



Corporate Giving Standard: Sample Completed Survey, 2011 Contributions

OVERVIEW

This document is a training tool for companies participating in the Corporate Giving Standard (CGS) survey. While all of the data is fictional, this sample survey is intended to be a realistic example of how an actual company might complete the CGS survey.

DATA SHARING

No one at another company can log into the CGS system and see your company's survey response in its entirety. However, the system does allow survey participants at different companies to choose to share their responses to certain questions, thus allowing for benchmarking against other companies' data. CECP encourages companies to share as many survey responses as reasonably possible. It is important to remember that the CGS is a password-protected environment accessible only by corporate survey participants and not by the media, academia, non-profit organizations or any other public non-participant. However, to accommodate the possibility of some answers requiring confidentiality, the CGS offers question-by-question control over which data points are sharable.

If a company elects to share all of its survey responses, then it may indicate this preference up front, in Question A1, eliminating the need to answer "yes" with respect to each question thereafter. If a company prefers to decide on a question-by-question basis, it may indicate its individual preferences by checking (or not checking) the box after each incidence of the question "Willing to share this information with other users?"

- Putting a checkmark in the box indicates that YES, you will allow other CGS survey respondents to view your answer to this question. A checkmark also indicates that you are willing for all of your company's responses to this question over the years to be shared.
- Leaving the box unchecked indicates that NO, you will not allow other survey respondents to view your company's response to this question. However, your company's giving information will nevertheless be included in all totals in the reporting module (e.g., aggregate, industry, peer group). A "no" indication applies to that question for all years for which your company has supplied data.

CONSOLIDATED FIGURES. The CGS often asks for figures to be broken down (such as "domestic" vs. "international"). In case you are unable to provide a specific breakdown, some questions offer the option to include a total in the "consolidated" field and "NA" in the detail fields.

UNAVAILABLE DATA: \$0 VS. "NA" The survey does not allow you to answer "I don't know" to any question and it does not allow you to provide a partial answer by leaving some fields empty. Therefore, there are three options to respond to questions for which you have neither data nor a reasonable estimate:

- Enter "NA" to indicate that the question (or field within a question) is not applicable to your organization.
- Enter "\$0" to indicate that the question (or field within a question) applies to your organization, but that you did not give funds in that area during this survey year.
- If you come across a question for which you have neither data nor a reasonable estimate, you may simply bypass it, leaving all fields in the question blank. This is the equivalent to entering "NA" in every field in the question.

"NOTES" FIELDS. Every survey question has a text area in which you may enter notes. Your remarks in these fields will not appear anywhere in the reporting system; they are visible only to your own company's employees. These notes are saved each year, so CECP recommends using the space to record useful information for those who will be answering the survey in the future: remarks explaining calculations, identifying data sources, etc.

Questions?

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Company A .:. 2011 Survey

I. Company Information

2011

Answer Question

Get Help

I. A. Provide your company information.

Company:	Redac
Parent Company Name:	Redac
Did your company undergo a merger, acquisition or divestiture in the 12 months of this survey that is considered significant by your industry standards?	Merger
Corporate Headquarters City:	Kenilworth
Corporate Headquarters State/Province/Region:	New Jersey
Corporate Headquarters Country:	United States of America
Corporate Headquarters Geographic Area:	North America
Contact Person Name:	Nancy Andrews
Contact Email:	xxx@redac.com
Classification:	Manufacturing
S&P Industry Sector Classification:	Telecommunications Services
Business Type:	Hybrid
End date for 12 months of data you submitted in this survey. (mm/dd/yyyy)	2/21/2012

[Answer Question](#)
[Get Help](#)
I. B. Provide your company's revenue and pre-tax profit for the most recently completed fiscal year.

Willing to share this information with other users for all years? Yes

	Revenue	Pre-tax profit
Domestic (Corporate Headquarters Country)	\$12,000,000,000.00	\$3,000,000,000.00
International (Outside Corporate Headquarters Country)	\$10,000,000,000.00	\$2,500,000,000.00
Total	\$22,000,000,000.00	\$5,500,000,000.00
(only if breakdown is not available) Consolidated	na	na
Notes:	Entered by CECP per the public SEC 10-K Filings. Confirmed by Redac	

[Answer Question](#)[Get Help](#)**I. C. Employee Count for your company at end of the most recent fiscal year.**

Willing to share this information with other users for all years? Yes

Employee Count: Domestic (Corporate Headquarters Country)	150,000
Employee Count: International (Outside Corporate Headquarters Country)	75,000
Employee Count: Total	225,000
(only if breakdown above is not available enter value, otherwise "na") Employee Count: Consolidated	na
Notes:	Entered by CECF per the public SEC 10-K filing.

II. Contributions

2011

Answer Question

Get Help

II. A. Provide total value of contributions:

Willing to share this information with other users for all years? Yes

	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	TOTAL CASH & NON-CASH
TOTAL	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00

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.

na

If your company made contributions that are deductible on its federal tax return (approved by your auditing/legal team), but which do not meet the CECP criteria for inclusion outlined in the Survey Guide, record the total sum of those contributions here:

na

Data entered in the two questions below will not be shared; responses will be only used in aggregate for CECP trend research.

Provide the breakdown of Non-Cash giving in Above:

Reference the CECP Survey Guide for a definition of pro bono service.

Product Donations	Pro Bono Service	Other
\$2,535,000.00	\$845,000.00	\$4,225,000.00

Provide the number of on-company-time pro bono hours:

Pro Bono Hours	
7042	

Notes:

[Answer Question](#)
[Get Help](#)

II. B. Changes in Total Giving

Comparing your company's 2010 giving to its 2011 giving, why did certain types of giving increase or decrease? This insight greatly improves CECP's analysis, so please take a moment to be as specific as you can.

We encourage you to use the report below to help identify changes; the report shows year-over-year data for companies that completed a CGS survey last year.

Will not be shared; this is for CECP "emerging trend" analysis only.

Response

Total giving increased because X Y & Z.

Company A - Numbers Snapshot - For Reference

	2010	2011	\$ Change	% Change	2010 % of Total	2011 % of Total
Company Information						
Classification		Manufacturing				
Industry		Telecommunications Services				
Number of Employees	0	225,000	↑			
Revenue & Pre-Tax Profit						
Revenue	\$0.00	\$22,000,000,000.00	↑			
Pre-Tax Profit	\$0.00	\$5,500,000,000.00	↑			
Total Giving						
Direct Cash	\$0.00	\$31,500,000.00	↑	↑	na	60.80 %
Foundation Cash	\$0.00	\$12,700,000.00	↑	↑	na	24.52 %
Non-Cash	\$0.00	\$7,605,000.00	↑	↑	na	14.68 %
TOTAL	\$0.00	\$51,805,000.00	↑	↑	na	100.00 %

[Answer Question](#)
[Get Help](#)
II. C. Break down total contributions by BUDGET SOURCE:

Willing to share this information with other users for all years? Yes

	CASH			NON-CASH	TOTAL CASH & NON-CASH
	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	
Corporate Community Affairs	\$21,500,000.00	na	\$21,500,000.00	\$0.00	\$21,500,000.00
Corporate Foundation	na	\$12,700,000.00	\$12,700,000.00	na	\$12,700,000.00
All Other Groups	\$10,000,000.00	na	\$10,000,000.00	\$7,605,000.00	\$17,605,000.00
Total	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Line above should equal totals from question II.A	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Notes:					


[Answer Question](#)
[Get Help](#)
II. D. Break down total contributions by MOTIVATION:

Willing to share this information with other users for all years? Yes

	CASH			NON-CASH	TOTAL CASH & NON-CASH
	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	
Charitable Gifts (includes the corporate match of employee giving)	\$0.00	\$6,000,000.00	\$6,000,000.00	\$0.00	\$6,000,000.00
Community Investment (the definition is unchanged from "Strategic" in prior years)	\$31,500,000.00	\$6,700,000.00	\$38,200,000.00	\$0.00	\$38,200,000.00
Commercial Initiatives	\$0.00	\$0.00	\$0.00	\$7,605,000.00	\$7,605,000.00
Total	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Line above should equal totals from question II.A	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Notes:					

II. E. Break down total contributions by PROGRAM TYPE:

Willing to share this information with Other users for all years? Yes

	CASH			NON-CASH	TOTAL CASH & NON-CASH
	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	
Civic & Public Affairs	\$4,000,000.00	\$0.00	\$4,000,000.00	\$1,000,000.00	\$5,000,000.00
Community & Economic Development	\$10,000,000.00	\$0.00	\$10,000,000.00	\$1,000,000.00	\$11,000,000.00
Culture & Arts	\$5,000,000.00	\$700,000.00	\$5,700,000.00	\$1,000,000.00	\$6,700,000.00
Education: Higher Education	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$1,000,000.00	\$5,000,000.00
Education: K-12	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$1,000,000.00	\$5,000,000.00
Environment	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$1,000,000.00	\$5,000,000.00
Health & Social Services	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$1,000,000.00	\$5,000,000.00
Disaster Relief	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$605,000.00	\$4,605,000.00
Other 	\$2,500,000.00	\$2,000,000.00	\$4,500,000.00	\$0.00	\$4,500,000.00
Total	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Line above should equal totals from question II.A	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Notes:					

[Answer Question](#)[Get Help](#)**II. F. In order of priority, list up to four focus areas of your company's philanthropy.**

Willing to share this information with other users for all years? Yes

1)	Test
2)	Test2
3)	Test3
4)	na
Notes:	

[Answer Question](#)[Get Help](#)**II. G. So that CECP might help identify appropriate press opportunities, please describe one key program that best represents your company's giving initiatives. Include:**

1. Program name and brief description
2. Partner organizations, if any
3. Program launch date and anticipated end date, if known
4. Approximate cash and non-cash contributed to the program in 2011
5. Approximate total cash and non-cash contributed to the program since inception
6. Description of the impact the program hopes to make and how impact will be measured

Willing to share this information with other users for all years? Yes

CECP may use this information to connect members with media and promotion opportunities, but will always confirm with the companies prior to releasing any information.

Response

Volunteer programs for employees at local schools to help students with technology advancement and STEM courses.

III. International

2011

Answer Question

Get Help

III. A. Break down total contributions by Geography of End-Recipient:

Willing to share this information with other users for all years? Yes

	CASH			NON-CASH	TOTAL CASH & NON-CASH
	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	
Giving to Domestic End-Recipients					
From Domestic Sources to Domestic End-Recipients	\$22,500,000.00	\$8,700,000.00	\$31,200,000.00	\$5,605,000.00	\$36,805,000.00
From International Sources to Domestic End-Recipients	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal for Domestic End-Recipients	\$22,500,000.00	\$8,700,000.00	\$31,200,000.00	\$5,605,000.00	\$36,805,000.00
Giving to International End-Recipients					
From Domestic Sources to International End-Recipients	\$9,000,000.00	\$4,000,000.00	\$13,000,000.00	\$2,000,000.00	\$15,000,000.00
From International Sources to International End-Recipients	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal for International End-Recipients	\$9,000,000.00	\$4,000,000.00	\$13,000,000.00	\$2,000,000.00	\$15,000,000.00
Total All	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Line above should equal totals from question II.A	\$31,500,000.00	\$12,700,000.00	\$44,200,000.00	\$7,605,000.00	\$51,805,000.00
Notes:					

[Answer Question](#)
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III. B. Breakdown the total amount of your giving by geographic region of End-Recipient: Willing to share this information with other users for all years? Yes

	TOTAL CASH & NON-CASH
Asia & the Pacific	\$3,000,000.00
Europe	\$9,000,000.00
Latin America & the Caribbean	\$0.00
Middle East & Africa	\$3,000,000.00
North America	\$36,805,000.00
Breakdown not available	na
Total:	\$51,805,000.00
Line above should equal Totals from question II.A	\$51,805,000.00

Breakdown the total amount of your U.S. to International giving that went to the developing world:


	Direct Cash	Foundation Cash	Subtotal Direct & Foundation Cash	Non-Cash	TOTAL CASH & NON-CASH
US to Intl For Developing World	\$2,000,000.00	\$2,000,000.00	\$4,000,000.00	\$2,000,000.00	\$6,000,000.00

Provide the total amount of giving to End-Recipients in the following countries:

	TOTAL CASH & NON-CASH
Brazil	\$500,000.00
Canada	\$200,000.00
China	\$200,000.00
India	\$100,000.00
Russia	\$50,000.00

[Answer Question](#)
[Get Help](#)
III. C. Break down total international contributions by PROGRAM TYPE:

Willing to share this information with other users for all years? Yes

	Total Cash and Non-cash to International End-Recipients
Civic & Public Affairs	\$1,000,000.00
Community & Economic Development	\$5,000,000.00
Culture & Arts	\$1,000,000.00
Education: Higher Education	\$1,000,000.00
Education: K-12	\$3,000,000.00
Environment	\$1,000,000.00
Health & Social Services	\$500,000.00
Disaster Relief	\$1,500,000.00
Other 	na
Total	\$14,000,000.00
Notes:	

IV. Engagement

2011




Answer Question

Get Help

IV. A. Break down the total value of your Matching of Employee Giving.

DO NOT INCLUDE funds given by employees.

Willing to share this information with other users for all years? Yes

	Direct Cash	Foundation Cash	Subtotal	Match Ratio & Program Caps 	Employee Eligibility	Optional: % of Employees donating <u>money</u> through these campaigns 	Additional Program Specifics
Workplace Giving Campaigns 	na	\$1,289,572.00	\$1,289,572.00	Offer a 1:1 match. Limit is \$10,000 per employee per year.	Participation is limited to full-time employees and retirees.	43	This campaign is United Way.
Year-Round Policy	na	\$5,041,800.00	\$5,041,800.00	1:1, minimum gift is \$50, maximum is \$500.	Limited to full-time employees.	15	Only match to nonprofits focusing on culture and arts.
Dollars for Doers	na	\$89,023.00	\$89,023.00	\$10 for every eligible hour of volunteer service, capped at \$500.	Full-time employees.	0	Employee can receive matching maximum from year-round policy and Dollars for Doers.
Disaster Relief employee matching	na	\$126,000.00	\$126,000.00	1:1 match; no cap	Full-time employees.	0	Match to Japan tsunami relief.
Other	na	na	na	na	na	0	na
TOTAL Matching	na	\$6,546,395.00	\$6,546,395.00				
Notes:							

IV. B. Philanthropic Leverage: Money Raised from Others by Your Company

Willing to share this information with other users for all years? Yes

Money Raised from Non-Employees:

Number of Fundraising Campaigns during the 12 month period	2
Total Number of Campaign Days (across all campaigns)	40
Total Marketing/Admin. Dollars Spent	\$100,000.00
Total Dollar Amount Generated for Non-Profits	\$400,000.00
Total Number of Non-Profit Partners Supported	1

Money Raised from Employees:

Total Dollar Amount Generated for Non-Profits from Employee Payroll Deductions	\$900,000.00
Total Dollar Amount Generated for Non-Profits from Other Employee Contributions	na
Total Number of Non-Profit Partners Supported	200

Notes:

Money raised from non-employees includes the "LightsOn" program which allows customers to contribute money to help other customers in need. Customer contributions are sent to a 501c3 organization that manages the program. The money raised from employees includes the employee contributions to matching gift programs (United Way and a Higher Education Matching Gift Program).

IV. C. Does your company have at least one formal program for employee engagement?

Criterion to qualify as volunteerism is that the company incurs costs (including staff time) associated with the volunteer activities.

Willing to share this information with Other users for all years? Yes

Domestic

Yes

International

Yes

If yes, please provide program details.

	Domestic	International	Program Specifics
Paid-Release Time	Yes	No	With manager approval, limited to 20 hours per year.
Flexible scheduling	No	No	
Dollars for Doers grants programs	Yes	No	\$100 grants per 100 hours of service
Employee volunteer recognition awards	Yes	No	Awards ceremony held at the end of Q1 each year.
Retiree volunteering	Yes	No	
Family volunteering	Yes	No	
Team grants	No	No	Hoping to implement in 2013.
Incentive bonuses	Yes	No	
Company-wide Day of Volunteer Service	Yes	Yes	
Board Leadership Programs	Yes	No	
Pro Bono Service (valued as non-cash giving; if answering yes, please also complete questions II.A.i, II.A.ii)	Yes	No	
Other	No	No	
Notes:			

IV. D. Which programs appear to be most successful?

Select TOP 3 for both Domestic and International (6 total).

FYI: This question will only accept a response if you have answered "yes" in Question IV.C

Willing to share this information with other users for all years? Yes

Dom	Int'l	
No	No	Paid-Release Time
No	No	Flexible Scheduling
Yes	No	Dollars for Doers Grants Programs
No	No	Employee volunteer recognition awards
No	No	Retiree Volunteering
No	Yes	Family Volunteering
No	No	Team Grants
No	No	Incentive Bonuses
Yes	Yes	Company-wide day of volunteer service
No	No	Board leadership programs
No	No	Pro Bono Service (valued as non-cash giving; see the Survey Guide)
No	No	Other (please describe in notes field)
Notes:		

[Answer Question](#)[Get Help](#)**IV. E. Estimate the % of your company's employees who volunteer at least one hour throughout the year On-Company-Time.**

FYI: This question will only accept a response if you have answered "yes" in Question IV.C

Willing to share this information with other users for all years? Yes

67%

Notes: Majority of the employees meet this with company-wide day of volunteer service.

[Answer Question](#)
[Get Help](#)
IV. F. Volunteerism (Value of Hours)

FYI: This question will only accept a response if you have answered "yes" in Question IV.C

Willing to share this information with other users for all years? Yes

On-Company-Time Volunteerism

Does your company have an "On Company Time" / "Paid Release Time" volunteering policy or program?				Yes
Does your company have a formal system in place to track On-Company-Time volunteer hours?				Yes
	Domestic	International	Total	Consolidated
Total # of volunteer hours performed	200,000	100,000	300,000	na
Cost to the company of on-company-time hours using company figures	\$4,272,000.00	\$2,136,000.00	\$6,408,000.00	na
Cost to company of on-company-time hours using the Independent Sector's current rate of approx. \$21.36/hour (applied across all survey years). <i>The reporting system will be updated in April of each year to reflect the latest value.</i>	\$4,272,000.00	\$2,136,000.00	\$6,408,000.00	na
Explain how you calculated the estimated cost to company of on-company-time hours?	Used the rate as described above			

Outside-Company-Time Volunteerism

Does your company have an "Outside-Company-Time" program or policy?				Yes
Does your company have a formal system in place to track Outside-Company-Time volunteer hours?				Yes
	Domestic	International	Total	Consolidated
Estimate the total # of volunteer hours performed	55,000	35,000	90,000	na
Notes:				
* TOTAL ON-COMPANY-TIME VOLUNTEERISM COSTS (auto calculated)				
Management & Program Costs in Support of Volunteerism (Direct Costs)				na
Value of HOURS (* Independent Sector's Rate will be used if no value of hours is provided using company figures.)				\$6,408,000.00
Total				\$6,408,000.00

V. Administration

2011

Answer Question

Get Help

V. A. Number of full-time equivalent (FTE) staff in your Corporate Foundation(s), Community Affairs operations and "All Other Groups".
(Please identify in a decimal format.)

Willing to share this information with other users for all years? Yes

FTEs: Domestic (Corporate Headquarters Country)

16

FTEs: International (Outside Corporate Headquarters Country)

4

FTEs: Total

20

(only if breakdown above is not available enter value, otherwise "na")

FTEs: Consolidated

na

Notes:

[Answer Question](#)
[Get Help](#)

V. B. What is the largest grant dollar amount that the senior-most grant-maker can authorize without escalating to a review committee or board?

Answer separately for the corporate and foundation sides.

Willing to share this information with other users for all years? Yes

Corporate	\$100,000.00
Foundation	\$0.00
Notes:	Board approval required for all foundation grants

[Answer Question](#)[Get Help](#)**V. C. Total number of grants made (does not include matching gifts):**

Willing to share this information with other users for all years? Yes

	Domestic	International	TOTAL	Consolidated
# of grants:	868	652	1,520	na
# of recipient organizations:	20	25	45	na
Notes:				

[Answer Question](#)[Get Help](#)**V. D. Foundations and Trusts**

Willing to share this information with other users for all years? Yes

Does your company have a foundation or trust?

Yes

What type of foundation does your company have?

Predominately Pass-Through

What was the total dollar amount of all corporate funds transferred to the foundation or trust during the 12 months of this survey?

\$5,465,465.00

Notes:

Transferred on January 15, 2012

V. E. Total Management & Program Costs

Willing to share this information with other users for all years? Yes

	Foundation & Corporate Community Affairs	All Other Groups	Total Mgmt & Program Costs (excluding costs associated with volunteerism)	Consolidated Foundation & Corporate Community Affairs & All Other Groups (only if breakdown is not available enter value, otherwise "na")	Volunteerism	Total Foundation & Corporate Community Affairs & All Other Groups & Volunteerism	Consolidated Foundation & Corporate Community Affairs & All Other Groups & Volunteerism (only if breakdown is not available enter value, otherwise "na")
TOP-LINE MGMT & PROGRAM COSTS	na	na	na	na	na	na	na
Notes:							

VI. Opinion Polls

2011

Answer Question

Get Help

VI. A. Estimate by what % you expect your total company contributions to change from 2011 to 2012?

Willing to share this information with other users for all years? Yes

Estimate % Change

Total Giving

Increase 2% to 10%

Direct Cash

Increase 2% to 10%

Foundation Cash

Increase 2% to 10%

Non-Cash

No change expected

Notes:

[Answer Question](#)[Get Help](#)

VI. B. Has the data from the Corporate Giving Standard helped to raise the quality of your company's giving programs and/or supported an increase in your company's philanthropy budget? If yes, how? If not, what can CECP do to make this research more relevant?

Will not be shared; this is for CECP's internal improvement efforts only.

Response

*