

IMPACT REPORT



Albert
Goodman

Certified

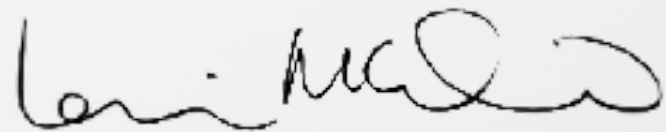


Corporation

A MESSAGE FROM OUR MANAGING PARTNER

We have been immensely proud to become one of the very first accountancy firms in the South West to secure 'B Corp' status, which is not only a huge honour but also a strong endorsement of our determination to be a business which is a true force for good.

We pride ourselves on being trustworthy and impactful, progressive and collaborative, and we have put this to the ultimate test by targeting B Corp status.



IAIN MCVICAR
Managing Partner



IMPACT ASSESSMENT SCORE



OVERALL IMPACT SCORE

Based on the B Impact assessment, **Albert Goodman** earned an overall score of

84.7

The **median score** for all **businesses** who complete the assessment is currently

50.9

Certified



Corporation

GOVERNANCE 22.4 / 25

Governance evaluates a company's overall mission, engagement around its social/environmental impact, ethics, and transparency. This section also evaluates the ability of a company to protect their mission and formally consider stakeholders in decision making through their corporate structure (e.g. benefit corporation) or corporate governing documents.

Mission & Engagement 5.5 / 6

Ethics & Transparency 6.9 / 9

+ Mission Locked 10 / 10

WHAT IS THIS?

A company with an Impact Business Model is intentionally designed to create a specific positive outcome for one of its stakeholders - such as workers, community, environment, or customers.



GOVERNANCE

- GOALS FOR 24/25



To increase the percentage of managers that have social and/or environmental goals. Becoming apart of Performance evaluation.



To review the nature of companies' associated with Albert Goodman. To be reviewed by Senior Leadership.

AG

OUR PEOPLE 32.7 / 50

This section evaluates a companys contributions to its employees' financial security, health & safety, wellness, career development, and engagement & satisfaction. In addition, this section recognises business models designed to benefit workers, such as companies that are at least 40% owned by non-executive employees and those that have workforce development programs to support individuals with barriers to employment.

Financial Security	8.2 / 20
Health, Wellness, & Safety	8.6 / 12
Career Development	7.3 / 8
Engagement & Satisfaction	5.9 / 10



OUR PEOPLE

- GOALS FOR 24/25



Review the use of our sub-contracted labour.



To look into increasing the percentage above minimum wage of the lowest paid employee earns.



Review the Accident Insurance policy.



Introduce a written Air Quality Complaint policy.



Improve our Professional Development percentage.



Aim to reduce Employee Attrition rate.



COMMUNITY 16.9 / 50

Community evaluates a company's engagement with and impact on the communities in which it operates, hires from, and sources from. Topics include diversity, equity & inclusion, economic impact, civic engagement, charitable giving, and supply chain management. In addition, this section recognizes business models that are designed to address specific community-oriented problems, such as poverty alleviation through fair trade sourcing or distribution via microenterprises, producer cooperative models, locally focused economic development, and formal charitable giving commitments.

Diversity, Equity, & Inclusion 6.3 / 15

Economic Impact 3.8 / 15

Civic Engagement & Giving 3.8 / 12

Supply Chain Management 1.3 / 8



COMMUNITY

- GOALS FOR 24/25

-  Increase community vitality and/or support local communities with economic growth.
-  Improve the percentage of opportunities to those in unrepresented communities.
-  Start to track socio-economic status.
-  Introduce programmes to mentor apprenticeships for unrepresented groups.
-  Set community service targets - move percentage of employees that took volunteering day, increase total number of volunteers hours.
-  Aim to move donation of revenue into the next bracket.



ENVIRONMENT 7 / 20

Environment evaluates a company's overall environmental management practices as well as its impact on the air, climate, water, land, and biodiversity. This includes the direct impact of a company's operations and, when applicable its supply chain and distribution channels. This section also recognizes companies with environmentally innovative production processes and those that sell products or services that have a positive environmental impact. Some examples might include products and services that create renewable energy, reduce consumption or waste, conserve land or wildlife, provide less toxic alternatives to the market, or educate people about environmental problems.

Environmental Management	0.3 / 7
Air & Climate	3.1 / 7
Water	0.2 / 2
Land & Life	2.5 / 4



ENVIRONMENT

- GOALS FOR 24/25



Review facility agreements with landlords - changing waste supplier, looking to have solar panels etc.



Monitor and reduce inter-office mileage.



Looking to install energy-saving electricals.



Aim to reduce car commuting by encouraging cycling and public transport alternatives.

AG

OUR CLIENTS 5.5 / 35

Customers evaluates a company's stewardship of its customers through the quality of its products and services, ethical marketing, data privacy and security, and feedback channels. In addition, this section recognizes products or services that are designed to address a particular social problem for or through its customers, such as health or educational products, arts & media products, serving underserved customers/clients, and services that improve the social impact of other businesses or organisations.

Customer Stewardship

3.1 / 5

+ Support for Underserved/
Purpose Driven Enterprises

1.3 / 30

WHAT IS THIS?

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OUR CLIENTS

- GOALS FOR 24/25



Understand and consider 'Industry', regarding quality accreditations.



Introduce specific targets for client satisfaction.



Starting to run B-Corp focussed events, explaining the benefits of being a B Corporation for better business.



Look into refering clients to other B Corp firms.

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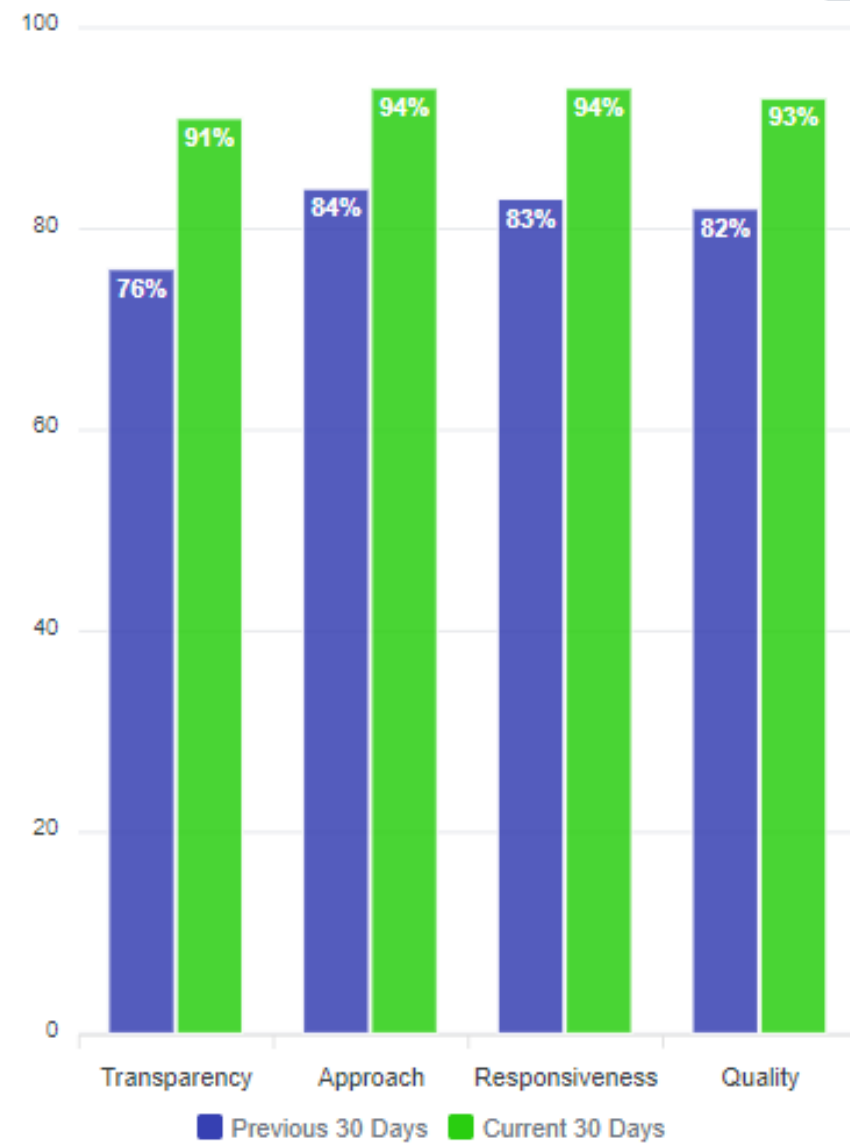


VUI Albert Goodman Dashboard -

Actively start to monitor client satisfaction feedback across the firm as a whole. Rolling out to Financial Planning who currently do not utilise.

TRAQ Dashboard

TRAQ or Transparency, Responsiveness, Approach and Quality is a measure of performance across four key categories of customer experience.

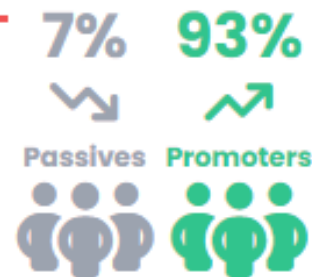
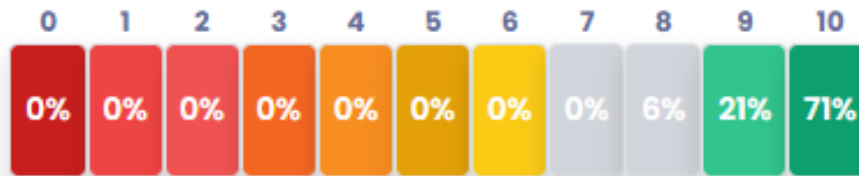


All Touchpoints ▾

Last 30 days ▾

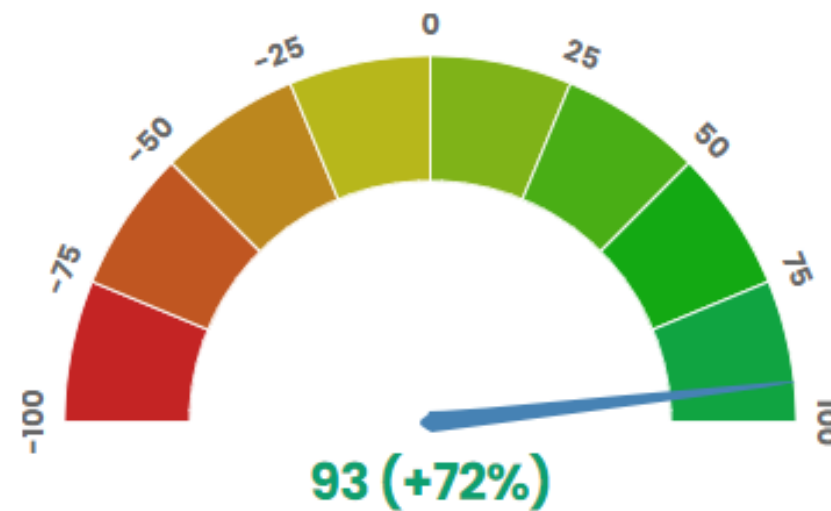
[VIEW DETAILED REPORT >](#)

NPS Dashboard



NPS Calculation

Net Promoter Score (NPS) is calculated as the percentage of promoters minus the percentage of detractors.



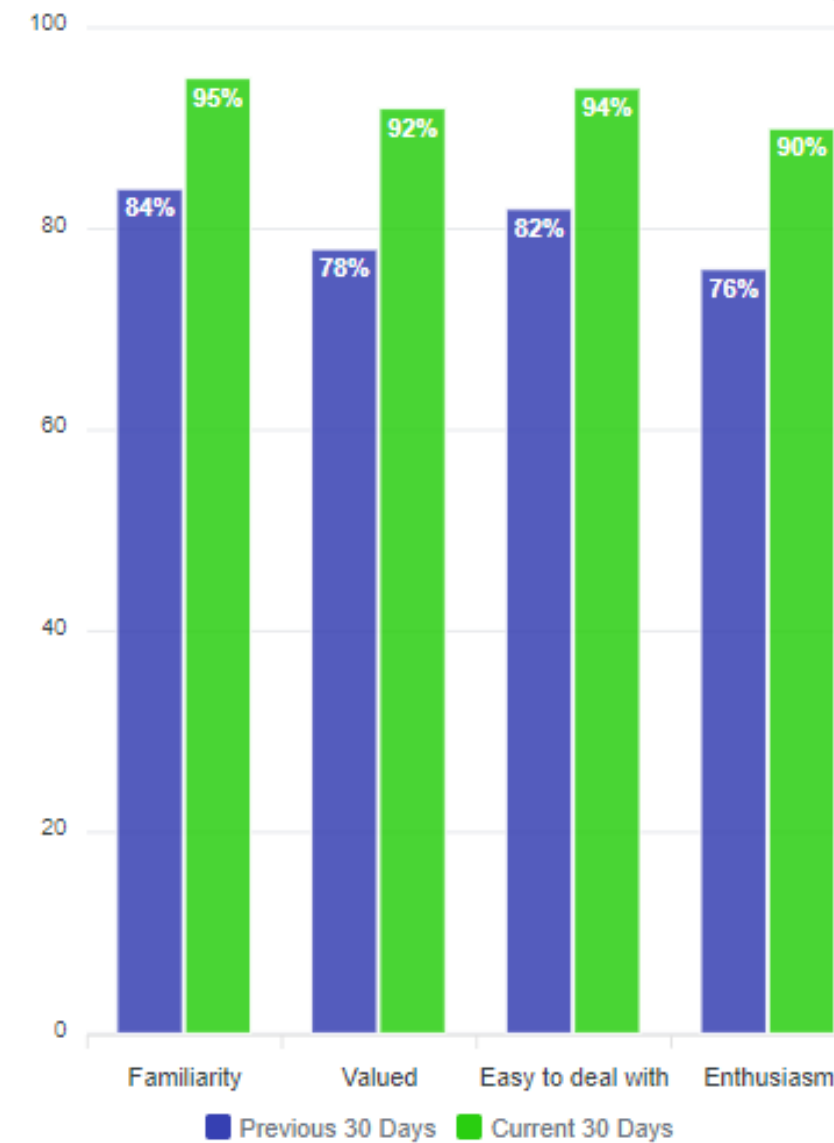
All Touchpoints ▾

Last 30 days ▾

[VIEW DETAILED REPORT >](#)

VES Dashboard

VES or viu Engagement Score is a measure of performance across four key categories of customer experience.



All Touchpoints ▾

Last 30 days ▾

[VIEW DETAILED REPORT >](#)

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ALBERT GOODMAN - B IMPACT ASSESSMENT PERFORMANCE COMPARISON

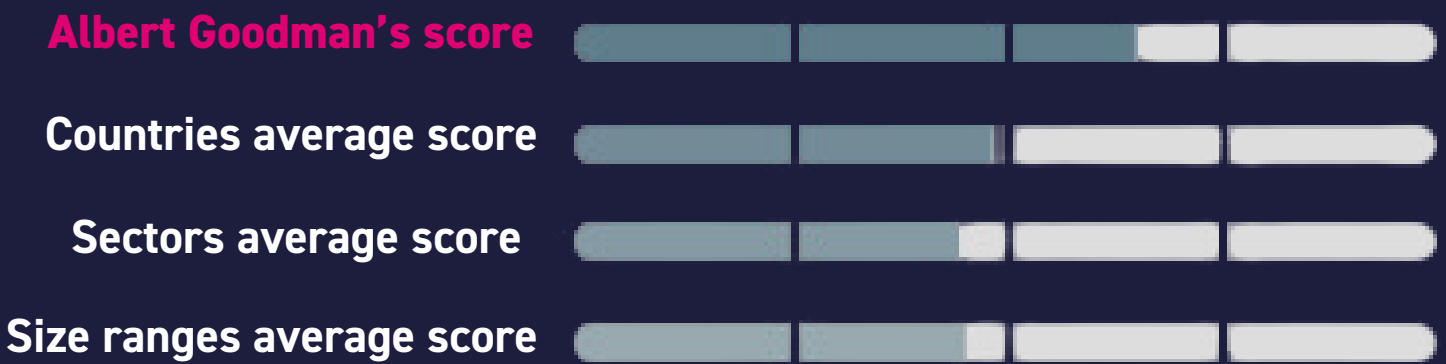
GOVERNANCE:



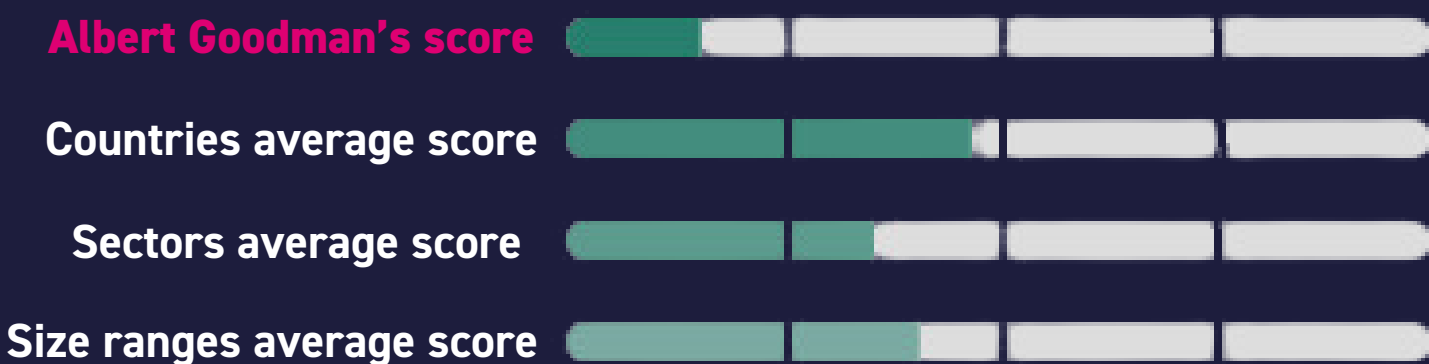
ENVIRONMENT:



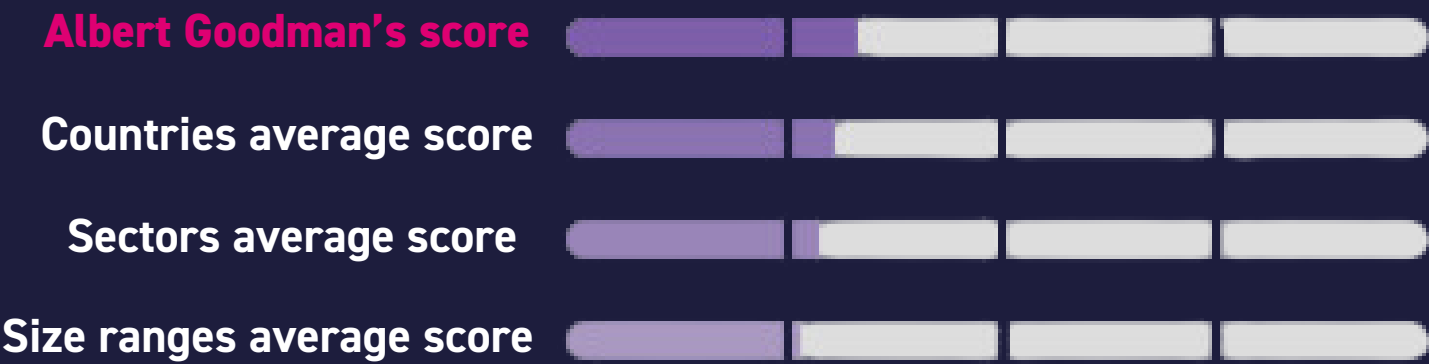
OUR PEOPLE:



OUR CLIENTS:



COMMUNITY:



SUSTAINABILITY AND CORPORATE SOCIAL RESPONSIBILITY



As a South West firm, we are committed to supporting and protecting our region. Local people are integral to our achievements, and it is vital that we support their well-being. Local businesses have also helped us to succeed, and we want to ensure that other organisations and communities can continue to thrive. We also need to limit our impact on the natural world to help protect its wellbeing and ensure it continues to benefit local communities.

We have a passionate sustainability committee who are active in considering our impact.



WHAT HAVE WE FOCUSSED ON? AND FURTHER GOALS



GOOD HEALTH AND WELLBEING

Develop a pre-planned annual programme of events to boost the health and wellbeing of our people.



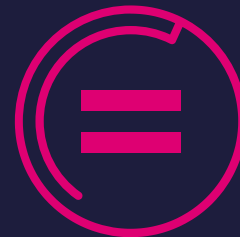
QUALITY EDUCATION

Develop a programme of professional and personal development training for each career milestone (job family)?



GENDER EQUALITY

Successfully deliver one placement through the Working Mum's scheme (checking name with SB)



REDUCE INEQUALITIES

X hours donated to TEDC / work experience offered to (liaise with RC)



CLIMATE ACTION

Encourage our people to travel more sustainably (shared calendar, remote meetings where possible etc)



PARTNERSHIP FOR THE GOALS

Collaborate with organisations and communities to achieve equitable environments

AG

IN 2023 WE...

- ✓ SECURED B CORPORATION STATUS.
- ✓ PRODUCED A SUMMARY NET ZERO ROAD MAP TO 2030.
- ✓ PRODUCED A PLAN OF ACTIONS TO BE TAKEN TO ENCOURAGE SUSTAINABLE WAYS OF TRAVEL OVER THE YEAR TO 30 APRIL 2024.
- ✓ HAD OUR FIRST ELECTRIC CAR PURCHASED BY ONE OF OUR PEOPLE THROUGH OUR SALARY SACRIFICE SCHEME FOR ELECTRIC VEHICLES. WE ARE CONTINUING TO ENCOURAGE OUR PEOPLE TO USE ELECTRIC VEHICLES TO REDUCE THE EMISSIONS WHEN TRAVELLING FOR BUSINESS.

IN 2024 WE WILL...

- 🕒 INVESTIGATE THE USE OF SOLAR PANELS AT OUR LARGEST PREMISE IN TAUNTON TO REDUCE THE RELIANCE ON FOSSIL FUELS TO HEAT AND LIGHT OUR BUILDINGS.
- 🕒 ENGAGE WITH OUR LANDLORDS AT OUR OTHER PREMISES TO ENSURE THAT THEY ARE SUPPORTIVE OF OUR 2030 NET ZERO COMMITMENT.
- 🕒 CONSIDERING THE SUSTAINABILITY OF FUTURE OFFICE PREMISES PRIOR TO THE SIGNING OF A LEASE.
- 🕒 ENGAGE IN COMMUNITY PROJECTS FOR IMPACT AND FUTURE OFFSET.
- 🕒 WILL LOOK TO INCREASE THE ACCURACY OF OUR EMISSIONS REPORTING BY BEING MORE SPECIFIC WITH THE TYPES OF VEHICLES USED BY OUR PEOPLE.
- 🕒 INCREASE THE PERCENTAGE OF PEOPLE USING THEIR 'VOLUNTEERING DAY'.



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Goodman

AWARDS AND ACCREDITATIONS



"People are at the heart of our business and employee engagement for us is paramount to the success of our firm. We constantly review measures to encourage employees to have a good work life balance and are pleased that employees enjoy working within their teams and can see that we support personal growth by creating opportunities for employees to have the career they aspire to." - **Sarah Bowden, HR Director**

CONTRIBUTING FACTS

BETWEEN 1 MAY 2023 – 30 APRIL 2024

119.75

hours taken for volunteering opportunities.

£7,747

Raised for dedicated Charity of the Year.



Raised money during Pride Month to celebrate and contribute towards a LGBTQ+ rights charity.



29

Trainee positions taken on board in various different departments.

Gas emissions decrease:
309,131kwh down to
146,616kwh.

Electric usage decrease:
194,290kwh to 185,705kwh

2020/21 compared to 2023/24.

150+

Charity-based clients that we work with through the specialised sector.

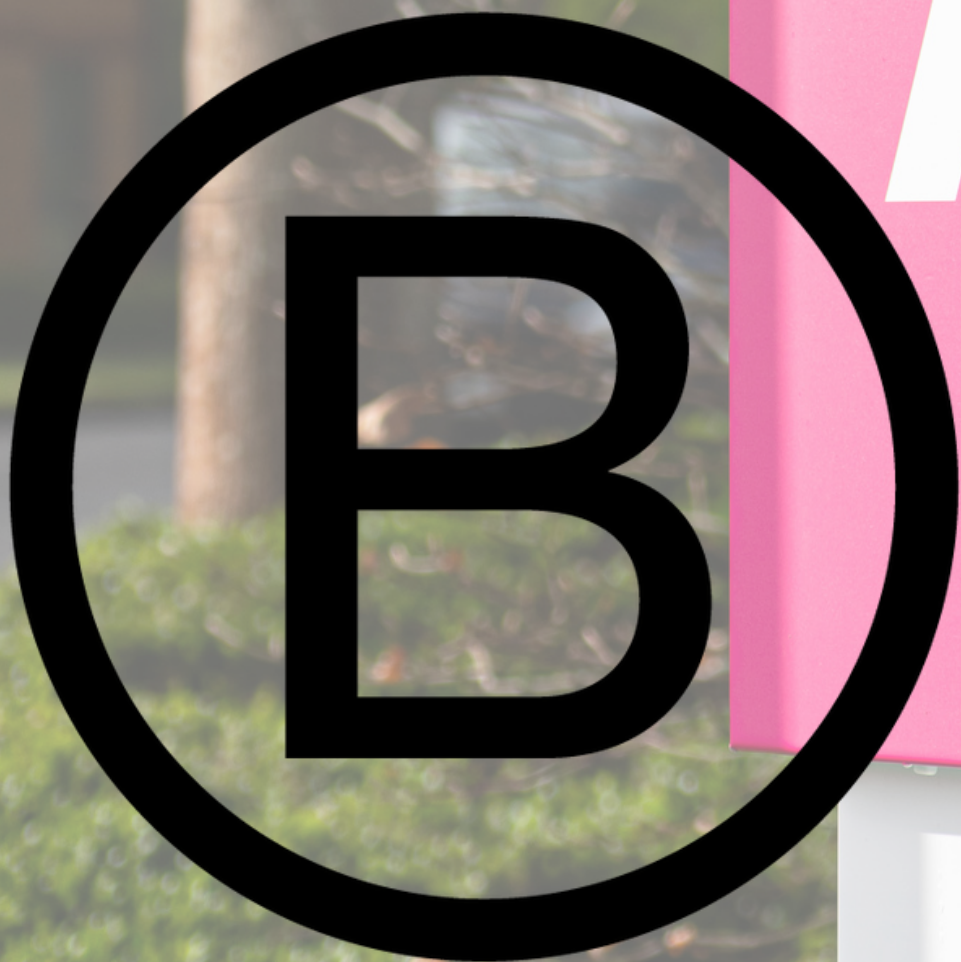


The highest standard of workplace engagement reflects 'world class' levels.



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