

# KEY INFORMATION FOR CHARITIES

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## WHO WE ARE

### Societe Generale UK

Societe Generale is one of the leading European financial services groups, with expertise in the UK ranging from corporate and investment banking to private banking, asset management, prime brokerage and clearance services to vehicle and equipment finance.

Our UK platform is composed of five legal entities:

- SG London Branch (SGLB)
- SG International Ltd (SGIL)
- Kleinwort Hambros Private Banking (KH)
- ALD Automotive (ALD)
- SG Equipment Finance (SGEF)

These entities range in size, geographic location, and level of CSR engagement. The successful charity partner would work with all entities and their staff (approximately 3,600 employees across all areas). The UK CSR Team takes the lead on the partnership for most of the entities.

Additionally, we collaborate with the SG UK Foundation (SGUKF), a separate legal entity which makes financial contributions to the partnership in recognition of actions taken by employees of the UK platform. The SGUKF doesn't have any employees, meaning that all staff engagement is delivered via the bank's five entities.

Our office locations, covering all of our UK operation, are widely spread across the country:

- London (Canary Wharf, St James's Square, Richmond)
- Bristol
- Channel Islands
- Gibraltar
- And satellite offices in Edinburgh, Leeds, Reading, Milton Keynes and Northampton

### The SG UK CSR team

Our core CSR UK team is comprised of two people who report into the UK Communications team and are based in Canary Wharf, London. There is also an independent CSR manager based in Bristol, responsible for ALD staff engagement.

An account manager from our team will be assigned to liaise with the charity partner on a regular basis. Our charity partner will become an extension of the team in order to deliver relevant fundraising activities for staff.

## WHAT WE DO

### Societe Generale Group CSR Strategy

SG's global CSR goals, driven by our headquarters in Paris, focus on inclusion through employability and education. As well as having a positive, local impact, our programmes benefit our staff and the bank as they strongly align and support our company values: Team Spirit, Commitment, Responsibility and Innovation. Click [here](#) for more information.

### Societe Generale UK CSR Strategy

In the UK, our CSR team primarily focuses on employee engagement through volunteering and fundraising.

Aligned with our Group's CSR strategy, we believe that everyone should have equal access to career opportunities, and thus have the chance to reach their potential. We also believe that a diverse workforce is key to a thriving business. So, we've focused our UK CSR strategy on making the banking sector more accessible to individuals who are typically under-represented in financial services - BAME, women, and those from low-socio economic backgrounds.

We're benchmarking our programmes against the Sustainable Development Goals in alignment with the bank's priority – to contribute to the positive transformation of our economies and societies - and are centering them around the skills development of these groups to increase the employment opportunities available to them in both the banking sector and beyond.

In 2021, we will launch a brand-new flagship programme, which will provide young people aged 17-18 with the essential skills needed in the workplace and culminate in work placement opportunities. The flagship programme will sit alongside our range of other staff volunteering opportunities in the areas of education and employability, delivered by longstanding partners.

As such, this charity partnership will support and align with our overarching aim, forming the fundraising element of our UK strategy.

To date, we have partnered with several charities, listed below with their respective partnership values:

- CLIC Sargent (3 years, target £1,000,000)
- Mind (2 years, £840,000)

- Alzheimer's Society (2 years, £930,000)
- Teenage Cancer Trust (2 years, £650,000)
- Friends of the Elderly (1 year, £113,529)
- Children's Hospices UK (1 year, £166,369)
- Cancer Research UK (1 year, £157,000)
- NSPCC (1 year, £117,000)

## **OUR EXPECTATIONS FOR THE CHARITY PARTNERSHIP**

Our key expectations for the partnership are:

- Alignment between the business and charity objectives to work towards a common goal over a three-year partnership;
- c. £250,000 per annum of partnership value;
- To fund a project (or projects) that have a focus on education or employability - projects solely focusing on raising awareness or educating about your cause will not be relevant;
- The project(s) will have a clear impact that staff can engage with and feel passionate about across all office locations, including the possibility to fundraise in each location.

In addition, we will be measuring the success of the partnership against the following Key Performance Indicator's (KPIs):

1. Specific & strategic outcomes:
  - Number of people in jobs generally (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 beneficiaries;
  - Number of participants in mentoring programmes.

We would like the successful charity to aspire to impact as many KPIs as possible through the proposed project, we however do not expect the project to have the capacity to impact all the KPIs. The full set of detailed KPI's and objectives will be discussed and agreed with the successful charity partner once selected.

Finally, we would like to explore how a partnership could bring additional value to either party, for example (all suggestions are optional):

- The potential for skills sharing from the business to the charity and vice versa;
- Employee volunteering opportunities\*;
- The opportunity to support, engage with or share key campaign messaging.

*\* Employee volunteering for staff should be skills-based and relevant to our global aims of education and employment. This activity could be designed for individuals or teams, and could be one-off or recurring (e.g. mentoring). All our staff are entitled to volunteer for up to 24 hours per year during work time.*

## **CHARITY PARTNER RESOURCE**

The charity will be required to provide the following (with additional requirements to be discussed and agreed with the successful charity):

- A dedicated Account Manager to work on the partnership full time;
- Support to the CSR team to organise events and campaigns, and engage employees;
- Links to key internal contacts such as communications, press, marketing, events, finance;
- Regional support or visits to all UK-based SG office locations;
- Communication support and stewardship to SG employees in the lead up to and post events;
- Volunteers to help at events;
- Merchandise and prizes for events, raffles and auctions;
- Bespoke fundraising collateral and marketing material;
- Contact with the charity CEO/senior manager and SG's Chief Country Officer;
- Networking/relationship building opportunities for key SG stakeholders;
- Quarterly partnership check-ins, funding reconciliations and project impact updates;
- Annual and end of partnership impact report;
- Monthly finance reconciliation;
- Continual endeavour to find opportunities to maximise the partnership for both parties.