Impact Survey Preparation Guide

We invest in companies like yours to bring jobs and opportunities to communities that have historically lacked access to investment capital. Your data helps us tell the powerful story of what happens when we invest in underserved areas - demonstrating to policymakers and investors that these investments create real jobs, build stronger communities, and drive economic growth. Your success becomes part of a larger narrative that shows these programs work.

When we can show concrete results - jobs created, wages increased, communities strengthened - it helps us secure renewals for existing programs and launch new initiatives. This means more companies like yours will have access to the capital they need to grow. Your company's growth isn't just your success - it's proof that strategic investments transform communities and create lasting opportunity.

Getting Started

Support Resources:

Advantage Capital's Impact team is available to assist with any questions or challenges that you encounter.

Reporting Period:

All employment data entered should reflect your company's status as of June 30, 2026. This creates a consistent measurement point across our portfolio.

Key Definitions and Guidelines

Employment Classifications:

Term	What it means	Easy example
Full-time	Employees averaging 35+ hours per week	A typical 9-to-5 employee
Part-time	Employees averaging fewer than 35 hours per week	Someone working 3 days a week or 4 hours a day
Contract	Non-employee workers retained for specific time/price	A freelance web designer you hired for 3 months
Entry-level	Positions requiring no prior full-time work experience	Someone who was hired straight out of school

Important Counting Rules:

- Count employees by their primary status (full-time vs part-time)
- If an employee's status changes during the year, use their most recent status as of June 30th
- Exclude contract employees from investee, in-state, and total employee counts
- Only include employees who were actively employed on June 30, 2026 (do not count employees who left before this date or were hired after this date)

Tips and Resources

Best Practices for Data Collection

- Designate a point person to coordinate data gathering
- Involve HR/payroll teams early for employment and wage data
- Work through one section at a time following this guide

Getting Help

If you need assistance completing any section, don't hesitate to schedule a call using this scheduling link or reach out to your Advantage Capital contacts. They can provide clarification on definitions, help with complex counting scenarios, or assist with technical issues.

Information You'll Need to Gather

1. Employee Counts (as of June 30, 2026)

a. Basic Employment Data:

Prepare counts for both full-time and part-time in these categories:

Category	What to count	Example
Total employees at the investee/ borrowing entity only	Employees at just your entity and/or specificed facililty	25 employees at an entity's facility that received Advantage Capital funding. The survey will inform you if POB data is needed
Employees that work in the primary state at the investee/borrowing entity only	Employees working in your specified state, and just at your entity	20 of those employees work in the state specified in the survey
Global employees at the investee/ borrowing entity and all parent/ related companies (entire US)	Include parent companies, subsidiaries (US employees only)	Your parent company has 50 more employees in other states
Contract workers	Freelancers, consultants (these employees should only be counted in this category)	You have 3 contract graphic designers
Entry-level positions	Jobs requiring no experience	8 employees that were hired with no experience
Salary vs hourly	How people are paid	15 employees are salaried, 10 recieve hourly wages

b. Employee Tenure:

Count each employee only once in the category that corresponds with their hire date:

Tenure Period	Includes Employees Hired
0-6 months	June 30, 2026 - December 31, 2025
6 months - 1 year	December 31, 2025 - June 30, 2025
1-2 years	June 30, 2025 - June 30, 2024
2-4 years	June 30, 2024 - June 30, 2022
4+ years	Before June 30, 2022

c. Hiring Projections:

Estimate new hires only (not replacements) for:

i. Next 6 months: 2 salespeople + 1 accountant = 3 full-time hires
ii. Next 12 months: 3 (from above) + 1 marketing assistant + 1 salesperson = 5 cumulative hires
iii. Next 18 months: 5 (from above) + 1 fulfillment specialist + 1 junior HR specialist = 7 cumulative hires

Note: It is expected that the totals entered will build on each other in this section of the survey

2. Wage Information

a. For Salaried Employees (Annual $)

i. All full-time employees: Total salaries ÷ number of full-time (non-hourly) employees
Example: $50,000 + $60,000 + $70,000 = $180,000 ÷ 3 = $60,000 average

ii. New entry-level hires only: Average salary of new, inexperienced employees (excludes senior-level hires)
Example: New grad at $45,000 = $45,000 average

b. For Hourly Employees (Hourly $)

i. Average wage of all full-time employees, excluding salaried employees

ii. Average wage of all part-time employees

iii. Average wage for new entry-level employees, excluding salaried employees

c. Minimum Wage of all Full-time Employees

i. Hourly Wage or Annual Salary of your lowest paid employee

3. Education Requirements

a. Full Time Positions

Enter data based on the minimum education required you would list in an advertisement for the position—not the employee's credentials. For example, a customer service role may only list a high school diploma. This role should be entered as requiring High school completion, even if the employee has a Bachelor's degree

Education Level	Entry-level Positions	Non-entry Level Positions
No specific requirement	Number of positions	Number of positions
High school completion/GED	Number of positions	Number of positions
Associate degree or equivalent	Number of positions	Number of positions
Bachelor's degree or higher	Number of positions	Number of positions

4. Benefits Information

Benefits Offered by

- Number of full-time employees
- Number of part-time employees

Recent Benefits Changes (Last 6 Months)

- Benefits added
- Benefits discontinued

5. Demographics

Change in Ownership Demographics (Last 6 Months)

- Female and veteran owners
- Racial/ethnic breakdown of ownership
- Institutional investors

Change in Workforce Demographics

- Female and veteran employees
- Racial/ethnic breakdown of workforce

6. Impact Initiatives

This section is intended to highlight any initiatives or activities that reflect your business's broader impact.

Share any initiatives or achievements, such as workforce development (e.g., internships, apprenticeships), community engagement, sustainability efforts, awards, local business support, staff volunteer hours, local procurement, or educational programs.