Corporate Citizenship Beyond Traditional Philanthropy

Roundtable Discussion Held under the Chatham House Rule
February 24, 2022

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AGENDA

- **10:00 AM** **WELCOME**
- **10:10 AM** **WHAT AND WHY**
- **10:40 AM** **HOW**
- **11:20 AM** **IMPACT**
- **11:45 AM** **WHAT'S NEXT**
- **12:00 NOON** **ADJOURNMENT**

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LEAD PARTICIPANTS TODAY

- **Michael Stroik**, Vice President, Community Relations, **3M**
- **Nicole Anderson**, Assistant Vice President, Corporate Social Responsibility, **AT&T** and President AT&T Foundation
- **Taryn Barclay**, Senior Director, Strategic Partnerships, **Cargill**
- **Asha Varghese**, President, **Caterpillar Foundation**
- **Dr. Millicent K. Ruffin**, Director, Community Affairs, Office of Racial Equality & Social Unity, **Corning Incorporated**
- **Alexandra (Sasha) Zoueva**, Senior Manager, Social Impact Measurement and Evaluation, **Johnson & Johnson**
- **Ken Gustavsen**, Executive Director, Social Business Innovation, **Merck**
- **Charlie Wigglesworth**, Deputy CEO, **Social Enterprise UK**
- **Alicia Vermaele**, Director, Global Social Impact & Executive Director, Starbucks Foundation, **Starbucks**

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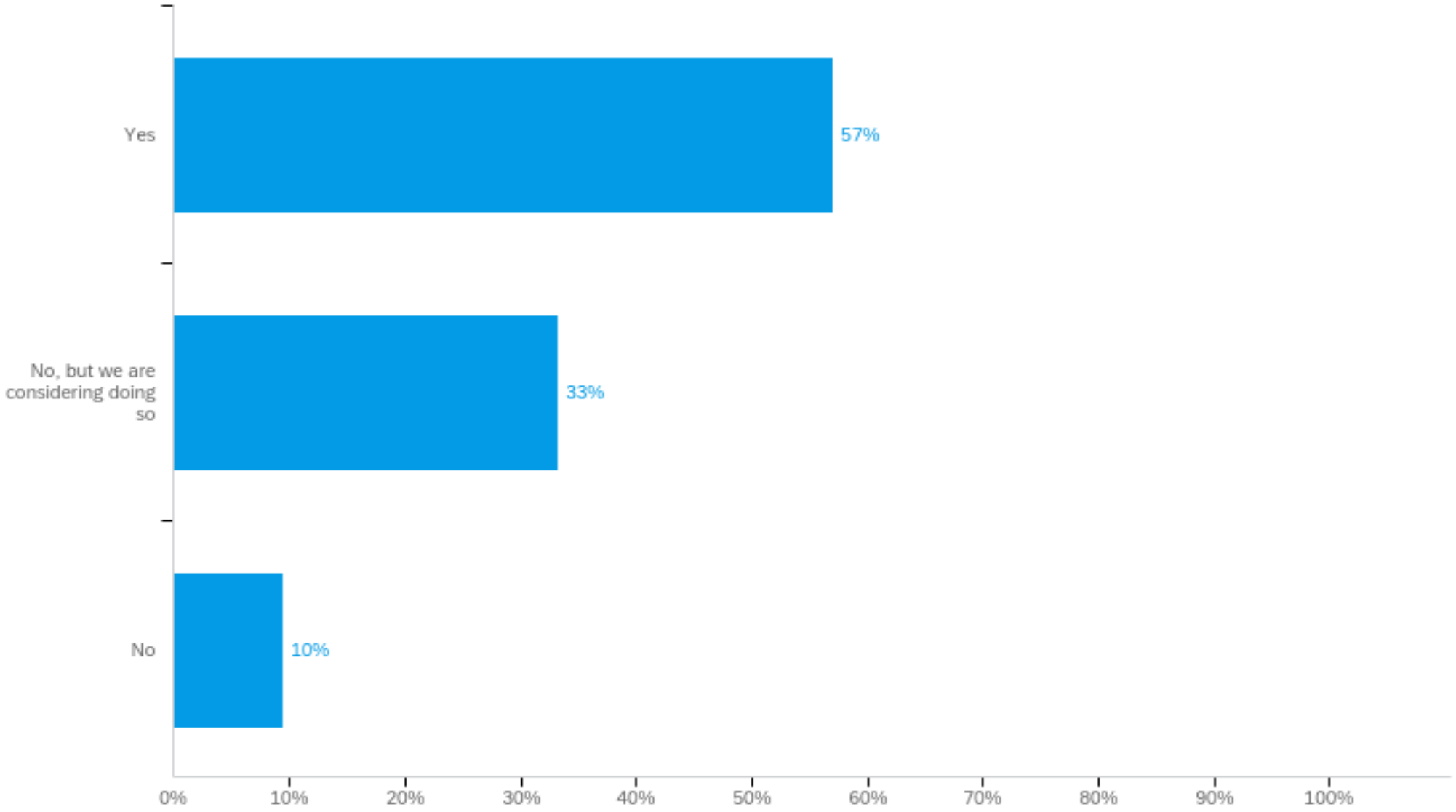
Does your organization make "societal impact investments" (defined as investing financially in an external entities (i.e., for profit, not-for-profit, or joint ventures) that seek to generate both a positive societal (social or environmental or both) impact and financial return for the company)?



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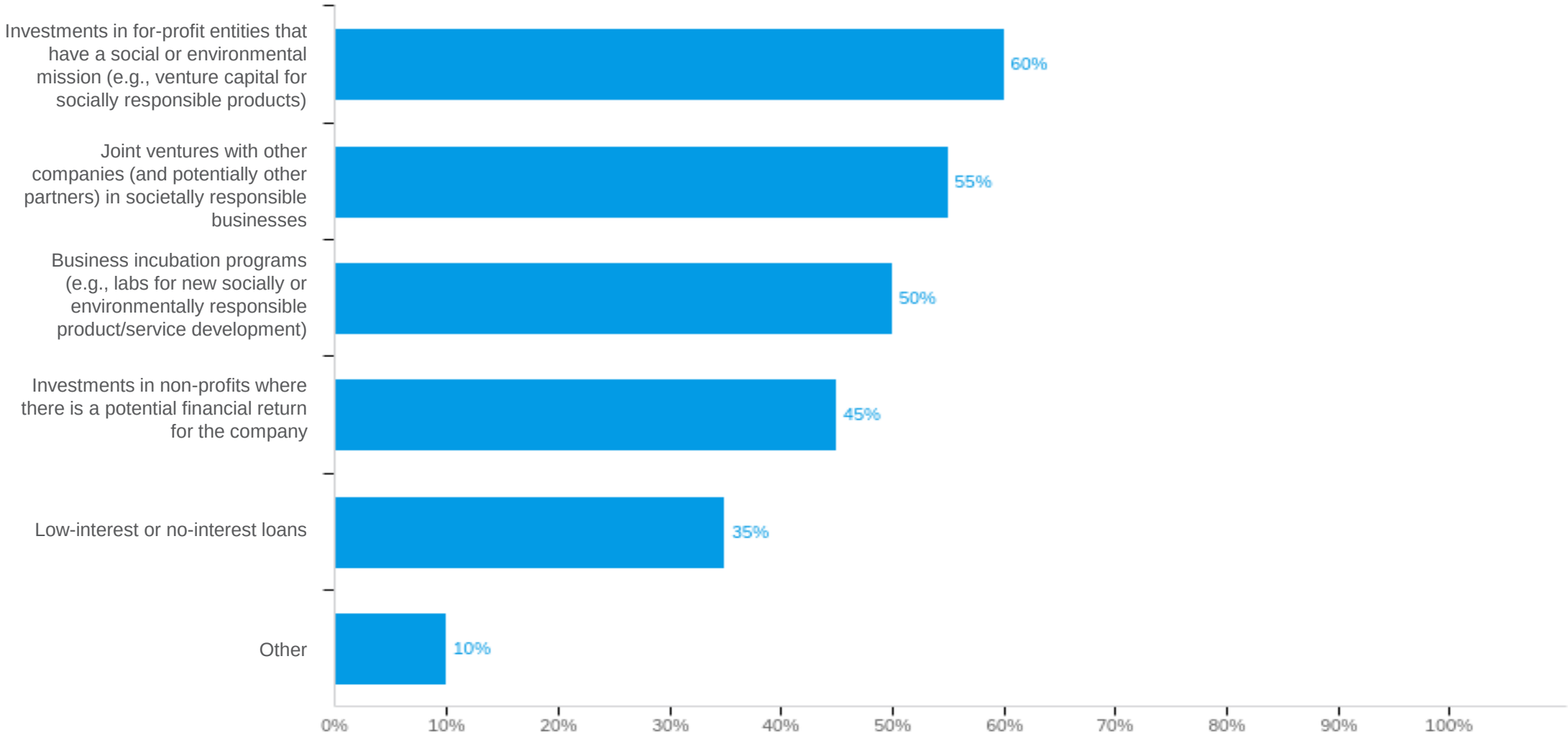
What types of societal impact investments does your company make or is considering making? (Select all that apply)



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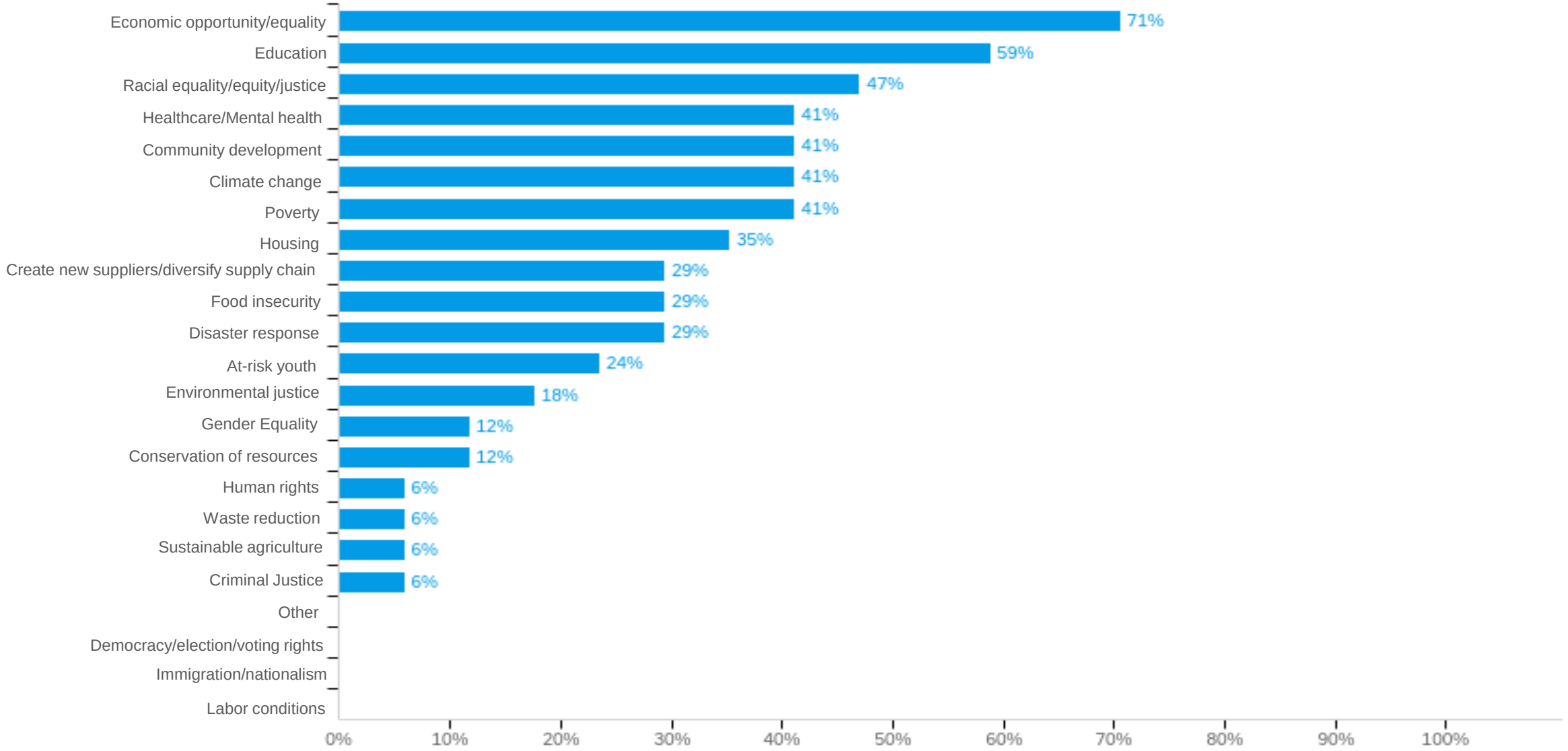
To which of the following areas are your societal impact investments directed? (Select all that apply)



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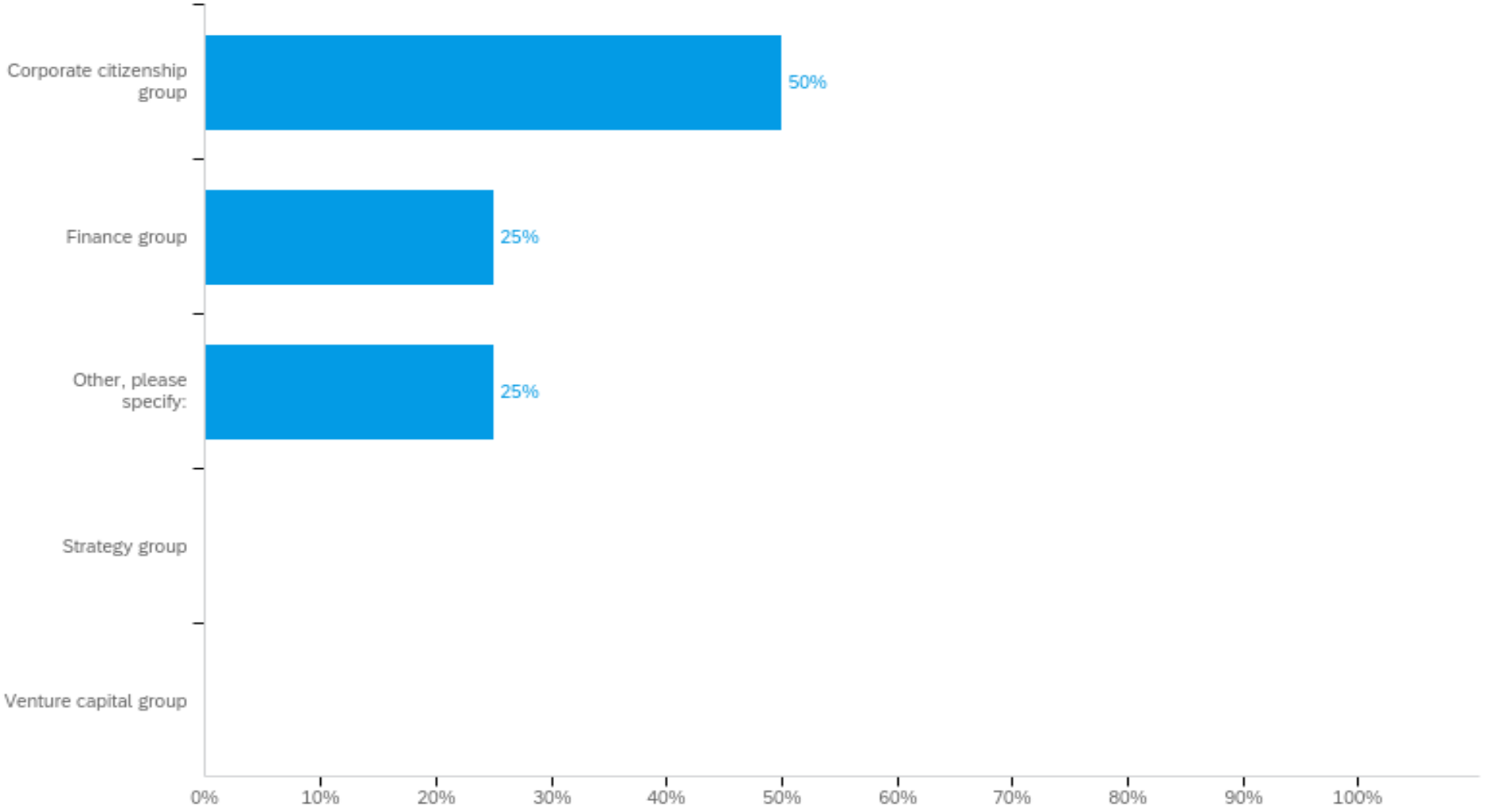
Who manages the societal impact investments at your company?



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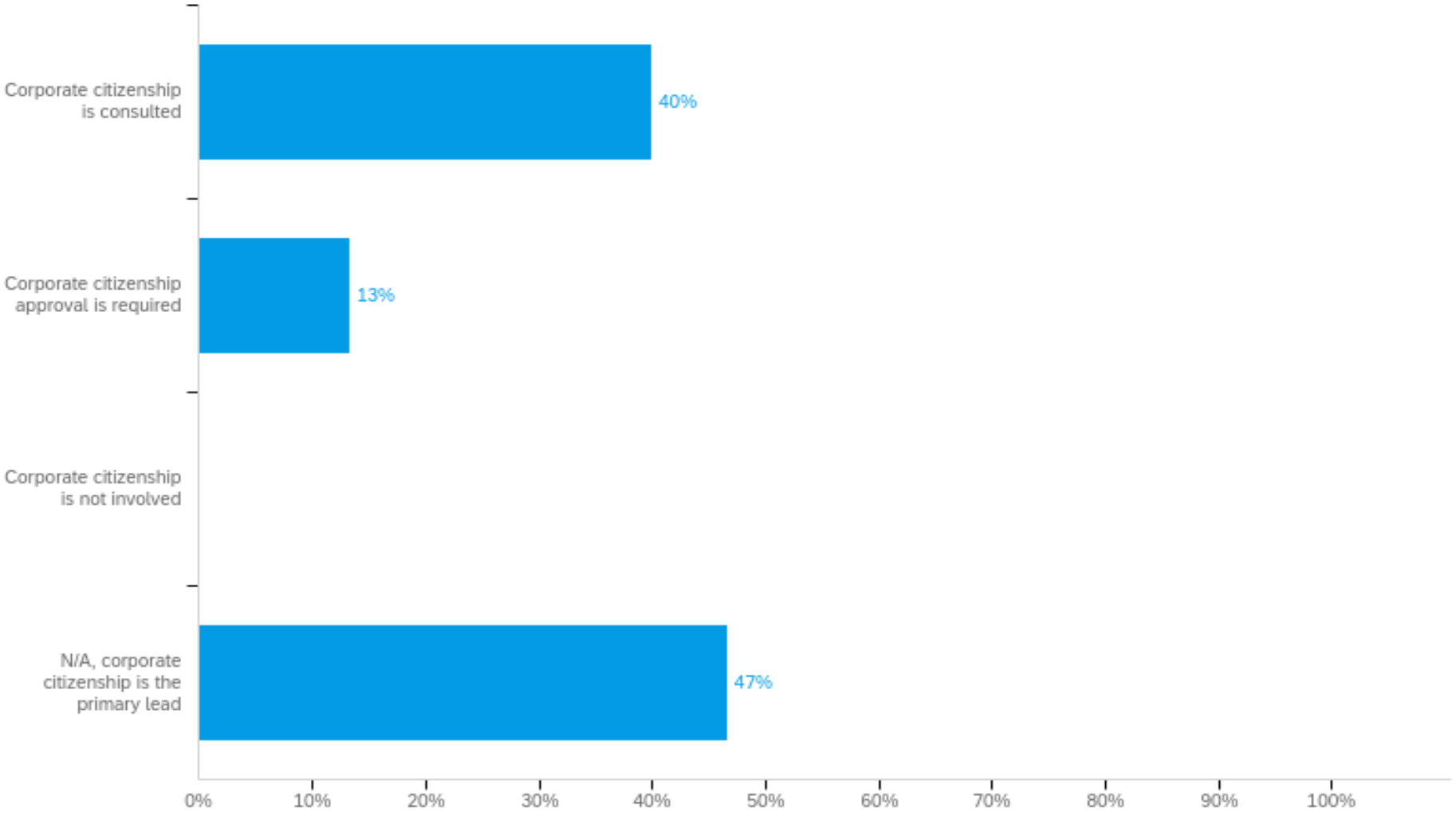
If a group other than corporate citizenship takes the lead on societal impact investments, what is the relationship with the corporate citizenship group?



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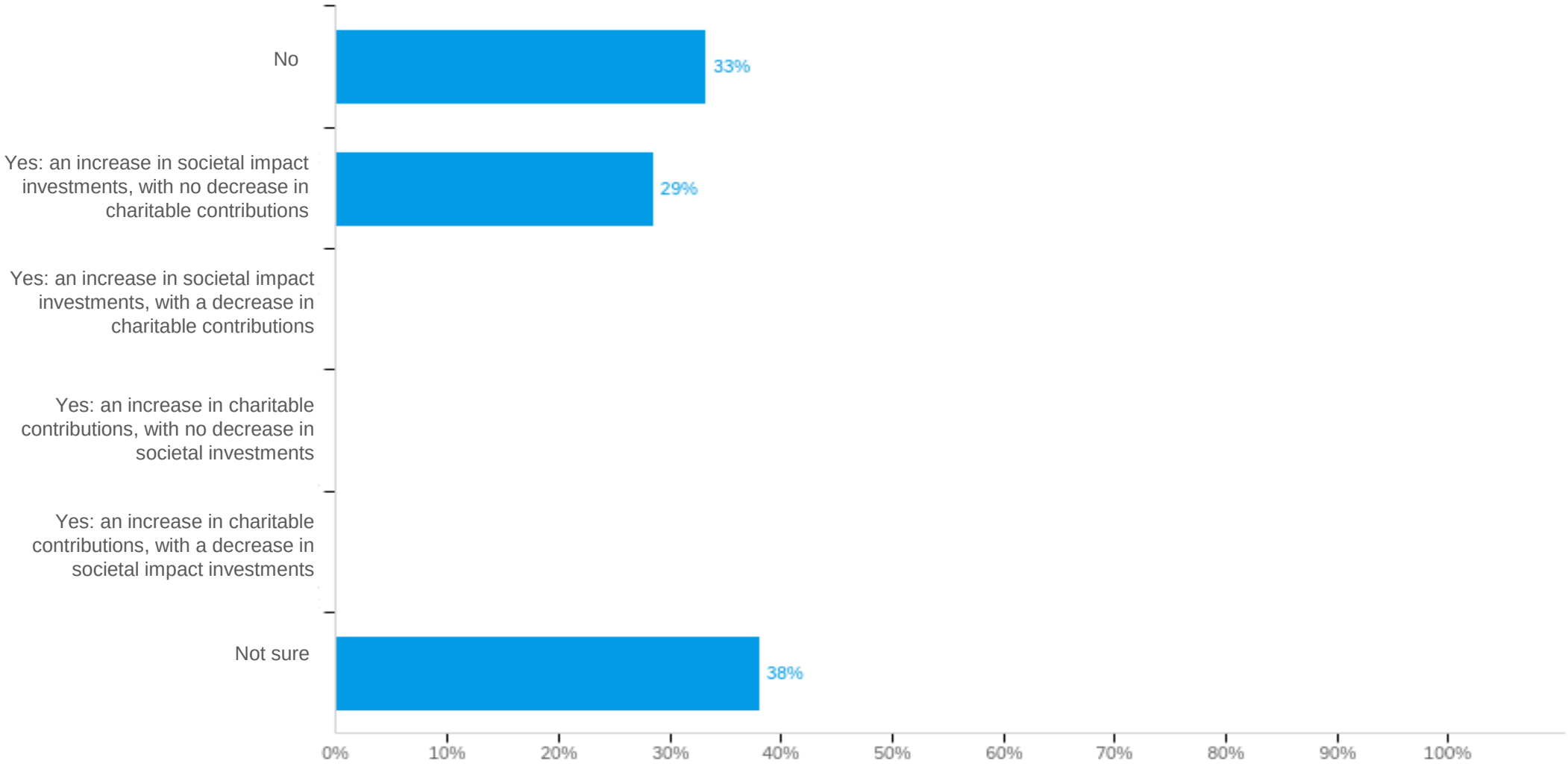
Do you foresee a change in your company's allocation of charitable contributions vs. societal impact investments over the next 18 months?



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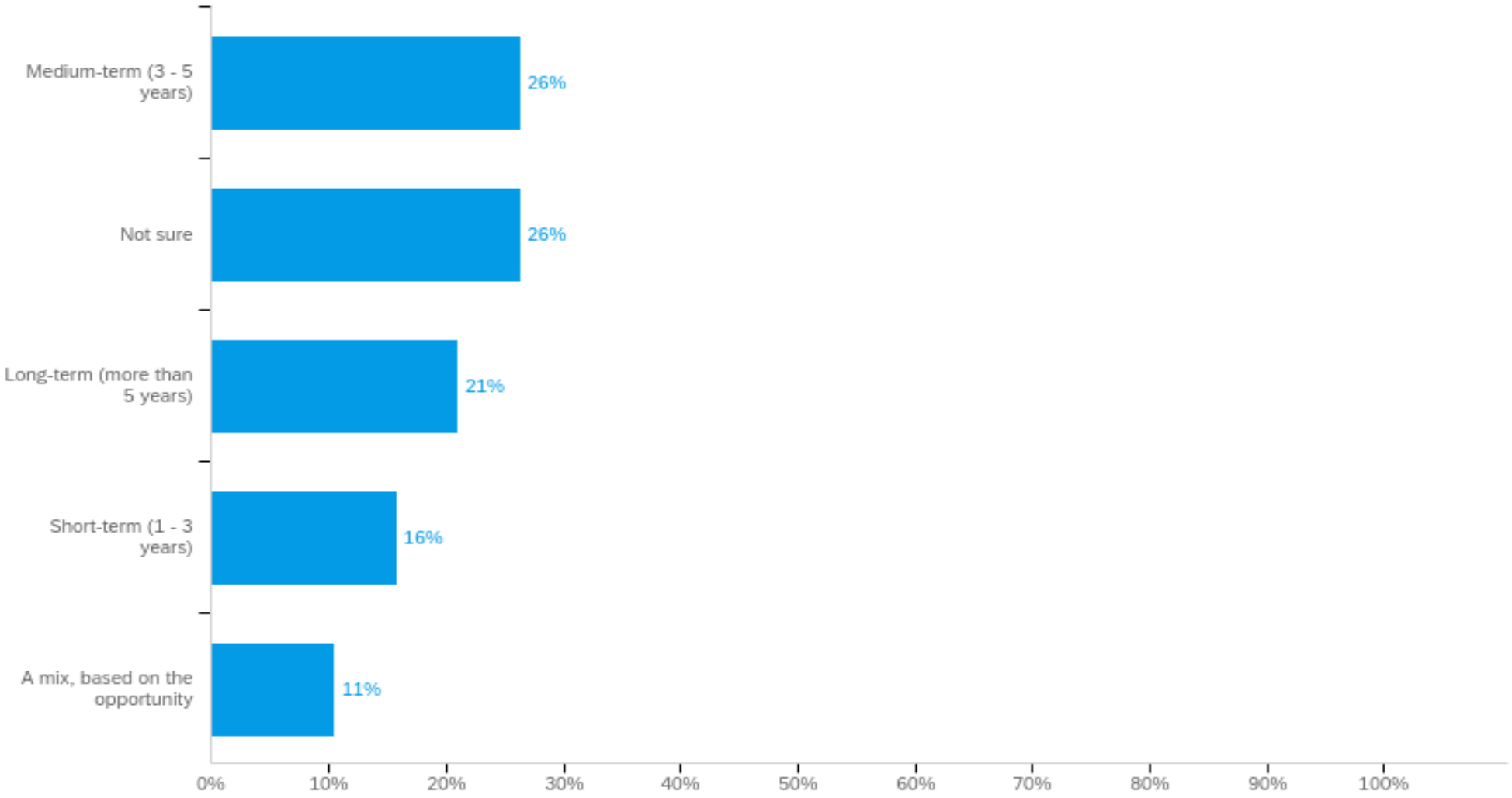
In general, what is, or do you expect to be, the duration of your company's societal impact investments over the next 18 months?



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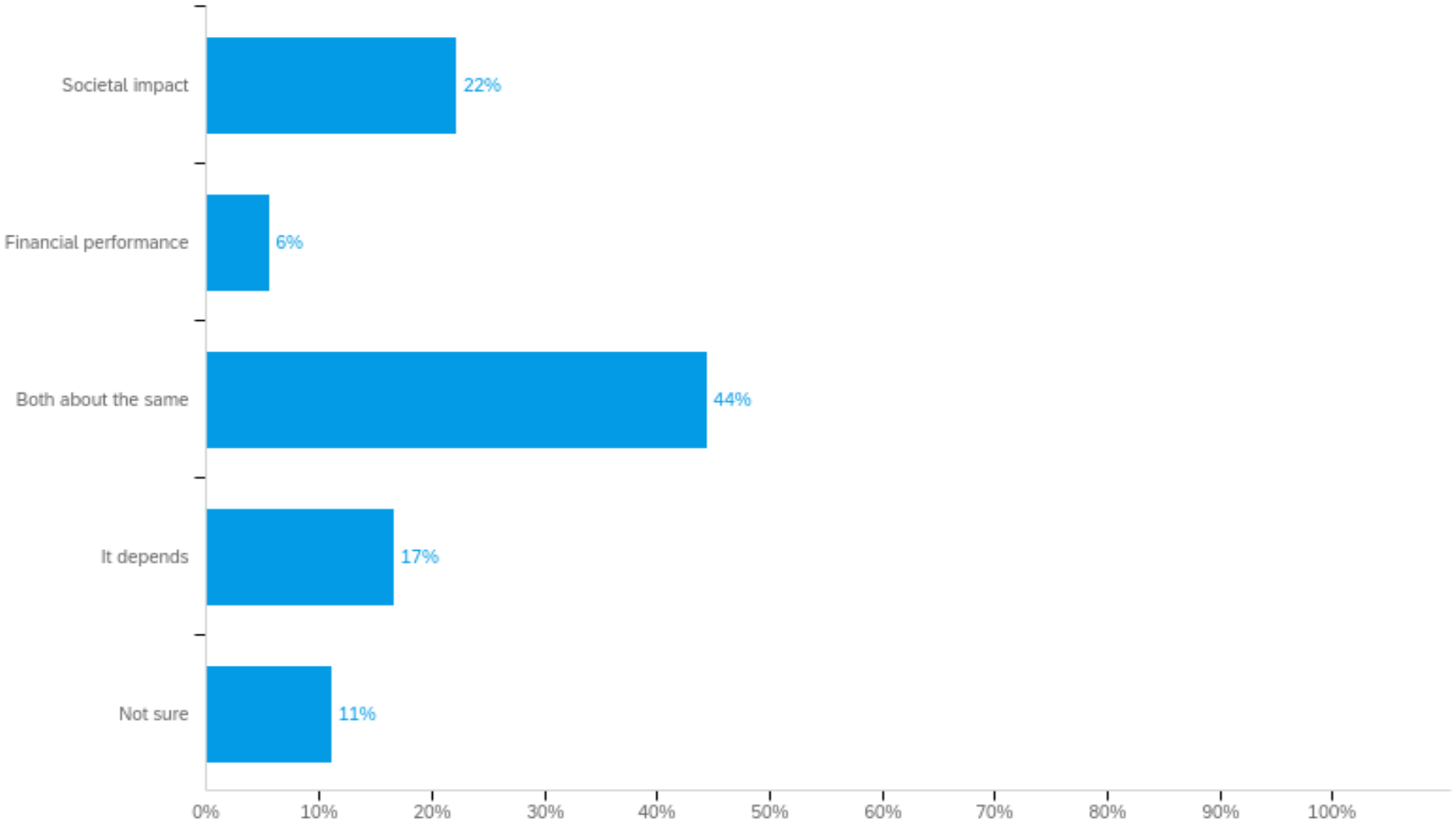
Which is more important: having a societal impact or successful financial performance?



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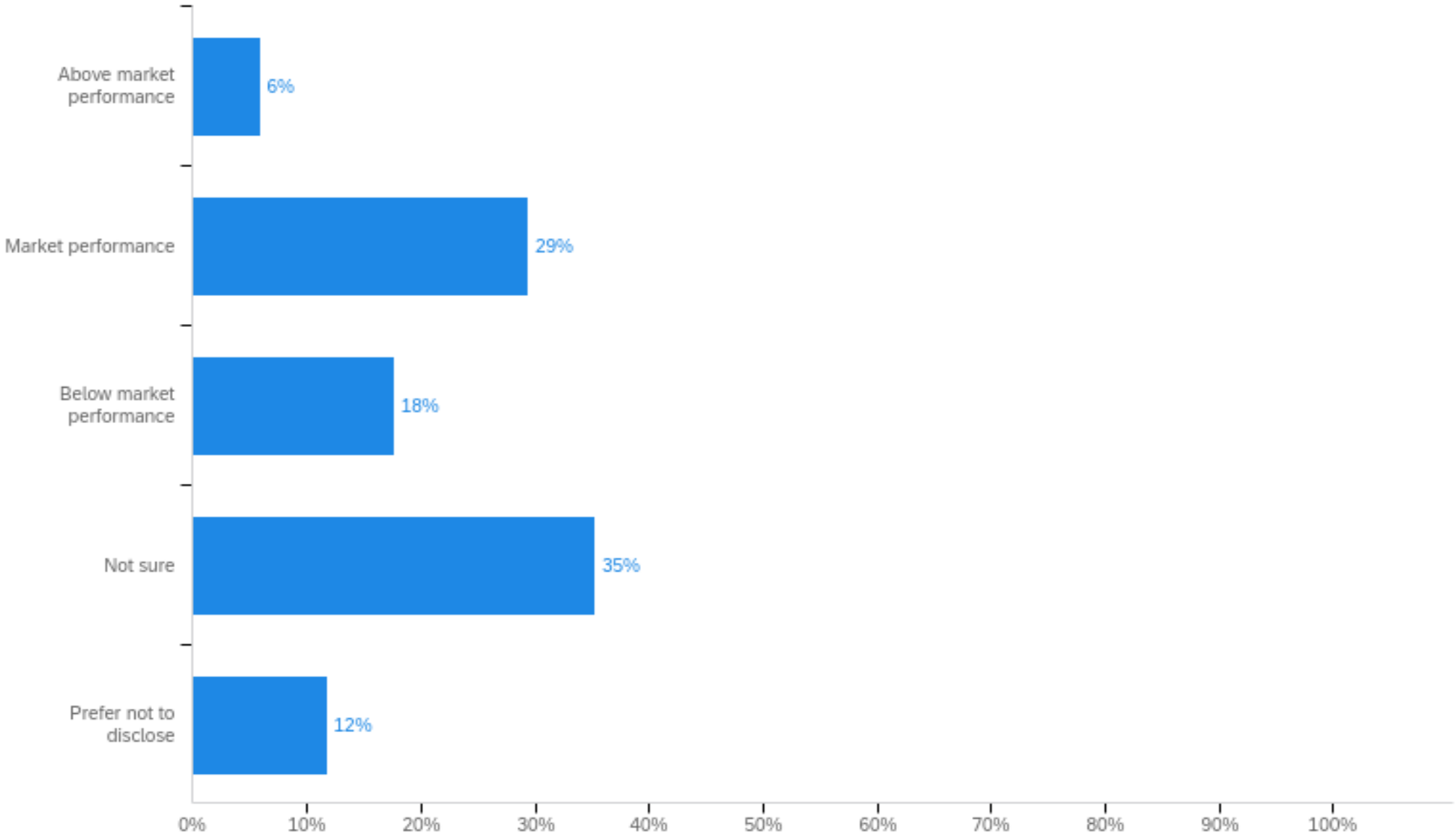
When it comes to societal impact investments, what are your financial expectations?



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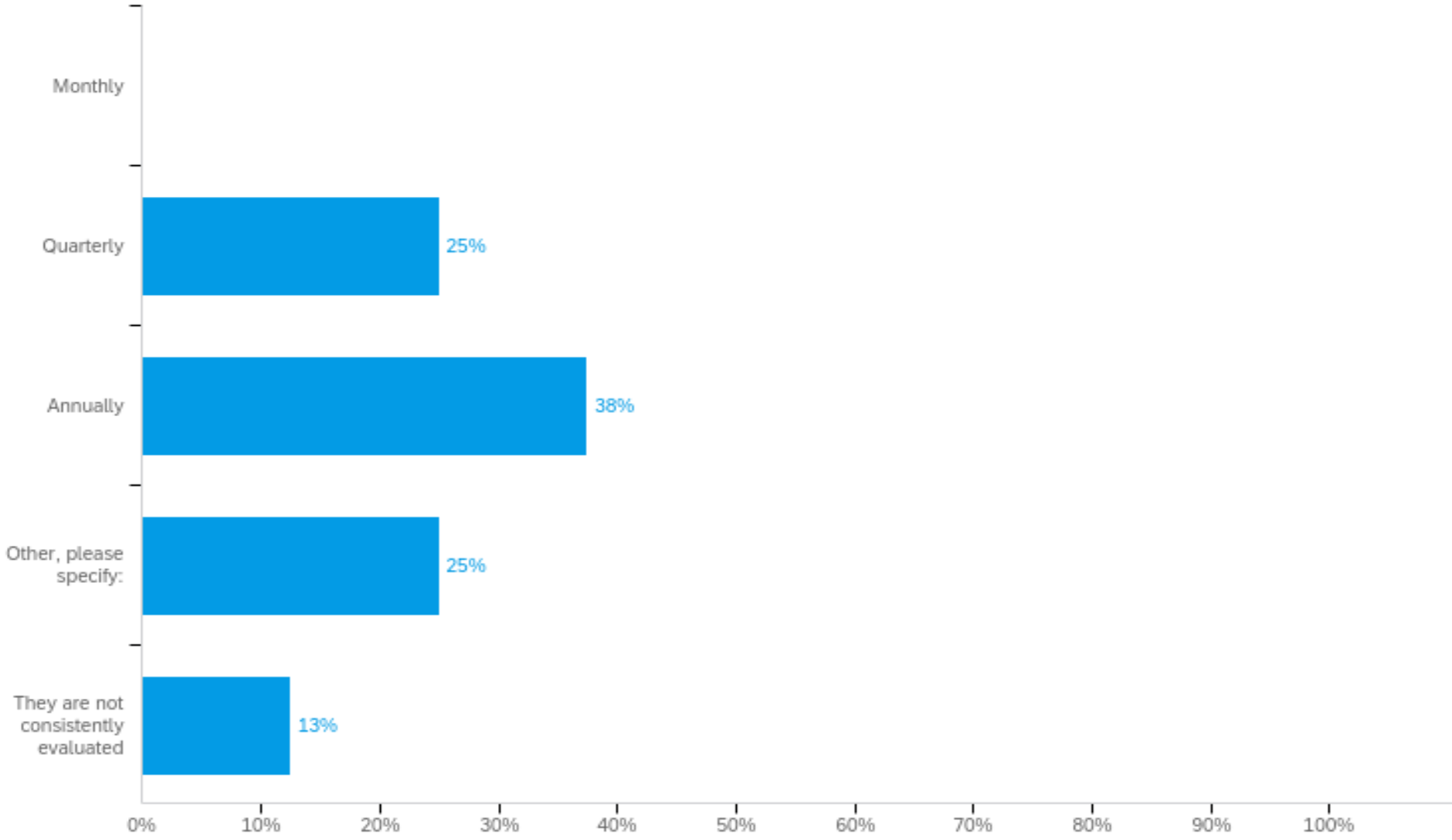
How often is the performance of your societal impact investments evaluated against goals?



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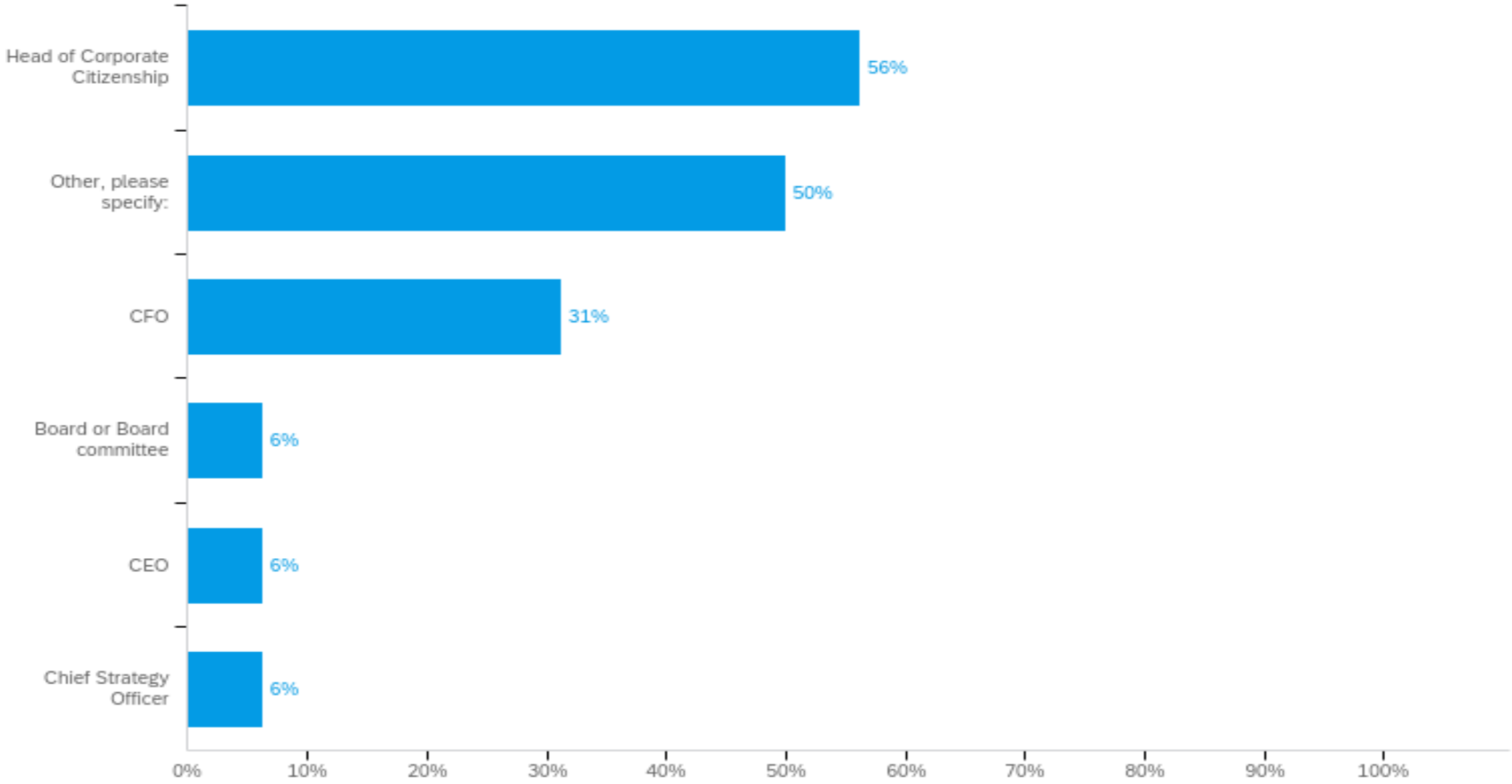
Who receives reports on the performance of these investments? (Select all that apply)



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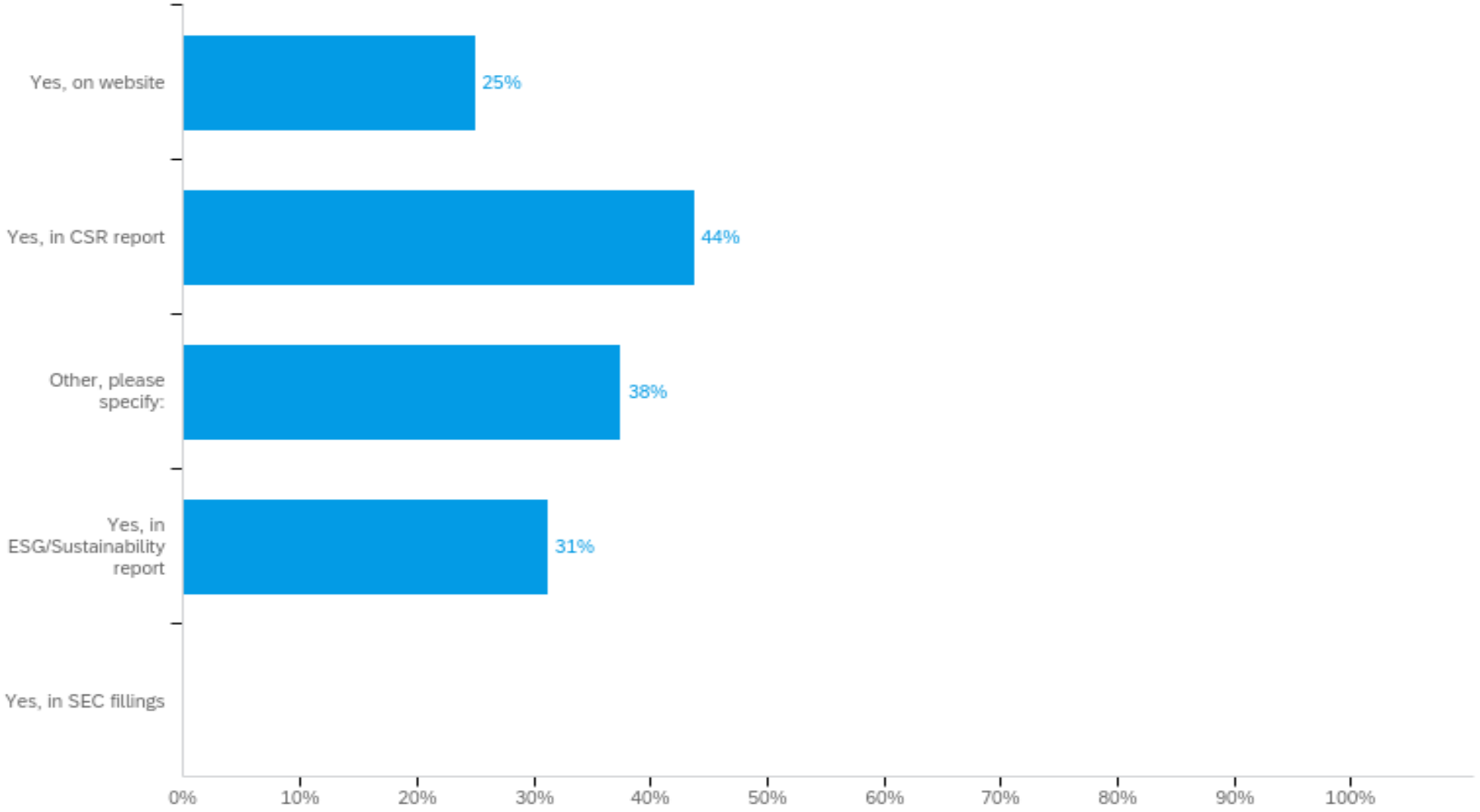
Do you report externally on societal impact investments? (Select all that apply)



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