 This is a calculated question based on your previous answers: "What were your total revenues last fiscal year from educational products or services?" and "Total revenue from the last fiscal year" [Not Weighted]

IBM37.8 This is a calculated question based on your answers above: IBM37.2 Which of the following product or service descriptions best fit your company? and IBM37.7 What % of your revenues last fiscal year were from products or services that promote education? [6x]

IBM37.13 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
- 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.

IBM37.14 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

IBM37.18 Does your company also measure and manage the negative or unintended outcomes generated by this business model? [Least Weighted]

- Yes No

Impact Business Models: Community Business Models Introduction

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

Answer(s): I have a "10% for People and Planet" giving policy. I make monetary donations amounting to at least 10% of Sustainability Advantage's annual REVENUE to individuals, organizations, and NGOs (with or without charitable status) working on pressing social and environmental issues.

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

Answer(s): I have a "10% for People and Planet" giving policy. I make monetary donations amounting to at least 10% of Sustainability Advantage's annual REVENUE to individuals, organizations, and NGOs (with or without charitable status) working on pressing social and environmental issues.

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

16,923.00 Answer(s): That is the total of:

Monetary donations to registered charities: \$2,852

+ Monetary donations to non-charity NGOs and social entrepreneurs: \$2,507

+ Value of pro bono talks: \$5,214

+ Value of donated books: \$6,350

= Total donations = \$16,923

This is 37% of my \$45,338 revenue.

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

Answer(s): That is the total of:

Monetary donations to registered charities: \$2,852 (see above)

+ Monetary donations to non-charity NGOs and social entrepreneurs: \$2,507

+ Value of pro bono talks: \$5,214

+ Value of donated books: \$6,350

= Total donations = \$16,923

This is 37% of my \$45,338 revenue.

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

Answer(s): I currently serve on the boards of Forum for the Future U.S. and the Future-Fit Foundation, and serves on the B Lab Standards Advisory Council. I previously served on the boards of The Natural Step Canada (12 years), Learning for a Sustainable Future (3 years), Durham Sustain Ability (6 years), was a citizen member of the Durham Region Roundtable on Climate Change (5 years), and was a member of the Global Initiative for Sustainability Ratings (GISR) Technical Review Committee (3 years).

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

- Yes No

Answer(s): We need companies to be "future-fit." A Future-fit company creates value while in no way undermining – and ideally increasing – the possibility that humans and other life will flourish on Earth forever. I co-authored the Future-Fit Business Benchmark that defines the required level of company performance on 21 environmental and social goals. That is, it defines the outcomes I seek for all companies in return for my four years of pro bono contribution as Lead Technical Advisor to the Future-Fit Foundation while creating the benchmark.

IBM13.7 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
- 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.

Answer(s): Companies respond to rankings and scoring. They want to be highly rated by the DJSI, Corporate Knights' Global 100, the B Lab BIA, etc. They also want to be attractive to investors. We intend to embed the Future-Fit Business Benchmark goals into these rating, ranking, and investment screening criteria so that companies will want to be more truly sustainable / future-fit.

IBM13.8 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

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

Yes No

Answer(s): There may a danger that if I do too much pro bono work, I may take away business from others who charge for their services. The organizations for which I do pro bono talks cannot afford high-priced speakers – that's why I do them pro bono. Also, I do not do consulting; I do talks. I am in close contact with the community of sustainability consultants and if I sense that an organization is prepared to pay for consulting help, I give two or three names of individuals / NGOs / consulting firms who could help. In effect, I am the rainmaker for those consultants.

IBM13.10 Is there something different or innovative about the company's approach to charitable-giving that has changed the industry? Is this something replicable, unique at the time it was created, and that has been emulated by other organizations? [Not Weighted]

My innovation is that I donate significant monetary / in-kind, and pro bono donations to non-charities and to social entrepreneurs, for which I receive no tax deductions. Some of these non-charity organizations (e.g. Avaaz, SumOfUs, Dogwood, Council of Canadians) are doing excellent work to build a groundswell of demand for more responsible corporate practices. I also give away many of my resources and tools to sustainability champions. My strategy is to get them into the hands of change makers who can help accelerate the necessary transformations. I make most of my revenue from paid speaking engagements and from subscriptions to enhancements to my resources that I have given away. That is not a new business model in other sectors, but I know of no other provider of resources for sustainability champions who uses it.

Disclosure Questionnaire

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]

Disclosure Questionnaire: Disclosure Practices

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

- | True | False | Yes | No |
|-----------------------|----------------------------------|----------------------------------|-----------------------|
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | <input checked="" type="radio"/> | <input type="radio"/> |

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

Disclosure Questionnaire: Disclosure Outcomes

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

- | True | False | Yes | No |
|-----------------------|----------------------------------|--|----|
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has had an operational or on-the-job fatality | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company sites have experienced accidental discharges to air, land or water of hazardous substances | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Construction or operation of company facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near your facility | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Material litigation or arbitration against company | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has filed for bankruptcy | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has had material breaches of individual's confidential information | |

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]

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"/> |
| | 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]

Disclosure Questionnaire: Supplier Disclosure

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

Disclosure Questionnaire: Other Disclosures

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

Does not apply