



# The Corporate Giving Standard: Data Sharing Policy

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## Summary

- The Corporate Giving Standard (CGS) community agrees to operate under a principle of mutual advancement. The information available within the CGS system should be used internally only, and under no circumstances used in a public or defamatory manner.
  - CGS data is self-reported, therefore participating companies must ensure that their data is complete, accurate, and conforms to the guidelines published in the CGS 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 CGS 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 from CGS, but is not permitted to publish any information associating a company with a particular data finding.
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## Overview

Participation in the annual CGS survey is optional. By electing to supply data to the survey, member and subscriber companies are entitled to unlimited access to the information available in the online CGS 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 CGS system requires a password. Only individuals at member or subscriber companies agreeing to this policy and to supply data to the system are given passwords by the staff at the Committee Encouraging Corporate Philanthropy (CECP). Member and subscriber companies can have unlimited logins.

No employees of government organizations, academic institutions, vendors in the corporate philanthropy industry, or members of the media may access the CGS system. Further, member or subscriber companies that do not supply data on their corporate giving will not be granted system access. System login information may not be given to individuals outside of the immediate CGS community. While it is discouraged, in the event that a participating company wishes to share login information with a consultant or other service provider for a specific internal project, the third-party must contract to only use CGS data as part of their service to the CGS member or subscriber company. At the conclusion of the consulting relationship, CGS member companies are obligated to change the password associated with any shared login. This is necessary to prevent the ongoing use of the CGS system by the third-parties.



## Self-Reported Data

Data supplied to the CGS survey is self-reported. Data points that are public information (such as revenue and number of employees) are verified 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 online CGS system and for customized CGS benchmarking requests. This is only accessed by the CECP community of companies. The first question of the CGS 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 start of each CGS 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 CGS 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.

There is one other way data is shared. It applies only to The Conference Board Contributions Council member firms. As of January 2012, CECP and The Conference Board are joining forces to promote one survey to capture the full scope and scale of annual contributions by leading global companies. This association will enhance the gathering and analysis of data for our member firms. CECP will provide 2011 Contributions Council member company-reported survey data to The Conference Board and to members of the Contributions Councils who have also completed the survey. The data provided will include all CGS survey question responses. If a Contributions Council member does not wish to participate in this data sharing arrangement, they must contact CECP in writing to opt out. This arrangement is also described in the CGS Valuation Guide.

## Viewing Reports

While the CGS 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, members 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 CGS 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, in association with The Conference Board, 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 corporate philanthropy community at large, CECP will occasionally distribute high-level findings from CGS data. CECP will not publish information that would associate a company with a particular data finding.