



The Oregon Clinic

2017 BENEFIT REPORT

SELF-REPORTED & UNVERIFIED*

Created from the 2017 B Impact Assessment on the version designed for:
Service companies, 250-999 employees, Developed Markets - U.S.

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Thank you for your interest in The Oregon Clinic's 2017 Benefit Report.

The Oregon Clinic is a legally-incorporated benefit corporation in the state of OR¹. A benefit corporation is a corporation that has voluntarily met the highest standards of corporate purpose, accountability, and transparency. Benefit corporations have a corporate purpose to create a material positive impact on society and the environment, have expanded the fiduciary duty of their directors to include consideration of stakeholder interests, and are required to report on their overall social and environmental performance.

In this report you will find:

- **B Impact Report:** a quantitative summary of this company's overall social and environmental performance assessed against the third party standard B Impact Assessment (BIA) in relation to each key stakeholder group and as compared to certain benchmarks
- **Benefit Report Narrative:** a set of narrative responses to questions required by the benefit corporation statute, including a discussion of why this benefit corporation chose the BIA as their reporting and impact management tool
- **B Impact Assessment:** answers to each BIA question assessing the company's positive impact on its workers, community, customers, and the environment

If you have any questions about benefit reports or benefit corporations generally, please visit benefitcorp.net or email thelab@bcorporation.net.

¹Benefit corporations (or benefit LLCs) are different from Certified B Corporations (aka B Corps). The most important difference from the perspective of a reader of this report is that benefit corporations, unlike Certified B Corporations, are not required to have their performance validated or certified by a third party.

The Oregon Clinic

2017 B Impact Report



	Company's Points UNVERIFIED	Ordinary Businesses** UNVERIFIED	B Corps*** CERTIFIED
Overall B Impact Score	83 pts	51 pts****	97 pts****
Governance	17	6	14
Corporate Accountability	5	3	10
Transparency	2	3	4
Workers	32	20	26
Compensation, Benefits & Training	19	15	17
Worker Ownership	7	1	3
Work Environment	6	4	5
Community	22	15	44
Community Practices	22	10	20
Suppliers & Distributors	5	2	4
Local Involvement	3	3	6
Diversity	6	1	3
Job Creation	1	1	2
Civic Engagement & Giving	7	2	5
Customers	1	5	18
Consumer Products & Services	1	5	18
Serving Those In Need	0	N/A	N/A
Products or Services	N/A	N/A	N/A
Environment	11	6	13
Environmental Products & Services	N/A	2	8
Environmental Practices	11	N/A	N/A
Land, Office, Plant	8	3	5
Inputs	3	1	3
Outputs	1	1	1
Suppliers & Transportation	N/A	0	3



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** Median score of Ordinary Businesses that have completed the B Impact Assessment (BIA).

*** Median scores of all Certified B Corporations that have received a minimum certified score of 80 on the BIA.

**** For Ordinary Businesses and Certified B Corps, Total B Impact Scores will not equal the sum of the sub-scores since each reflects a median score.

Benefit Report Narrative



Benefit corporation statutes require a benefit report to include narrative responses to a specific set of questions. Below are our responses to those statutory questions.

The Oregon Clinic selected the B Impact Assessment (BIA) as the third party standard to prepare this benefit report because it is the most widely-used impact measurement and management tool in the world. It is used by more than 30,00 businesses to measure, compare, and improve their overall social and environmental performance, as well as by an increasing number of investors, business associations, and government entities serious about understanding and benchmarking the impact of the companies in which they invest and with which they do business. The BIA is governed by the nonprofit B Lab and meets the statutory requirement that a third party standard must be comprehensive, credible, transparent, and independent. More information about the BIA and B Lab is available at bimpactassessment.net.

Describe the ways in which the benefit corporation pursued general public benefit during the year and the extent to which general public benefit was created.

The Oregon Clinic was founded by physicians twenty-three years ago to provide the highest quality specialty health care to Oregonians. Each year since our founding, we have grown to include more physicians and more patients, always with a steadfast commitment to providing the best possible care and putting our patients first.

Throughout our history, we have also made the commitment to serve low-income patients who have Medicaid, Medicare or no insurance at all. Many of the approximately 420,000 patients we serve each year are low-income, resulting in more than \$50,219,000 in community benefit care as defined by the State of Oregon Community Benefit reporting regulations.

In addition to providing high quality care to all patients, including low-income patients, The Oregon Clinic provides community benefit through:

- Prioritizing an excellent workplace by providing exceptional benefits and respect for our staff. We were awarded high ranking among large companies in Oregon in the Top Workplace awards three years in a row, including 2016.
- Improving environmental benefit through added energy efficiencies at our Gold LEED Certified building.
- Providing leadership in the medical community as program directors, chairs or members of committees and boards.
- Providing thousands of hours of critical hospital call.
- Training the next generation of specialists through fellowship programs and residencies
- Sponsoring medical foundations, sports teams, and non-profits.

If applicable, describe the ways in which the benefit corporation pursued a specific public benefit that the articles of incorporation state it is the purpose of the benefit corporation to create and the extent the specific public benefit was created.

N/A

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Describe any circumstances that have hindered the creation by the benefit corporation of general public benefit or specific public benefit this period.

The Oregon Clinic has been successful in its pursuit of providing public benefit in 2016 and will continue to build on this success.

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Describe the process and rationale for selecting the third party standard used to prepare the benefit report

After extensive research of appropriate third party assessment tools, The Oregon Clinic chose the B-lab assessment because it is considered a gold standard in benefit reporting. It also allows for some flexibility to meet the specifics of the healthcare field. Many of the alternative third-party tools were focused on other industries or did not seem appropriately robust. The B-labs tool is also specifically designed to meet the needs of state benefit company reporting.

If applicable, provide an explanation for changing the third-party standard used to prepare the benefit report.

N/A

If applicable, provide a statement of any connection between the organization that established the third-party standard, or its directors, officers or material owners, and the benefit corporation or its directors, officers or material shareholders, including any financial or governance relationship which might materially affect the credibility of the use of the third-party standard.

The Oregon Clinic's staff, directors, shareholders or directors do not have any known connection to B-lab.

In this benefit report, was assessment of the overall social and environmental performance of the benefit corporation against a third-party standard applied consistently with any application of that standard in prior benefit reports?

- NA- This is the company's first benefit report
- No
- Yes

If a difference exists in the application of the standard from prior benefit reports, provide an explanation of the reasons for it.

N/A

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Provide the name of the benefit director and the benefit officer, if any, and the addresses to which correspondence to each of them may be directed. Note: some states do not mandate that a Benefit Director or Benefit Officer exist, so this question may not apply. You can find more information about the requirements of individual states here: <http://benefitcorp.net/sites/default/files/Benefit%20Corporations%20Chart.pdf>

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Benefit Director: Name	Philippa Ribbink, MD
Benefit Director: Address	c/o The Oregon Clinic 501 N. Graham Street Suite 445 Portland , OR 97227
Benefit Officer: Name	Sarah Moseley
Benefit Officer: Address	c/o The Oregon Clinic Marketing 1111 NE 99th Avenue Portland, OR 97220

If applicable, provide a statement from the benefit director or the board of directors as to whether the benefit corporation acted in accordance with its general, and any named specific, public benefit purpose, and whether directors complied with their duty to consider the impact of decisions on stakeholders, and if in the opinion of the benefit director or board of directors they did not, a description of the ways in which they did not comply.

Since The Oregon Clinic's inception in 1994, our focus has always been to provide highest quality care to patients of all income levels. The Oregon Clinic's Board of Directors, made up of physician shareholder, has always considered the impact of our business decisions on the health of our patients and our community while ensuring our staff have an excellent workplace.

In choosing to become a Benefit Company in 2016, The Oregon Clinic publically declared our commitment to community benefit and to building the internal structures that formalize our long-standing approach to our business. In 2016, Board of Directors:

- Meeting minutes began to reflect the decisions-making process related to our community benefit.
- Started a Benefit Company Committee.
- Approved that the chair of the Benefit Company Committee would be the Benefit Board Member and serve as a full member of the Board of Directors.
- Assigned the role of Benefit Officer to Director-level staff member who is responsible for managing our Benefit Company committee and assessment.

The board continues to prioritize our community benefit values in our decision making and we are amplifying those values through the work of a Benefit Company Committee focused on developing ways we can more positively impact our environment and the communities we serve.

If applicable, provide additional information or explanations required by your state's specific benefit corporation statute.

N/A

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B Impact Assessment

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Governance

Governance: Mission & Engagement

GV1.1 **Select the description that best describes your business.** [Not Weighted]

- Positive social/environmental impact is desirable but not a particular focus for our business.
- Social and environmental impact is frequently considered but it isn't a high priority.
- We consider social and environmental impact in some aspects of our business but infrequently.
- We consistently incorporate social and environmental impact into decision-making because we consider it important to the success and profitability of our business.
- We treat our social/environmental impact as a primary measure of success for our business and prioritize it even in cases where it may not drive profitability.

GV1.2 **Does your company have a corporate mission statement, and does it include any of the following?** [Less Weighted]

- No written statement
- A written corporate mission statement that does not include a social or environmental commitment
- A general commitment to social and/or environmental responsibility and stewardship
- A commitment to a specific positive social impact (e.g. poverty alleviation, sustainable economic development)
- A commitment to a specific positive environmental impact (e.g. reducing waste to landfill with upcycled products)
- A commitment to serve a target beneficiary group in need (e.g. low income customers, smallholder farmers)

GV1.3 **Please type or paste your mission statement here.** [Not Weighted]

GV1.4a **Which type of employee training does your company provide regarding its social and environmental mission?** [Equally Weighted]

- No social or environmental mission
- No training on the company's social and environmental mission
- Only informal inclusion in orientation, training and/or instruction
- Specific, formal training integrated into new employee and new manager training
- Specific, formal training integrated into ongoing employee and manager training
- Workers articulate goals and achievements on social and environmental metrics as an individual or part of a workplace team
- All supervisors and managers receive training on how to communicate social and environmental goals to employees and implement accountability for results

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GV1.4b **Does the Board of Directors or equivalent governing body review the company's social or environmental performance on at least an annual basis?** [Equally Weighted]

- No
- Yes - The Board receives a general update on the company's social and/or environmental performance
- Yes - The Board reviews key performance indicators (KPIs) on the company's social and/or environmental performance
- N/A - No Board of Directors or equivalent governing body

GV1.6 **What proportion of full-time managers have social or environmental mission-related responsibilities or expectations outlined in their job description?** [Equally Weighted]

- 0%
- 1-49%
- 50-99%
- 100%

Answer(s): Currently all managers have the priority of providing high quality health care to our community included in their job description. In 2017, we will add more specific language about supporting our role as a Benefit Company.

GV1.7 **What portion of management had a formal written performance evaluation/review in the last year that included social and/or environmental goals?** [Equally Weighted]

- 0
- 1-49%
- 50-99%
- 100%

Answer(s): Currently all managers have the priority of providing high quality health care to our community included in their job description. In 2017, we will add more specific language about supporting our role as a Benefit Company.

GV1.8 **Is the compensation of your CEO and those who directly report to the CEO tied to achieving specific social and environmental metrics or objectives?** [Equally Weighted]

- No
- Yes, CEO/President compensation
- Yes, other senior management team member(s) compensation

Answer(s): CEO job description includes supporting our community and environmental values.

GV1.9b **In the last year, how did the company solicit specific feedback from its external stakeholders (excluding employees and investors) regarding the company's social and environmental performance?** [Equally Weighted]

- No formal stakeholder engagement
- Meetings or other engagement mechanisms with local community members
- Meetings or other engagement mechanisms with social or environmental advocacy groups
- Online stakeholder forum to provide/report social or environmental concerns or feedback
- Third party or anonymous surveys
- Other (please describe)

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GV1.10 **Are there key performance indicators (KPIs) or metrics that your company tracks at least annually to determine if you are meeting your social or environmental objectives?** [Equally Weighted]

- We don't track key social or environmental performance indicators
- We measure KPIs/metrics or outputs that we have identified and defined in order to determine if we are achieving our social and environmental objectives
- We measure social and environmental outcomes over time (examples: 3rd-party impact assessments, progress out of poverty indexing, beneficiary outcome surveys, etc.)

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Governance: Corporate Accountability

GV2.1a **What is the company's highest level of corporate oversight?** [Less Weighted]

- Owner/Manager only
- Non-Fiduciary Advisory Board
- Board of Directors or Equivalent

GV2.2c **Which of the following apply to your company's Board of Directors or equivalent governing body?** [Heavily Weighted]

- Meets at least quarterly
- Includes at least 1 independent member
- Includes at least 50% independent members
- Oversees executive compensation
- Reports members names and relation to company transparently to public
- Has an Audit Committee with at least 1 independent member
- Has a Compensation Committee with at least 1 independent member
- Company is a cooperative and elects Board from membership
- None of the above
- N/A - Company has no Board of Directors or equivalent

GV2.3a **Which of the following stakeholder groups or relevant independent experts have voting seats on the Board of Directors or equivalent governing body?** [Less Weighted]

- Executive employee representative
- Non-executive employee representative
- Community expertise (e.g. local university representative)
- Environmental expertise (e.g. environmental nonprofits)
- Customers
- None of the above
- N/A - no Board of Directors or other governing body

Governance: Ethics

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GV3.1b **Does the company maintain any of the following financial controls?** [Equally Weighted]

- None
- IT systems have different password protection systems that are changed periodically with different access levels according to the position of the staff member accessing the data
- Fraud risk assessment is conducted at least annually and any internal control deficiencies identified are communicated to BoD and senior management.
- Lines of financial reporting, responsibilities and limits for the authorization, approval and verification of disbursements are all documented in writing
- Document financial control activities, which at the minimum cover controls around cash disbursement, accounts receivable, accounts payable, and inventory management

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GV3.3a **Which of the following anti-corruption reporting and prevention systems are in place?** [Equally Weighted]

- Written employee whistle-blowing policy provides legal protection to workers, with strict confidentiality easily accessible and circulated to all employees
- Helpline or anonymous mechanism to report grievances/concerns
- Individual or department oversight with direct access to Board of Directors
- Other (please describe)
- None of the above

GV3.4 **Which of the following describes how your company instructs employees regarding your Code of Ethics about behavioral expectations, bribery and corruption?** [Equally Weighted]

- No Code of Business Conduct (or equivalent policy) or training on the Code
- We instruct the Board of Directors on the Code at least annually
- We instruct all newly hired workers on the Code
- We instruct managers on the Code on an on-going basis
- We instruct all non-managerial workers on the Code on an ongoing basis
- We communicate changes to the Code whenever it is updated
- Other (please describe)

GV3.5 **Which of the following aspects are covered in your Code of Ethics?** [Equally Weighted]

- Bribes in any form, including kickbacks or gifts, on any portion of contract payments or soft dollar practices are prohibited
- Formal oversight policy covering direct or indirect political contributions, charitable donations and sponsorships
- Financial and in-kind contributions to political parties, politicians, lobby groups, charitable organizations and advocacy groups are publicly disclosed
- Other (please describe)
- None of the above
- N/A - No Code of Ethics

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GV3.6a **In cases where there are material breaches to the company's Code of Ethics, does the company have formal written guidelines in place for taking the following actions?** [Equally Weighted]

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- Breaches, including case details, are reported publicly
- Reported breaches are investigated promptly via an independent party
- Employees are dismissed or disciplined if found in breach
- Contracts with business partners in breach are terminated
- Company makes improvements to anti-corruption program based on reported cases
- Other (please describe)
- None of the above
- N/A - No Business Code of Conduct

Other: We have a specific Corrective Action Policy that addresses corrective action in relation to a variety of breaches. We specifically report HIPAA violations to the Secretary of Health and Human Services via their website.

GV3.7 **Is there an annual conflict of interest questionnaire filled out by all board members and officers?** [Less Weighted]

- Yes No N/A - No Board of Directors or equivalent

Governance: Transparency

GV4.1c **Does the company produce financials that are audited annually by an internationally accredited Certified Public Accountant (CPA)?** [Equally Weighted]

- Yes No

Answer(s): Our finances are reviewed annually by an outside CPA firm, Moss Adams, and we receive an annual review letter.

GV4.2a **Does the company have a formal process to share financial information with its full-time employees?** [Equally Weighted]

- No
- Yes - the company shares financial information if employees ask for them
- Yes - the company discloses all financial information (except salary info) at least yearly
- Yes - the company discloses all financial information (except salary info) at least quarterly
- Yes - The company has complete transparency of financial information and formally empowers all employees and departments to actively participate in financial planning (i.e. Open Book Management)
- Yes- In addition to sharing financials the company also has an intentional education program around shared financials

GV4.3a **Do all full-time employees have access to written information that identifies all material owners and investors of the company?** [Equally Weighted]

- Yes No

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GV4.5b **Does the company publicly share information on its social and/or environmental performance? If so, how?**
[Equally Weighted]

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- No public reporting on social or environmental performance
- Specific quantifiable social and/or environmental indicators or outcomes are made public
- Company sets public targets and shares progress to those targets
- Information is shared/updated annually
- Information is presented in a formal report that allows comparison to previous time periods
- Information adheres to a comprehensive third party standard (ex. GRI or B Impact Assessment)
- A third party has validated the information shared
- Impact reporting is integrated with financial reporting

Governance: Governance Metrics

GV5.1 **On what date did your last fiscal year end?** [Not Weighted]

12/31/2016

GV5.2 **Reporting currency** [Not Weighted]

US Dollar - USD

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Workers

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Workers: Worker Metrics

WR1.1 **Are the majority of your employees paid on a fixed salary or a daily/hourly wage?** [Not Weighted]

Fixed Salary Daily/Hourly Wage

WR1.2 **Number of Total Full-Time Workers**

Current Total Full-Time Workers	995.00
Total Full-Time Workers 12 months ago	863.00

WR1.3 **Number of Total Part-Time Workers**

Current Total Part-Time Workers	87.00
Total Part-Time Workers 12 months ago	101.00

WR1.4 **Number of Total Temporary Workers**

Current Total Temporary Workers	2.00
Total Temporary Workers 12 months ago	0.00

Workers: Compensation & Wages

WR2.1 **Total Wages (including bonuses)** [Not Weighted]

140,747,050.00

WR2.2 **What is the company's lowest wage calculated on an hourly basis?** [Not Weighted]

10.00

WR2.5 **What % above living wage did your lowest-paid worker (excluding interns) receive during the last fiscal year?**
[Equally Weighted]

- 0% or below
 1-14%
 15-24%
 25%+
 N/A - No living wage data available for country of operations

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WR2.7a **What multiple is the highest compensated individual paid (inclusive of bonus) as compared to the lowest paid full-time worker?** [Equally Weighted]

- >20x 16-20x 11-15x 6-10x 1-5x

Answer(s): Phil Armstrong, CEO, was used as the highest compensated individual (i.e. non-physician).

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WR2.9a **Based on a company referenced compensation study in the last two years, how does your company's compensation structure (excluding executive management) compare with the market?** [Equally Weighted]

- Don't Know: Have not referenced a compensation survey
 1st quartile (0-24th percentile)
 2nd quartile (25-49th percentile)
 3rd quartile (50-74th percentile)
 4th quartile (75-100th percentile)

WR2.10 **Which of the following are true about the company's bonus plan:** [Less Weighted]

- Bonuses are given but there is no formal plan
 Formal guidelines on the structure of the bonus plan (e.g. eligibility, profit/revenue target tied to the bonus pool, allocation criteria) are disseminated and accessible to all workers
 All full-time and part-time workers are eligible in the plan
 None of the above

Answer(s): Bonus plan is defined as TOC's annual holiday gift.

WR2.12 **What % of full-time and part-time employees, excluding founders and executives, received a bonus in the last fiscal year?** [Equally Weighted]

- 0%
 1-24%
 25-49%
 50-74%
 75-99%
 100%
 N/A

Workers: Compensation & Wages (Hourly)

WR2.5.3 **What % above the local minimum wage did your lowest-paid hourly worker receive during the last fiscal year?** [Equally Weighted]

- 0% 1-9% 10-19% 20-25% >25%

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WR2.5.6a **What % of hourly workers are paid a living wage?** [Equally Weighted]

- <75%
- 75-89%
- 90-99%
- 100%
- N/A



WR2.5.11b **In the last fiscal year, the company's bonus plan for non-executives represented what % of the company's salary base?** [Equally Weighted]

- No bonus payout, or no bonus plan
- <1%
- 1-3%
- 3-6%
- >6%

Workers: Benefits

WR3.1a **Does the company's healthcare plan available to all full-time workers include any of the following practices?** [Heavily Weighted]

- Coinsurance of 80%+ covered by healthcare plan
- Company pays 80%+ of individual premium
- Company pays 80%+ of family coverage premium
- Out-of-pocket maximum for individual coverage of \$2000 or less (net of company HSA or equivalent contribution)
- Annual deductible for individual coverage of \$1000 or less (net of company HSA or equivalent contribution)
- Co-payment of \$20 or less per primary care visit paid for by worker
- Prescription drug coverage where workers pay \$10 or less for generic drugs, \$30 or less for brand name drugs and \$50 or less for non-formulary drugs
- Explicit policy of transgender inclusive healthcare coverage
- None of the above

WR3.2a **What % of full-time workers are enrolled in a health care plan offered by your company?** [Equally Weighted]

- <70%
- 70-79%
- 80-89%
- 90-99%
- 100%

WR3.3 **At what juncture do your part time employees qualify for health care benefits?** [Equally Weighted]

- No additional health insurance benefits provided by the company to part time workers
- 30+ hours per week
- 25-30 hours per week
- 20-24 hours per week
- 15-19 hours per week
- <15 hours per week
- N/A - Company has no part-time employees

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WR3.5 **What % of part-time workers who work more than 20 hours a week are enrolled in the private healthcare plan offered by your company?** [Equally Weighted]

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- No additional health insurance benefits provided by the company to part time workers
- 0%
- 1-39%
- 40-59%
- 60-79%
- 80%+
- N/A - No part-time workers working more than 20 hours per week

WR3.6a **Does your company have an Employee Retirement Plan available for workers? If so, which of the following apply?** [Equally Weighted]

- Retirement plan is not available for all tenured workers
- Retirement plan is available with no company match
- Partially matched of 4% or less
- Partially matched greater than 4%
- Full match of 4% or less
- Full match greater than 4%
- Plan includes Socially-Responsible Investing option

Answer(s): specific fund option was removed mid year however any participant can elect a PCRA account and choice a socially responsible fund option -HR

WR3.12 **What additional benefits are offered to full-time tenured workers?** [Heavily Weighted]

- No additional benefits
- Dental insurance
- Short-term disability
- Long-term disability
- Structured account mechanism for qualified medical expenses (e.g. HSA, HRA, FSA)
- Domestic partner, civil union, and/or same-sex marriage spousal benefits
- Life insurance
- Other benefits (please describe)

Other: Subsidized annual public transit pass (TriMet); employee appreciation activities; Wellness program including on-site massages

Workers: Worker Benefits (Hourly)

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WR3.5.4 **What is the minimum tenure required to be eligible for health care benefits for hourly workers?** [Equally Weighted]

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- No benefits beyond what is provided under national law
- 91+ days / 450+ hours
- 61-90 days / 300-450 hours
- 31-60 days / 150-300 hours
- 1-30 days / 1-150 hours
- No tenure required, benefits available upon hire

WR3.5.7b **What is the minimum number of paid days off provided annually to hourly tenured workers?** [Equally Weighted]

- 0-8 work days
- 9-15 work days
- 16-20 work days
- 21-25 work days
- >25 work days

WR3.5.8b **What is the minimum number of weeks tenured hourly workers receive paid primary caregiver leave, either through the company or the government?** [Equally Weighted]

- 0-5 weeks
- 6-11 weeks
- 12-17 weeks
- 18 weeks or more

WR3.5.11 **Does the company provide any of the following financial products or services that help to meet urgent needs of employees, discourage predatory lending and/or facilitate savings?** [Less Weighted]

- Access to free banking services, e.g. free ATM debit card
- Employer match for deposits into savings accounts
- Low-interest loans
- Issue paychecks off schedule on a need basis
- Other (please describe)
- None of the above

Workers: Training & Education

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WR4.1 Which of the following is true of intern hiring practices? [Equally Weighted]



- There is a formalized policy/program outlining the objectives of internships or internship programs for participants
- Company partners with education institutions to provide internship opportunities
- Interns are paid a living wage
- Interns receive formal performance reviews
- Interns have a formal opportunity to provide feedback on experience
- Interns have been hired on as full time permanent employees in the past two years
- Intern tenures are restricted to not exceed 1 year if interns are not currently enrolled in school
- None of the above apply to my intern programs
- N/A - Company does not employ interns

Answer(s): unless it is an externship which is required by the school to be unpaid -HR

WR4.1a What % of positions above entry level have been filled with internal candidates in the last 12 months? [Equally Weighted]

- 0% 1-24% 25-49% 50-74% 75%+

WR4.1b What % of employees have been internally promoted within the last 12 months? [Equally Weighted]

- 0% 1-5% 6-15% >15%

WR4.5 How many paid days of professional development do the majority of full time workers receive (in a single year)? [Equally Weighted]

- No formal policy
- 0 days
- 1-4 days
- 5-9 days
- 10+ days

WR4.6 Do new and existing managers get regular training and coaching on the following? [Equally Weighted]

- Providing ongoing praise and corrective feedback
- Conflict negotiation and resolution
- Group dynamics and optimal team functioning
- Performance evaluation systems
- Other (please describe)
- None of the above

Workers: Training & Education (Hourly)

WR4.2b **Excluding newly hired workers, what % of full-time and part-time workers received the following types of formal training during the last 12 months?**

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0%	1-24%	25-49%	50%+	Don't know	
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Skills-based training to advance core job responsibilities
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Skills-based training on cross-job functions (i.e. training beyond regular job responsibilities, e.g. public speaking training or management training for non-managers)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Training on life skills for personal development (i.e. literacy, personal financial planning, etc.)

WR4.5.3b **What % of full-time workers have participated in external professional development opportunities or lifelong learning opportunities in the past fiscal year?** [Equally Weighted]

0% 1-24% 25-49% 50%+

WR4.5.7 **Approximately how many hours did each worker (on average) spend on dedicated, job-related training/education time in the past 12 months?** [Equally Weighted]

Don't know 1-5 hrs 6-10 hrs 11-20 hrs 21 hrs+

Workers: Worker Ownership

WR5.1 **What % of all full-time employees have been granted stock, stock options or stock equivalents (including participation in an ESOP or other qualified ownership plans) in the company?** [Equally Weighted]

0%
 1-24%
 25-49%
 50-74%
 75-99%
 100%
 N/A

Answer(s): Company is 100% owned by shareholder physicians who are actively employed.

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WR5.2 **What % of the company is owned or formally reserved as part of a written plan for full-time workers and management (including founders/executives)?** [Equally Weighted]

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- 0%
- 1-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A
- Don't Know

WR5.4 **What % of the company is owned by full-time workers who are non-executive employees and non-founders?** [Heavily Weighted]

- 0%
- 1-4%
- 5-24%
- 25-49%
- 50%+
- N/A
- Don't Know

Answer(s): Non-executive is defined as not part of TOC's Exec Committee (i.e. Fausel, Sheffield, Jamison, Schaumberg & Armstrong) -

Workers: Management & Worker Communication

WR6.1 **Is there a formal consistent process for providing performance feedback to all tenured employees which includes any of the following?** [Heavily Weighted]

- Is conducted on at least an annual basis
- Includes peer and subordinate input
- Provides written guidance for career development
- Includes social and environmental goals
- Clearly identifies achievable goals
- Follows a 360-degree feedback process
- None of the above

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WR6.2 **Does your company have a written employee handbook that workers have access to and includes any of the following information?** [Less Weighted]

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- No written employee handbook
- A non-discrimination statement
- An anti-harassment policy
- Statement on work hours
- Pay and performance issues
- Policies on benefits, training and leave
- Grievance resolution
- Disciplinary procedures and possible sanctions
- Statement regarding workers' right to bargain collectively and freedom of association
- Prohibition of child labor and forced/compulsory labor

WR6.3a **What percent of your employees are 'Satisfied' or 'Engaged'?** [Heavily Weighted]

- N/A
- <65%
- 65-80%
- 81-90%
- >90%

Answer(s): from 2016 top work place survey - HR

WR6.5 **Which of the following employee metrics are regularly collected, monitored and made transparent to all employees?** [Less Weighted]

- Retention and turnover metrics
- Diversity metrics
- None

WR6.6 **Which of the following is included in your company's termination policy?** [Equally Weighted]

- No written notice required prior to termination
- Required written notice of worker performance only
- Required written notice of worker performance and a stated probationary period
- N/A - No written termination policy

Workers: Management & Worker Communication (Hourly)

WR6.5.4b **What is the average tenure of your current workforce?** [Equally Weighted]

- <6 months
- 6-12 months
- 1-2 years
- 2-3 years
- >3 years

Workers: Job Flexibility/Corporate Culture

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WR7.5 **Do company policies support any of the following health and wellness initiatives above insurer-provided programs?** [Equally Weighted]

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- Company does not offer any formal health and wellness initiatives
- Company sponsors and encourages workers to participate in health and wellness activities during the workweek (i.e. walking or steps programs)
- Company offers incentives for workers to complete health risk assessments or participate in health and wellness activities (e.g., a fund for exercise equipment, subsidized gym membership, etc.)
- Over 25% of workers have completed a health risk assessment in the last 12 months
- Employees have access to behavioral health counseling services, web resources or Employee Assistance Programs
- Spouses, partners, or children of employees provided access to behavioral health counseling services, web resources or Employee Assistance Programs
- Company has policies and programs in place to prevent ergonomic-related injuries in the workspace
- Management receives reports on aggregate participation in worker wellness programs
- Other (please describe)

Workers: Job Flexibility/Corporate Culture (Hourly)

WR7.5.1 **Which of the following best describes the flexibility of scheduling process for hourly workers?** [Heavily Weighted]

- Company has a minimum work hours policy for hourly employees.
- There is a written policy that worker preference must be incorporated into scheduling (e.g. self-scheduling or honoring worker preferences to work certain shifts or certain days)
- Company shares employee schedules two weeks or more in advance
- Workers schedules are kept consistent week to week
- Management (or enabling technology) facilitates exchange of hours if the employee is not able to commit to his/her shift
- Other (please describe)
- None of the above

Other: Condensed work weeks, flex time, telecommuting

WR7.5.2b **Does the company offer any of the following job flexibility options, whenever feasible, in writing and in practice for the majority of workers?** [Less Weighted]

- Part-time work schedules at the request of workers
- Flex-time work schedules (allowing freedom to vary start and stop times)
- Telecommuting (working from home one or more days per week)
- Job-sharing
- None of the above

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WR7.5.4d Which of the following supplementary benefits are offered to employees? [Heavily Weighted]



- Onsite childcare
- Offsite subsidized childcare
- Counseling services
- Free or subsidized meal
- Policy to support breastfeeding mothers
- Other (please describe)
- None

Other: Subsidized public transportation, On-site massages, Subsidized health cooking classes, and Health recipes and tips

Subsidized Trimet passes at 70%

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Community

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Community: Job Creation

CM2.1 **Number of full-time and part-time jobs that have been added to your company's payroll. Enter 0 if none or if your company has no workers.**

Last 12 months: 54.00

Prior 12 months: 166.00

CM2.2a **By what % has your worker base grown over the last 12 months?** [Heavily Weighted]

0% (Has not grown on a net basis) 1-5% 6-15% >15%

CM2.4a **What was the attrition rate at the company for full-time and tenured part-time workers for the last 12 months?** [Heavily Weighted]

>10% 5-10% 2.5-4.9% 0-2.4%

CM2.5 **What % of workers (including full-time and part-time and temporary workers) are verified/self-identified to be a part of the following groups?**

0%	1-9%	10-19%	20-29%	30%+	Don't Know	
<input type="radio"/>	<input checked="" type="radio"/>	Individuals residing in a low income area				
<input type="radio"/>	<input checked="" type="radio"/>	Other chronically underemployed populations (e.g. individuals who are formerly incarcerated or homeless)				

CM2.6 **What % of your workers are employed in company facilities located in low-income communities?** [Equally Weighted]

<10% 10-19% 20-29% 30%+ Don't Know

Community: Diversity & Inclusion

CM3.1 **Number of total full-time and part-time female employees.** [Not Weighted]

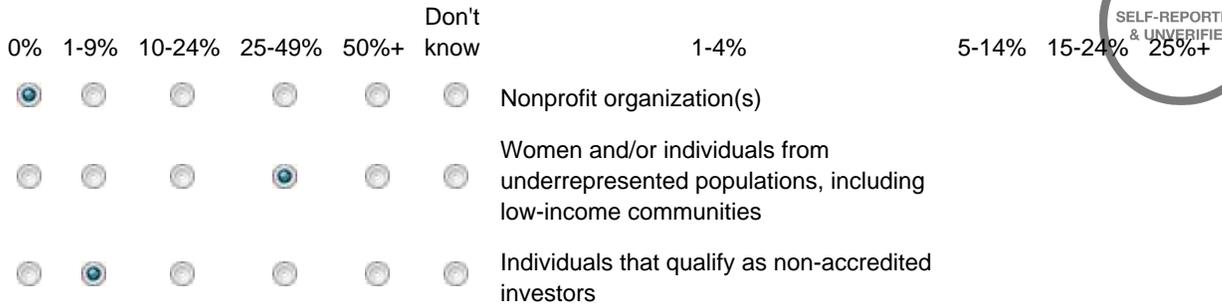
855.00

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CM3.2 **What % of the company is owned by the following groups?**



CM3.3 **Optional unweighted metrics: Approximately what % of your company's ownership is held by individuals from the following groups?**

Women	25%
Low income communities	0%
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)	

CM3.5 **What % of the members of your Board of Directors (or equivalent) are women or individuals from other underrepresented populations?** [Equally Weighted]

- 0%
- 1-9%
- 10-24%
- 25-49%
- 50%+
- Don't know
- N/A - No board of directors or equivalent

CM3.6 **Optional unweighted metrics: Approximately what % of your Board of Directors or other governing body are from the following groups?**

Women	42%
Low income communities	0%
Minority/previously excluded populations	17%
Other underrepresented populations (e.g. minorities, LGBT community, individuals with disabilities, etc.)	8%

CM3.7 **What % of management are women and/or individuals from underrepresented populations, including low-income communities?** [Equally Weighted]

- 0% 1-9% 10-24% 25-49% 50%+ Don't know



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CM3.8 **Optional unweighted metrics: Approximately what % of management is from the following groups?**

Women

Low income communities

Other underrepresented populations (eg - minorities, LGBT community, individuals with disabilities, etc.)



CM3.10 **Is average compensation for men and women equal in comparable managerial and non-managerial roles?**

Yes	No	Don't know	N/A - Only one gender represented	
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Managerial
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Non-managerial

CM3.11 **What % of your Significant Suppliers are majority owned by women or individuals from underrepresented populations?** [Equally Weighted]

0% 1-9% 10-19% 20-29% 30%+ Don't Know

CM3.12 **Does the company have a written policy giving preference to suppliers owned by women or individuals from underrepresented populations?** [Less Weighted]

Yes No N/A: Such policies are illegal in my country of operations

CM3.18 **Does the company provide specific content in worker training on inclusion and diversity issues related to any of the following specific underrepresented groups?** [Equally Weighted]

- Gender inclusiveness
- Minorities
- LGBT community
- Individuals with disabilities
- Other underrepresented groups (please describe)
- None of the Above

Community: Civic Engagement & Giving



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CM4.1a **Does your company have a formal corporate citizenship program (with allocated resources) in place that includes the following:** [Equally Weighted]

- Statement on the intended social or environmental impact of company's charitable contributions
- Cash and in-kind donations (excluding political causes)
- Volunteer and pro bono service
- Formal donations commitment (e.g. 1% for the planet)
- Matching individual workers' charitable donations
- Allowing workers and/or customers to select charities to receive company's donations
- Other (please describe)
- None of the above

CM4.2b **Are full-time employees granted in writing any of the following options for volunteer service?** [Equally Weighted]

- Non-paid time off
- Paid time off
- 20 hours or more a year of paid time off
- Workers offered incentives for volunteerism (office parties, competitions with prizes, etc.)
- Do not offer paid or unpaid time off

CM4.3 **What % of employees took paid time off for volunteer service last year?** [Equally Weighted]

- 0%
- 1-24%
- 25-49%
- 50-74%
- >75%
- Don't know

CM4.4a **Does your company monitor and record volunteer hours of company workers?** [Less Weighted]

- We do not currently monitor and record our hours contributed
- Our company monitors and records hours contributed (no increase targets)
- Our company monitors hours contributed and has specific increase targets
- Our company monitors hours contributed and has met specific increase targets during the reporting period

CM4.5 **Number of hours volunteered by full-time and part-time employees of the organization during the last fiscal year.** [Not Weighted]

- Not tracked / unknown

CM4.6a **What was the % of per capita worker volunteer, community service, or pro bono time donated in the reporting period?** [Heavily Weighted]

- 0%
- .1-.9% of time
- 1-2.4% of time
- 2.5-5% of time
- >5% of time
- Don't know / not monitored

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CM4.8a **What was the equivalent % of revenue donated to charity during the last fiscal year?** [Most Heavily Weighted]

- No donations last FY
- 0.1-0.4% of revenues
- 0.5-1% of revenues
- 1.1-2.4% of revenues
- 2.5-5% of revenues
- 5%+ of revenues
- Don't know

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CM4.9 **Which organizations does your company support?** [Not Weighted]

Consano
Oregon High Schools Athletics Program
Girls on the Run Portland Metro
Tucker Maxon School for Hearing Impaired Kids
ALS Association of Oregon & SW Washington
Parkinson's Resources of Oregon
Providence Portland Medical Foundation
Providence Cancer Center
Legacy Emanuel Medical Center Foundation
Southern Oregon High School Sports

CM4.10 **Which of the following volunteer and charitable giving practices did your company employ in the last fiscal year?** [Equally Weighted]

- Company contributed the majority of its cash, service and in-kind donations to local markets it sourced from or operates in
- Company has public facing partnership with a service/charitable organizations
- Company provided facilities for community events or trainings
- Other innovative engagement practices (please describe)
- None of the above

Answer(s): We calculate our community benefit using the State of Oregon's regulation for non-profit hospitals. This shows our charity care and low-cost services to low income patients.

CM4.11 **Has your company worked with policymakers and/or stakeholders (including competitors) to develop or advocate for increased adoption of social and environmental standards or voluntary practices in your industry in the past two years?** [Equally Weighted]

- Yes, company has offered support in name and/or signed petitions
- Yes, company has provided active staff time or financial support
- Yes, company has directly introduced, testified, made recommendations or provided expertise to advance standards
- Yes, company has worked with other industry players on a cooperative initiative
- Yes, and efforts resulted in a specific institutional, industry or regulatory reform
- Other (please describe)
- None of the above

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Community: Local Involvement



CM5.1a **We realize that for companies with more than one office, the definition of local involvement is a more complicated one to answer. Please tell us a bit about the structure of your company geographically.** [Not Weighted]

The Oregon Clinic has 59 offices throughout the Portland Metro area, as far as Newberg, Oregon City, Tualatin and Hood River. Our largest location is a LEED certified Gold building built and owned by The Oregon Clinic physicians. It is located in Gateway neighborhood of Portland. Other locations are leased by The Oregon Clinic.

CM5.2 **Does the company have the following written local purchasing or hiring policies in place?** [Equally Weighted]

- No written local purchasing or hiring policy in place
- Written preference at each facility to purchase from local suppliers
- Ready-to-use lists of preferred local suppliers/vendors for specific facilities
- Written preference for hiring and recruiting local managers
- Incentives for staff to live within 20 miles of local company facility
- Other (please describe)

CM5.3a **What % of your company's expenses (excluding labor) was spent with independent suppliers local to the company's headquarters or relevant production facilities?** [Equally Weighted]

- <20% 20-39% 40-59% 60%+ Don't know

CM5.4b **Is the majority (over 50%) of the company's ownership located locally to the majority of the company's workforce?** [Equally Weighted]

- Yes No Don't know

CM5.8 **Is the majority of your company's banking services provided by an institution with any of the following characteristics?** [Equally Weighted]

- A certified CDFI or national equivalent social investment organization
- A Certified B Corporation
- A member of the Global Alliance for Banking on Values
- A cooperative bank or credit union
- A local bank committed to serving the community
- An independently owned bank
- None of the above

Answer(s): From our banker: While it is true that KeyBank is a national bank based in Cleveland, Ohio, we are organized as a local bank, with local decision-making and a local president as the voice of Key in the markets where do business. We've been in Oregon since 1985 when we acquired Bank of Oregon and Beaver State Bank, and, soon thereafter, Pacific Western Bank.

Key is committed to building thriving communities and in 2015 generated \$605,000 in donations to 57 Oregon nonprofit

organizations. What's more, in 2015, 69 employees served on 48 nonprofit boards.

Finally, Key has consistently received an Outstanding rating of for its compliance with the Community Reinvestment Act. Fewer than 10% of financial institutions in the nation are awarded that rating, which is based on lending level, investments, and service within the low- and moderate-income communities in which they have a market presence.

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Community: Suppliers, Distributors & Product

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CM6.1 **Please select the types of companies that represent your Significant Suppliers:** [Not Weighted]

- Product Manufacturers
- Professional Service Firms (Consulting, Legal, Accounting)
- Independent Contractors
- Marketing/Advertising
- Office Supplies
- Benefits Providers
- Technology
- Raw materials
- Farms
- Other

CM6.2 **Does your company screen and/or evaluate Significant Suppliers for social and environmental impact?** [Not Weighted]

- Yes No

CM6.4 **What is the social and environmental screen that is used for a majority of your company's Significant Suppliers:** [Equally Weighted]

- No formal screening process in place
- Screened for negative practices or regulatory non-compliance (e.g. no child labor)
- Screened for positive practices beyond what is required by regulations (environmentally-friendly manufacturing process; excellent labor practices, etc.)

CM6.5a **When monitoring and evaluating the on-going social and environmental performance of the majority of Significant Suppliers, which of the following apply?** [Equally Weighted]

- No formal supplier monitoring and evaluation process
- Significant Suppliers are evaluated based on company's own criteria
- Significant Suppliers are evaluated based on social and environmental standards best-in-class third-party certification for your industry (ISO, SA8000, etc.)
- Company visits a majority of Significant Suppliers on-site

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CM6.16 Which of the following describe your relationships with all your company's independent contractors? [Equally Weighted]

- Formal routine process for independent contractors to receive post-project/contract performance feedback
- Formal routine process for independent contractors to communicate post-project or post-contract feedback to the company
- Independent contractors are verified to either work on a time-bound basis, or else split their time with work for other clients. Contractors not meeting either criteria have been offered employment.
- Independent contractors are paid a living wage (when calculated as hourly wage when living wage data is available)
- We have independent contractors, but have not engaged in any of these practices
- N/A - We haven't used independent contractors in the last year

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UNVERIFIED*

CM6.22a What % your services have been reviewed and certified by an accreditation body? Select N/A if industry or service relevant accreditation does not exist. [Equally Weighted]

- 0%
- 1-9%
- 10-24%
- 25-74%
- 75-99%
- 100%
- Don't know
- N/A

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Environment

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Environment: Land, Office, Plant

EN2.2a **What % of company facilities (by area, both owned by company or leased) are certified to meet the requirements of an accredited green building program?** [Equally Weighted]

- <20%
- 20-49%
- 50-79%
- 80%+
- N/A - Company has virtual office

Answer(s): Gateway LEED Gold building is 36% of facilities

EN2.3a **What % of the square footage of all company facilities is located in previously constructed buildings?** [Equally Weighted]

- 0%
- 1-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A

EN2.5 **What % of your facilities on a square foot basis have a facility-wide recycling program that has ongoing collection of at least all standard materials in your area?** [Equally Weighted]

- <20%
- 21-40%
- 41-60%
- 61-80%
- >80%

EN2.6a **Does your company have an environmental management system that includes any of the following?** [Heavily Weighted]

- Policy statement documenting the organization's commitment to the environment
- Assessment undertaken of the environmental impact of the organization's business activities
- Stated objectives and targets for environmental aspects of the organization's operations
- Programming designed, with allocated resources, to achieve these targets
- Periodic compliance and auditing to evaluate programs conducted
- None of the above

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EN2.12 Which of the following environmentally preferred products have been purchased for the majority of your corporate facilities? [Equally Weighted]

- Non-toxic janitorial products
- Unbleached / chlorine free paper products
- Soy-based inks or other low VOC inks
- Recycled/environmentally preferred office supplies (paper, pens, notebooks, etc.)
- Other (please describe)
- None of the above

EN2.15 Does the company have a written and circulated environmentally preferable purchasing (EPP) policy that includes any of the following? [Equally Weighted]

- Building and construction
- Carpets
- Cleaning
- Electronics
- Fleets
- Food or food services
- Landscaping
- Meetings and conferences
- Office supplies
- Paper
- Product input materials
- Other (please describe)
- N/A - No environmentally preferable purchasing policy

Answer(s): We are working on a policy for this and work with vendors that have these options currently. - K.Erickson & T. Harman

EN2.18 Does your company have any programs or policies in place to reduce the environmental footprint caused by travel/commuting? [Equally Weighted]

- Employees are subsidized/incentivized for use of public transportation, carpooling, or biking to work
- Facilities are designed to facilitate use of public transportation, biking, or cleaner burning vehicles (e.g. electric chargers)
- Employees are encouraged to use virtual meeting technology to reduce in person meetings
- Company has a written policy limiting corporate travel
- None of the above

EN2.20 Does the company monitor indoor environmental quality to ensure a healthy and comfortable work space, avoiding "Sick Building Syndrome"? [Less Weighted]

- Yes No NA

EN2.21 **Do you conduct an annual indoor air quality audit of your facilities that includes the following?** [Equally Weighted]

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- No smoking within 25 feet of building entrances
- Compliance with the following criteria in ASHRAE Standard 62.1 1010, Ventilation for Acceptable Indoor Air Quality: Ventilation rates for applicable spaces meeting combined outdoor air rate in cfm per person shown in Table 6.1 (Compliance may be shown through CO2 measurement, BMS data or volumetric measurements.)
- Compliance with Table 5.1, Air Intake Minimum Separation Distances
- Compliance with Operations and Maintenance Section 8 via documented O&M records
- HVAC Filters - ASHRAE 52.1 2007 MERV rating of at least 8, with no air by pass
- Temperature and relative humidity levels in compliance with ASHRAE Standard 55
- Written IAQ Compliant response policy
- None of the above

EN2.22a **If you lease your facilities, have you worked with your landlord to implement/maintain any of the following?** [Equally Weighted]

- Energy efficiency improvements
- Water efficiency improvements
- Waste reduction programs (including recycling)
- None of the above
- N/A - Company does not lease majority of facilities

Environment: Inputs

EN3.1c **Does your company monitor, record and/or report its energy usage?** [Equally Weighted]

- We do not currently monitor and record our usage
- We monitor and record usage (no reduction targets)
- We monitor and report usage, and have specific reduction targets
- We monitor and record, set reduction targets and report progress on targets annually to a voluntary public reporting program
- We have met or exceeded those targets in the last FY

EN3.1d **Does your company monitor, record and/or report its water usage?** [Equally Weighted]

- We do not currently monitor and record our usage
- We monitor and record usage (no reduction targets)
- We monitor and report usage, and have specific reduction targets
- We monitor and record, set reduction targets and report progress on targets annually to a voluntary public reporting program
- We have met or exceeded those targets in the last FY

EN3.2 **Total energy used (Gigajoules) during the last 12 months:** [Not Weighted]

- Not tracked / unknown

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EN3.3 **Total energy used from renewable resources (Gigajoules) during the last 12 months:** [Not Weighted]

Not tracked / unknown



EN3.4 **Total water use (liters) during the last 12 months** [Not Weighted]

Not tracked / unknown

EN3.5 **Have conservation and efficiency improvements led to energy savings for your facilities? If so, by how much?** [Heavily Weighted]

0% 1-4% 5-9% 10-14% 15-20% >20% Don't know

EN3.6a **What % of energy use is produced from low-impact renewable sources?** [Heavily Weighted]

0% 1-24% 25-49% 50-74% 75-99% 100% Don't know

EN3.7a **Has the company increased its % use of low impact renewable energy annually at its corporate facilities?** [Equally Weighted]

Yes No Already Maximized (100% low impact renewable)

EN3.8b **For which of the following systems have you used energy conservation/efficiency measures for each of your corporate facilities/locations (by majority of square feet) in the past year?** [Equally Weighted]

- 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

EN3.10a **Which of the following water conservation methods have been implemented at the majority of your corporate offices:** [Equally Weighted]

- Low-flow faucets/taps, toilets/urinals, showerheads
 - Grey-water usage for irrigation
 - Low-volume irrigation
 - Harvest rainwater
 - Other (please describe)
 - None
 - N/A: My company has a virtual office
- Other: Planted low water use landscaping

Environment: Outputs



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EN4.1 Please select the option that best describe how you monitor and record the following emissions:

- | | | | | | |
|---|---|---|---|--|-----|
| Company does not currently monitor and record emissions | Company monitors and records emissions (no reduction targets) | Company monitors emissions and has specific reduction targets | Company monitors emissions and has met specific reduction targets during the reporting period | Eliminated emissions of this by-product entirely | N/A |
|---|---|---|---|--|-----|



Scopes 1 and 2 greenhouse gas (GHG) emissions

EN4.5 Waste Disposed (metric tonnes) during the last 12 months [Not Weighted]

Not tracked / unknown

EN4.6 Waste Disposed: Recycled/Reused (metric tonnes) during the last 12 months [Not Weighted]

Not tracked / unknown

Answer(s): we do co-mingled recycling but don't track the tonnes - K. Erickson & T. Harman

EN4.7 Total Greenhouse Gas Emissions (metric tonnes of CO2 equivalent) in:

Scope 1:

Scope 2:

Scope 3:

EN4.9a What is your current Carbon Intensity for Scopes 1 and 2 (measured in metric tons of CO2/\$million of revenue), not including the use of carbon credits or offsets? [Equally Weighted]

>100 81-100 61-80 41-60 21-40 1-20 0 Don't know

EN4.11b What % of Scopes 1 and 2 GHG emissions has been saved due to efficiency improvements implemented by your company? [Equally Weighted]

0% 1-4% 5-9% 10-14% 15-20% >20% Don't Know

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EN4.12 **If your company purchased certified carbon credits in the reporting period, what % of GHG emissions were off-set?** [Less Weighted]

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- 0%
- 1-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- Don't know
- N/A - No carbon offsets purchased

EN4.17 **Is hazardous waste always disposed of responsibly, in a way that the company can verify?** [Equally Weighted]

- Yes
- No
- N/A - We have eliminated hazardous waste

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Impact Business Models

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Impact Business Models: Mission Locked

IBM1.2 **Separate from a mission statement, has your company done any of the following to legally ensure that its social or environmental mission will be maintained over time, regardless of company ownership?** [Equally Weighted]

- Signed a contract or board resolution to amend or adopt a legal form that requires consideration of employees, community, and the environment (i.e. Signed B Corp Term sheet but have not yet adopted stakeholder consideration)
- Amended corporate governing documents to require the consideration of employees, community and the environment (e.g. Amended Articles of Incorporation)
- Has a specific legal entity/governance structure that preserves mission (i.e. cooperative)
- Legal entity/governance structure preserves mission and requires stakeholder consideration (i.e. Benefit Corp or cooperative that has amended governing documents to include stakeholder consideration)
- Other - Please describe
- None of the above

Answer(s): The Oregon Clinic is a registered Oregon Benefit Company.

Impact Business Models: Worker Business Models Introduction

IBM2.2 **Is your company structured to benefit its employees in the following way?** [Not Weighted]

- Ownership structures that provide significant equity (>40%) and empowerment to all employees (i.e. employee-owned companies/cooperative)
- No

Impact Business Models: Customer Models Introduction

IBM15.1a **Does your product/service address a social or economic problem for or through your customers?** [Not Weighted]

- Yes
- No

Impact Business Models: Customer Products & Services Introduction

IBM16.2 **How would you describe the positive outcome for customers created by your product/service?** [Not Weighted]

We provide high quality specialty healthcare to save lives and improve the quality of life for our 350,000 patients each year. Many of our physicians are directors of medical programs at local hospitals, positively impacting healthcare for everyone in the Portland metro area. Many are also engaged in research projects that impact medicine globally.

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IBM16.3a Which of the following most closely matches the outcome and/or problem solved for your customers as defined above? [Not Weighted]

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- Access to products/services that fulfill basic human needs for individuals without prior access (e.g. providers of electricity or clean drinking water to rural poor communities, affordable housing projects, waste and sanitation systems or disposal)
- Improved or Maintained Health/Wellness (e.g. medical equipment, medical services and medicines, preventative health services or products, healthy living products, exercise and sporting products, prescription eyeglasses)
- Improved Education or Skills Development (e.g. schools, textbooks, tutoring services, career leadership training, education tools, games and software)
- Increased economic opportunity for underserved groups (e.g. financial or insurance services or benefits consulting for the underserved, new mechanisms to connect products to market)
- Increased operational success or capital for purpose driven or underserved enterprises (e.g. impact investing or fundraising platforms, non-profit accounting services)
- Increased social and/or environmental impact for businesses or other organizations (e.g. sustainability consulting)
- Increased Access to Arts, Media, or Culture (e.g. independent media, artisanal crafts, photography, information services)
- None of the above

IBM116.4 Total Number of Customers

Individuals:

Organizations:

0.00

Impact Business Models: Health & Wellness Improvement

IBM36.2 Which of the following best describes your health related product or service? [Not Weighted]

- Our product reduces health risk, such as by producing healthy alternatives to products that are traditionally unhealthy or toxic to consumers (healthy food alternatives that meet rigorous government standards, BPA free, etc.)
- Our product/service contributes to the positive development of individual health and well-being (wellness programs, sporting equipment)
- Our product/service supports healthcare through improving the efficiency or access to healthcare systems (health insurance, drug tracking, hospital equipment, etc.)
- Our product/service directly provides healthcare that cures or prevents illness/disability
- None of the above

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IBM36.3 **What is the severity of the health issue or issues addressed by your product/service?** [Not Weighted]

- Low
- Mid
- High
- My product/service enables healthcare that cures or prevents illnesses/disabilities of all kinds
- My product/service does not address a particular ailment, it contributes to overall positive health outcomes
- Don't know



IBM36.4 **Which of the following best describes the extent to which your product/service contributes to the positive health outcome?** [Not Weighted]

- My product/service has been demonstrated to effectively and substantially address the stated health problem, independent of other factors
- My product contributes to the stated positive health outcome, but does so dependent upon other resources/circumstances outside of our control

IBM36.5 **What were your total revenues last fiscal year from the previous products or services?** [Not Weighted]

IBM136.7 **How many customers/clients/beneficiaries were served through the provision of the previous products or services during the last 12 months? Please provide figures that are as accurate as possible. Estimates within +/- 5% acceptable. Do not double count.**

Individuals	350,000.00
Households	0.00
Communities	0.00
Businesses/Non-Profits	0.00
Governments	0.00

IBM36.8 **Please provide a brief description of how you track your customer/client/beneficiary figures.** [Not Weighted]

Our electronic health records system allows us to clearly track our individual patients.

IBM36.12 **How do you verify that your product contributes to the outcome previously selected?** [Least Weighted]

- We have a track record of successful verified positive outcomes and have created case studies based on these.
- There is secondary research that supports the link between our type of product and the stated outcome.
- We conduct our own direct research to track the outcomes produced for all our customers, such as impact-related surveys
- We have third party certifications or verifications that verify the efficacy of our product/service in delivering outcomes
- We have performed, commissioned, or partnered with scientifically designed impact or outcome assessments to systematically learn about our product's impact
- Our product is too early stage to have research or studies that link our product to positive outcomes
- We cannot provide verification of our outcomes at this time.

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IBM36.13 **If direct research on your product/service has been performed, did the results confirm that a desired outcome is being achieved?** [Least Weighted]

Yes No NA

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IBM36.14 **Is there something different or innovative about the company's health product/service that has changed the industry? Is this something that is replicable, unique at the time that it was created, and that has been emulated by other organizations?** [Not Weighted]

Our unique proposition is our ownership and management structure. Ever since our founding, TOC has held firm to the belief that being an organization owned by our physicians allows us to provide the highest quality care for all.

Because our leadership team is made up of our physician-owners, we can make decisions to support an excellent workplace for our staff, provide new services that may not be financially rewarding yet provide an important value to our community, and avoid bureaucracy and expenses that get in the way of us doing the best we can for our patients.

IBM36.19 **Does your company also measure and manage the negative or unintended outcomes generated by this business model?** [Least Weighted]

Yes No

Impact Business Models: Serving In Need Populations

IBM59.1 **Does your product/service benefit underserved populations, either directly or by supporting organizations that directly serve them?** [Not Weighted]

Yes No

IBM59.2 **Describe the beneficiaries or end-users of your products or services and how you characterize them as underserved.** [Not Weighted]

We provide healthcare to low income people with Medicare and Medicaid. Many specialists in Oregon and around the country deny access to people on Medicaid, but we believe it is part of our mission to serve low income people. We also provide free services through a group called Project Access that matches people in need with providers who are willing to provide services for free. We also provide free care to low income undocumented people who are referred to us through local clinics. Finally, we provide charity care for patients who simply can't pay their bills. If it weren't for The Oregon Clinic's commitment to serving underserved populations, many of our low-income patients would not have access to specialty medical care.

IBM59.3 **If your beneficiaries are underserved individuals, which of the following underserved populations do they belong to? If you serve organizations that serve the underserved, which of the following populations are your client's beneficiaries?** [Not Weighted]

- Low income, poor, or very poor
- Other populations underserved in your product/service category, which can include minorities, veterans, disabled individuals
- Individuals who are not underserved in your product/service category (do not continue)

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IBM59.4 Which of the following best describes how your product/service benefits underserved populations previously described? [Not Weighted]

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- My product/service helps the financial viability of purpose-driven enterprises, which in turn allows them to continue to serve their underserved target population (ex. marketing or accounting services for a social service agency)
- My product/service directly helps purpose driven enterprises improve positive impact for their underserved beneficiaries, but is not designed specifically for that underserved population (e.g. teaching curriculum sold to low income schools)
- My product/service directly helps purpose driven enterprises improve positive impact for their underserved beneficiaries, and is specifically designed to benefit that underserved population (e.g. teacher training/curriculum specifically designed to address challenges of teaching low income students)
- My product/service is directly used by the previous underserved populations (e.g. products marketed to or designed for the underserved)

IBM159.5 If relevant, select which of the following impoverished communities your company serves:

	Urban	Rural	Peri-urban
Low Income			
Poor			

IBM59.6 If relevant, which of the following beneficiary groups is your product/service targeting? [Not Weighted]

- Young children (younger than 5 years old)
- Children and adolescents (5 years of age or older but younger than 18)
- Adults
- Elderly/older adults
- Persons with disabilities
- Minority/previously excluded populations
- Women
- Pregnant women
- Other at risk populations
- None of the above

IBM59.7 Which of the following statements are true about your in-need customers/ clients? [Not Weighted]

- Most customers/clients continue with us year by year and latest figures for the year roughly reflect the total number of beneficiaries to date
- Customers/clients we reach each year are in addition to previous customers/clients and total number served should be calculated by adding together the numbers for each year
- Don't know - we don't sell direct to customers/clients

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IBM59.9 **What % of customers/end beneficiaries of your product or service are from an underserved population identified previously? If you serve purpose driven enterprises, please respond with the % of your revenues generated from services provided that benefited the previously selected underserved in the last fiscal year.** [Not Weighted]

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IBM59.12 **How many customers/clients served qualify in the previously selected underserved populations during the last 12 months? Do not duplicate individuals and households. Estimates within +/- 5% are acceptable.**

Individuals	
Households	0.00
Communities	0.00
Businesses/Non-Profits	0.00
Governments	0.00

IBM59.13 **Please provide a brief description of how you track your customer/client/beneficiary figures.** [Not Weighted]

IBM59.14 **Which of the following products/services attributes assist in targeting the previously selected underserved communities:** [Least Weighted]

- Product/service is accompanied by a zero-interest or below-market financing option (directly from company or through finance partner) with small repayment amounts to provide the poor access to purchase
- Company utilizes a cross-subsidization model whereby higher pricing for middle and high-income clients facilitates offering lower/subsidized pricing for low income clients/customers
- Product/service pricing model includes transparent pricing for all customers
- Vendor provides training on safe use and/or maintenance of the product/service
- These product/service attributes do not apply to our company (Skip the remainder of this section)

Impact Business Models: Community Business Models Introduction

IBM4.1a **Is your company structured to benefit community stakeholders in any of the following ways?** [Not Weighted]

- A producer-owned cooperative structure in which suppliers share control and benefits of company operations (e.g. farmer cooperative, artisanal cooperative)
- Purchasing fair/direct trade to improve livelihoods for underserved groups in your supply chain
- A micro-distribution or micro-franchising model that provides economic opportunities to underserved groups
- A formal standing commitment to donate a significant portion of sales/profits/ownership to charitable causes (>2% sales, >20% profits/ownership)
- Providing high quality jobs and/or professional development for individuals with chronic barriers to employment (workforce development programs)
- A community-focused business model that supports and builds the economic vitality of local communities
- None of the above

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Impact Business Models: Environmental Models Introduction

IBM59.1 **Are your company's products or process structured to restore or preserve the environment in any of the following ways?** [Not Weighted]

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- Through a manufacturing, wholesale or agriculture process which is designed to significantly reduce environmental impact compared to typical practices for the industry
- Through a product or service that preserves, conserves, or restores the environment or resources
- None of the above

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Disclosure Questionnaire

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Disclosure Questionnaire: Disclosure Industries

DQ1.1 **Please indicate if the company is involved in production of or trade in any the following. Select Yes for all options that apply.**

Yes No

- Any product or activity deemed illegal under host country laws or regulations or international conventions and agreements
- Gambling
- Pharmaceuticals subject to international phase-outs or bans
- Payday lending
- Pornography
- Wildlife or wildlife products regulated under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

DQ1.2 **If you selected "Yes" previously, please provide a detailed explanation of the company's involvement here.**
[Not Weighted]

Disclosure Questionnaire: Disclosure Practices

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DQ2.1 Please indicate if the following statements are true regarding whether or not the company engages in the following practices. Check all that apply. If the statement is true, select "True." If false, select "False."

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No

- | True | False | Yes | No |
|-----------------------|----------------------------------|--|----|
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company is not formally registered in accordance with domestic regulations | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has reduced or minimized taxes through the use of corporate shells or structural means | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company facilities are located adjacent to or in sensitive ecosystems | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company employs workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138) and/or company does not keep personnel records that include evidence of the date of birth of each | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Overtime work for hourly workers is compulsory | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company uses workers who are prisoners | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company prohibits workers from freely associating and bargaining collectively for the terms of one's employment | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company exploitatively operates in conflict zones | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company employs individuals on zero-hour contracts | |

DQ2.2 If you selected "True" previously, please provide a detailed explanation of the company's engagement in these practices here. [Not Weighted]

Disclosure Questionnaire: Disclosure Outcomes

DQ3.1 Please indicate if the following statements are true regarding if the company has experienced any of the following in the past 5 years. Check all that apply. If the statement is true, select "True." If false, select "False."

- | True | False | Yes | No |
|-----------------------|----------------------------------|--|----|
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has had an operational or on-the-job fatality | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company sites have experienced accidental discharges to air, land or water of hazardous substances | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Construction or operation of company facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near your facility | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Material litigation or arbitration against company | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has filed for bankruptcy | |
| <input type="radio"/> | <input checked="" type="radio"/> | | |
| | | Company has had material breaches of individual's confidential information | |

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* All of this information in this report is self-reported by the company and unverified by a third party, which is compliant with all benefit corporation statutes. B Lab has not verified and does not make any claims about the veracity of any of the information contained in this report. The B Impact Scores presented in this report are also self-reported and unverified and are thus of limited use for benchmarking. B Impact Scores typically decline by a material amount after review by B Lab, typically as a result of misunderstanding of questions, not misrepresentation of answers.

DQ3.2 **If you selected "True" previously, please provide a detailed explanation of the company's experience related to the previous statement here.** [Not Weighted]

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& UNVERIFIED*

Disclosure Questionnaire: Disclosure Penalties

DQ4.1 **Please indicate if the company has had any formal complaint to a regulatory agency or been assessed any fine or sanction in the past five years for any of the following practices or policies. Check all that apply.**

- | Yes | No | |
|-----------------------|----------------------------------|--|
| <input type="radio"/> | <input checked="" type="radio"/> | Diversity and equal opportunity |
| <input type="radio"/> | <input checked="" type="radio"/> | Employee safety or workplace conditions |
| <input type="radio"/> | <input checked="" type="radio"/> | Environmental issues |
| <input type="radio"/> | <input checked="" type="radio"/> | Financial reporting |
| <input type="radio"/> | <input checked="" type="radio"/> | Geographic operations or international affairs |
| <input type="radio"/> | <input checked="" type="radio"/> | Investments or Loans |
| <input type="radio"/> | <input checked="" type="radio"/> | Labor issues (internal and supply chain) |
| <input type="radio"/> | <input checked="" type="radio"/> | Marketing |
| <input type="radio"/> | <input checked="" type="radio"/> | Political contributions |
| <input type="radio"/> | <input checked="" type="radio"/> | Taxes |
| <input type="radio"/> | <input checked="" type="radio"/> | Bribery, fraud or corruption |

DQ4.2 **If you selected "Yes" previously, please provide a detailed explanation of the complaint/fine/sanction here.**
[Not Weighted]

Disclosure Questionnaire: Supplier Disclosure

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DQ5.1 Please indicate if any of the following statements are true regarding your company's significant suppliers.



True	False	Don't Know	
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant Suppliers employ workers under the age of 15 (or other minimum work age covered by the International Labour Organization Convention No. 138)
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant suppliers use any workers who are prisoners
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant Suppliers have had an operational or on-the-job fatality
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant Suppliers' sites have experienced accidental discharges to air, land or water of hazardous substances
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Construction or operation of Significant Suppliers' facilities resulted in physical resettlement or economic displacement involving 5,000 or more people near their facility
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Construction or operation of Significant Suppliers involved large scale land acquisition
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Construction or operation of Significant Suppliers involved large scale land conversion and/or degradation
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Construction or operation of Significant Suppliers involved the construction or refurbishment of dams
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant Suppliers have had material fines or sanctions in the last five years regarding the issues indicated in DQ4.1
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Significant Suppliers exploitatively operate in conflict zones

Disclosure Questionnaire: Other Disclosures

DQ6.1 Are there any other sensitive aspects of the business that are necessary to disclose? [Not Weighted]

Does not apply



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