



## Analyse, Benchmark and Celebrate Your Giving

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# Analyse, Benchmark and Celebrate Your giving

## GIVX 2019 Submission Guidelines

GivX provides your company with a simple, effective way to quantify the value of your giving in terms of their 'Community Value', and benchmark this against other firms.

In order to participate, you provide six data points which are the direct output of your UK community investment programme.

By submitting to GivX you receive:

- A GivX Score and GivX Score Per Capita
- A printed GivX Report
- Access to our online benchmarking report showing how you compare to a benchmark of other companies against these six data points
- Two tickets to the prestigious GivX event in September 2019

**SUBMIT**

### SECTION 1: INTRODUCTION

#### What is Community Value?

'Community Value' is calculated by considering the replacement cost to the charitable organisation receiving the donation / help.

For volunteering time and in-kind donations this is valued at the price the receiving charitable organisation would have to pay to procure similar support (time, items etc.) on the open market from you or another provider.

All financial contributions are valued the same – at their monetary value!

#### What are the six Data Points?

In order to submit you will need to provide the following for your UK business for your most recent 12-month reporting period.

- # Unskilled Volunteering Hours
- # Skilled Volunteering Hours
- # Professional Volunteering Hours
- £ Fundraising
- £ Inkind donations
- £ Company cash donations

*We also collect*

- Your UK staff count figure (FTE)
- Your reporting year end (e.g. 31/12/2018)



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## Community Investment Survey

For GivX 2019, we are including a few additional questions to better understand the resources and strategies high-performing CSR teams are using. Our hope is that the insight we draw from this survey will support you when it comes to planning your approach, your team and your budgets.

Our aim is that these questions should be answerable in no more than a minute or two. Your specific answers will remain completely anonymous and will only be used to display general trends.

## What do you do with the data?

The data you provide will be aggregated into anonymous benchmarks – see more detail on this below.

If you are in GivX's 'Top' lists, your 'Total GivX Score' and 'GivX Score Per Employee' will be celebrated in the GivX report – see more details below.

We analyse the data to understand the total contribution made by companies submitting and draw insights and trends. These are published in the GivX report (hard-copy and online) and discussed in the GivX event in the autumn.

## How do the GivX 25 and GivX SME 10 Awards fit in?

The GivX 'Top' lists awards publicly celebrate those firms making the greatest contribution to the community on a per-employee basis. These firms will be recognised in the GivX report and at the event.

If you are in the 'Top' lists, we will contact you by 31 July asking you for your logo.

If you provide these they will be included with your score in the GivX report. If you do not provide these we will compile a summary based on publically available information and include your company name in text in place of your logo.

### GivX's 'Top' lists

- GivX 25: Top 25 overall companies
- SME Top 10: The ten highest scoring SMEs
- Top five highest scoring organisations on each of the main six data points (e.g. professional volunteering)
- Sector specific top givers (dependent on the number of participants in each particular sector)
- Highest scoring newcomer: the highest scoring corporate and SME that hasn't previously participated in GivX



# Anaylse, Benchmark and Celebrate Your giving

## **SECTION 2: SUBMISSION**

### **How do we submit?**

You can submit your data through the Benefacto / GivX portal. You will need to create an account for your organisation.

If you are an existing Benefacto member, login as normal to your DataHub account and select GivX from the main menu.

### **When should we submit?**

The window for submission will run from 2 April to 28 June 2019.

If you wish to retract a submission, this must be done in writing to Linz Darlington via [linz@benefacto.org](mailto:linz@benefacto.org) on or before 28 June 2019.

### **What year should we report on?**

You can report to any 12-month period you wish. It is likely to be your financial reporting year which has most recently ended.

You should endeavour to provide the most recent data you have available.



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## SECTION 3: BENCHMARKING

### Does GivX share our data publically?

No data is shared publically for most contributing firms.

If you are in GivX's 'Top' lists, your 'Total GivX Score' and 'GivX Score Per Employee' will be recognised in the GivX report, along with a short overview of your programme.

Should you not feature in the 'Top' lists, we will not publish any of your data whatsoever.

In the benchmarking tool, your data will always be shown as part of wider dataset so it will always be completely anonymised. It will never be linked to your company by name.

### What benchmarks will we have access to?

Using our online tool, you will be able to compare your total contribution and the contribution made by each of your six data points using a benchmark of your peers.

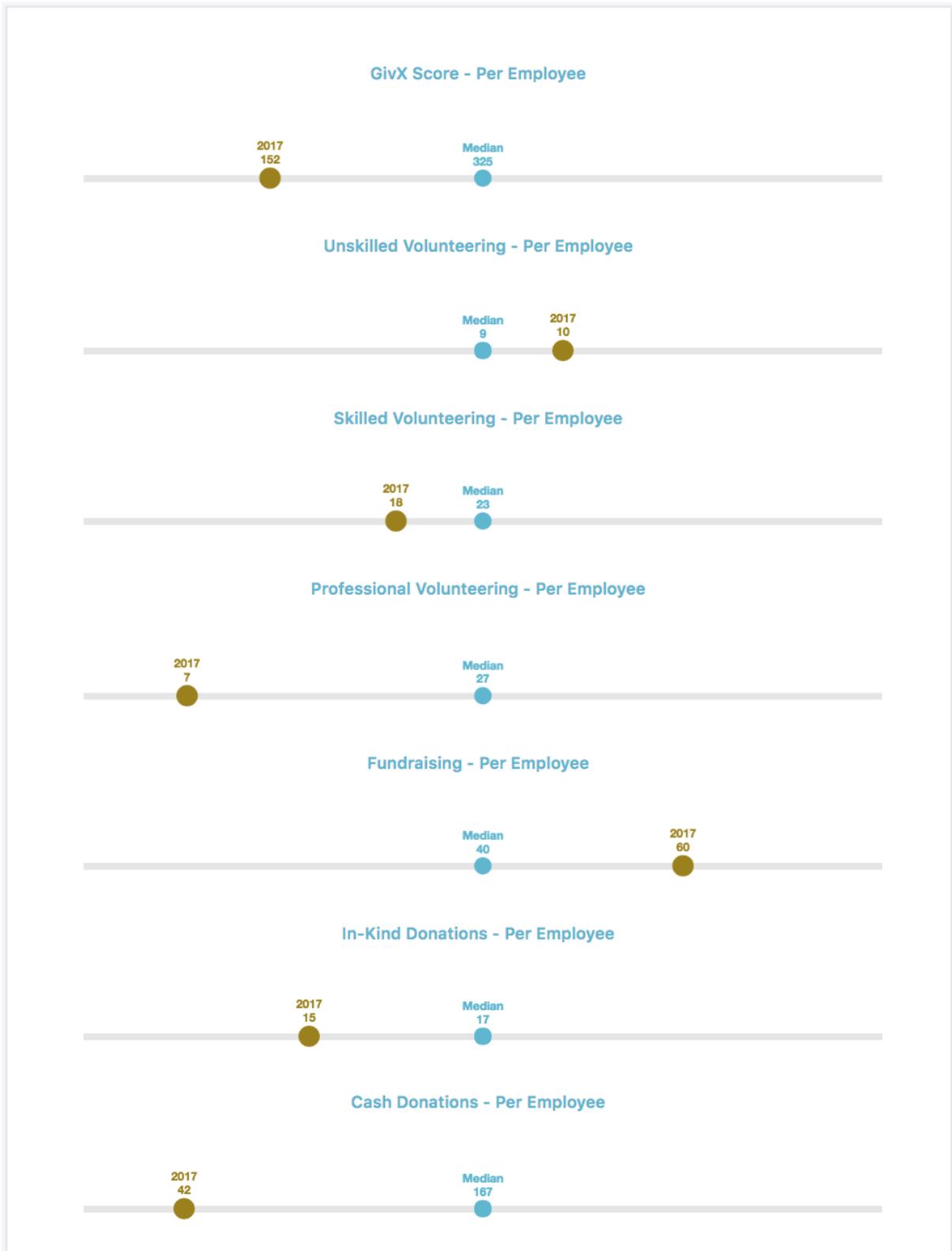
We will provide the following datasets:

- *Main Dataset:* Your data will be aggregated with data submitted by other companies into one of two benchmarks:
  - Companies 11-250 UK employees
  - Companies 251 – 1000 UK employees
  - Companies 1001 – 5000 employees
  - Companies over 5001 employees
- *Sector Datasets:* For sectors with over 10 companies submitting data, we will also produce a sector benchmark alongside the overall benchmark – please encourage your peers to submit!
- *Previous Years Comparison:* For companies which submitted to GivX in previous years, they can also compare their score from this year with that of past years.

You will be able to compare yourself against the median (the middle of the pack) contributor for that dataset and see your percentile rank (i.e. the % of scores which are equal to or below yours). Both the median and percentile rank are calculated after excluding any companies which did not provide any data (i.e. responded as contributing '0') for that datapoint.



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# Anaylse, Benchmark and Celebrate Your giving

## How does GivX look after our data?

Your data will be held on the secure Benefacto web-platform which is hosted in Europe. All back-up data will be held securely and also in Europe.

We comply with relevant data protection legislation in respect of any personal data that you may supply us in connection with your submission.

## SECTION 4: CATEGORISING VOLUNTEERING TIME

GivX values volunteer time at what the charitable organisation receiving the support would have to pay for that support if they were to procure it elsewhere.

**Unskilled volunteering** is any volunteering activity which could normally be completed by any adult volunteer. Examples include but are not limited to:

- gardening
- serving food in soup kitchens
- sorting donations

For 2019 this is valued at £9.80p/h, which is an average of the Living Wage Foundation's UK Living Wage and London Living Wage.

**Skilled volunteering** is any activity that requires a level of soft or hard skills to complete. Examples include but are not limited to

- delivering a presentation to school children
- helping someone write a CV or learn to use computers
- spending time socialising with vulnerable people

For 2019 this is valued at £33.30p/h which is the average cost of a professional person, divided by the number of working hours in the year.

**Professional volunteering** is providing an activity for free that would usually be sold as a professional service. Examples include but are not limited to

- legal pro-bono
- completing a charity's accounts
- web design work

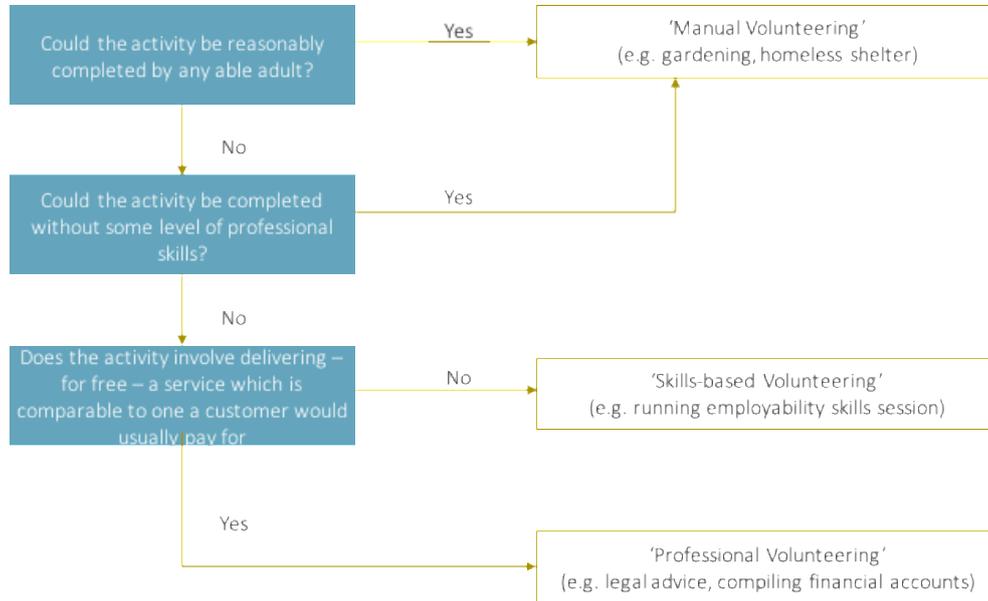
For 2019 this is valued at £125.90 p/h which is the average amount that charities pay for professional services.



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## Categorisation Flow

In order to categorise different volunteering activities between the three discreet types of volunteering, test them using the questions below:



## Categorisation FAQs

### We only report on 'Volunteer Days', not 'Volunteer Hours' - what do we do?

Please multiply your 'Volunteering Days' by 7.5 (average hours per day) to get the number of hours

We would recommend recording hours in future years.

### We don't differentiate between different types of volunteering – what do we record?

If you do not differentiate between different types of volunteering, please categorise all of your volunteering within the 'Unskilled' bucket.

We would recommend recording this for future years.

### Our staff do volunteering outside of work, can we include this?

If your staff are volunteering as employees of your company, you can include this. Hallmarks of this are being given paid time off in lieu for their volunteering, volunteering for company-supported opportunities or promoting opportunities through your communication channels.

However, if staff are volunteering outside of working hours for their own causes and without your involvement, they are doing it in a private capacity and not as employees of your firm.

The same is true for contractors who volunteer. If volunteering hours aren't billable, they are volunteering in a private capacity.



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### Can we include time spent fundraising in our volunteering figures?

No. See the section on fundraising for more detail.

### Can we count time spent managing our programme as volunteering?

No. The value of the time of your CSR staff is reflected in the contribution of time / fundraising your colleagues make as a result of these efforts.

The exception to this rule is if you have staff time actually dedicated to running charitable services (e.g. you are directly co-ordinating a programme, enlisting service users and enlisting your volunteers). You can include this time because in this example you are both acting as the 'charitable organisation' and as the volunteers.

### Can we include volunteering and donations made as part of a bid/contract?

Any volunteering or donations made to the community as part of the terms of a contract/bid your company has won may not be included in your submission. As a general rule of thumb, only include the giving which your company elected to do, rather than was required to do for direct commercial purposes.

### Can we edit our submitted data?

You are able to edit your submitted data by contacting [linz@benefacto.org](mailto:linz@benefacto.org) before the submission window closes on 29 June. Once the 29 June deadline is passed, the entire dataset is locked and no alterations can be made – please check your data thoroughly before submitting.

## SECTION 5: DEFINITION OF FUNDRAISING

You can include any funds which are raised by an activity which has been *actively led by your company* or your employees. Examples include but are not limited to:

- an employee running a marathon, which they fundraise for within the office.
- collection boxes you put in store for customers to donate to your charity partners
- asking customers to donate foreign currency
- a coffee morning run by your charity committee in your canteen

### Can we include donations from customers?

Yes, so long as they are giving money to an initiative which is being *actively led by your company*.



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### **If we help other organisations raise funds, can we include this?**

No. You cannot include donations if the activity *was not actively led by your company*. Examples where your company is not actively leading the fundraising include:

- operating the call centre for a charity's television appeal
- allowing charities to fundraise on your property
- allowing charities to do a food drive in your store

### **Can we include time we spend fundraising as volunteering time?**

No, the value of the time you spend fundraising as part of company activities is already captured and included in the value of the funds you have raised.

If you spend time supporting charitable organisations in raising funds, but your company is not actively leading this, you can include this as volunteering time. A good example is operating the call centre for a charity's television appeal would be 'Skilled Volunteering'.

### **Our staff do fundraising outside of work, can we include this?**

If your staff are fundraising as employees of your company, you can include this. Hallmarks of this are fundraising in the office, promoting activities using your communications channels or requesting match funding.

However, if they're fundraising outside of working hours, for their own causes and without your involvement, they are doing it in a private capacity and not as employees of your firm.

### **Can we include payroll giving?**

No. While you may be facilitating the donation, you are not actively raising funds.

If your company matches employees' payroll giving donations, you can value the contribution your company makes as a cash donation.

### **We have a charitable foundation. Can we include donations of time and money to this?**

Think of your foundation like any other charitable body. You can count donations of time, money and staff fundraising your company make to this. However, do not count any donations from third parties to your charitable foundation.

If staff are fundraising for your foundation, you may add this to your fundraising total.



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### Do donations to community groups and social enterprises count?

Yes, money and time donated to community groups and social enterprises can be counted towards your overall GivX score, as long as the beneficiary is not expected to deliver a service valuable to your firm.

### SECTION 6: VALUING IN-KIND DONATIONS

#### How do you value in-kind donations?

Valuing physical in-kind donations is a long-debated topic. Do you value them at what it costs you to produce? Or the price you to sell them?

In some cases in-kind donations are being provided to charities or non-profit because they cannot be sold. In this case you should apply a discount to the 'Fair Market Value' to reflect how much you'd have to discount them to find a buyer on the open market.

You may want to take the following considerations into account.

- the estimated discount you would have to apply to saleable goods to sell them to a third party
- an estimate of what proportion of goods are defective
- an estimate of what proportion of goods will be disposed of by the charitable organisation

GivX is designed is to be fairly 'light touch', so we would encourage you to value your donated goods using common-sense and conservative estimates, rather than an in-depth audit and valuation!

#### Can GivX provide any support in valuing in-kind donations?

As each in-kind donation is different, the team at GivX will not able to provide you with tailored support at valuing yours. However, a few commons examples include:

##### *Meeting Rooms*

A common in-kind donation is firms providing meeting room facilities which they lend to charitable organisations free of charge.

Through analysing HireSpace data and the cost of refreshments available on the high-street, we have averaged the cost of meeting rooms. If you wish you can use these to value the meeting rooms you lend without charge to the charity:

- £5.50 per hour per person for meeting rooms without refreshments
- £6.50 per hour per person for meeting rooms with refreshments

The approach above is not suitable for calculating the cost of large conferences (e.g. over 100 people). In these cases, please use the value of a comparable, local alternative to your venue as an indicator.



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### How can we value giving blood?

A blood donation is classified as an in-kind donation. While there is no market value in the UK for blood, we recommend you place your own value on what a pint of blood would be worth based on reasonable assumptions and 'replacement value' (in so far as this is possible). As with all in-kind donation evaluations, we urge participants to make a conservative estimate.

## SECTION 7: COMPANY DONATIONS

### We're an international / global company - What should we include for our UK giving figures?

Include any contributions which were made by the UK business.

If you make donations at a group level a proportion of these can be apportioned to your UK business using the % contribution to group profit of your UK business.

### Our company paid for a table at a charity event – can this be counted as a cash donation?

No, tables at charity events should not be included in your company donation value.

### The money we donate to charities has 'strings attached' – does this still count as a company donation?

You are able to include donations which are made with conditions for use, so long as there is no expectation for the organisation to deliver a service valuable to your firm.

## SECTION 8: PUBLICISING YOUR GIVX AWARD

### Publicising your award

If you are recognised in any GivX 'Top' awards, you will be notified by 31 July 2019.

There will be an embargo on announcing this inclusion until after the GivX event in September 2019.

### THE BORING BIT....

**Accuracy:** Benefacto Limited takes all reasonable measures to ensure the accuracy and reliability of GivX 25, GivX SME 10, any awards, and the GivX benchmarks and compiles each using reasonable skill and care, based on the data that it is submitted to it. Benefacto gives no representation or warranty that the information will be complete, true and not misleading.

We reserve the right to audit data submissions both on a random basis and should we identify any anomalies in the data. To safeguard the integrity of GivX, we spot-check 5% of submissions. This will involve reviewing the underlying data, calculations and any assumptions on which a company's submission was based.

**Incomplete submissions:** Benefacto reserves the right not to include any incomplete submission but may contact you for further clarifications where data appears incomplete or inaccurate.



## Anaylse, Benchmark and Celebrate Your giving

**Liability:** Benefacto Limited will not be liable for any ill-effects associated with GivX or your involvement with it.

**SUBMIT**