

## The Sustainability Advantage B Survey

Note: These are my answers to the subset of B Impact Assessment questions for Sole Proprietors with 0 employees in the Service/Retail sector, which do Management & Financial Consulting. I do talks and provide resources for sustainability champions, so these categories were the closest to my reality.

### Section 1: Accountability

This section focuses on Governance and Transparency issues.

#### Governance

##### *Mission*

AA1.1 - Has the company explicitly integrated the following into its written corporate mission?

- A commitment to social impact
- A commitment to environmental stewardship
- None of the above

AA1.2 - Please type or paste-in a 2-3 sentence summary of your mission here, and attach a copy of your official mission statement.

##### Vision:

A sustainable world in which individuals, communities, and businesses thrive within nature's limits.

##### Mission:

1. To inspire business leaders to integrate sustainability strategies into company strategies.
2. To provide useful resources for an army of sustainability champions so that they have the competence and confidence to accelerate the transformation toward a sustainable global society.

##### *Governance Body*

AA2.1b - Does your company have a Board of Directors or other governing or advisory body that:

- Meets at least twice annually
- Includes at least 1 independent member
- Oversees executive compensation
- Company has no governing body

Note: As a Sole Proprietor, I am my own governing body.

#### Transparency

##### *Transparency & Reporting*

AA4.1b - Does the company produce financials that are reviewed by the Board, other governing body, or independent third party?

No

Note: As a Sole Proprietor, I do not review my financials with anyone. I use QuickTax for my tax return, so do not use an accountant.

AA4.8 - Has the company been assessed a penalty, fined or sanctioned in the past three years for any of the following?

- Tax Penalty
- EEOC Complaint
- Environmental Fines or Sanctions
- SEC Fine
- OSHA or FDA Fines or Sanctions
- None of the above

## Section 2: Employees

This section focuses on how the Company treats your Employees through Compensation Practices, Benefits, Employee Ownership and Work Environment.

Note: As a Sole Proprietor, I have no employees so this whole set of questions is omitted.

## Section 3: Consumers

This section focuses on benefits that inherently accrue to your Consumers through the use of your products and services. It includes two areas: what you produce or deliver and who your target customer is.

### *Beneficial Products or Services*

The following questions refer to the impact of the actual product or service itself on customers, not the impact of the method by which it was produced or delivered. Please list the types of products and/or services that your company produces.

- \* Presentations about the sustainability business case and culture change
- \* Books about the sustainability business case and culture change
- \* DVDs about the sustainability business case and culture change
- \* Spreadsheets that quantify the sustainability business case
- \* Slides about the sustainability business case and culture change

CN1.1 - What is the impact of your product or service on your CUSTOMERS? Please select the ONE impact area below that is most applicable. (Consulting and Finance: we are measuring the impact of YOUR product or service, NOT that of your client/portfolio)

CN1.1a - It promotes economic equality for individuals

as a direct impact (e.g. job training, education, products that directly address economic inequalities for the underserved)

as an indirect impact (e.g. educational toys, etc.)

no inherent product impact in this area

CN1.1b - It promotes economic equality for communities

as a direct impact (e.g. CDFI's, low-income housing, access for underserved communities (water, internet, utilities, etc.))

as an indirect impact (e.g. YMCA, local summer camps)

no inherent product impact in this area

CN1.1c - It preserves the environment

as a direct impact (e.g., renewable energy, recycling technology, green building design & development, sustainable technologies)

as an indirect impact (e.g., products made from recycled or sustainable input materials (paper, cups, FSC certified, etc.)

no inherent product impact in this area

CN1.1d - It improves health

as a direct impact (e.g. disease prevention or cure, such as AIDS or other vaccines, cancer clinics)

as a indirect impact (e.g. Products promoting healthy living (organic food, mountain bikes, etc.)

no inherent product benefit in this area

CN1.1e - It promotes the arts, sciences or the advancement of knowledge

as a direct impact (e.g. museums, photographers/artists, independent media, publishing, research labs)

as a indirect impact (e.g. intl. travel agent, book stores, sound equipment, fine jewelry)

no inherent product benefit in this area

CN1.1f - It increases the flow of capital to purpose-driven enterprises

as a direct impact (e.g. fundraising for purpose-driven enterprises, socially responsible investing)

as a indirect impact (e.g. consulting to purpose-driven enterprises, ad agency for purpose-driven companies)

no inherent product benefit in this area

CN1.1g - Other: Please specify, and attach a description of beneficial product or service.

creates direct impact in this area

creates indirect impact in this area

no inherent product benefit in this area

CN1.2 - What % of your total company revenues in your last fiscal year was generated by providing products/services that create the above impact?

100

## Section 4: Community

### Suppliers

CM1.1 - How many Significant Suppliers do you have? Significant Suppliers are your largest suppliers that collectively represent approximately 80% of your purchases in dollar volume. [Not Weighted] Significant suppliers can include both suppliers of physical items and service providers like accountants and web designers.

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Note: They are

1. New Society Publishers in B.C. who publish my books.
2. Virtually Yours / Joanne Burgess in who is my bi-weekly blog and social networking guru.
3. Bright Ideas / Diane McIntosh in B.C. who is my webmaster for my web site.
4. Hostgator, my green web site host.
5. Staples in Whitby, Ontario, where I purchase my 100% recycled fiber paper.

CM1.2b - When evaluating potential Significant Suppliers, is social and environmental performance and/or local commitment considered?

Yes

CM1.3 - What is the average tenure of your relationships with Significant Suppliers? [Equally Weighted]

- 0 - 1 Year
- 1 - 2 Years
- 2 - 3 Years
- 3 - 5 Years
- 5+ Years

CM1.4 - What % of Significant Suppliers have been certified and/or approved by one of the following: B Corporation, Green America, SIF, FTF, Transfair, FSC, MSC, Cradle to Cradle, Green-e, USDA Organic, Other?

33%

Note: New Society Publishers has attained the equivalent of these ratings. I expect that the others are close, too.

CM1.5 - Have you shared your social and environmental mission with all of your Significant Suppliers? [Equally Weighted]

Yes

### Local

One aspect of community involvement is whether the company has local ownership, purchasing, sourcing, or financing. In the following sequence of questions, local is defined as located within a hundred mile radius of the company's primary place of business.

#### *Local Involvement*

CM4.3 - What % of your company's Significant Suppliers are independent suppliers located in the same community as one of your offices?

- 0%
- 1-19%
- 20-39%
- 40-60%
- >60%

Note: I use the local Staples store.

CM4.4 - Have you asked your Significant Suppliers if they source locally?

Yes

CM4.5 - Is the majority of your company's banking services provided by an institution with any of the following characteristics:

- A local independent institution located in your community
- A bank with a CRA rating of outstanding
- A certified CDFI
- A certified B Corporation
- None of the above

CM4.6 - Is there a written local purchasing strategy or policy in place?

No

Note: As a Sole Proprietor, I do not have written policies. I support the idea advocated by this approach, though.

CM4.7 - Do more than 50% of the company's customers reside in the same community(ies) (i.e. within 100 miles) as material owners?

No

Note: I do talks province-wide, country-wide, and world-wide. Many of them are done by webinar or videoconference technology, so I stay "local" even though my audience / customers are remote.

## **Diversity**

### *Leadership*

CM5.1 - What % of the company is owned by individuals from previously excluded populations? We define previously excluded populations as women, ethnic minorities, people with disabilities, and/or individuals living in low or moderate-income communities.

0

Note: I'm a male, Caucasian, able-bodied Sole Proprietor living in a middle-class neighborhood. I have no plans for major surgery.

### *Supplier Diversity*

CM7.1 - Is there a policy for the active recruitment of women or ethnic minority owned suppliers? Please attach supplier recruitment policy.

No

Note: As a Sole Proprietor, I do not have written policies. I support the idea advocated by this approach, though.

### *Community Impact*

CM8.1 - What % of your Significant Suppliers is located in low or moderate-income communities?

0%

<10%

10-19%

20-30%

>30%

Don't Know

Note: New Society Publishers and Bright Ideas live in modest-income areas.

## **Charity / Service**

### *Civic Engagement: Policy*

CM10.1 - Is there a written Community Service Policy?

No

Note: As a Sole Proprietor, I do not have written policies. I support the idea advocated by this approach, though.

CM10.2 - Are suppliers and customers actively made aware of your service mission?

Yes

#### *Civic Engagement: Practices*

CM11.3 - Has the company created a public facing partnership with a service/charitable organization?

No

Note: I am on the boards of The Natural Step Canada, Learning for a Sustainable Future, and Durham Sustain Ability. Perhaps I should consider them as partners.

#### *Charitable Giving*

CM12.1 - What was the average annual % of net profits or net revenues that your company gave to charity in the last two fiscal years? (Please include tax deductible pro bono work and in-kind donations.)

\_ 0%

\_ 1-4% of profits or 0.1-0.4% of sales

\_ 5-9% of profits or 0.5-0.9% of Sales

\_ 10-50% of profits or 1-5% of sales

X >50% of profits or >5% of sales

Note: In 2010, 13.3 % of my profits and 6.3% of my sales were given to charities. In addition, 50% of my talks were free / pro bono, and I gave away /donated hundreds of books and DVDs.

CM12.2 - Which organizations do you support?]

\* The Natural Step

\* Uganda Rural Development and Training Programme (URDT)

\* BC Sustainable Energy Association

Note: These were the organizations which I supported most strongly. There were another dozen or so sustainability-related organizations which I also donated in 2010.

CM12.3 - Is there a formal written policy that sets a required commitment for Charitable Giving?

No

Note: As a Sole Proprietor, I do not have written policies. I support the idea advocated by this approach, though.

CM12.4 Is your charitable giving certified by an organization, such as 1% for the planet or another organization that promotes charitable giving (choose n/a only if your company does not make charitable donations)?

No

CM12.5 - Does the majority of your community development activities occur in the markets you source from and/or operate within

Yes

#### **Section 5: Environment**

## Facilities

### Accountability

EN1.1 - Has the company formally engaged with suppliers, business partners, or customers to reduce the environmental impact of their activities on a regular basis?

Yes

EN1.4 - Does the company have a written environmental policy (beyond its mission statement)? If so, please attach your company's environmental policy.

No

Note: As a Sole Proprietor, I do not have written policies. I support the idea advocated by this approach, though.

EN1.5 - Is the company a member of an association that fosters environmentally sustainable business practices?

Yes

### Facilities

EN2.2 - Does the company use an office wide recovery and recycling program that includes the following (please check all that apply)?

Cardboard

Plastic

Glass & Metal

Paper

Composting

None

EN2.3 - What % of materials used for office operations (e.g. office supplies, furniture, catering supplies, janitorial supplies, etc.) come from recycled / sustainable input materials?

None

Some (less than 49%)

Most (more than 50%)

All

EN2.7 - Has the company implemented written policies that reduce corporate travel, thereby lowering its carbon footprint?

Yes

Note: This is why I try to use webinar or videoconference approaches for remote talks, to avoid flying to do one-hour talks. I have a 5-level fee structure to encourage conference organizers to consider these options—I charge less for talks done by webinar and videoconference technology. When I do travel, I try to batch several presentations at a remote location to make the trip and its carbon footprint more leveraged.

### Inputs

EN3.1 - Which of the following water conservation methods have been implemented at the majority of your corporate offices:

- Low-flow toilets/urinals
- Low-flow faucets or showerheads
- Grey-water usage for irrigation
- Low-volume irrigation
- Harvest rainwater
- Other (please specify)
- None

EN3.2 - Which of the following chemical reduction methods have been implemented at the majority of your corporate facilities on a consistent basis: [Equally Weighted]

- Non-toxic janitorial products
- Unbleached / chlorine free paper products
- Soy-based inks or other low VOC inks
- Organic or sustainable kitchen products
- Other
- None

EN3.3 - Is hazardous waste (batteries, paint, electronic equipment, etc.) always disposed of responsibly?  
Yes

EN3.4 What % of your company's printed materials use recycled paper content, FSC certified paper, or soy-based inks?

- 0%
- 1-24%
- 25-49%
- 50-74%
- >75%
- N/A

Note: My business cards are printed on FSC certified, 100% post-consumer fiber, Mohawk card stock, powered by wind power. Paper is the main material that I use in my practice. I use printer paper that is 100% post-consumer recycled fiber from Staples. I use remanufactured toner cartridges for my duplexing Lexmark Optra S 1255 laser printer. I buy the cartridges locally and recycle the used cartridges. I use recycled plastic, recycled paper, and soy inks in the packaging for my DVDs.

### Energy Usage

EN5.4 - What % of energy is used from renewable sources at your corporate facilities?

- 0%
- 1-4%
- 5-24%
- 25-50%
- >50%

Note: For years, 100% of my electricity has been [Green Electricity from Bullfrog Power](#) . In March 2011, I subscribed to [Bullfrog Power' Green Natural Gas](#) to cover all my natural gas needs.



EN5.5 - Has the company increased its % use of renewables annually at its corporate facilities?

Yes

No

Already Maximized

EN5.7 - For which of the following systems have you implemented energy conservation/ efficiency measures for your corporate facilities?

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

EN5.9 For which of the following activities does your company purchase carbon offsets?

Travel

Commuting

Office Operations

Shipping

Other

None of the above

EN5.10 - What % of carbon inventory for company travel, commuting, office operations, and shipments was reduced through the purchase of certified carbon credits last year?

0%

1-4%

5-24%

25-50%

>50%

Note: I calculate and offset 100% of my travel and operations carbon footprints, annually. I know that offsets are not the answer. If offset dollars can support communities in the developing world to transition away from fossil-fuel based energy, that is a good thing while we try to figure out long term solutions for climate change. I use [Less](#) offsets. Less™ aims to provide the highest quality carbon offsets available in Canada. All Less offsets are sourced from Gold Standard-certified projects.



## Section 6: Beneficial Business Models

This section is intended to recognize extraordinary business models that are not sufficiently rewarded in the rest of the Survey. Certain companies have developed business models that through their practices address social and environmental issues: for example, companies hiring from underserved communities; products produced using fair trade principles and/or environmentally sustainable practices; community-focused businesses which source products and service customers locally; or businesses which exist to generate charitable donations.

### *Consumer Benefit Models*

Note: Simply because the consumers of a product or service are predominantly, or even exclusively, low income households, women, ethnic minorities, or people with disabilities, does not credit the company with Targeting Underserved Populations. In order to receive credit, the product or service delivered must provide tangible benefit to people in need.

### *Serving Those In Need*

BP9.1 - Which underserved population does your product or service target that directly addresses inequalities?

- Low-income households in the U.S.
- Low-income households, outside the U.S.
- Ethnic Minorities
- People with Disabilities
- Non-Profit Organizations (NGOs are considered serving those in need indirectly)
- Others (please attach)

None of the Above

BP9.2 - What % of your total company revenues in the last fiscal year was generated by delivering beneficial products or services to the underserved populations you checked above?

0

### **Community Benefit Models**

#### *Local*

BP2.1 - Is your company a community based business, focused on serving your local economy?

No

BP2.2 - If yes, please indicate which of the following statements below are true.

- More than 75% of the company's ownership is held within the community in which the business resides
- More than 50% of the company's primary suppliers are independent and local.
- More than 50% of the company's customers are local.
- The company banks with a local independent institution or a community development bank.
- The company contributes 5% of profits or more to community based charities
- N/A

BP2.3 - How many of the above statements in the above question are true about your business?

3 or less of the 6 statements above

- 4 of the 6 statements above
- 5 of the 6 statements above
- 6 of the 6 statements above
- N/A

#### *Supply Chain*

BP3.1 - Is your supply chain designed to address issues of poverty alleviation and job creation for underserved populations?

No

BP3.2 - If yes, are fair wages (as determined by an independent third party) paid to underserved workers and either certified by an independent third party or verified by the company?

- Certified or verified by a third party
- Verified by the company
- Not verified

BP3.3 - If yes, what % of your products are sourced through channels that are certified or verified?

### *Charitable Giving*

BP5.1 - Is the company's business model designed to generate charitable giving?

Yes

BP5.2 - Does the company give greater than 10% its profits or 1% of revenues to charitable partners (including pro bono or in-kind donations)?

Yes

BP5.3 - If yes, what % of profits or revenues does the company donate to charities (including pro bono and in-kind)?

- 0-10% of profits or 0-1% of sales
- 10-20% of profits or 1-2% of sales
- 20-30% of profits or 2-3% of sales
- 30-40% of profits or 3-4% of sales
- 40-50% of profits or 4-5% of sales

X >50% of profits or >5% of sales

Note: In 2010, 13.3 % of my profits and 6.3% of my sales were given to charities. In addition, 50% of my talks were free / pro bono, and I gave away /donated hundreds of books and DVDs.

### **Environmental Benefit Models**

#### *Service: Environment*

BP8.1 - Is your business model created to benefit the environment in the way your service is delivered?

Yes

BP8.2 - If yes, which of the following statements are true about your business?

- Majority of company operated facilities are LEED certified or meet the requirements of LEED certification
- X At least 15% of energy from onsite renewables or 75% of energy derived from renewable sources (REC's)
- X An energy audit has been completed in the last 24 months
- X 75%+ of corporate materials from recycled or sustainable materials
- Public Transit/Carpooling incentives for employees and/or initiatives to reduce the impact of the company fleet

Notes:

- I buy Bullfrog Power 'green tags' for all my electricity.
- As of May 2011, I use Hostgator as my web site host. Hostgator is using renewable energy to both power and cool their servers. It purchases Green-e certified Renewable Energy Credits (RECs) to cover 130% the electricity used to power and cool its shared and reseller servers.



- As a sole Proprietor, the public transit / carpooling option for employees does not apply.

BP8.3 - How many of the above statements above are true about your company?

X 3 or less of the 6 statements above

\_ 4 of the 6 statements above

\_ 5 of the 6 statements above

\_ 6 of the 6 statements above