



The Civic 50 Orange County: Survey Workbook

Updated: 2.4.26

How to Use This Workbook: This workbook is designed to help you organize responses and data for completing The Civic 50 Orange County survey. Use it as a central place to gather your information before entering answers into the online survey platform.

What Questions are Scored: Questions in this workbook that are marked with a star (★) will be scored. Applicants do not need to fill out auto-calculated fields – these will be generated in the benchmarking reports.

Use this page to capture internal comments, clarifications and supporting details that won't be submitted with the survey. It's ideal for documenting data sources for future reference.

A large, empty rectangular box with a thin black border, occupying most of the page below the introductory text. It is intended for users to provide internal comments, clarifications, and supporting details that are not part of the survey submission.

Table of Contents

Company Profile	4
Company	4
Causes	5
Contacts	5
Employee Volunteering	6
Volunteering.....	6
Skills-Based/Pro Bono	6
Board Service	6
Volunteer Ambassadors	7
Giving & Philanthropy	8
Financial Contributions	8
Gift Matching.....	8
Dollars-for-Doers/Volunteer Grants	8
In-Kind Contributions	8
Grantmaking	8
Integration & Culture.....	10
Volunteer Recognition	10
Volunteer Time Off.....	10
Voting Time Off.....	10
Planning & Evaluation	11
Strategic Planning	11
Impact Measurement	11
Sector Insights.....	14
Support & Reports	16
Verification & Feedback	17

Company Profile

Questions in the Company Profile section are **required, but not scored**.

Company

- **Official company name** (as you would like to see it displayed on published materials if your company ranks in the top 50): _____
- **Orange County City:** _____
- **State:** _____
- **Which of the following best describes the geographic scope of your company's operations?**
 - Local or regional (primarily within Orange County)
 - National (primarily across multiple states within the country)
 - Global (significant operations outside the US)
- **Annual companywide revenue:** _____
- **Total Orange County employees** (including part-time): _____
- **Benchmarking size category based on companywide employees (including part-time):**
 - Small (5-99)
 - Medium (100-499)
 - Large (500+)

- **Select your company's Industry Group**

(Note: View the Global Industry Classification Standard Methodology for more details.)

<p><u>Energy</u></p> <p><input type="checkbox"/> Energy</p> <p><u>Materials</u></p> <p><input type="checkbox"/> Materials</p> <p><u>Industrials</u></p> <p><input type="checkbox"/> Capital Goods</p> <p><input type="checkbox"/> Commercial & Professional Services</p> <p><input type="checkbox"/> Transportation</p> <p><u>Consumer Discretionary</u></p> <p><input type="checkbox"/> Automobiles & Components</p> <p><input type="checkbox"/> Consumer Durables & Apparel</p> <p><input type="checkbox"/> Consumer Services</p> <p><input type="checkbox"/> Consumer Discretionary Distribution & Retail</p>	<p><u>Consumer Staples</u></p> <p><input type="checkbox"/> Consumer Staples Distribution & Retail</p> <p><input type="checkbox"/> Food, Beverage & Tobacco</p> <p><input type="checkbox"/> Household & Personal Products</p> <p><u>Health Care</u></p> <p><input type="checkbox"/> Health Care Equipment & Services</p> <p><input type="checkbox"/> Pharmaceuticals, Biotechnology & Life Sciences</p> <p><u>Financials</u></p> <p><input type="checkbox"/> Banks</p> <p><input type="checkbox"/> Financial Services</p> <p><input type="checkbox"/> Insurance</p>	<p><u>Information Technology</u></p> <p><input type="checkbox"/> Software & Services</p> <p><input type="checkbox"/> Technology Hardware & Equipment</p> <p><input type="checkbox"/> Semiconductors & Semiconductor Equipment</p> <p><u>Communication Services</u></p> <p><input type="checkbox"/> Telecommunication Services</p> <p><input type="checkbox"/> Media & Entertainment</p> <p><u>Utilities</u></p> <p><input type="checkbox"/> Utilities</p> <p><u>Real Estate</u></p> <p><input type="checkbox"/> Equity Real Estate Investment Trusts (REITs)</p> <p><input type="checkbox"/> Real Estate Management & Development</p>
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- **12-month reporting end date:** _____

Note: This is the reporting period that you should use consistently throughout your responses.

• **What volunteer or giving platform(s) do you currently use? Check all that apply:**

- Benevity
- CyberGrants/Bonterra
- Deed
- GivePulse
- Groundswell
- Submittable
- YourCause/Blackbaud
- We do not use a volunteer or giving platform
- Other (please specify): _____

Causes

• **What are your top US cause and program focus areas? Select up to 5.**

<input type="checkbox"/> Economic Development <input type="checkbox"/> Financial Wellness <input type="checkbox"/> Job Training & Workforce Development <input type="checkbox"/> Early Childhood Education <input type="checkbox"/> K-12 Education <input type="checkbox"/> Higher Education <input type="checkbox"/> STEM <input type="checkbox"/> Youth Development	<input type="checkbox"/> Food Insecurity & Nutrition <input type="checkbox"/> Environmental Sustainability <input type="checkbox"/> Disaster Response & Recovery <input type="checkbox"/> Military & Veteran Support <input type="checkbox"/> Mental Health & Wellness <input type="checkbox"/> Community Development & Revitalization <input type="checkbox"/> Health & Wellbeing	<input type="checkbox"/> Poverty & Homelessness <input type="checkbox"/> Social Innovation & Entrepreneurship <input type="checkbox"/> Gender Equality <input type="checkbox"/> Equity & Racial Justice <input type="checkbox"/> Employee-Driven Issues <input type="checkbox"/> Arts & Culture <input type="checkbox"/> Other (please specify): _____
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Contacts

- **Primary applicant first name:** _____
- **Primary applicant last name:** _____
- **Primary applicant title:** _____
- **Primary applicant email:** _____
- **Orange County executive first name:** _____
- **Orange County executive last name:** _____
- **Orange County executive title:** _____
- **Orange County executive email:** _____
- **Executive assistant first name:** _____
- **Executive assistant last name:** _____
- **Executive assistant email:** _____

Employee Volunteering

Volunteering

- Total **number of Orange County employees** engaged in company-sponsored volunteering (including hands-on and skills-based/pro bono): _____
- Total **hours** Orange County employees contributed through company-sponsored volunteering: _____
- ★ *Auto-calculated: volunteering participation rate*
- ★ *Auto-calculated: average volunteer hours per employee*
- ★ *Auto-calculated: average volunteer hours per volunteer*

Note: Applicants do not need to fill out auto-calculated fields – these will be generated in the benchmarking reports.

Skills-Based/Pro Bono

- Total **number of Orange County employees** engaged in company-sponsored skills-based/pro bono volunteering: _____
- Total **hours** Orange County employees contributed through company-sponsored skills-based/pro bono volunteering: _____
- ★ *Auto-calculated: skills-based/pro bono participation rate*
- ★ *Auto-calculated: average skills-based/pro bono volunteer hours per skills-based/pro bono volunteer*

Board Service

- ★ **Does your company offer a nonprofit board training and/or placement program for employees?**
Select the option that best describes your current approach.
 - Yes (full) – We have a formal program that includes all of the following: board governance training, placement services and financial support
 - Yes (partial) – We have a formal program that includes two of the following: board governance training, placement services and financial support
 - Yes (partial) – We have a formal program that includes one of the following: board governance training, placement services and financial support
 - Yes (informal) – We offer informal or ad hoc support for board service
 - No, but we are currently developing a program
 - No, we do not currently offer this type of support

Volunteer Ambassadors

Note: For the purposes of this survey, employee ambassador programs include employee champions, volunteer councils and committees.

- ★ **Does your company have an employee volunteer ambassador program that supports the planning, promotion and/or management of your Orange County volunteer initiatives?** *Select the option that best describes your current program.*
 - Yes – We have a formal program (defined roles with responsibilities) with broad representation (includes employees from multiple departments, career levels, and/or geographic locations)
 - Yes – We have a formal program (defined roles with responsibilities) with limited representation (primarily concentrated in a few departments, career levels, and/or geographic areas)
 - Yes – We have an informal program with broad representation (includes employees from multiple departments, career levels, and/or geographic locations)
 - Yes – We have an informal program with limited representation (primarily concentrated in a few departments, career levels, and/or geographic areas)
 - No, but we are currently developing a program
 - No, we currently do not have a program
- ★ **In what ways do your volunteer ambassadors support your programs?** *Select all that apply.*
 - Organizing volunteer events and activities
 - Recruiting employees to participate in volunteering
 - Educating employee volunteers on the purpose and impact of their work
 - Advising on volunteer event design and feedback
 - Advising on nonprofit partnerships and community needs
 - Contributing input on volunteering program strategy and development
 - Not applicable, we currently do not have a program
- ★ **Do you provide trainings or learning opportunities to volunteer ambassadors during the reporting year?** Yes No

Mini Case Study

- Employee Volunteering Mini Case Study (Optional — Not Scored).** Please share one example (300 words or fewer) that highlights how your company engages employees in volunteering to drive social impact and strengthen nonprofit partnerships. Describe what the initiative involved, why it was successful, and how it created meaningful impact for your business, employees, and the community. Submission of a case study is optional and will not affect your score. Selected examples may be used to showcase and celebrate honoree companies and elevate leading social impact and community engagement practices.

Giving & Philanthropy

Financial Contributions

- **Total contributions.** Total value of financial charitable grants and contributions your company and foundation provided to support **Orange County** causes and nonprofit organizations during your reporting year (including matching-gifts and dollars-for-doers grants, but excluding donations given by employees themselves): _____
- ★ *Auto-calculated: contributions as percent of annual US revenue*
- **Number of grant contributions.** Total number of financial charitable grants and contributions your company and foundation provided to support **Orange County** causes and nonprofit organizations during your reporting year (excluding employee matching gifts and dollars-for-doers grants): _____
- ★ *Auto-calculated: average grant size*

Gift Matching

- ★ **Does your company have a gift matching policy?** Yes No
- **Briefly describe your company's gift matching policy** (optional, will not affect scoring)

Dollars-for-Doers/Volunteer Grants

- ★ **Does your company have a dollars-for-doers or volunteer grants program?** Yes No
- **Briefly describe your company's dollars-for-doers or volunteer grant program** (optional, will not affect scoring)

In-Kind Contributions

- **Total value of in-kind goods and services contributed to support **Orange County** causes and nonprofit organizations during your reporting year:** _____
- ★ *Auto-calculated: in-kind goods and services as percent of annual US revenue*

Grantmaking

- ★ **Which of the following support activities did you provide to at least two of your three largest grantees (by total funding awarded in your reporting period)?**
 - Employee volunteering (hands-on activities)
 - Employee volunteering (skills-based or pro bono)
 - In-kind goods or services (e.g., products, services, space, etc.)
 - A company employee serves on the board
 - Public recognition or promotion (e.g., spotlighting the nonprofit in company communications, social media, events, or press?)
 - None of the above

- ★ Which of the following types of funding did you provide to at least two of your three largest grantees (by total funding awarded in your reporting period)?
 - Multi-year grant commitments
 - Unrestricted/general operating funding
 - Funding specifically for capacity building (e.g., technology, staffing, strategic planning, etc.)
 - None of the above
- ★ Which of the following stakeholders have been **formally** engaged in the past three years to provide guidance on the company’s philanthropic focus areas or grantmaking processes? *Select all that apply.*
 - Employees
 - External subject matter experts
 - Community leaders
 - Current or past grantees
 - None of the above

Mini Case Study

- **Giving & Philanthropy Mini Case Study (Optional — Not Scored).** Please share one example (300 words or fewer) that highlights how your company leverages its financial and in-kind resources to drive social impact and strengthen nonprofit partnerships. Describe what the initiative involved, why it was successful, and how it created meaningful impact for your business, employees, and the community. Submission of a case study is optional and will not affect your score. Selected examples may be used to showcase and celebrate honoree companies and elevate leading social impact and community engagement practices.

Integration & Culture

Volunteer Recognition

- ★ **Does your company have an employee volunteer recognition program?** *Select the option that best describes your current approach.*
 - Yes (formal/broad)** – We have a formal, structured recognition program with clear criteria that is actively promoted and aligned with our company’s culture and values
 - Yes (formal/limited)** – We have a formal program with clear criteria, but it is not widely promoted or integrated into our broader culture
 - Yes (informal/broad)** – We have a consistent recognition approach, but it is informal or decentralized (e.g., recognition handled at the team, department, or regional level)
 - Yes (informal/limited)** – We offer informal or ad hoc recognition (e.g., manager shout-outs, thank-you emails, team acknowledgements)
 - No, but we are currently developing a program.**
 - No, we currently do not have a program**

Volunteer Time Off

- ★ **Does your company have a formal volunteer time off (VTO) policy?** Yes No
- How many hours per year are provided through the VTO policy?** (enter 0 if no policy)

- ★ **Does your policy cover nonprofit board service as an eligible VTO activity?** Yes No N/A
- Briefly describe your VTO policy and how utilization is tracked** (optional-will not affect scoring)

Voting Time Off

- ★ **Does your company have a policy that provides employees with time off to vote in local, state, or national elections?** *Select the option that best describes your current approach.*
 - Yes – We have a formal, company-wide policy that provides paid time off to vote.
 - Yes – We offer unpaid time off or allow schedule flexibility for voting.
 - No formal policy, but managers are encouraged to allow time for voting.
 - No – We do not currently have a policy or practice in place.

Mini Case Study

- Integration & Culture Case Study (Optional — Not Scored).** Please share one example (300 words or fewer) that highlights how your company embeds community engagement into its culture and business systems. Describe what the initiative involved, why it was successful, and how it created meaningful impact for your business, employees, and the community. Submission of a case study is optional and will not affect your score. Selected examples may be used to showcase and celebrate honoree companies and elevate leading social impact and community engagement practices.

Planning & Evaluation

Strategic Planning

- ★ **Do you have a CSR or social impact strategic plan that was developed or significantly updated within the last 3 years?**
 - Yes – We have a formal strategic plan that details goals, evaluation methods and alignment with business priorities.
 - Yes – We have a formal strategic plan that helps guide our work, but does not fully detail goals, evaluation methods and alignment with business priorities.
 - Yes, we have an informal or evolving strategy documents that help guide our CSR work.
 - No, we do not currently have a formal strategic plan, or our existing plan has not been updated in the past 3 years.
- ★ **Does your company have a strategy to engage remote employees in your volunteering programs?**
 - Yes – formal, written strategy
 - Yes – informal approach
 - No current strategy
 - Not applicable
- ★ **Does your company have a strategy to engage frontline/deskless employees in your volunteering programs?**
 - Yes – formal, written strategy
 - Yes – informal approach
 - No current strategy
 - Not applicable
- ★ **Does your company have a strategy to engage hourly/part-time employees in your volunteering programs?**
 - Yes – formal, written strategy
 - Yes – informal approach
 - No current strategy
 - Not applicable

Impact Measurement

- **Volunteering Impact Measurement.** *Volunteerism creates social value when it strengthens nonprofit organizations' ability to fulfill their mission. Specifically, the outcomes of successful volunteerism include:*
 - *Efficiency (e.g., helping systems or services run with fewer resources)*
 - *Effectiveness (e.g., improving success rates among beneficiaries, such as more tutored students raising their grades)*
 - *Reach (e.g., enabling nonprofits to serve more people)*

- ★ Please identify the primary method (used for over 50% of your Orange County employee volunteering activities, by hours) of measuring the social value generated by your company's volunteerism.

- Quantified outcomes** (e.g., # of people that gained housing, increased income, graduated high school, or other life improvement) that you can claim as a direct result of your support based on a contribution or attribution calculation. If selected, you will be required to provide examples of your outcome indicators to validate your response.

- Qualitative outcome measures** (i.e., success stories) and/or predefined satisfaction metrics that are part of a standardized and regularly implemented data collection process.
- Quantitative outputs** (i.e., drivers of outcomes) that are part of a regularly implemented data collection process (e.g., capturing the number of hours or people served and/or the monetary value of those services).
- Anecdotal, non-quantitative information** (e.g., success stories) collected informally or periodically.
- Not currently measured**
- Cannot share this information**

- **Grants Impact Measurement.** *Grants create social value when they help nonprofits advance their mission, build capacity, and deliver services that improve wellbeing or address social issues. Specifically, successful outcomes of grants include:*

- *Efficiency (e.g., helping systems or services run with fewer resources)*
- *Effectiveness (e.g., improving success rates among beneficiaries, such as more tutored students raising their grades)*
- *Reach (e.g., enabling nonprofits to serve more people)*

- ★ Please identify the primary method (used for over 50% of your Orange County grants, by value) of measuring the social value generated by your company's grants.

- Quantified outcomes** (e.g., # of people that gained housing, increased income, graduated high school, or [other life improvement]) that you can claim as a direct result of your support (based on a contribution or attribution calculation). If selected, you will be required to provide examples of your outcome indicators to validate your response.

- Qualitative outcome measures** (i.e., success stories) and/or predefined satisfaction metrics that are part of a standardized and regularly implemented data collection process
- Quantitative outputs** (i.e., drivers of outcomes) that are part of a regularly implemented data collection process (ex., capturing the number and value of grants distributed and number of beneficiaries served)
- Anecdotal, non-quantitative information** (i.e., success stories) that is informally or periodically collected
- Not currently measured**
- Cannot share this information**

- **★ Employee Feedback.** In the past reporting year, how has your company collected feedback from employees about company-sponsored volunteering and community engagement programs? *Select all that apply.*
 - Post-event surveys to gather feedback after volunteering activities.
 - Surveys on employee volunteering interests and preferences.
 - Surveys on employees' social or community issue area priorities.
 - Focus groups or structured discussions with employees.
 - Focus groups or structured discussions with employee/business resource group (ERG/BRG) members.
 - Informal or anecdotal feedback collected through conversations, emails, or other non-structured channels.
 - We have not collected employee feedback on volunteering or giving programs in the past reporting year.
- **★ Employee Impact.** In the past reporting year, has your company surveyed employees to better understand how volunteering or community engagement programs impact any of the following? *Select all that apply.*
 - Skill development
 - Career development or advancement opportunities
 - Sense of purpose or belonging at work
 - Relationships with coworkers or team cohesion
 - Pride in the company or sense of loyalty
 - Retention or intent to stay
 - Mental health or wellbeing
 - We have not surveyed employees about these areas

Mini Case Study

- **Planning & Evaluation Case Study (Optional — Not Scored).** Please share one example (300 words or fewer) that highlights how your company strategically plans, measures or communicates its community engagement and social impact initiatives. Describe what the initiative involved, why it was successful, and how it created meaningful impact for your business, employees, and the community. Submission of a case study is optional and will not affect your score. Selected examples may be used to showcase and celebrate honoree companies and elevate leading social impact and community engagement practices.

Sector Insights

Questions in the Sector Insights section are **required, but not scored**.

- **What non-profit organizations do you support in Orange County and what other missions would you like to support?**

- **Have any of your employees participated in Pro-Bono work to help support non-profit organizations?**
 Yes
 No

- **If yes, how so? If no, would you be interested in learning about Skill-Based Volunteers?**

- **What are the top internal challenges your corporate social impact team is currently facing? Select up to 5.**

- Limited staff capacity or bandwidth
- Limited budget or resources
- Competing or shifting internal priorities
- Difficulty securing leadership buy-in or visibility
- Difficulty scaling social impact work nationally
- Difficulty scaling social impact work globally
- Lack of integration or collaboration with other business units
- Insufficient data or measurement tools to evaluate impact and outcomes
- Aligning the volunteer program with evolving company priorities and employee engagement trends
- Lack of clarity or consistency in CSR strategy across teams and geographic regions
- Challenges demonstrating business value or ROI of programs
- Limited access to employee feedback or engagement data
- Difficulty aligning with business priorities
- Balancing corporate social impact priorities with local office and community interests
- Barriers for employee participation due to work setting (e.g., front line, deskless, remote)
- Difficulty sunseting programs or partnerships.
- Organizational restructuring (team, department or companywide)
- Other (please specify): _____

- **Points of Light has a goal to double the rate of volunteering in the US by 2035 ([learn more](#)). What specific resources, support, or changes would your company need in order to double the number of employees actively participating in your volunteer programs? *Select up to 5.***

- Increased executive sponsorship and buy-in
- More flexible volunteer time off (VTO) policies
- Better tracking and recognition systems
- Stronger partnerships with nonprofits
- Internal communications or awareness campaigns
- New programs to engage harder to reach employees (ex., front line, deskless, remote)
- More team capacity and upskilling
- More robust volunteer ambassador or champion program
- Support from external groups to plan and manage volunteer events
- Program Assessments
- Development of a Phased Scaling Roadmap
- Team Goal Setting/Prioritization
- Other (please specify): _____

Support & Reports

Additional Support

- **Which of the following OneOC programs or services would your company be interested in receiving more information about? *Select all that apply.***
 - Corporate Volunteer Council of Orange County
 - Match.Meet.Serve Corporate Volunteering Projects
 - Community Cup
 - Skill-Based Volunteering
 - Board Training and Placement
 - Volunteerism Council
 - None of the Above

Benchmarking Reports

All eligible companies that submit a completed The Civic 50 survey will receive a free Individual Scorecard, which lists the company's individual score and ranking in each dimension.

Would you like to receive additional information about purchasing advanced reports, which will include greater detail to support more detailed corporate reporting and continuous improvement efforts?

- Yes, I am interested in receiving more information about purchasing an advanced scorecard
- No, I would only like the complimentary scorecard

If you have any questions about these scorecard options, please email Civic50@trueimpact.com.

Verification & Feedback

- **The answers provided within this application are true to the best knowledge of the corporation and its employees.** *Companies found to intentionally falsify information will be banned from participating in The Civic 50 for a period of no less than 5 years.* Agree
- **What motivated your company to participate in The Civic 50 this year?** *Select up to 3.*
 - To benchmark our social impact performance against other companies
 - To gain recognition for our corporate social impact work
 - To strengthen our brand or reputation
 - To evaluate our work and identify areas of strength and for improvement
 - Encouraged by leadership and internal stakeholders
 - Other (please specify): _____
- **How easy or difficult was it to complete this survey?**
 - Very easy
 - Somewhat easy
 - Neither easy nor difficult
 - Somewhat difficult
 - Very difficult
- **Please upload a vector or EPS logo that can be used for promotion/publication purposes if your company appears on The Civic 50.**
- **Please indicate where you learned about The Civic 50.**
- **Points of Light and OneOC will keep all identifiable information in your submission confidential and will not publicly share company-specific data without your explicit permission. Benchmarking, research, and reporting will use only anonymized, de-identified data, and will be conducted by Points of Light and its partners. By submitting this survey, you confirm you are authorized to provide this information and agree to these uses. You also authorize Points of Light to use your company's name and logo in public communications if your company is selected as a Civic 50 honoree and agree to receive volunteering and corporate social impact-related communications from Points of Light, OneOC and True Impact (you may unsubscribe at any time).**
 Agree
- **Additional feedback and comments.**