Corporate Philanthropy and Social Impact: Engaging Employees, Serving Society and Measuring Outcomes

CONFERENCE

Pre-Conference Workshop:
Navigating the Many Roles of Today’s Corporate Citizenship Practitioner

December 4, 2019
The Conference Board
New York, NY

Conference:
December 5–6, 2019
New York Law School
New York, NY

www.conferenceboard.org/philanthropy2019
Pre-Conference Workshop

Wednesday December 4, 2019

1 – 5 pm

Navigating the Many Roles of Today’s Corporate Citizenship Practitioner

Are you new to the field? Or maybe you find yourself wearing more hats than usual and/or being asked to expand your horizons to the broader CSR/ESG/sustainability realm. Either way, it’s time to take a step back and plan for what’s ahead.

Part I: Lay of the Land

• Setting the stage for an interactive workshop, participants will come together with their peers to explore a framework through which to make sense of the many aspects of their cross-cutting roles

Welcome & Workshop Overview
Introductions, agenda & workshop objectives

• Citizenship, CSR, Community: What is My Job, Really?
  Dive into the varied and expanding role of the corporate citizenship practitioner. Identify key internal stakeholders whose interests and support are critical to your success.

Maureen Flynn, Senior Managing Director, Changing Our World, Inc
Mandy Ryan, Managing Director, Changing Our World, Inc
Tamara Tepper, Senior Consultant, Changing Our World, Inc

Part II: Key Issues

A combination of mini-presentations and panel discussions will delve into major and emerging issues citizenship practitioners face when wearing their various “hats.” Participants will hear directly from leaders representing various business stakeholder groups. Topics include:

• Philanthropy: Finding Balance Between Strategic Focus and Community Needs
  Carolyn C. Cavicchio, Director, Corporate Responsibility/ Vice President, S&P Global Foundation S&P Global

• HR: Connecting Community Involvement to Recruitment, Development & Retention
  Julia Brown, Associate Manager Corporate Social Responsibility, Prudential Financial, Inc.
  Rene’ O. Deida, Director, Corporate Social Responsibility, Prudential Financial, Inc.

• Communications & Marketing: CSR/ESG Reporting and Authentic Leadership
  Bob Axelrod, Senior Vice President, FleishmanHillard

Part III: Tools for My Job

From targeted benchmarking data to personalized action plans, participants will leave with tools to succeed in their unique roles, along with new peer relationships to carry forward.

• Make the Case: Citizenship Trends & Benchmarks to Demonstrate Your Value to Stakeholders
  Explore key trends and data that will help make the case for the value of your work to various internal audiences.

Peer Learning
Come together with your peers to brainstorm around common challenges and exchange solutions and tips.

Defining Your Role & Goals
Leveraging the framework presented in opening sessions, participants will reflect upon their unique role and develop practical action plans to carry the day’s learnings forward when they return to their desks.

Maureen Flynn, Senior Managing Director, Changing Our World, Inc
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Conference Day 1
Thursday, December 5th, 2019

8:30 - 9:00 am
Registration and Breakfast

9:00 - 9:15 am
Welcome and Program Goals
Jeff Hoffman, Conference Chair, The Conference Board

9:15 - 10:30 am
Is your philanthropy aligned with your corporate strategy? Aligning corporate and philanthropic strategies
If your corporate strategy doesn’t align with the strategy of the nonprofit you’re supporting, both parties will lose. The same goes for culture and mission. We discuss strategic alignment, balance and diversity of portfolios, and other ways to maximize both the effect of your philanthropic initiatives and the benefit of those initiatives to your employees and business.

Jason Rahlan, Director of Social Impact & Philanthropy, Chobani
Ylann Schemm, Director, The Elsevier Foundation and Director of External Partnerships, Elsevier
Kate Chinn, Vice President and Head of Community Relations, Alliance Bernstein
Kathleen Ryan Mufson, Director, Global Corporate Citizenship & Philanthropy, President, Pitney Bowes Foundation

10:30 - 10:45 am
Break

10:45 - 11:45 am
Measure what matters. Evaluate your grant portfolio’s performance.
The Conference Board has partnered with the Impact Genome Project® (IGP) to measure the performance of corporate societal investments. TCB member companies Moody’s and T Rowe Price discuss the process they undertook to view their grant portfolio in a data-driven way, evaluating total cost, program efficacy, and more. Discussion includes:

• Social impact leaders’ role in developing employee and organizational skills for the future

For sponsorship opportunities, please contact michael.felden@conferenceboard.org
Recent trends with focus on businesses engaging in and facilitating social change

Case studies from companies that are measuring impact on both employees and beneficiaries

Discussion Leader:
Jason Saul, Chief Executive Officer, Mission Measurement

Panel:
John Brothers, President, T. Rowe Price Foundation, T. Rowe Price Charitable
Arlene Isaacs-Lowe, Global Head of Corporate Social Responsibility, Moody’s Corporation, and President, Moody’s Foundation

11:45 am - 12:45 pm
Social impact is not an add-on for the next generation of leaders—it is a requirement.
As socially conscious millennials and younger workers become a larger part of the workforce, they put more pressure on companies to be good citizens. Social impact isn’t just a corporate strategy—it’s a hiring strategy. By partnering with both internal and external stakeholders, CSR professionals can build a global, inclusive talent pipeline while engaging employees as changemakers.

Julie Glugage, Co-Founder and Executive Director, Team4Tech
Denise Dahlhoff, Ph.D., Senior Researcher, Consumer Research, The Conference Board
Nicole Johnson, Executive Director, Pure Good Foundation, Pure Storage, Inc.
Kim Kerry-Tyerman, Brand Purpose, Adobe

12:45-1:45 pm
Luncheon

1:45-2:45 pm
Philanthropy in action: Educating refugees in Concord, NH
As tension around the immigration issue escalates, organizations would do well to look at success stories from the recent past. In the early 1990s, Concord, NH became a refugee resettlement site for families fleeing violence in their home countries. The transition has not been easy, but it has been aided by corporate philanthropy, nonprofit organizations, and local educators. They discuss aspects of immigration including:

• Preparing refugees for college academically, socially, and emotionally
• The ripple effect of first-generation students
• Implications of immigrants on the local economy, the talent pool, and the future workforce
• Ties between community resettlement and philanthropic giving

Anna Marie DiPasquale, LCSW, Be The Change Club, Concord High School
Ashish Kharel, Gates Scholar
Ganesh Sharma, Gates Scholar
Noël Harmon, President and Executive Director, Asian Pacific Islander American Scholars formerly, the Asian Pacific Islander American Scholarship Fund

2:45 - 3:30 pm
The Points of Light Civic 50: How to build and sustain a culture of civic engagement
The Civic 50, chosen under the auspices of the 30-year-old nonprofit volunteer foundation Points of Light, are companies with US operations, revenues of $1 billion-plus, and outstanding US community engagement. Points of Light leaders analyze what makes a winner, covering:

• Investments in employee time and skills, cash, in-kind giving, and public leadership
• Integration of philanthropic strategies into business functions
• Supporting community engagement in the US and beyond through policies, systems, and incentives
• Measuring social and business outputs and outcomes

Jenny Lawson, Chief Civic Innovation Officer, Points of Light
Member, Points of Light Corporate Citizenship Advisory Council

3:30 - 3:45 pm
Break

3:45 - 4:30 pm
Philanthropy in action: Working with at-risk youth in Connecticut
Domus, which began in 1972 as a group home for homeless boys, now serves approximately 1,700 at-risk young people in Stamford each year. The challenges they face include poverty, homelessness, academic failure, and chronic, untreated health care issues. The organization meets its clients where they are, whether that is in elementary school, in a post-secondary school program, or in the juvenile court system. Domus leaders discuss the organization, its community partnerships, and its strategies for achieving its philanthropic mission.

Michael Duggan, Executive Director, DOMUS
Julia Wade, Director of Volunteers, DOMUS
Sarah Zupnik, VP Client Initiatives Group, Synchrony

4:30 - 5:15 pm
Deepening engagement, increasing collaboration, and building communities through volunteer initiatives
Legg Mason Global Asset Management shares its success in sustaining employee engagement when it comes to CSR initiatives. Executives give case histories from their employee volunteer initiatives, which rest on a four-pronged strategy:

• Harness the experience and talents of employees through participation in nonprofit boards
• Identify critical challenges in the community where employees can make a real difference
• Support and promote bottoms-up employee-initiated programs
• Share the company’s core expertise to build greater competence in the community

Speakers
Kristin Kosmides, Managing Director, Corporate Social Responsibility, Legg Mason Global Asset Management
George Schott, Director, Integrated Marketing, Legg Mason Global Asset Management

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**Day 2**
**Friday, December 6, 2019**

8:30 - 9:00 am
**Breakfast**

9:00 - 10:15 am
**Government, tech, culture, and investment: Connecting the four quadrants of meaningful change**

In an increasingly interconnected world, strong relationships among partners and disciplines can accelerate forces for good. When lawmakers, institutional investors, innovators, and community organizers collaborate, they can significantly strengthen initiatives to improve society and ensure the future of a sustainable planet.

**Panel Leader**
**Eamonn Store, Founder & CEO, FairShare**

**Panel**
**Penny Abeywardena, Commissioner for Internal Affairs, NYC Mayor’s Office**
**Julie Davitz, Head of Impact Solutions BNP Paribas/Bank of the West, BNP Paribas**
**Trace Cohen, Founder, BrAlve**
**Josh Thompson, Founder, Civics Unplugged**

10:15 - 11:00 am
**Consumer-facing corporate social initiatives**

What steps should companies take to optimize programs intended to engage consumers in their work at the intersection of purpose and profit? Three leaders in the field explore steps in the process: homing in on issues, selecting partners, winning internal buy-in, and executing programs that do well by doing good.

**David Hessekiel, President, Engage for Good**
**Maggie Hureau, Head of Social Impact, Harry’s**
**Icema D. Gibbs, Director, Corporate Social Responsibility, JetBlue**

11:00 am - 12:00 pm
**Philanthropy in action: Serving those affected by military deaths, in action and by suicide**

The Tragedy Assistance Program for Survivors offers care to those grieving the loss of a military loved one. Since 1994, TAPS has assisted more than 85,000 surviving family members, casualty officers, and caregivers. In the last five years, military deaths by suicide reported to TAPS have increased by almost 40 percent. TAPS services include suicide prevention and post-suicide intervention, peer-based emotional support, community-based care, casework assistance, and a 24/7 helpline. Support is provided at no cost, and TAPS receives no government funding.

**Colleen C. Shine, Veterans and Survivor Advocate; National League of POW/MIA Families**
**Bonnie Carroll, President and Founder, Tragedy Assistance Program for Survivors (TAPS)**
**Heather Nesle, President, New York Life Foundation**

12:00 - 12:45 pm
**Closing Address**
**Is it a match? Ensuring collaboration between corporations and the nonprofits they support**

When internal and external partners bridge divides and operate without strategic or cultural barriers, their social impact initiatives build community. This session will explore:

- Strong, effective policy making
- Establishing long-term strategic relationships
- Determining and driving collaboration where corporation and nonprofit intersect
- Advocating for the nonprofit sector
- Digital transformation for nonprofits

**Allyson Knox, Senior Director of Education Policy, Microsoft Philanthropies**

12:45 - 1:00 pm
**Final Wrap-Up**
REGISTRATION INFORMATION

Online  www.conferenceboard.org/philanthropy2019
Email   customer.service@conferenceboard.org
Phone 212.339.0345
       8:30 am – 5:30 pm ET, Monday – Friday

Pre-Conference Pricing:

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Fees do not include hotel accommodations.

Locations:

Pre-Conference Workshop
The Conference Board Conference Center
845 Third Avenue
(Between 51st and 52nd), 3rd Floor
New York, NY 10022
Customer Service: 212.339.0345

Conference
New York Law School
185 West Broadway (between Worth and Leonard Streets)
New York, NY 10013
Tel: 212.431.2100

Cancellation Policy
Full refund until three weeks before the meeting. $500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

Team Discounts per Person
For a team of three or more registering from the same company at the same time, take $300 off each person’s registration. One discount per registration. Multiple discounts may not be combined.