

User Guide

2022 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. [Data Sharing Policy](#)
- III. [Survey Questions](#)

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

More information available at <http://cecp.co/gin>. Please refer to the Valuation Guide for detailed instructions for calculating each response.

I. 2022 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.***

1. 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 updated the [Top 10 Community Investment Metrics template](#) in January 2022. 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.

Innovation Partners:

Companies using software from CECP's Innovation Partners – Benevity and YourCause, a part of Blackbaud – will have access to a standard CECP Giving in Numbers report they can run to more easily pull their companies' data in a way that aligns with the Giving in Numbers research.

If your company uses Benevity, go to Benevity Reporting and click on the "CECP Giving in Numbers Support" report found under *Stock Reports. If your company uses YourCause, a part of Blackbaud, go to your Tableau Standard Dashboards folder and select CECP Giving in Numbers Survey. Use the General Instructions tab to guide you through completing your survey.

Additional helpful resources and recommendations to help you prepare for 2022 include:

1. Contact CECP for a copy of last year's submission at ahchavarria@cecp.co.
2. Mark your calendar with this year's **deadline for submission, March 31st, 2022.**
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. Review pre-populated reports from Innovation Partners (if available).
7. 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 Community investment KPI tool.
- [Giving in Numbers](#) for benchmarking numbers to supplement your presentations.
- Members can log into [MyCECP](#) to export 2020 benchmarking data and charts. Contact insights@cecp.co for login information or to make a custom data request.

2. 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.

3. Access

- Your company's unique survey 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
 - Every company has a unique survey link. If you are unable to find your survey link, please contact ahchavarria@cecp.co.
 - 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.

4. 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.

5. 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.

6. 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.

7. 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.

II. 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 section 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.

III. 2022 Giving in Numbers Survey Questions

Survey Contents

Giving in Numbers is the **unrivaled leader** on benchmarking corporate social investments, in partnerships with companies. Thank you to the 500+ companies that have participated over the years for your ongoing commitment to this research!

I. RESPONDENT INFORMATION

Basic details about the respondent and company

II. COMMUNITY INVESTMENT

Monetary totals of cash and non-cash, breakdown by program area, focus areas and strategic programs

III. INTERNATIONAL

Monetary breakdown of domestic and international impact and country totals

IV. EMPLOYEE ENGAGEMENT

Monetary totals of matches, program details, volunteering programs offered, participation rates and total hours

V. ADMINISTRATION

Information about the respondent's team size and organization structure, operating budget, and corporate foundation details

VI. EVALUATION

Measuring outcomes, measuring to manage, measuring business ROI

VII. THE 'S' IN ESG: TOTAL SOCIAL INVESTMENT

Information on corporate efforts to support social investment, including DEI, in this innovative and leading area

For questions, please contact Armando Hechavarria, Corporate Insights' Associate at ahechavarria@cecp.co.

Data Sharing within the CECP Community

Although optional, we encourage companies to share all data submitted in order to produce the most robust and useful head-to-head benchmarking in this corporate community. *More information regarding CECP's Data Sharing Policy can be found in the User Guide.*

All information submitted via this survey is secure and safeguarded. CECP takes very seriously that companies may be sharing confidential information and can be assured that your data will remain protected.

Indicating "Yes":

All survey questions will be shared within this benchmarking community. No further sharing questions are required.

Indicating "Decide question by question":

You must select YES or NO in the "Willing to Share?" questions throughout the survey, typically following each section of the survey.

***Share within the CECP community?**

- Yes, willing to share all data within the CECP community
- Decide question by question on whether to share

I. RESPONDENT INFORMATION

I.A. Respondent Information

Responding Company Name: [Type here]
 Parent Company Name (if above is a subsidiary): [Type here]
 Company Headquarters City, State/Province/Region, Country: [Type here]
 Contact Person Name: [Type here]
 Contact Title: [Type here]
 Contact Email (where the final survey email confirmation should be sent): [Type here]

II. COMMUNITY INVESTMENT

II.A. Total Community Investments

*Please provide your company's **2021 TOTAL Community Investments** (Total Cash + Non-Cash, \$USD):* [Type here]

Provide the **breakdown** values of your company's total contributions in \$USD (*breakdown must equal total community investments reported above*):

Direct (or Corporate) Cash (FY2021): [Type here]
 Foundation Cash (FY2021): [Type here]
 Non-Cash (FY2021): [Type here]

If available, please provide the Total Non-Cash breakdown (must equal total non-cash reported above):

Product Donations: [Type here]
 Pro Bono Service: [Type here]
 Other: [Type here]
 Breakdown not available: [Type here]

If you made **additional contributions** but will not be able to break them down in subsequent sections, indicate the total value of these additional contributions here (\$USD). [Type here]

Comparing your company's 2020 community investments to its 2021 community investments, why did certain types of community investment increase or decrease? This information will only be used to identify trends. [Type here]

II.B. Totals by Program Type

Please break down total contributions (II.A) by PROGRAM TYPE.	Cash (\$USD)	Non-Cash (\$USD)
Civic & Public Affairs	[Type here]	[Type here]
Community & Economic Development	[Type here]	[Type here]
Culture & Arts	[Type here]	[Type here]

Education: Higher Education	[Type here]	[Type here]
Education: K-12	[Type here]	[Type here]
Environment	[Type here]	[Type here]
Health & Social Services	[Type here]	[Type here]
Disaster Relief	[Type here]	[Type here]
Other	[Type here]	[Type here]
Total (Must equal II.A)	[Type here]	[Type here]

If you selected 'other' program type above, please specify: [Type here]

Recent global events have redefined the scope of new types of social investments. Having this in mind:

What amount from your company's TOTAL Community Investments (Cash + Non-Cash) from II.A (either newly allocated or repurposed from existing budget) did you dedicate in 2021 to:

Covid-19 Response [Type here]

Social Justice/Racial Equity as a consequence of racial reckoning in the Spring of 2020 [Type here]

A long-term priority focus area in the corporate sector has been STEM (Science, Technology, Engineering, and Mathematics) Education. Having this in mind:

What amount from your company's Total Community Investments (Cash + Non-Cash) on Education (K-12 and/or Higher Education) did you allocate in 2021 towards STEM? [Type here]

II.C. Priority Focus Areas by Program Types

For which of the above program areas does your company have a strategic focus? Please list up to (4) below:

#	Program Type (e.g. Education: K:12)	Focus Area (e.g. STEM)	Strategic Program Tied to Focus Area (if applicable, e.g. STEM4Girls Chicago Program)	Strategic Program Cash (\$USD)	Strategic Program Non- Cash (\$USD)	What KPIs do you have for this focus area and/or strategic program?
1	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]
2	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]
3	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]
4	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]	[Type here]

III. INTERNATIONAL

III.A. International Breakdown

Please indicate whether your company contributed at least one grant that had **international impact** in 2021 the survey year. Select one: Yes / No

If yes, please provide estimated total community investment \$ (II.A) for both your Headquarters country and International. Breakdown the total based on **where the funds had impact**, *not where the check was cut*.

	Total Community Investment \$USD (Corporate Cash, Foundation Cash & Non-Cash)
Headquarters Country (domestic)	[Type here]
International (outside headquarters country)	[Type here]
Total	[Type here]

III.B. Country Breakdown

COUNTRY LEVEL: Report community investments (cash and non-cash) (II.A) by country in which the impact of the contribution is located (\$USD).

Enter any country data you have regardless of whether it is some or all countries where you have programs.

The “Breakdown Not Available” field should contain the remaining, unallocated balance of total community investment. The total must equal the same amount as your reported total community investments.

Headquarters country (or domestic) community investment should go in your HQ country’s field. *Please make sure to also include any community investments made within your headquarters – for most this will be the USA.*

	\$USD
Afghanistan	
Albania	
Algeria	
Andorra	
Etc. <i>Full list of countries available online</i>	
Breakdown Not Available	

IV. EMPLOYEE ENGAGEMENT

IV.A. Matching Gifts

Did your company offer at least one employee MATCHING-GIFT PROGRAM? Select one: Yes / No

Please provide the total value (\$USD) of your MATCHING GIFTS to employee community investment - **DO NOT INCLUDE funds given by employees:** [Type here]

Please provide the breakdown by program if you have it available (DO NOT INCLUDE funds given by employees):	Direct Cash (\$USD)	Foundation Cash (\$USD)
Workplace Giving Campaigns	[Type here]	[Type here]
Year-Round Policy	[Type here]	[Type here]
Dollars for Doers	[Type here]	[Type here]
Disaster Relief	[Type here]	[Type here]
Other	[Type here]	[Type here]

Who has access to one or more of your company's matching gifts programs? Please select all that apply:

- Full-time employees
- Contracted employees
- Part-time employees
- Retirees
- Corporate board members

Match Ratio & Program Caps

**Caps refers to the minimum and maximum matched gifts per employee per year. Match Ratio for Dollars for Doers is the grant amount per hours of service.*

	Program Caps	Match Ratios	Program Details
Workplace Giving Campaigns	[Type here]	[Type here]	[Type here]
Year-Round Policy	[Type here]	[Type here]	[Type here]
Dollars for Doers	[Type here]	[Type here]	[Type here]
Disaster Relief	[Type here]	[Type here]	[Type here]
Other	[Type here]	[Type here]	[Type here]

Total Employee Community Investment:

Employees give through corporate programs, most of which the company matches but not always. Over the past year, how much did **employees** give *total* (matched and non-matched, \$USD)? [Type here]

Participation Rate (%)

What percentage of employees gave through corporate matching programs? Employee participation rate%: [Type here]

Some matching programs are limited to specific organizations while others are open to all applicable organizations. Does your company limit which organizations are eligible for a match in your company's domestic market? Please select the answer that best describes your company's approach:

- No: We do not limit which nonprofit organizations are eligible to receive a matching gift in the geographic area the company serves
- Yes: We limit matches to a select number of nonprofit organizations
- Yes: We limit matches to a select number of cause areas (e.g., Education or Arts)
- Yes: We limit matches solely to educational institutions

IV.B. Employee Volunteer Programs & Hours

Identify which EMPLOYEE-VOLUNTEER AND INCENTIVE PROGRAMS are offered by your company.

	Are these offered by your company?	
	Domestic Employees	International Employees
Paid Release Time (also called VTO)	Y or N	Y or N
Flexible Scheduling	Y or N	Y or N
Company-Wide Day of Service	Y or N	Y or N
Board Leadership Programs	Y or N	Y or N
Pro Bono Service	Y or N	Y or N
Virtual Volunteering	Y or N	Y or N
Team Grants	Y or N	Y or N
Dollars for Doers	Y or N	Y or N
Employee-Volunteer Recognition Awards	Y or N	Y or N
Other	Y or N	Y or N

If 'Other', please provide program name and/or description:

How has the use of Virtual Volunteering changed as a result of global health circumstances in 2021?
(Select all that apply)

- Increased volunteer-time-off offered hours
- Created a Virtual Volunteering program from scratch
- Adapted offering of previous Virtual Volunteering program to current circumstances
- Deepened partnership with nonprofit partners already offering virtual service options
- Found new partnerships in order to expand virtual service options
- Increased budget allocated towards Virtual Volunteering
- Expanded access to Virtual Volunteering to other stakeholders (e.g., international employees, temporary employees, board members, customers, suppliers, vendors, partners, etc.)
- Decreased resources (either monetary, offered hours, etc.)
- No change
- Maintained program developed in 2020
- We don't have a Virtual Volunteering program

How many hours does your company policy offer to employees for volunteer service on an annual basis? This is often called Volunteer Time-Off (VTO) If your company offers a number of days, please multiply the number of days by 8. Type the number of hours:

Provide your company's total employee volunteer hours (#):

IV.C. Employee Volunteer Participation Rate

Please provide the total percentage participation rate of employees that volunteered through corporate programs over this past year (a value between 1 and 100):

V. ADMINISTRATION

V.A. Organization Structure

Did your company undergo a merger, acquisition, or divestiture that is considered significant by your industry standards during the last year? Select: Yes / No

If 'Yes', select: Merger, Acquisition, OR Divestiture

End date for 12 months of data you submitted in the survey [Type here]

Help your peer companies better understand your corporate structure. Where does your department sit within the company? Knowing that some departments sit inside others, choose the option that best represents the C-suite executive responsible for your department:

- Administration
- Communications
- Community Affairs / Community Relations
- External Affairs
- Executive Office
- Public Affairs
- Government Affairs
- Finance
- Legal
- Human Resources
- Marketing
- Strategy
- Sustainability/ESG
- Other, please specify

What is your department or team's name? [Type here]

Team Size: Full-time Equivalents (FTEs)

Size of the Department: Number of FTE staff members in your department. (Please use a decimal if the team includes part-time responsibilities of some staff members.) If the categories below do not apply for your department, enter the total team members into the "breakdown not available" line.

	Number of FTEs: Domestic (Corporate HQ Country)	Number of FTEs: International (Outside Corporate HQ Country)
Corporate Foundation	[Type here]	[Type here]
Corporate Community Affairs or related terms	[Type here]	[Type here]
Communications/Marketing dedicated to community investments	[Type here]	[Type here]
All Other Groups	[Type here]	[Type here]
Breakdown Not Available	[Type here]	[Type here]
Total	[Type here]	[Type here]

V.B. Foundations

Does your company have at least one foundation or trust? Select one: Yes / No

If yes, does your company have more than one corporate foundation? For example, some companies open a corporate foundation in certain countries where it is advantageous to do so. Select one: Yes [Type here] / No

If yes, how many of each type of foundation operationally does your company have?

- Operating [Type here]
- Grantmaking [Type here]
- Other (please specify) [Type here]

If yes, how many of each type of foundation financially does your company have?

- Endowed [Type here]
- Passthrough [Type here]
- Hybrid [Type here]

If yes, what was the total dollar amount of all corporate funds transferred to all of your foundations or trusts during the 12 months of this survey? Please report in US Dollars. [Type here]

How does your company's foundation giving strategy differ from your corporate giving strategy?

- Differ in type of program supported (i.e., matching gifts vs. strategic programs)
- Differ in strategic focus areas
- We do not differentiate giving strategies
- Other (please specify) [Type here]

What is the maximum percentage of each of your foundation's grants that you allow to go toward the indirect costs (also known as general operating expenses) of the recipient organization? [Type here]

Which of the following types of grants do you fund? Please select all that apply:

- Program support
- General operating
- Program evaluation
- Organizational capacity building
- Capital grants
- Research
- Multi-year grants
- Other (please specify) [Type here]

V.C. Recipients

Provide the total number of Domestic & International Recipients (excluding matching gifts) for your company's community investments.

	Domestic (<i>within your HQ country</i>)	International	Breakdown Not Available
# of Recipient Organizations	[Type here]	[Type here]	[Type here]

V.D. Budget: Management & Program Costs

Peer companies seek to compare the costs it takes to operate social investments departments and staff. If the categories below do not apply to your company, please simply enter the total budget in the "Breakdown not available" field. Including salaries, what are your company's approximate total MANAGEMENT & PROGRAM COSTS (\$).

	TOP-LINE MGMT & PROGRAM COSTS
Foundation	[Type here]
Corporate Community Affairs	[Type here]
Volunteerism	[Type here]
All Other Groups	[Type here]
Breakdown not available	[Type here]
Total	[Type here]

What specialized software or platform do you use to manage your grants? Please select all that apply:

- Benevity (including Versaic)
- Blackbaud (including YourCause)
- Cybergrants
- Front Stream
- Causecast (America's Charities)
- Salesforce
- SmartSimple
- Custom platform
- Other (please specify) [Type here]

What specialized software do you use to manage your employee engagement and volunteering? Please select all that apply:

- Benevity (including Versaic)
- Blackbaud (including YourCause)
- Cybergrants
- VolunteerMatch (Impact Online)
- Front Stream
- Causecast (America's Charities)
- Bright Funds
- Custom platform
- Other (please specify) [Type here]

VI. EVALUATION

VI.A. Outcomes Measurement

In previous years, we've found that 85%+ of companies measure outcomes on at least one grant. Which of the following best describes the scope of your company's measurement of societal outcomes of your grants? Our company measures societal outcomes for:

- All grants, regardless of grant size
- Only grants larger than a specific threshold (please share the threshold [Type here])
- Only grants made to a specific cause area (or cause areas) [Type here]
- Only grants made to a specific cause area (or cause areas) that exceed a specific threshold: [Type here]
- Only grants made for a strategic philanthropic program (or programs)
- We do not measure outcomes
- Other (please describe) [Type here]

VI.B Measuring to Manage

Does your department/team use a dashboard or scorecard of metrics to manage its achievement of your strategy?

- Yes, for a long time
- Yes, it's relatively new
- No
- Don't know

How often does your team review the results of the tracked KPIs/metrics?

- Quarterly or more frequently
- Less frequently than quarterly
- Don't review results
- Don't know

Does your company consider the investor perspective when reporting on social KPIs in your sustainability report? For example, aligning reporting with SASB.

- Yes, frequently
- Yes, sometimes
- No
- Not sure

Over the last year, were any of your ESG-related KPIs/metrics requested by a colleague internally in preparation for your company's quarterly earnings calls? Select: Yes / No

If yes and readily available, please specify which KPIs/metrics:

VI.C. Measuring Business ROI

Employee Metrics

Does your company measure the business value of community investments in terms of metrics that assess employees (e.g., improved retention)?

- Yes
- No
- Don't know

If yes, does your company:

- Survey volunteers
- Leverage an existing employee survey (e.g. add one question on pride increase due to social strategies)
- Analyze HR data to compare volunteers to non-volunteers (e.g. identify rising leaders)
- Other (please specify)

From your perspective, what employee benefit of community investments is most important to your company?

- Improve retention rate
- Identify rising leaders
- Increase employee engagement score
- Gain skills/professional development

- Attract/recruit better potential candidates
- Other, please specify:

If available, please provide examples of the employee engagement related KPIs your team tracks on an annual basis to achieve the above benefits:

Customer or Brand Metrics

Does your company measure the business value of community investments in terms of metrics that assess the brand or customers (e.g., increased customer loyalty)?

- Yes
- No
- Don't know

If yes, does your company:

- Survey customers
- Lever an external company-wide brand assessment (e.g. Reputation Institute)
- Analyze marketing data (e.g. impressions, clicks, site traffic)
- Other, please specify:

From your perspective, what customer or brand benefit of community investments is most important to your company?

- Increase customer loyalty
- Acquire new customers
- Increase customer referrals
- Attract and retain best candidates and employees
- Improve brand perception
- Improve reputation/trust score
- Other, please specify:

If available, please provide some customer/brand related KPIs your team tracks on an annual basis to achieve the above benefits:

Corporate Purpose

Are metrics in place to ensure your department's business practices align with the company's corporate purpose? Select: Yes / No / Unsure

If yes, please specify a few of these metrics:

VII. THE S IN ESG: TOTAL SOCIAL INVESTMENT

Total Social Investment sums up all resources (operational expenses, staff time, and more) the company used for "S" in ESG efforts. One component of that is Social Value. Social value is defined as innovation and unique efforts outside the definitions of Community Investment. Examples of these are below: socially-driven internships, donation of digital assets, and much more.

Please provide your company's total Social Value efforts for FY2021 in \$USD.

From your perspective, how are the resources available to improve Diversity/Inclusion/Equity at your company changing?

- On the rise
- Steady
- On the decline
- Don't know

In what department does your company's DEI work sit?

- Corporate Responsibility (or CSR)
- Human Resources
- Executive Office
- It is its own division
- Other (please specify) [Type here]

What percentage of your community investments budget was allocated toward funding DEI programs and initiatives for **qualified recipient organizations**? [Type here]

Considering the movement for more equity- and community-centered approaches to grantmaking, please share any resulting changes to your grantmaking focus or operations. [Type here]

From your perspective, how are the resources available to improve Human Rights at your company changing?

- On the rise
- Steady
- On the decline
- Don't know

From your perspective, how is your company's resources for social strategies for entities within its supply chain changing?

- On the rise
- Steady
- On the decline
- Don't know

In the last year, did your company conduct "impact investing?" For large companies, "impact investing" (the incorporation of ESG factors into investing decisions) could occur along the continuum of investing assets from the Foundation to assets managed by the Treasury department or a third-party asset manager.

- Yes
- No
- Don't know

If yes, what % of AUM at your company is allocated toward impact investing (%): [Type here]

In the last year, did your company conduct business with a social lens that is not counted/ not reported in your ESG metrics? Sometimes these efforts are called "shared value" initiatives.

- Yes, many
- Yes, some
- No
- Don't know

In the last year, did your company donate or otherwise lever anything digital for social goals? This does not refer to executing a donation digitally, but instead the donation itself is something digital, such as data, cryptocurrency, digital assets, etc.

- Yes, many
- Yes, some
- No
- Don't know

In the last year, did your company have any internships or apprenticeships with social goals integrated in how they operate? (e.g. a workforce program specifically for at-risk students that includes on-the-job experience)

- Yes, many
- Yes, some
- No
- Don't know

If yes, approximately how many socially-driven interns did your company employ in 2021? [Type here]

BONUS: Feedback on what to add next year! What ESG benchmark (either monetary (\$) or percentage (%)) would be a helpful addition to this survey? [Type here]

You have reached the end of the survey.

Thank you for participating in this year's *Giving in Numbers* Survey! Your contribution to this industry-leading research helps raise the level of awareness and transparency on how companies are a **force for good** in society.

For any questions, please reach out to Armando Hechavarria (ahechavarria@cecp.co).