

Key Considerations

2020 Corporate Social Investment and Environmental, Social and Governance (ESG) Questionnaire

As you review this year's questionnaire, *please keep in mind the following key considerations:*

- **Question Updates:**
 - In order to avoid asking questions for which the answers are publicly available, please note that CECP pulls financial data for benchmarking analysis from the Bloomberg database. In 2020, CECP will also conduct secondary research from other publicly available reports for information regarding respondent companies, such as its consideration of one or more of the SDGs and the company's key focus areas around social issues.
- **Company Size:** The data collected for the 2020 Questionnaire will focus on companies with over US\$1 billion dollars in annual revenue, resulting in insights that will represent:
 - GX Country partners use their survey process to collect companies of all sizes for their own research if they choose to.
 - If the threshold of US\$1 billion is prohibitive to adequate sample in a given market, an adjustments can be made to lower the threshold in order to achieve adequate sample but never going below US\$.5 billion.
 - Please note, the goal is to benchmark and compare large companies and not the entire corporate sector.
- **Company Ownership Structures:** Publicly traded and private companies can participate. Benchmarking analysis will focus on publicly listed companies of which their financial information will be pulled systematically from the Bloomberg database. Private companies may participate but will be excluded from benchmarking analysis for financial comparisons.
- **Corporate Headquarters:** The insights will report corporate community investment numbers from the highest possible structural level, *preferably* the parent company.
 - In general, the questionnaire will assume subsidiary companies are included in their parent company. This means that companies should include data from subsidiaries, regional groups, and/or international divisions in their answer as much as possible.
 - Should a subsidiary or region seek an exception to this rule, they must comfortably exceed the revenue threshold (US\$1B) and they must also ensure there will be no duplicate reporting of their companies' community investments.
 - The Respondent Information question provides a field to indicate the questionnaire respondent and their parent company, if applicable.
- **Timeline:** Data and the funds reported by company survey takers must be disbursed in the 12 months of the survey year or the 12 months of the latest fiscal year.