User Guide
2020 Giving in Numbers Survey

Designed to help you navigate this year's Giving in Number Survey, this User Guide is comprised of the following reference materials:

I.   Instructions

II.   2020 Data Sharing Policy

*Giving in Numbers is the **unrivaled leader in benchmarking on corporate societal investments, in partnership with companies.***

More information available on http://cecp.co/gin.

2020 Giving in Numbers Survey Instructions

1. **Review & Plan**
2. **Validate**
3. **Access**
4. **Navigate, Edit, Autosave**
5. **Input Considerations**
6. **Review of response**
7. **Submitting your Responses**

We thank you in advance for your company's participation in Giving in Numbers - *the unrivaled leader in benchmarking on corporate social investments, in partnership with companies.*

Review & Plan

Plan out a timeline that works best for your company. Take into consideration any internal final review or approval that may be required

CECP released the [Top 10 Community Investment Metrics template](#) in November 2019. It consists of metrics we recommend every company review at the end of the year. This customizable excel sheet can be emailed to colleagues who can provide numbers for the community investments happening locally in their region or unit.

Additional helpful resources and recommendations to help you prepare for 2020 include:
1. Contact CECP for a copy of last year's submission at insights@cecp.co.
2. Mark your calendar with this year's **deadline for submission**, *March 31st, 2020*
3. Review this year's survey questions
    - Print and review the PDF version of the survey included in the launch email and on the first page of the digital survey.
    - Use this to compile answers prior to inputting responses online
    - If necessary, send sections of the survey to other departments or colleagues for input or answers.
4. Connect with colleagues to identify areas of the survey for potential collaboration with data
5. Review this year's survey questions alongside their definitions in the updated **Valuation Guide,** your guide on how best to interpret key questions
6. Pull your data

Survey submission is often an output of what companies complete as part of their year-end reporting process. Year-end resources also include:

- [The Community Investment KPI webinar](#) during which we launched the template for more details on how to use the tool.
- Refer to [Giving in Numbers](#) for benchmarking numbers to supplement your presentations. Log into [MyCECP](#) to export 2018 benchmarking data and charts

- o   Username: your email address
- o   Submit a custom data request to insights@cecp.co.

Validate

- Confirm that Total Community Investment is equivalent to the following breakdowns:
  - i. Totals by Program Area
  - ii. International Breakdown
  - iii. Country Breakdown
- If the breakdown totals do not equal your reported total community investments, an error message will appear. You will not be able to proceed with the survey until this error is resolved.

Access

- Your company's unique survey link can be accessed **directly through the Survey Link** sent via email to the main survey contact at your company at the time of survey launch
  - o   Every company has a unique survey link, if you are unable to find your survey link, please contact insights@cecp.co.
  - o   Multiple colleagues can access the survey using the same link. Each time the link is accessed, the user will be directed to the latest survey page that was updated/saved.

Navigate, Edit, & Autosave

- Increase or decrease the size of your survey view in your browser by selecting Ctrl + or Ctrl – function on your computer
- Please note certain questions of the survey are mandatory, indicated by a red asterisk (*) next to the question. You will be unable to submit the survey until all mandatory questions within each section are responded to.
- Select "back" or "next" on the bottom of each screen to proceed to another page/section.
- *For your online entries to be automatically saved, please ensure that you select 'next' after completing each page, prior to exiting the browser*. Selecting 'next' will lock in responses on that current page and will enable you to edit/finish sections at a later time.
  - i. When you return to the survey at a later time, you will be directed to the page where you left off.
- Share the survey with your colleagues by simply forwarding the unique link to them by email. Upon accessing the same link, they will be directed to the page where you last input and saved responses.

Input Considerations & Troubleshooting

- No punctuation should be entered in the numeric fields, simply type the entire number with all zeros excluding the use of commas, decimals, and/or dollar signs – commas, decimals and dollar signs will appear automatically.
- Data errors will display a red error message at the top of your screen. Review the message and edit the error by scrolling down in order to proceed to the next page.
- *Do not* **select your web browser's back arrow** to revisit a previous response

Reviewing your response
- From the summary review page, identify any remaining edits you would like to make
  - You can print a PDF version of your responses on the bottom of the summary review page to share with your colleagues, manager or any others that need to review
  - You can also print the survey from the summary review page by selecting 'CTRL P' on your keyboard

Submitting Your Responses

  - To make edits to your responses from the summary review page, please select the *'back' button at the bottom of the survey page* in order to return to a previous section/page
- You can also print a PDF version of your responses on the bottom of the summary review page for your records
  - You can also print the survey from the summary review page by selecting 'CTRL P' on your keyboard
- Once you have reviewed and are satisfied with all your responses, click "Submit" to complete your survey.
- Shortly after submitting your survey, you will receive an email confirmation with a PDF copy of your submission attached.

Thank you for your work to prepare for the Giving in Numbers survey! This research provides your individual company with useful benchmarking data while also advancing the community investment field as a whole.

CECP Data Sharing Policy

Summary
- The CECP corporate community agrees to operate under a principle of mutual advancement. Company-specific information should be used internally only, and under no circumstances used in a public or defamatory manner.
- CECP data is company-reported, therefore participating companies must ensure that their data is complete, accurate, and conforms to the guidelines published in the CECP Valuation Guide.
- Usernames and passwords are to be kept confidential and are not to be shared. While discouraged, companies may extend temporary access to third-party consultants provided that those individuals agree to use the data solely in the service of the company.
- Participating companies agree to have their giving information included in all aggregate, industry, classification, and peer group totals. CECP agrees to only allow benchmarking in a manner that preserves confidentiality.

- CECP may distribute high-level findings, yet is not permitted to publish any information associating a company with a particular data finding.

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Overview
Participation in the annual survey is optional. By electing to supply data to the survey, CECP companies are entitled to unlimited access to the information available in the online system. All participating companies must also abide by the data-sharing limitations agreed upon by the system's user community. The rights and guidelines of participation are outlined below.

Groups with Access
Access to the online system requires a password. Only individuals at CECP companies agreeing to this policy and that supplied data to the system are given access by the staff at CECP.

No employees of government organizations, academic institutions, vendors in the corporate philanthropy industry, or members of the media may access the online system. Further, CECP companies that do not supply data will not be granted system access. System login information may not be given to individuals outside of the immediate CECP corporate community.

Self-Reported Data
Data supplied to the CECP survey is self-reported. Data points that are public information (such as revenue and number of employees) are inputted by CECP staff. However, the majority of data entered into the system cannot be confirmed. Therefore, it is the responsibility of companies supplying data to ensure the accuracy of their responses. As it is critical that all survey questions be answered consistently across companies, it is incumbent upon CECP to provide training materials and the duty of participating companies to provide honest and complete data, and to seek clarification from CECP as needed.

Sharing Survey Responses
Sharing means a company's responses will be shown in the MyCECP online system and for customized benchmarking requests. This is only accessed by the CECP corporate community. The first question of the survey allows companies to either share all survey question responses or to indicate their preference to share question by question. If selecting the latter, participants must indicate at the end of each survey question whether they are willing to share their company's response to that question. Companies may change their designations at any time by contacting CECP. Sharing is encouraged.

Regardless of a company's willingness to share each survey question, every company participating in the survey agrees to have its company's giving information included in all totals (aggregate, industry, classification, and peer group). CECP agrees to only allow benchmarking in a manner that preserves the confidentiality of every company's data.

Viewing Reports
While the online system is designed to protect the data confidentiality of participating companies, it is also designed to allow companies to share any data points that they wish. When viewing the survey responses of another company, companies agree to use that information for internal purposes only. Data supplied by other companies is not to be shared

with the media or published in outward-facing documents. The spirit behind data sharing with the system is mutual advancement and learning. Under no circumstances is the information provided by a company to be used publicly or disparagingly.

Published Research Reports

CECP will publish an annual report which contains expert data analysis and is intended to surface year-over-year and industry trends. Printed and/or electronic copies of this document are made available to companies as a benefit of participation.

As a service to the field at large, CECP will occasionally distribute high-level findings from the data. CECP will not publish information that would associate a company with a particular data finding.