SOCIETE GENERALE CHARITY PARTNER 2026 - 2031

Stage 1 Application Information Pack

THE FUTURE IS YOU SOCIETE GENERALE

DISCLAIMER

Societe Generale is looking for our next charity partner, to work with from March 2026 for a five-year term. Our aim is for this partnership to be mutually beneficial, and to help us achieve our CSR strategy: *to improve employability prospects for people from socially disadvantaged backgrounds.*

This document outlines who we are, what we can offer, what we're looking for, and how to apply. It aims to provide all the information you as charities need to decide whether we'd be a good fit together, and if you want to apply.

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SOCIETE GENERALE

1. WHO WE ARE

Societe Generale is a leading European financial services group, with expertise in the UK ranging from corporate and investment banking to asset management, prime brokerage and clearance services.

Our UK entities who will participate in this partnership are SG London Branch (SGLB) and SG International Ltd (SGIL), who are all based at our One Bank Street office in Canary Wharf, London (approximately 1,600 employees in total). This partnership will not involve SG's global entities.

CSR at Societe Generale

The UK CSR team takes the lead on charity partnership management, fundraising, and volunteering activities for SGLB & SGIL.

We have two CSR managers who are part of the UK Communications team, based in Canary Wharf, London. The roles are split across fundraising and volunteering, and the successful partner will work with both managers and become an extension of the team to deliver activities for staff.

Additionally, they collaborate with the SG UK Foundation (SGUKF), a separate legal entity and registered UK charity which makes financial contributions to the partnership in recognition of employee fundraising and volunteering. You can find out more about the SGUKF here.

Our CSR strategy

In the UK, our CSR strategy focuses on improving employability prospects for people from socially disadvantaged backgrounds. With the support of the SG UK Foundation, we are proud to be investing in programmes that provide alternative pathways into employment and skills development opportunities for individuals and organisations in the communities in which we operate. We measure the success of our initiatives using the B4SI framework.

Our CSR activity is enabled by our CSR Policy. This entitles every staff member to 24 hours of paid time to undertake fundraising and volunteering. Staff have the option to use this time to support our CSR initiatives (and most do) or to support causes personal to them. The time can be taken flexibly, at manager discretion.

When we talk about employability prospects and socially disadvantaged backgrounds we mean:

- **Employability prospects:** We define this in terms of supporting people to gain employment or work experience, to re-enter education, take on voluntary roles, get a promotion or improve their skills – from digital skills to general communication and presentation skills, etc.
- **Socially disadvantaged backgrounds:** We want our CSR work to contribute to social mobility. Our definition of socially disadvantaged backgrounds encompasses people who have lower than average earnings, social class, education status, or whose parents may have had this – essentially people from lower socio-economic backgrounds. We work with partners who target these types of beneficiaries and track this demographic data. We are happy to be led by our charity partner on how they define disadvantage and/or social mobility.

Historically our fundraising and volunteering programmes have had the same strategy but operated independently of each other, delivered by different partnerships. As part of our new charity partnership in 2026, our aim is to bring these elements together, fundraising for a single charity who will also help us deliver our flagship volunteering initiative, the Young Influencers Programme. In the following sections we will outline the history of these programmes to give context, but please note we are looking to find a new model that takes the best of both forward.

Our Fundraising programme to date

Our fundraising programme is a 'charity of the year' style partnership, with our employees fundraising for a specific project (or projects) over the course of the partnership. We ask our charity partner for access to their challenge events and beneficiary case studies to support fundraising and raise awareness amongst staff. Many of the fundraising events are currently run in-house.

Our current partnership with Shelter was extended from three to five years, and we are on track to reach £2 million in fundraising by its conclusion in March 2026. Our previous partnerships and their respective values are listed below:

- 2018 – 2021: CLIC Sargent (3 years, £1.3m)
- 2015 – 2017: Mind (2 years, £840,000)
- 2013 – 2015: Alzheimer's Society (2 years, £930,000)
- 2011 – 2013: Teenage Cancer Trust (2 years, £650,000)

Our partnership with Shelter funds their GROW Programme, providing 12-15-month work placements for people with lived experience of homelessness and housing issues. To date we have funded over 35 trainees (direct beneficiaries), as well as three full-time roles at Shelter (two officers and one manager) who are crucial to the delivery of the programme. We were also able to fund a successful pilot to extend the initial placements from 12 to 15-months.

Our fundraising generally consists of:

- 45% from employee donations/fundraising
- 10% from corporate donations (these are ad hoc rather than a fixed payment)
- 45% matched funding for employee efforts from the SG UK Foundation (see section 4)

We expect this partnership to benefit in a similar way but there is a minimum commitment from the business given the added volunteering aspect (see section 2).

Our Volunteering programme to date

We have a range of volunteering initiatives that our staff can get involved in throughout the year. Our focus is on encouraging skills-based volunteering to maximise our impact.

Our current portfolio of volunteering activities include:

- Skills-sharing sessions with staff from local charities, run throughout the year.
- Mentoring programmes with staff from local charities, staggered throughout the year.
- Ad hoc skills-sharing activities with local schools or charities, run throughout the year.
- Team practical volunteering days, run across two fortnights a year.

Most of our volunteering activities are run in partnership with the East London Business Alliance (ELBA), with others run with Shelter or charities supported by the SG UK Foundation.

Our flagship volunteering initiative is the Young Influencers Programme (YIP), which gives Year 12-13 students the opportunity to discover the world of banking, while gaining key employability skills. We work with 70 students a year from three local secondary schools, and the programme is currently delivered with ELBA.

The programme is delivered across four 1.5-hour workshops in Year 12 (January to April) and two workshops in Year 13 (autumn term). The sessions are led by an ELBA staff member, with 20-25 SG staff working with students in small groups (we aim for a 6:1 ratio of students to volunteers).

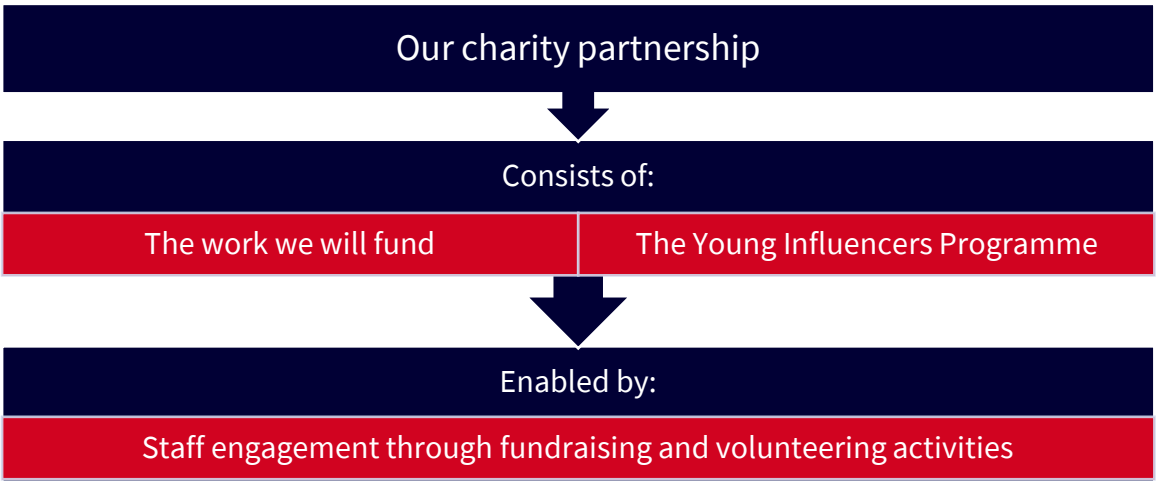
In Year 12, students work in teams with employee volunteers to develop their own positive impact project for their local community. At the end of session 4 they submit a project plan outlining their team's idea. The top three teams from each school are invited to a Pitch Day where our volunteers coach them to develop and carry out a successful pitch.

As students move into Year 13 they receive 1:1 personal statement support from SG volunteers in the early autumn term, followed by a networking skills workshop – the final event of the programme. During this event, students network with SG staff and receive exclusive support to apply to our Young Influencers Work Experience Programme, a four-week paid work experience placement at Societe Generale taking place in July each year.

Our Work Experience programme is run in-house and acts as the bridge between our CSR and Early Careers teams. We offer around 20 placements a year, open to all Year 13 students at YIP partner schools. Work Experience is run separately from the core Young Influencers Programme and we do not expect our next charity partner to help us deliver it, though we welcome opportunities to collaborate.

2. WHAT WE WANT THE PARTNERSHIP TO LOOK LIKE

In line with our CSR strategy, we want the outcome of this partnership to be improving employability prospects for people from socially disadvantaged backgrounds. This would be achieved through 1) our funding and 2) through the co-delivery of the Young Influencers Programme.



We've chosen to make this a five-year partnership to allow us time to set up and develop a partnership that can make a real difference, with the ability to pivot if needed and still achieve our aims. It also gives our charity partner the financial security of long-term income.

A five-year partnership can also come with challenges, such as the potential for engagement fatigue among our staff. We'd like to hear about any potential issues that charities anticipate on their side too and take a collaborative approach to resolving them.

What are we offering?

The funding we can offer a charity partner is split into two categories:

- Minimum £40,000 annual financial commitment from the business
- Approximately £250,000 - 300,000 annually from funds raised by Societe Generale staff, ad hoc business donations and matched funding from the SG UK Foundation.

We also have a strong volunteering culture, with many UK staff engaging across initiatives. We're not expecting our next charity partner to provide all our volunteering opportunities, but we have a strong foundation to provide volunteers for your programmes should you need them.

What would we fund?

We are looking to fund a specific project that achieves employability outcomes for people from socially disadvantaged backgrounds, or to fund the core work of a charity where that is their main focus. In the latter situation, we would need to make sure there is a clear and compelling narrative in place to articulate what we're achieving together.

These funds can also be spent on the delivery costs of the partnership. For example, to cover salary costs for an account manager to liaise with us on fundraising, and a delivery manager to work on the Young Influencers Programme.

What are we looking for?

It's important to us that we're upfront with charities about what we're looking for, what's a nice-to-have, what's a dealbreaker and why. Please look at our 'must haves' below. The first section forms our "eligibility criteria" – if the answer for your charity is either 'no' or 'we'd really struggle with that' then it's unlikely the partnership will be the right fit for you.

ELIGIBILITY CRITERIA Our next charity partner must…
Be registered charity with the UK Charity Commission.
Be registered, or happy to register, with the Charities Aid Foundation to enable matched funding payments from the SG UK Foundation.
Not have a political or religious purpose or affiliation. *Our global code of conduct prohibits us from working with these types of charities.*
Have annual voluntary income of between £4.5 million and £25 million.
Have previous experience with corporate volunteering and employee fundraising and ability to provide some opportunities from "day 1" of the partnership. *Staff engagement is a key driver for us. We know setting up a new partnership takes time, but we do need there to be some engagement opportunities from the beginning.*
Have skills-led volunteering opportunities that are important to the delivery of their work. *Our volunteers should have the opportunity to use and enhance their own skills, and we want to avoid any activities that are put on solely for our benefit and not the charity's.*
Provide a dedicated account manager who covers no more than 2-3 corporate partnerships *For more information on this please see FAQs.*

OUR FUNDING…
Must support work (a specific project or covering core costs) that improves employability prospects for people from socially disadvantaged backgrounds. *To ensure our funding aligns with our UK CSR strategy.*
If supporting a charity's core costs, there must be a clear and compelling narrative around what we're achieving together. *This narrative is important for our impact reporting and employee engagement.*
If supporting a specific project, it must already be within scope of the charity's strategy. *We don't want charities to change goals or direction just to secure this funding. We're happy to fund a new or bespoke project, but it must work for both strategies.*

Should include all overheads associated with partnership delivery, reporting, communications, etc. (including the co-delivery of the Young Influencers Programme)
Must go towards something (specific project/core costs) that has robust impact reporting. *We report on the impact of our charity partnership to our employees, Head Office, and the public.*

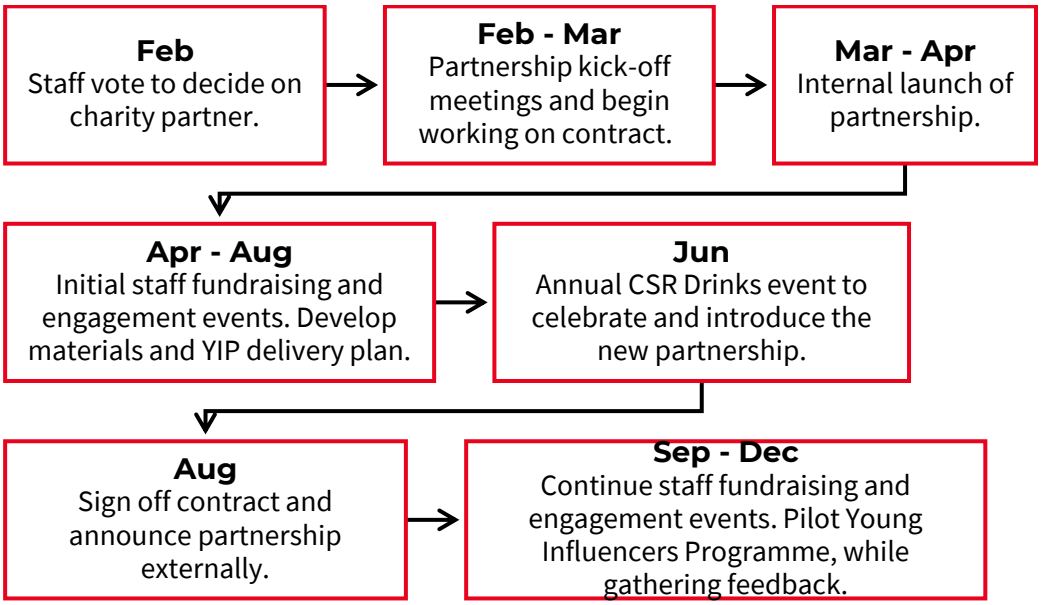
OUR VOLUNTEERING...
The charity must help us create a new way to deliver the Young Influencers Programme. *We recognise that our new charity partner will have a different model and way of working with their beneficiaries, so see this as an opportunity to rethink and revamp the delivery of YIP.*
Must align with the charity's strategic aims.
Must have robust impact measurement built into the programme's delivery. *It's crucial that we can measure the impact YIP has and make improvements where needed.*
Must have a dedicated delivery manager who is responsible for the programme delivery.
Must have multiple in-person skills-based volunteering opportunities for large numbers of SG staff (10-30), with most activities held at our offices in Canary Wharf. Staff volunteering is at the core of how YIP operates, a key element that we want to retain.
Must engage young people in any year from 10-13 through multiple touchpoints. We want to retain the current YIP focus on working with young people. Working with students across multiple touchpoints is important to helping us have a significant impact.

What are we not looking for?

1. The YIP should not focus on just East London, we are looking to expand the reach of this project to the whole city or beyond (provided delivery can take place at our office).
2. We don't want charities to come up with something new that doesn't align with your strategy. If a project doesn't work for you, please don't pitch it to us.
3. Our current charity partnership is with Shelter, so we are not looking for our next charity partner to be focused on homelessness or housing.

What do the first 9-12 months of partnership look like?

The below is a rough outline of a timeline and subject to change slightly based on both partners.



What are our KPIs?

We don't have set KPIs for what we want this partnership to achieve, as we will be guided by our charity partner's theory of change, delivery model, and impact tracking. Robust impact measurement is extremely important to us. The metrics we currently use to track the impact of our partnerships are based on the B4SI framework:

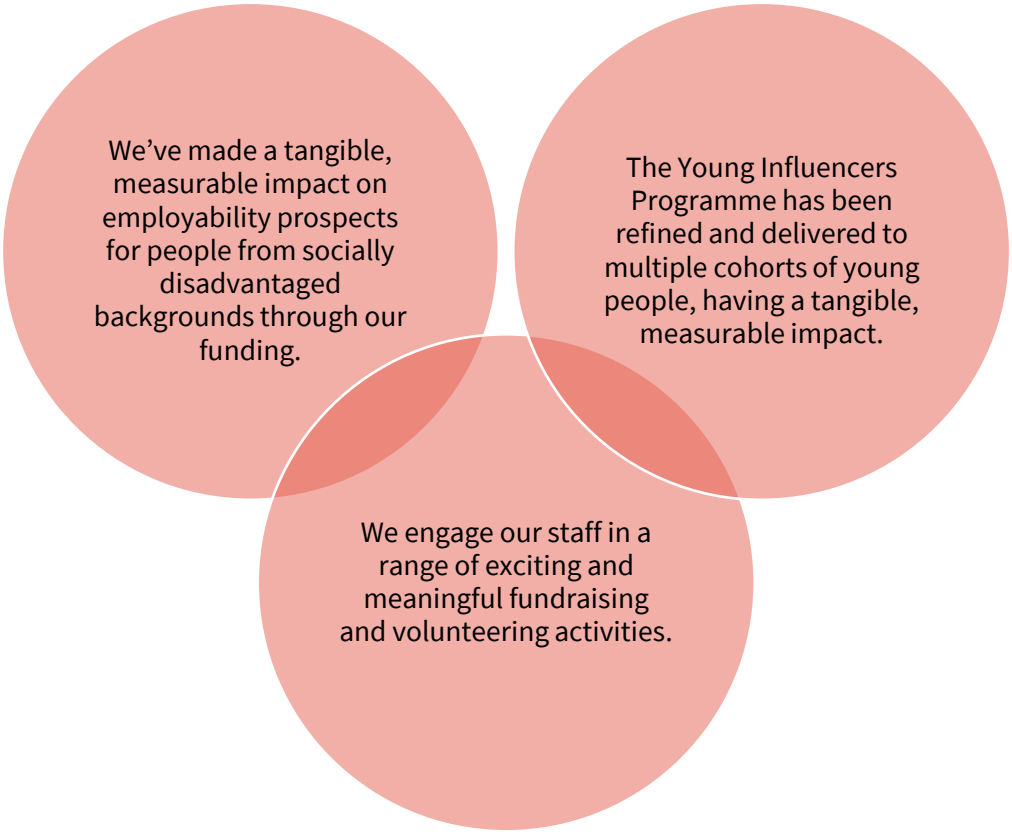
1. **Specific & strategic outcomes**
   - Number of people in jobs (offered/accepted a job) as a result of our programmes.
   - Number of people in education, training, work experience, or volunteering role.
   - Number of people securing a job interview.
   - Percentage of participants reporting increased employability skills and increased confidence in their skills.

2. **Broad programme outcomes**
   - Number of direct and indirect beneficiaries.
   - Number of participants in mentoring programmes.

We are including these metrics in this pack to give you a sense of how we approach impact measurement, but we will work *with* the successful charity to develop and agree detailed KPI's and objectives once they are selected.

What do we want to achieve across five years of partnership?

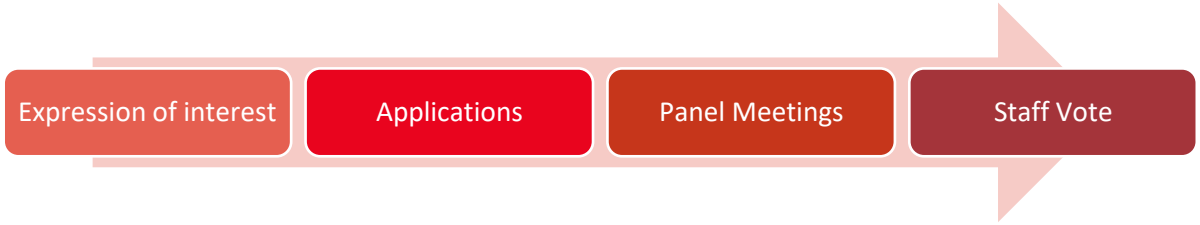
There are three main things we want to be able to say in five years' time:



SOCIETE GENERALE

3. THE APPLICATION PROCESS

We have developed a four-stage process which is outlined in this section.



Stage 1: Expression of Interest

Our first stage is an expression of interest and basic eligibility check. We will have an open invite to anyone who is interested in applying to complete the Stage 1 Form. This form is open from **6 May to 20 June 2025**.

We want to gather some basic information about your organisation, how you are structured, and an overview of how you would spend the funding and engage our staff through volunteering. It's important to be clear on how we can make an impact through a potential partnership.

There are also some simple yes/no questions around eligibility (you can see our basic criteria in this section). If you do not fit these criteria, then you will not progress beyond this stage. We value charity time and know how much effort goes into preparing an application, so **if you don't meet the basic criteria then please do not apply**.

During this time the UK CSR Team will also host two webinars Thursday 15 May 14:00 – 15:00 & Thursday 5 June 14:00 – 15:00 to share an overview of what we are looking for and answer any questions. These will be interactive discussions rather than a repeat of the content in this pack.

Decision making
All expressions of initial interest will be reviewed by the CSR Team.

We expect there to be a fair amount of interest at this initial stage but aim to bring only 8 – 10 charities forward to the *Application* stage. The *Application* stage is where most work will be required for all parties so we will only bring charities forward that we feel have a strong possibility of being our ultimate partner.

Feedback
Given the volume of interest we expect and the limited information we will have at the initial stage we unfortunately won't be offering tailored feedback at this stage. All charities will be notified of the outcome by **Friday 11 July 2025**.

Stage 2: Applications

Our second stage is a full application form. This will include much more detail than the expression of interest, requiring longer answers and evidence to help us understand:

- How the work our funding would support fits into your & our strategy and the impact it would have
- How you would work with us to deliver the Young Influencers Programme
- How this work would be costed
- How you would manage this partnership
- Examples of communications materials and impact reporting from previous partnerships and previous volunteering initiatives

Our aim is to get a much clearer, tangible view of how you see our partnership working day-to-day, how it aligns with both organisations' strategies and the experience you have in delivering this. We are not looking at the charity's profile within the sector or prioritising one beneficiary group over another, provided they meet our strategic aims.

The form will be sent directly to successful charities by **Friday 11 July** and they will have until **Friday 29 August 2025** to complete and return it.

During Stage 2 the UK CSR Team will also host one group call to answer any further questions that may arise **on Tuesday 29 July, 09:30 – 10:30**.

Decision making
All applications will be reviewed by the CSR Team.

We will put forward a maximum of five charities to the next stage.

Feedback
Given the work involved at this stage and the time spent to craft each application, each charity will receive tailored feedback, whether they are successful or unsuccessful. All charities will be notified of the outcome by **Friday 3 October 2025**, with feedback calls taking place in the following two weeks.

Stage 3: Panel Meetings

The process so far has been in the hands of the UK CSR Team, looking at the practicalities of working in partnership and meeting strategic objectives. The purpose of Stage 3 is to bring in other stakeholders to get to know the charities and proposed projects. No new information is being asked for here, this is your opportunity to get to know some other stakeholders and our chance to get some other perspectives in the selection process. We will however, ask for a contact at another existing or previous corporate partner of yours who we can speak to and get a verbal reference.

This stage is an in-person meeting during **w/c 3 November 2025**. Each charity will be given a 45-minute slot to do a brief (10 min) reminder/overview of the proposed partnership and then have 30 minutes for questions and discussions. Everyone attending will have seen the full application form in advance and will be familiar with this detail. We expect the questions will largely focus on bringing some of this to life through more examples.

Our preference is that these are in-person, and we are happy to cover travel expenses for non-London based charities (from within the UK). If this is not possible then please speak to us and we can arrange alternatives.

At this stage, each charity will also be going through our in-house due diligence process so there may be some additional questions from our teams regarding this, but this will not feature in the in-person meetings.

Ahead of these meetings, Shelter (our current fundraising partner) and ELBA (our current YIP delivery partner) will also host a call (without the presence of the CSR team) to answer honestly any questions you have. Attendance is optional. The call will take place on **Tuesday 14 October 2025, 11:00 – 12:00**.

Decision making
The meetings will be held with a group of our staff including the CSR Team, representatives from our Executive Committee (C-suite), representatives from the SG UK Foundation, and staff members to represent different areas of the business. Exact participants are TBD but we aim to have no more than 12 people.

Feedback
The successful charities will be notified by **Monday 10 November 2025** and given exact details on how the final stage will work, details of materials required, and any feedback from this stage that may help them going forward.

The unsuccessful charities will be notified by the same date, and a feedback session held with each charity to discuss the process and share any feedback.

Stage 4: Staff Vote

Strong staff engagement is crucial to the success of our future partnership in both fundraising and volunteering, so we must offer our employees the chance to have their say on our next charity partner.

We aim to have three charities in the staff vote stage, which will be completely blind. By 'blind vote' we mean that our staff will not know the names of the charities, we will not invite them to present or canvas our staff, and do not want charities paying for targeted LinkedIn campaigns or similar. Staff will be presented with the merits of the projects/programmes they will support, and vote based on that information alone. We hope that running our staff vote blind will have the following benefits:

- We avoid a situation where the charity with the best-known brand has the highest chance of winning. All charities have an equal shot and are judged based on their cause and the strength of their work.
- Aside from sending short summaries of their proposals (outlined below) there is no additional charity resource required. This keeps the process as efficient as possible from the charity side and avoids using up staff hours or resources unnecessarily.

In early December 2025 we will ask for a summary of where the funding will go, what difference it will make, and how you see staff engaging.

Decision making
All SG London Branch and SG International Limited staff will be eligible to vote. Staff will rank the charities in order of preference and a score will be given to each charity. The highest scoring charity will become our partner.

Feedback
The successful charity will be notified no more than 1 week after the vote closes, and work will then begin on a partnership agreement.

The unsuccessful charities will be notified and receive personalised feedback with the opportunity to discuss the process. Whilst our priority at this stage is to direct our resources to the successful charity partnership, the SG UK Foundation will also make a small contribution to each of the unsuccessful charities at this stage of £2,500.

Timeline

PROCESS	DATE
STAGE 1: EXPRESSION OF INTEREST	
Initial interest window	6 May – 20 June
Information webinars with CSR Team	15 May & 5 June (14:00 – 15:00)
Notification of success (no feedback provided)	11 – 14 July
STAGE 2: APPLICATIONS	
Full-application window	14 July – 29 August
Group call with CSR Team	29 July (09:30 – 10:30)
Feedback for successful/unsuccessful charities	6 – 10 October
STAGE 3: PANEL MEETINGS	
Individual calls with CSR Team	W/C 13 OCT & W/C 20 OCT
Group call with Shelter and ELBA	14 October (11:00 – 12:00)
In-person meetings	4 or 5 November
Feedback for successful/unsuccessful charities	10 November
STAGE 4: STAFF VOTE	
Summary content deadline	Early December
SG staff vote	February
Feedback for successful/unsuccessful charities	1 week after vote closes

As we progress some of the later dates may shift to within a week of the above based on availability and workload.

4. THE SG UK FOUNDATION

The Societe Generale UK Foundation (the "Foundation") is the corporate charity for the Societe Generale UK Group ("SG UK"). The Foundation is a separate entity and registered charity governed by a Board of Trustees made up of SG UK employees and independent representatives.

The Foundation's strategy is centred on investing in Bright Futures with the goal of unlocking the potential in our communities. The Foundation's activities centre around three main pillars: employment and education, societal, and matched funding investments. Find out more here.

While the Foundation is a separate charity, it aligns its activity to that of SG UK, aiming to add value to the CSR strategy.

Funding

The Foundation's matched funding policy supports the activities of SG UK employees providing enhanced matching for the SG UK charity partner. This includes matching for volunteering time, fundraising, donations, payroll giving, in-kind, and employee engagement campaigns.

In previous SG UK partnerships, the Foundation has played a key role in funding, donating around 47% of the total raised through matched funding.

The Foundation will continue to provide matched funding for the 2026+ charity partner although the matching policy is always subject to change. The Foundation is also interested to explore additional funding opportunities for the 2026+ charity partner that could provide wraparound or bookend support to the central programmes or YIP.

Payments

Direct donations from the Foundation will be made through its Global Cash bank account upon receipt of a clear invoice and once approved by Trustees.

All matched funding payments are made through the Foundation's Charities Aid Foundation (CAF) account. The 2026+ charity partner will need to register with CAF to receive payments.

Reporting

In line with SG UK CSR, the Foundation uses the B4SI framework for monitoring and reporting impact. Reporting requirements will be comparable to CSR but the 2026+ charity partner will need to be able to record and report separately on contributions from the Foundation. There may also be ad hoc requests for updates for the Foundation Board over the partnership lifetime.

Communications

As a registered charity and corporate foundation, it's important that the Foundation's contributions are clearly recognised in all communications. All external communications by the 2026+ partner would require approval.

Staffing/Management

In the main, the 2026+ partnership will be managed by the CSR team. However, there would also be a regular check-in with the Foundation Director, the main point of contact. Meetings to discuss specific Foundation matters would be scheduled monthly initially then quarterly thereafter.

Ideally, the 2026+ charity partner would also attend Foundation Board meetings ad hoc and, where possible, provide engagement opportunities for Trustees.

5. FAQs

We've tried to include as much information as possible in this pack, but we know there will be more that charities want to know about us, what we can offer and the process. We've created an FAQs page here that we'll be updating regularly to provide more detail.

We also encourage interested charities to attend one of our Stage 1 webinars to learn more about us and ask questions:

- Thursday 15 May, 14.00 – 15.00
- Thursday 5 June, 14.00 – 15.00

Register here for either session.

Thank you for your interest in partnering with Societe Generale, we look forward to hearing from you.