



# Summary Report

MAY 2014, NEW YORK CITY

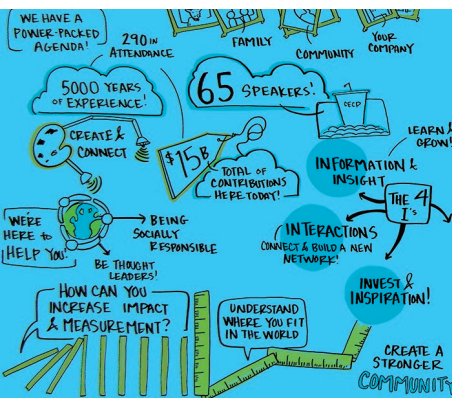
Presentations, resources, photos, videos, and attendee blog posts can be found at [cecp.co](http://cecp.co).



**Save the Dates: May 18th, 19th & 20th, 2015**  
2015 CECP Summit | New York City



L TO R: Ian Rowe, Public Prep; Jason Weedon, Achieve, Inc.; Kelli Wells, GE; Karl Rectanus, Leg(R)n, Inc.



"Awesome Summit! There was a great level of engagement and the information presented will be very useful in the day-to-day running of our community engagement work."

FRANK ROMEO, Vice President, The UPS Foundation



"I always get a lot of value out of the CECP Summit, and now that I am back in my office, I am in the process of **prioritizing** what I can act on."

LALITA ADVANI, Director, Community Engagement, Credit Suisse Americas Foundation



Brian Grill,  
Merck & Co., Inc.

#### ATTENDING COMPANIES

Adobe  
Alcoa Inc.  
Allstate Insurance Company  
Altria Group, Inc.  
American Express  
Apollo Education Group  
Applied Materials, Inc.  
AT&T Inc.  
Avon Products, Inc.  
BAE Systems, Inc.  
Banco Bilbao Vizcaya Argentaria S.A.  
Bank of America Corporation  
Barclays  
BD  
Best Buy Co., Inc.  
Bloomberg  
BNY Mellon  
Bristol-Myers Squibb Company  
Broadridge Financial Solutions, Inc.  
CA Technologies  
Capital One Financial Corporation  
Cargill  
Carlson  
CenterPoint Energy, Inc.  
CIGNA  
CITGO Petroleum Corporation  
Citigroup Inc.  
Citizens Bank  
The Coca-Cola Company  
Colgate-Palmolive Company  
Collette Vacations  
Consolidated Edison, Inc.  
Coty Inc.  
Credit Suisse  
CVS Caremark Corporation  
Darden Restaurants, Inc.  
Deutsche Bank  
Devon Energy Corporation  
Discovery Communications, Inc.  
Dollar General  
Dominion Resources, Inc.  
The Dow Chemical Company  
DuPont  
Ecolab Inc.  
Edelman  
Emerson Electric Co.  
Entergy Corporation  
Exelon Corporation  
Fannie Mae  
FedEx Corporation  
Gap Inc.  
General Electric Company  
The Goldman Sachs Group, Inc.  
Google Inc.  
GSK  
The Hartford  
Hess Corporation  
Honeywell International Inc.  
HSBC Bank USA, N.A.  
Humana Inc.  
IBM Corporation  
Interpublic Group  
JM Family Enterprises, Inc.  
Johnson & Johnson  
JPMorgan Chase & Co.  
KPMG LLP



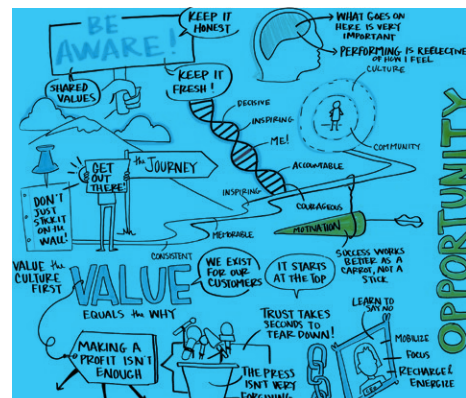
## ATTENDING COMPANIES (continued)

Land O'Lakes, Inc.  
 Lockheed Martin Corporation  
 Marsh & McLennan Companies, Inc.  
 MasterCard Worldwide  
 McDonald's Corporation  
 McKesson Corporation  
 Medtronic, Inc.  
 Merck  
 Microsoft Corporation  
 Mitsubishi Corporation (Americas)  
 Moody's Corporation  
 Morgan Stanley  
 The Mosaic Company  
 National Basketball Association  
 New York Life Insurance Company  
 Newman's Own  
 Pearson plc  
 Pepco Holdings, Inc.  
 PepsiCo  
 PG&E Corporation  
 PIMCO  
 Pitney Bowes Inc.  
 The PNC Financial Services Group, Inc.  
 PPL Corporation  
 Praxair, Inc.  
 PricewaterhouseCoopers LLP  
 Prudential Financial, Inc.  
 Public Service Enterprise Group  
 Incorporated  
 Quest Diagnostics Incorporated  
 Royal Bank of Canada  
 Sabre Holdings  
 Salesforce.com  
 Samsung Electronics America, Inc.  
 Sempra Energy  
 Southwest Airlines Co.  
 Starwood Capital Group  
 Starwood Hotels & Resorts  
 Worldwide, Inc.  
 State Farm Mutual Automobile  
 Insurance Company  
 Symantec Corporation  
 Target  
 Time Warner Inc.  
 Toshiba America, Inc.  
 Total S.A.  
 Toyota Motor North America, Inc.  
 Toys "R" Us, Inc.  
 TransCanada Corporation  
 The Travelers Companies, Inc.  
 UBS  
 United Technologies Corporation  
 UPS  
 U.S. Bancorp  
 Vanguard  
 Verizon Communications Inc.  
 Visa Inc.  
 Votorantim Group  
 Voya Financial, Inc.  
 Wal-Mart Stores, Inc.  
 The Walt Disney Company  
 Wells Fargo & Company  
 White & Case LLP  
 Xerox Corporation  
 Zurich Insurance Group



"I am inspired by  
 the **collective**  
 wisdom from the  
 participants."

RAY JOHNSON, Vice President,  
 Community Investment, HSBC Bank USA, N.A.



L TO R: Stacy Palmer, *The Chronicle of Philanthropy*;  
 Emmett Carson, *Silicon Valley Community Foundation*



Kathleen  
 McLaughlin,  
 Walmart  
 Foundation



"I view CECP as the  
 lead organization for  
 professionals working in  
 corporate community  
 investment. The Summit  
 is always wonderful."

GAIL GERSHON, Executive Director,  
 Community Leadership, Gap Inc.

# 2014 CECF Summit: What Counts

The annual CECF Summit is where more than 250 senior leaders of corporate societal engagement meet once a year in a closed-door setting at Time Warner Center in New York City to network with their peers, hear about trends and exclusive data analysis, and be inspired. Speakers from across sectors, including Fortune 500 CEOs, foundation presidents, *Forbes* "30 under 30" honorees, best-selling authors, and many other of today's most sought-after thought leaders, present and interact with attendees at the CECF Summit.

## AUDIENCE PROFILE

Senior corporate societal engagement professionals from the world's largest companies

**\$17 billion+**\*

Total corporate societal investment

**\$5 trillion+**\*

Total revenue

**10**

Industries represented (See Figure 1, Right)

**35%**

Percentage of attendees who were the companies' senior-most giving officers or heads of CSR departments

**5,000**

Collective years of experience

**40%**

Attendees who reported that increasing impact and measurement counted to them the most (See Figure 2, Right)

\* For audience members who also filled out the Giving in Numbers Survey, when information was provided.

FIGURE 1: AUDIENCE BY INDUSTRY

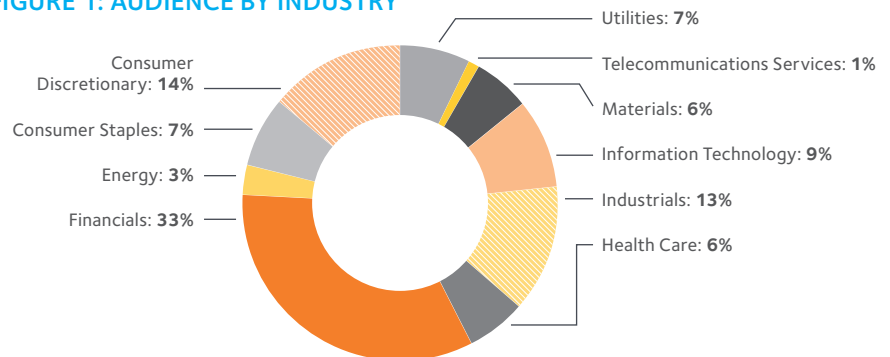
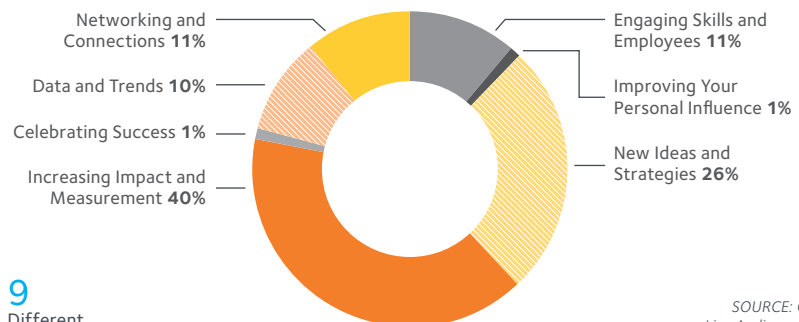
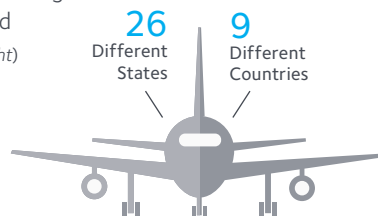


FIGURE 2: WHAT COUNTS MOST TO YOU?



SOURCE: CECF Summit Live Audience Polling, 2014



**ATTENDEES** came from 26 different states of the U.S. and 9 different countries

## TOP TWEETS



**MATTHEW BISHOP**  
@mattbish May 21

The #unselfie tied to text giving will be big during this year's #givingtuesday, predicts co-founder @htimms at #CECPSummit.



**ANDREA L. TAYLOR**  
@USworkers May 21

"A future where everyone has access to the American dream," Opportunity Nation's work led by Mark Edwards #CECPSummit. pic.twitter.com/ulF8ciY8mu



**CHRISTINE BADER**  
@christinebader May 20

Few things cooler than graphic facilitation; LOVE @the\_ink\_factory's #CECPSummit this morning! pic. twitter.com/FI0tSVI7wj



**J.P. MORGAN**  
@jpmorgan May 20

Impact investors redefine returns by pursuing businesses where social/envtl impact is as critical to success as fin return. #CECPSummit.

# 14th Annual Excellence Awards



LEFT, L TO R: Thomas Tighe, Direct Relief; Michelle Grogg, Cargill; Ezra Garrett, PG&E  
RIGHT, L TO R: Eileen Howard Boone, CVS; Ezra Garrett; Thomas Tighe; Michelle Grogg

CECP's Excellence Awards winners join a distinguished roster of companies that take part in an ongoing awareness-building effort on their behalf by CECP. Presented annually since 2000, these awards are juried by an external Selection Committee comprised of representatives from the corporate, nonprofit, consulting, media, and academic communities. For more information on the Excellence Awards, please visit <http://cecp.co/awards>.

## Congratulations to the 14TH ANNUAL EXCELLENCE AWARDS recipients!

### Directors' Award: Direct Relief in collaboration with FedEx

Presented to Thomas Tighe, President and CEO, Direct Relief, at the CECP Summit

### President's Award: PG&E Corporation

Presented to Anthony F. Earley Jr., Chairman, CEO, and President, at the Board of Boards CEO Roundtable, February 2014

### Chairman's Award: Cargill

Presented to Gregory Page, Executive Chairman, at the Board of Boards CEO Roundtable, February 2014

## Congratulations to the 2014 FORCE FOR GOOD AWARD recipient!

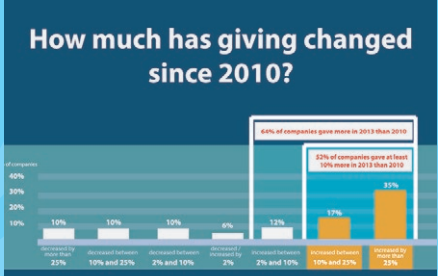
### Charles H. Moore Award for Leadership in Corporate Community Engagement:

Presented to Eileen Howard Boone, Senior Vice President of Corporate Social Responsibility and Philanthropy, CVS Caremark; President, CVS Caremark Charitable Trust, at the CECP Summit

## GIVING IN NUMBERS

Drawn from CECP's company-reported information—with more than US\$250 billion in comparative, corporate societal engagement data from leading multi-national companies since 2001—*Giving in Numbers* provides analysis and benchmarking for corporate societal investment professionals, the media, and the public.

CECP released its inaugural Giving in Numbers Brief at this year's CECP Summit. In the form of an infographic, the Brief includes insights on the funds, resources, and skills that companies invest globally to solve pressing societal challenges. See the infographic at <http://cecp.co/brief>.



## TOP TWEETS



**CARGILL FOODSECURITY**  
@foodsecureworld May 20

Thanks! RT @NJYMCA SR Congrats @Cargill @CECPtweets 2014 Chairman's Award Winner <http://bit.ly/1i0xjJS> #CECPSummit.



**PG&E**  
@PGE4Me May 20

RT @CECPtweets: @DirectRelief @PGE4Me @foodsecureworld celebrate receiving Excellence Awards at #CECPSummit. [pic.twitter.com/M40NXqUtM](http://pic.twitter.com/M40NXqUtM)



**DIRECT RELIEF**  
@DirectRelief May 20

MT @CECPtweets: @DirectRelief CEO, Thomas Tighe, receives Excellence Award presented by @PartnersSIDerek #CECPSummit. [pic.twitter.com/nlz3gMS9qw](http://pic.twitter.com/nlz3gMS9qw)



**CVS IN THE COMMUNITY**  
@CVSInAction May 20

So proud of @EileenBooneCSR who was recognized by @CECPtweets at the #CECPSummit for helping to drive social change. <http://ow.ly/i/5Dpzg>



# Key CECF Summit Takeaways and Words of Wisdom

The 2014 Summit focused on the essential theme, “What Counts” to companies and communities:

## LEADERSHIP

- ▶ Think like a movement builder, not a philanthropist.
- ▶ Advocacy is transformational philanthropy: going after entrenched interest to change the power dynamic.
- ▶ Leadership is being decisive, accountable, and courageous.
- ▶ Programs need to be a priority from the top down, but need support from the bottom up.

“We needed to fix the company for our six million Representatives around the world, so that they could make money and invest in our causes. We have to be successful for *them*.”

SHERI MCCOY, CEO, Avon Products, Inc.

## CULTURE

- ▶ Culture and values need to be connected to everyday life and translated into every job; culture needs a strategy.
- ▶ Focus on the interior of your company first.
- ▶ A company’s brand is no stronger than its weakest link.

## OPPORTUNITY

- ▶ Opportunity can be measured.
- ▶ Disconnected youth—those not in school or work—are the biggest predictor of opportunity, which affects the entire community.
- ▶ A healthy society equals a healthy business.
- ▶ Business has real capabilities that are relevant to solving societal problems.

## CHANGE

- ▶ Over the last decade, society has gone from “old power” to “new power” and from “leader driven” to “peer driven.”
- ▶ Societal challenges are too big for one sector to address alone. There’s no way to get there through aid alone; we need entire systems.
- ▶ The definition of innovation is finding new insights into old problems.

“Movements say: ‘Enough is enough. We have to solve our own problems and we cannot wait. We have come together to help ourselves.’”

KENNEDY ODEDE, President and CEO, Shining Hope For Communities

“Societal engagement in your company is not philanthropy or CSR as a side activity; it’s being able to explain what you do in your core business every single day, and how that adds value to society—and then deliberately expanding that impact.”

KATHLEEN MCLAUGHLIN, President, Walmart Foundation

## MEASUREMENT

- ▶ 76% of companies are measuring the societal outcomes and/or impacts of their grants and are starting to use those insights to inform their core programs and measure the value of their investments.
- ▶ Apply the same measurement principles from business to corporate societal engagement.
- ▶ Root program goals in measurement and data; make your goals compelling and specific.



## CUSTOMERS AND COMMUNITY

- Invite participants into the story; honor the wisdom of everyone.
- We've become experts at saying no, but not at being transparent about our priorities.
- Exist for your customers; help them realize their hopes and ambitions.
- Businesses are a vital local stakeholder; speak up and show support for what matters.

"Innovation is not just about creating a new thing. The real innovation is about bringing new insights to old problems."

**EMMETT CARSON**, CEO and President, Silicon Valley Community Foundation

"As companies address the many issues they will face, or as they find themselves under siege, they will suffer if they do not have connections to the community, so they can be open and transparent and tell people what's going on." **IRENE DORNER**, President and CEO, HSBC Bank USA, N.A.

## TRUST

- If a business lost its license to operate, what would that cost? Change the probability of that happening by decreasing risk through societal engagement.
- It takes two minutes to knock down trust, and 150 years to rebuild it. The only way to rebuild is through people.

"'New power' is driven by technology, but it's a people-enabled form of mass participation. It comes from millions coordinating together and creating something that's even stronger and more effective than traditional top-down 'old power'."

**JEREMY HEIMANS**, CEO, Purpose

## BUSINESS STRATEGY

- Community engagement can be a competitive weapon; it should be an integral part of a company's overall strategy.
- Craft your programs in business terms. What is the contribution to overall business goals? Talk to business heads and ask them what they need or worry about.
- Engagement needs to be organically rooted in business in order to be authentic.
- There's nothing wrong with being profitable. That's what keeps societal programs going.

## COMMITMENT

- Societal engagement work is incremental.
- Be in it for the long haul or not at all.

## EMPLOYEES

- To attract and keep highly sought-after employees, meet their internal needs and desires to give back and work somewhere they can be proud of.
- Engaged employees give you engaged customers.
- Some companies find that offering skills-based volunteering opportunities encourages greater employee engagement than offering "hands-on" opportunities and is more likely to retain employees, who can cost \$100,000-\$125,000 each to replace.
- Employee engagement is an investment of skills in the community.

"It can be easy to sit in our corporate offices and make decisions that are far removed from the impacts our companies have on people and communities. It is important for us to get out into the field to affirm our own personal commitments and what we're fighting for."

**CHRISTINE BADER**, Author, *The Evolution of a Corporate Idealist*



CECP would like to thank its Convening Sponsors for their generous support of the 2014 CECP Summit and the 14th Annual Excellence Awards ceremony:



CECP would also like to thank Ink Factory for its graphic visualizations, capturing the momentum and spirit of the Summit, and CorpsGiving for coordinating CECP's first on-site service activity, benefiting SeriousFun Children's Network and The Hole in the Wall Gang Camp.

## Summit Agenda Highlights

### MONDAY, MAY 19, 2014

Welcome Reception

### TUESDAY, MAY 20, 2014

Networking Breakfast: By Industry

Opening Remarks: "What Counts": **Daryl Brewster**, CECP

The Evolution of a Corporate Idealist: **Christine Bader**, Author, *The Evolution of a Corporate Idealist*

#### KEYNOTE

*Unlocking People Power: How to Think Like a Movement-Builders*: **Jeremy Heimans**, Purpose

#### BREAKOUTS

*Realizing the Future We Want: The Corporate Role in Global Development*

- **Emad Bibawi**, KPMG; **Sharon Kathryn D'Agostino**, Johnson & Johnson; **Georg Kell**, United Nations Global Compact; **Andrew Park**, Bloomberg LP; **Heather Grady**, Conrad N. Hilton Foundation

*Harnessing Employee Passions: Models that Work*

- **Akhtar Badshah**, Microsoft; **Pat Gottfried**, Apollo Education Group; **Jeff Senne**, PwC; **Diahann Billings-Burford**, Time Warner Inc.

*Amplifying Impact: The Role of Companies in Supporting Collaboration*

- **Pamela P. Flaherty**, Citi Foundation; **Greg Hills**, FSG; **Margaret Coady**, CECP

Networking Lunch: Employee-Engagement Programs

Celebration of the 2014 Excellence Awards:

*Making the Business Case for Community Engagement: Telling Your Company's Story*

- **Ezra Garrett**, PG&E Corporation; **Michelle Grogg**, Cargill; **Thomas Tighe**, Direct Relief; **Eileen Howard Boone**, CVS; **Derek Mitchell**, Partners in School Innovation

*What Counts: Deliciousness*: **Robert Karimi**, ThePeoplesCook

*Emerging Trends in Corporate Contributions*: **Michael Stroik**, CECP

#### BREAKOUTS

*Giving in China and India: 2.5 Billion Reasons to Do Better*

- **Deval Sanghavi**, Dasra; **Ping Wang**, YouChange Foundation; **Carmen Perez**, CECP

*Redefining Returns: The Impact of an Emerging Investment Model*

- **Dana Pancrazi**, F.B. Heron Foundation; **Ommeed Sathe**, Prudential; **Sonal Shah**, Beeck Center for Social Impact & Innovation at Georgetown University; **Amy Bell**, J.P. Morgan Social Finance

*SeriousFun: On-Site Service Opportunity*

- **Grady Lee**, CorpsGiving; **Clea Newman**, SeriousFun Children's Network

*CEOs Speak Candidly: How to Get Engagement at the Top*

- **Carly Fiorina**, Good360; **David Stern**, National Basketball Association; **Debra Benton**, Benton Management Resources, Inc.

*Narrative Works: How Storytelling Can Help Educate, Organize, and Facilitate Change*

- **Cara Mertes**, Ford Foundation's JustFilms; **Katy Rubin**, Theatre of the Oppressed NYC; **Yvette Alberdingk Thijm**, WITNESS; **Paul VanDeCarr**, Working Narratives

CECP Excellence Awards Networking Reception

### WEDNESDAY, MAY 21, 2014

Networking Breakfast: Corporate Giving Focus Areas

#### OPENING REMARKS

"What Counts": **Margaret Coady**, CECP

*Shining Hope for Communities: Kennedy Odede*, Shining Hope for Communities (SHOFCO)

*What Counts at Walmart: Building a Better World through the Strengths of Business*: **Kathleen McLaughlin**, Walmart Foundation

#### KEYNOTE

*Balancing Interests: Demonstrating the Value of Local and Global Philanthropy in a Shrinking World*

- **Emmett Carson**, Silicon Valley Community Foundation; **Stacy Palmer**, *The Chronicle of Philanthropy*

#### BREAKOUTS

*Goal Setting for Greater Results*

- **Brian M. Grill**, Merck & Co., Inc.; **Marcie Passarella**, PepsiCo, Inc.; **Farron Levy**, True Impact

*Nonprofit Board-Matching: Benefiting Your Company, Executives, Nonprofits, and the Community*

- **Grace Koo**, Credit Suisse; **Carolyn Powell**, CP Integrated Solutions (CPIS); **Jilly Stephens**, City Harvest; **Alice Korngold**, Korngold Consulting LLC

*New Models for Supporting a Shovel-Ready Third Sector*

- **Kristin Giantris**, Nonprofit Finance Fund; **Jeff Nugent**, The Center for Leadership Innovation; **Tracy Palandjian**, Social Finance, Inc.; **Kerry H. Sullivan**, Bank of America

Networking Lunch: Foundation vs. Corporate Staff

#### LEADERSHIP PLENARY

*Focusing on What Counts*

- **Irene Dorner**, HSBC Bank USA, N.A.; **Sheri McCoy**, Avon Products, Inc.; **Tony Schwartz**, The Energy Project

*The Opportunity Index: What Your Zip Code Says About Upward Mobility*: **Mark Edwards**, Opportunity Nation

*Reflecting on "What Counts"*: **Courtney Murphy**, CECP

#### SPOTLIGHT SESSIONS

*Get Social for Good on #GivingTuesday*

- **Melissa Buchanan**, Wells Fargo; **Elizabeth Lipscomb**, Discovery Education; **Henry Timms**, 92nd Street Y

*Investing in Education: Why Common Core Matters*

- **Karl Rectanus**, Lea(R)n, Inc., and TechExecutives; **Kelli Wells**, GE; **Jason Weedon**, Achieve; **Ian V. Rowe**, Public Prep

**CLOCKWISE ON COVER:** Kennedy Odede, *Shining Hope for Communities*; Sheri McCoy, Avon Products, Inc.; Tony Schwartz, The Energy Project; Carly Fiorina, Good360; David Stern, NBA

*Presentations, resources, photos, videos, and attendee blog posts can be found at [cecp.co](http://cecp.co).*



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"I helped to start CECP with  
the belief that corporations could  
be a force for good in society."  
PAUL NEWMAN, FOUNDING CO-CHAIR, CECP

