



## GX Partner Toolkit

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

Dear Global Exchange Partners,

Thank you for collaborating with CECP!

The most valuable outreach GX Partners can undertake is **personal emails** to companies in your network to advocate for their participation. We also welcome additional outreach through other communications channels like:

- Cross-post a **blog** about the survey using the accompanying material's language or the one your organization drafts.
- Share a **case study** on a leading company that completes the survey. We can all/some cross-post them online.
- Host a **conference call** or **webcast** with your corporate network to let them know about the 2020 Questionnaire or include a note about the survey on one of your online events.

Below, we tried to think of the core language that you may need for your communication with companies about the survey. All of the language below is just a suggestion, feel free to customize to accommodate your needs.

#### HELPFUL LANGUAGE FOR YOUR COMMUNICATION

- **About the 2020 Corporate Social Investment and ESG Questionnaire**

The 2020 Corporate Social Investment and ESG Questionnaire is the result of a collaborative effort with CECP's Global Exchange. The [Global Exchange](#) (GX) is an international network of leading organizations that seek to advance the corporate sector as a force for good around the world. The GX was launched three years ago to serve companies by building a body of knowledge on locally relevant corporate citizenship best practices through information sharing and collaborative research. The Global Exchange acts as a catalyst to enhance and advance corporate social investment strategies. This questionnaire was co-created by Global Exchange Country Partners, representing 18 different countries in Africa, the Americas, Asia, and Europe. Last year's questionnaire collected data from 64 multi-billion-dollar companies headquartered outside the U.S. and was carried out in the late spring of 2019. Representing the leading research on trends in corporate societal engagement, the questionnaire was developed to help identify shared characteristics and test the reach of trends in corporate social investment and ESG across countries.

- **Benefits for companies that are part of this research**

- Participation is free
- Estimated time to complete the survey is brief, estimated time is [CECP's estimate is 15-20 minutes];
- **Recognition:** public citation of the research in cross-regional media outlets, platforms of various organizations that are part of the Global Exchange – based in 18 different countries;
- **Leadership:** Establish your company as a leader in corporate responsibility and join leaders of other multi-billion-dollar companies based in different regions which will also be answering the survey;
- **Higher purpose:** contribute to research that informs non-profits, academics, media, SMEs, and more on how large companies are committed to creating a better world through business;
- **Peer Learning & Collaboration:** Exposure to, and recognition from, leaders in global CSR;
- **Data:** Use the results to benchmark your company's programs. Help make your case!

- **Brief Details about the Questionnaire**

- There is no fee to participate.
- Specific company information is never publicly shared, all analysis will be conducted in an aggregate manner.



- The goal is to benchmark and compare large companies and not the entire corporate sector. Research is limited to companies with over US\$1 billion dollars in annual revenue. Adjustments can be made to lower the threshold but never going below US\$.5 billion.
- Data is submitted through an online platform called Survey Gizmo or through a questionnaire sent via email.
- List of survey questions are available here [please include the survey gizmo link and/or excel attachment that your organization is using]
- CECP drafted the following resources that can be of help for participating companies
  - 2020 Corporate Social Investment and ESG Questionnaire Instructions
  - 2020 Corporate Social Investment and ESG Questionnaire Key Considerations
- Companies must submit by [deadline, GX deadline has been extended to Friday, June 26<sup>th</sup>] to be included in the 2020 Corporate Social Investment and ESG Questionnaire Key Considerations
- Contact [your contact information] or Laura Galindo, Associate Manager, Corporate Leadership at CECP, for more information: [lgalindo@cecp.co](mailto:lgalindo@cecp.co)

- **CECP Boilerplate, if needed**

Chief Executives for Corporate Purpose® (CECP) is a CEO-led coalition that believes that a company's social strategy—how it engages with key stakeholders including employees, communities, investors, and customers—determines company success. Founded in 1999 by actor and philanthropist Paul Newman and other business leaders to create a better world through business, CECP has grown to a movement of more than 200 of the world's largest companies that represent \$6.6 trillion in revenues, \$21.2 billion in social investment, 14 million employees, 23 million hours of employee engagement, and \$15 trillion in assets under management. CECP helps companies transform their social strategy by providing customized connections and networking, counsel and support, benchmarking and trends, and awareness building and recognition.

### **SUGGESTED EMAIL TEMPLATES**

#### **SUGGESTED EMAIL TO USE IN OUTREACH TO COMPANIES IN YOUR NETWORK - OPTION # 1 (EXTENDED VERSION)**

Subject: Exclusive invitation to join Corporate Social Investment and ESG research

Cc: Laura Galindo, [lgalindo@cecp.co](mailto:lgalindo@cecp.co)

Dear [Name],

Greetings from [City] – we hope this finds you staying safe and well, despite the effects of the coronavirus rippling around the world. We know this continues to be a very difficult period for so many in our communities and elsewhere.

We'd like to invite you to take part on the **2020 Corporate Social Investment and ESG Questionnaire**, a leading research that will uncover global trends and identify shared characteristics in corporate social investment and ESG across countries.

To participate, please follow this [include Survey Gizmo link sent via email]. This year's survey will remain open until Friday, [deadline for your organization's data collection, GX deadline has been extended to Friday, June 26<sup>th</sup>]

Leading companies' participation in this questionnaire will be invaluable, and we'd like to thank you in advance for the interest and involvement of [company name] despite the current global circumstances! Your efforts contribute to a collective movement to enrich the field at a global level and encourage the application of data insights to inform decisions that companies in different countries make daily.

The **benefits** of being a part of this research are:

- Participation is free
- **Recognition:** public citation of the research in cross-regional media outlets, platforms of various organizations that are part of the Global Exchange – based in 18 different countries and more;



- **Leadership:** Establish your company as a leader in corporate responsibility and join leaders of other multi-billion-dollar companies based in different regions which will also be answering the survey;
- **Higher purpose:** contribute to research that informs non-profits, academics, media, SMEs, and more on how large companies are committed to creating a better world through business;
- **Peer Learning & Collaboration:** Exposure to, and recognition from, leaders in global CSR
- **Data:** Use the results to benchmark your company's programs. Help make your case!

All company-specific data is treated with highest confidentiality, and only aggregate results are published. Please contact us to learn how your company can join this collective effort.

We look forward to your continued collaboration in representing [country] in the 2020 Corporate Social Investment and ESG Questionnaire.

Best regards,  
[Your name, organization]

**SUGGESTED EMAIL TO USE IN OUTREACH TO COMPANIES IN YOUR NETWORK - OPTION # 2 (ABBREVIATED VERSION)**

Hello [name],

The **2020 Corporate Social Investment and ESG Questionnaire** is now open!

**Get started today - Follow this link to the Survey:**

[Link to survey]

Or copy and paste the URL below into your internet browser:

[Link to survey]

The survey will stay open until [deadline imposed by each GX Country Partner, GX deadline has been extended to Friday, June 26<sup>th</sup>]

Leading companies' participation in this questionnaire will be invaluable, and we are so thankful for the interest and involvement of [company name] despite the current global circumstances! Your efforts contribute to a collective movement to enrich the field at a global level and encourage the application of data insights to inform decisions that companies in different countries make daily.

**We have noted you as our primary contact and I look forward to working with you this year.** If there is a change in this or if you have any questions, please let me know.

We look forward to your continued collaboration in representing [country] in the 2020 Corporate Social Investment and ESG Questionnaire.

Warm regards,  
[Your name, organization]

**SOCIAL MEDIA SUGGESTIONS**

- Sample Tweets:
  - It's time to be a part of a global movement to track impact of corporate societal investment and ESG trends.  
#2020GlobalExchangeQuestionnaire

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- Is your company on the list of #GEQ2020 participants? Leading companies are tracking their corporate social investments and ESG trends with the 2020 GEQ Survey. #2020GEQ
- Show your company's commitment to the community by taking part in #2020GEQ
- Is your company getting ready to take part in #2020GEQ?
- Is your company investing in society? Measure your impact. #2020GEQ
- How do #corp societal investment strategies differ around the world? #Asia #Africa #LatinAmerica #Europe? #2020GEQ

## **LOGO**



## **ANSWERS TO FAQs**

### **How is the collected data used?**

Specific company information is never publicly shared, all analysis will be conducted in an aggregate manner. Data will be aggregated and shared in a Global Exchange report that will be free to the public and downloadable by companies, academia, media, nonprofits all across the globe to help tell the story of how companies are a force for good.

### **How can companies participate for the first time?**

In its second year, the Global Exchange is making a concerted effort to invite and encourage new companies to join the research – this helps make sure the research is representative for the field and of trends happening in different regions of the world. Companies do not need to be affiliated with CECP or Global Exchange partners to participate. There is no cost to participate in the survey.

### **How long does it take to complete the survey?**

Survey completion should take about 15-20 minutes as the vast majority are multiple choice and programmatic questions.

### **When is the deadline?**

This year's survey deadline is Friday, June 26<sup>th</sup>.

### **What are some of the benefits of participation?**

In addition to contributing to a collective movement to enrich the field at a global level and encourage the application of data insights to inform decisions that companies in different countries make daily, additional benefits include:

- **Recognition:** public citation of the research in cross-regional media outlets, platforms of various organizations that are part of the Global Exchange – based in 18 different countries;
- **Leadership:** Establish your company as a leader in corporate responsibility and join leaders of other multi-billion-dollar companies based in different regions which will also be answering the survey;
- **Higher purpose:** contribute to research that informs non-profits, academics, media, SMEs, and more on how large companies are committed to creating a better world through business;
- **Peer Learning & Collaboration:** Exposure to, and recognition from, leaders in global CSR;
- **Data:** Use the results to benchmark your company's programs. Help make your case!

## **ELIGIBILITY**

- 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:

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- Adjustments can be made to lower the threshold but never going below US\$.5 billion.
- Please note, the goal is to benchmark and compare large companies and not the entire corporate sector.

#### **HOW COMPANIES CAN TAKE THE SURVEY**

1. Email [\[point of contact at GX partner\]](#) request your company's link to answer the survey
2. Email Laura Galindo, Associate Manager at CECP [lgalindo@cecp.co](mailto:lgalindo@cecp.co) to request your company's link to answer the survey