The intersection of Diversity & Inclusion and Corporate Responsibility in the United States

COMMON PURPOSE

The intersection of Diversity & Inclusion and Corporate Responsibility in the United States
WHAT’S IN A NAME?

Corporate Responsibility, Sustainability, ESG (Environmental, Social, Governance), CSR (Corporate Social Responsibility), Diversity & Inclusion, Community Relations, EHS (Environment, Health and Safety), Purpose... Finding the right words for this paper was challenging. Professionals that work in these fields each bring their own lens and meaning to these words and that meaning helps drive their long term plans, annual priorities and day-to-day efforts. Some see them as closely related and even interchangeable while others feel strongly about the distinctions. As these professional fields evolve we are seeing more overlap in how they are managed and what each can learn from the other. We hope this paper will help to expand these connections and shared understanding.

We chose the terms Corporate Responsibility and Diversity & Inclusion for this work. Diversity & Inclusion is a broadly recognized description used by companies today. Corporate Responsibility was selected because it is holistic. Often people associate “Sustainability” with environmental priorities and “Corporate Social Responsibility” with a stronger social aspect. At Sodexo a broad view of Corporate Responsibility has led to the inclusion of safety, diversity, waste reduction, well-being and more into a holistic strategy roadmap called Better Tomorrow 2025. You can find more information about this approach on page 25.
For many in the business world, the Diversity & Inclusion and Corporate Responsibility platforms provide the meaningful purpose behind their work every day. This purpose is a motivating factor for employees, an engine for innovation, and an important point for building trust with consumers and communities.
Introduction

Today, many corporate professionals can cite a Diversity & Inclusion (D&I) or Corporate Responsibility (CR) initiative that makes them proud. To many, the D&I and CR functions provide the meaningful purpose their companies serve, in many cases becoming the heart and soul of the business. This purpose is a motivating factor for employees, an engine for innovation, and an important point for building trust with consumers and communities.

Despite the many commonalities, in the United States, D&I and CR functions have traditionally operated very separately. The two speak to many common stakeholders—investors, employees, suppliers, clients, customers—but often come at these stakeholders with very separate messaging. In many businesses the two functions can even compete for attention and resources. Further, we often observe that the two functions don’t fully embrace the other’s mission. Sustainability functions are sadly lacking in diversity of their teams and it’s not uncommon to attend a diversity event with an embarrassing level of waste on display.

It has taken hard work and commitment over many years from armies of D&I and CR professionals to become strategic partners within their business and demonstrate their critical contribution to business performance. But there is more work to be done. We are now seeing the potential to deliver far greater value to shareholders and other stakeholders through alignment and close collaboration of the D&I and CR functions. This could mark the next logical stage of evolution for D&I and CR, a new phase that leads to even greater value for shareholders, customers, employees and other stakeholders.
D&I and CR in the U.S. have traveled distinctly different paths, yet their origin stories share striking similarities as both have transitioned from reactive necessities to strategic drivers of business value.

Corporate Responsibility emerged with an emphasis on managing external stakeholders and defensive risk management as a response to activist campaigns. These campaigns put a strong focus on the environmental and social impacts of business operations. Diversity & Inclusion was concerned primarily with internal stakeholders, specifically employees, as a defensive tactic in reaction to legislation focused on prohibiting discrimination, such as the Equal Pay Act and Civil Rights Act, both of 1963.

Through the 1980s and 1990s, each became more embedded into business culture. However, it was not until the start of the 21st century that many companies began to fully comprehend the strong business case and potential for transformative internal and external impact when both functions are fully integrated into the business.

**TO PUT THIS SIMPLY –** both functions started from a reactionary, risk mitigation approach but over time have become more embedded and more strategic assets to the business.
With growing recognition of a business case, companies aim to approach D&I more strategically, embedding and integrating the function within their business models and functions.

A fundamental shift from compliance (focusing on gender and race) to a more holistic approach begins to emerge.

Workforce 2000 created a business rationale for diversity and is often credited as the start of the modern-day diversity field.

The Civil Rights Act 1964 makes it illegal for any business, private or public, to practice discriminatory hiring (and firing) practices.

President Truman de-segregates Armed Forces.

In the 1990s, CSR was institutionalized with standards like the Global Reporting Initiative, ISO 14001 and SA 8000, and other corporate governance codes.

Application of quality management to occupational health and safety and the introduction of CSR codes in 1980s.

CSR was challenged and strengthened in the 1960s with the birth of the environmental movement.

Two principles formed the foundation for contemporary CSR in the post war period – Stewardship & Charity.
COMMON OPPORTUNITIES:
The Benefits of Diversity & Inclusion and Corporate Responsibility
Today the business case for both D&I and CR is strong and we find that both offer common benefits to the business.
TALENT

The value that employers experience from D&I and CR in terms of recruiting, retention and engagement are well documented. One expert interviewed for this report suggested that the two functions intersect most prominently when it comes to helping businesses attract, engage and retain talent.

Research continually supports the value of diversity in recruitment, particularly at the highest levels of an organization. The global, five-year Sodexo Gender Balance Study found that when management was made up of a balance of both genders, teams performed better across five distinct performance indicators. Harvard Business Review research has found that diverse groups make better decisions than homogeneous groups.

Meanwhile, CR has also proven to be a powerful draw for attracting top talent. Robust CR efforts have been shown to significantly increase interest among potential employees—especially among Millennials and Gen Zs. Sodexo’s own research on Gen Z found that strength of the CR program was the second highest priority for this generation when deciding where to seek employment.

Employee engagement is also correlated to corporate responsibility and diversity. One study found that CR can improve employee feelings about belonging, generate pride in the enterprise and build social relationships among colleagues. Sodexo surveys of employee engagement in the U.S. have also demonstrated that diversity and inclusion is an important driver for employee engagement.

“Nurturing talent is a strategic priority at Sodexo as a foundation for our success. Embracing Diversity & Inclusion along with overall Corporate Responsibility is our opportunity to create a greater purpose, which will attract, retain, and engage our people.”

CATHY DESQUESSES
Chief People Officer
Sodexo
When it comes to innovation, D&I and CR create a virtuous cycle. As consumers and the public are evermore increasingly conscious of corporate values, businesses are designing successful marketplace strategies around D&I or CR commitments. These businesses are finding that the more prominent D&I and CR efforts lead to internal changes, such as broader thinking and innovation, that in turn lead to enhanced product and service development. What is eventually brought to market, therefore, better serves the customer and the broader public.

Researchers have been able to demonstrate a correlation between diversity and increased innovation. Bringing unique viewpoints together is often the spark of breakthrough thinking and the most innovative organizations often have diversity of thought embedded into their foundation. Fast Company reports that companies that met a diversity screening launched, on average, two additional products in any given year. This was almost twice the average for a major company. A Forbes review also found that different perspectives led to better problem solving. Better problem solving led to better products and more efficient product development, which, in the end, led to higher revenues and profits and better employee retention.

For CR, management guru Peter Drucker might have said it best when he observed, “every social and global issue of our day is a business opportunity in disguise.” CR helps businesses better understand the context in which they work and connect them with the social and environmental issues that need attention, thus sparking innovative product and service solutions.

According to the most recent GreenBiz State of the Profession report, budget support for environmental sustainability in product and service innovation rose from 46% in 2016 to 54% in 2018. The report cites several recent examples. Steelcase, the office furniture company, for instance, launched programs to help companies evaluate their furniture inventory and identify options for reuse, donation and recycling. BMW and General Motors are piloting car-sharing programs that increase access to transportation while reducing the need for individual car ownership.
**SUPPLY CHAIN**

D&I and CR help broaden and develop supply chains that are not only reliable and efficient, but also innovative and responsible. In an environment where brands are increasingly held accountable for the actions of their suppliers, a responsible supply chain helps to deliver innovation opportunities as well as risk management for the enterprise.

“We value and leverage the agility, ingenuity and new perspectives we gain when partnering with small businesses,” Susannah Raheb, Supplier Diversity Leader for Lockheed Martin Corporation told *Inc. Magazine*. “Having a diverse supplier network is one way we leverage a broad spectrum of expertise.”

CR functions may help monitor and assess supply partners, adding value particularly in terms of sustainability, transparency and risk management. By considering and addressing issues like climate change, fair trade, deforestation and labor practices, companies can differentiate their products in the marketplace and manage the reputational risks to their brand.
Both D&I and CR represent powerful components of the brand personality and can be drivers of increased brand recognition, trust and consumer choice in the marketplace.

The 2017 Cone Communications CSR Study found that 87% of consumers said they would purchase a product because a company advocated for an issue they cared about, and more than 75% would refuse to purchase a product if they found out a company supported an issue contrary to their beliefs. Millennials are known to have an even stronger connection to brand purpose. A 2015 Nielsen Report reported on in Inc. Magazine covered 30,000 consumers in 60 countries and found that consumers, especially millennials, are willing to pay extra for sustainability. Millennials care about issues of social justice and are the most cross-cultural, globally savvy generation. While 66% of global consumers are willing to pay more for sustainable goods, a full 73% of Millennials are willing to do so.

The issues consumers care about cross the lines between people and planet—bridging diversity and inclusion as well as sustainability and broader corporate responsibility. They include being a good employer, managing environmental impacts, issues of equality, etc. These are all part of the common brand promise and therefore a unifying purpose between companies and their customers.
COMMUNITY

Ultimately, the results of effective D&I and CR efforts are felt in the community. Separately and together, these functions work to support underrepresented communities through job growth, recruiting, supply management, philanthropy, volunteerism, supply chains and overall environmental impact. There are many overlaps here, with D&I often emphasizing jobs and community relations and CR emphasizing localized philanthropy, volunteerism and environmental impact.

Organizations from Sodexo to Walmart include community impact as an integral component of their D&I strategy. On issues such as pay equity, advancement for underrepresented groups, recruiting to reflect the customer base and creating more welcoming workplaces, D&I affects both its internal constituencies and the broader community.

With effective stakeholder engagement the functions can also help businesses better understand new markets, especially in different parts of the world. D&I and CR can help the broader business understand cultural nuances, comply with local laws and regulations and build trust in the local market. Additionally, they can help businesses foster relationships to establish social license to operate. That is, the acceptance of the local community and other stakeholders, which enables an enterprise to enter and sustain business in a new market.

“Corporate Responsibility is core to our mission of improving quality of life, defining how we behave as an employer, a service provider and a corporate citizen. Our commitment to Diversity and Inclusion is fundamental to our common purpose, contributing to employee engagement, innovation, talent management and brand leadership.”

TED MONK
Vice President, Corporate Responsibility
Sodexo, North America
With effective stakeholder engagement the functions can also help businesses better understand new markets, especially in different parts of the world.
COMMON SKILLS:
Where the Two Functions Overlap and Where They Do Not

From a strategic perspective, both functions are focused on building a strong business case by shaping the way the company goes about core functions such as recruiting and managing talent, delivering products and services, growing the client or customer base and engaging with communities—all with a focus on driving performance and ROI.

TO ACHIEVE THIS VISION, BOTH PROFESSIONS RELY ON SEVERAL SHARED FUNCTIONAL SIMILARITIES, INCLUDING:

• Building leadership support and engagement
• Using metrics and analytics to drive progress
• Leading change and mitigating resistance
• Managing external partnerships
• Storytelling to create a compelling message

LEADERSHIP SUPPORT AND ENGAGEMENT

Senior leadership support and engagement for both D&I and CR are critical to delivering the full business and stakeholder value of these functions. As noted, in the United States both functions have evolved from peripheral functions to, in many cases, strategic partners within the business. The reason for this transition is the result of engagement and support from leadership that has helped foster stronger ties to strategic goals.

In turn, leaders must understand how to fully integrate and gain buy-in from employees at all levels. Both functions can often suffer from a “tick the box” mentality where enterprises implement initiatives to appease an internal or external stakeholder rather than add real value. It is only through deep commitment and engagement that enterprises can begin to seriously engage both functions to identify and deliver real value to the enterprise.
“Both D&I and CR are fundamentally about reaching out to disenfranchised communities, bringing new market insights to the table and driving collaborative solutions to business challenges. Professionals in these fields are skilled at helping the business understand definitions of success that will be relevant for the evolving marketplace. We have much to gain by focusing on our shared purpose if we are to continue our contribution to improved business outcomes for all stakeholders.”

ROHINI ANAND
Senior Vice President
Corporate Responsibility and Global Chief Diversity Officer
Sodexo
As the adage goes, “what gets measured gets managed,” so both D&I and CR have in the last decade become more metrics-based as enterprises attempt to measure the ROI of both functions and report against marketplace standards. Both D&I and CR have evolved from being considered as “soft” functions with very little fiscal importance to having a direct impact on the bottom line. As this evolution has occurred, more organizations have introduced metrics to measure the impact and ROI of these functions. There is now a wealth of literature attesting to the increasing importance of metrics in both D&I and CR functions.

In addition, not only is the increasing importance of metrics a similarity between the two functions, the actual metrics often overlap. The Society for Diversity posted five must have D&I metrics for organizations which includes retention and recruitment. These metrics are also cited as important in measuring the ROI of CSR.

From an investor relations perspective there is an increasing focus on reporting of metrics which cover environmental, social and governance related issues.

The widely adopted Global Reporting Initiative (GRI) was created in 1997 to develop standard reporting metrics for sustainability and in 2011 the Sustainability Accounting Standards Board (SASB)—an initiative backed by Bloomberg, Ford Foundation, PWC, Packard Foundation, Deloitte, and Rockefeller Foundation—was created to maintain accounting standards for sustainability across 79 industries. Both consider diversity as well as other parts of corporate responsibility. As the reporting against these standards has become more common, the concept of Corporate Responsibility has become broader, serving as an overarching framework and as such, leading to more connections between Corporate Responsibility teams and functions like Diversity & Inclusion.
At the core of both D&I and CR is an intention to create positive impactful change. Both functions seek to engage employees and help them adopt new behaviors and processes. Both functions also have a need to evolve and adapt in response to the macro cultural and environmental factors like natural resource scarcity or shifting diversity dimensions such as generations. Both functions deploy change management processes to maximize their effectiveness in embedding new practices and delivering performance improvements.

External partnerships are also integral to CR. As CSR Pulse (2016) asserts, partnerships are no longer just an option for corporate responsibility. This makes sense, as a single enterprise cannot be expected to tackle immense challenges like eliminating poverty, addressing climate change and promoting food security by itself. CR functions often partner to gain valuable insights, prioritize issues, leverage tools, receive technical assistance, facilitate industry dialogue and consensus, track progress, and ensure credibility of their work.

Both D&I and CR typically rely on a variety of external partnership to maximize the effectiveness of the functions. For D&I these partnerships are often about building relationships with key influencers and stakeholders to support the enterprise in accessing diverse talent pools and engaging diverse employee populations. This can often mean partnering with organizations that represent the interests of minority populations. At Sodexo USA these include the Mexican American Legal Defense Fund, the Urban League, and many more.

Finally, with all the functional similarities, both functions are central to creating an improved employee experience at all levels of the organization.
Based on our research in the United States, D&I and CR often occupy very different places in the organizational structures of large enterprises. This is driven by the different subject matter expertise required by the two functions based on the issues involved. For example, D&I addresses challenges and opportunities related to dimensions of identity such as creating inclusion and opportunity across race, ethnicity, gender, disability, generations, sexual orientation and culture & origins. This function is most frequently aligned with Human Resources. CR deals with issues, risks and opportunities related to environmental sustainability, waste, human rights in the supply chain, etc. Many of these issues are more related to the product or service lifecycle.

The differences in subject matter seem to drive differences in functions. For many large enterprises in the United States, CR has its roots in the investor relations, strategy, EH&S (Environment, Health and Safety), procurement, facilities, and/or the supply management functions. CR therefore tends to have a more external and broader stance than D&I with a focus on engaging stakeholders to influence business policies and process. CR also has a much wider timeline than D&I with the social focus being shorter term and the environmental focus resulting in a far longer timeline. For example, environmental challenges such as global warming have an extremely long timescale.

D&I tends to have a deep internal focus related to the diversity of its employee base, and fostering an inclusive culture for that diverse employee population such that all can succeed. D&I teams will often have an additional focus on leveraging a diverse supply base, but otherwise D&I tends to be more closely tied to the human resources departments and the corporate foundations or community relations teams within large enterprises.

Both teams must be good at driving change and influencing internal stakeholders, but D&I teams often meet a different kind of resistance—one tied to the personal nature of identity and privilege. D&I teams must be skilled at community building and creating a welcoming environment where diverse populations can express themselves authentically and thrive within the organization—creating the environment where diversity leads to inclusion and inclusion leads to a sense of belonging and better decision-making.
DIVERSITY & INCLUSION

- Relatively Shorter Timescale

DISTINCT SUBJECT MATTER
- Specific D&I Dimensions
- Identity
- Inclusion

- Greater layers of complexity and potential resistance when managing topics such as identity and privilege

DIVERSITY & INCLUSION

FUNCTIONAL SIMILARITIES
- Importance of leadership support and engagement
- Metrics and analytics to drive progress
- Systemic and cultural change and mitigating resistance
- Managing external partnerships
- Storytelling to create a compelling message

EMPLOYEE EXPERIENCE
- Positive touchpoints through employee life cycle

STRATEGIC VISION
- Importance of business case
- Need to embed within business

COMMON SKILLS

FINDING COMMON GROUND

- Longer Timescale

CORPORATE RESPONSIBILITY

- More robust focus on product/service design and operations

- Strong external, multi-stakeholder focus
COMMON APPROACHES:
The Many Paths to Alignment

Given how much these two business functions have in common, the question is no longer why align them, but how? We researched seven companies in the United States and found five primary means to bridge the relationship between D&I and CR. These methods are often employed together, so there is a good degree of overlap—but some companies may choose one approach or another based on factors such as leadership support, industry context and historic development of the functions.

- Organizational Structure
- Governance Councils
- Communication and Reporting
- Information Sharing
- Community Engagement
Organizational Structure
Some companies are placing Corporate Responsibility and Diversity under a shared leader. For example, at Warner Media (formerly Time Warner Inc.) the two functions fall under a common leader at the corporate level. One D&I specialist and one CR specialist works with sub-brands to embed D&I and CR in projects such as promoting diverse representation on screen and behind the camera. These specialists meet weekly to identify points of collaboration.

Governance Councils
For companies where corporate sustainability includes management of material environmental, social and governance (ESG) issues, they often bring diversity to the table as part of cross-functional governance councils. This is the case at Eaton, where I&D (Inclusion & Diversity) is considered within the social impact area and management responsible for I&D sits on the Sustainability Governance Council. In alignment with the environmental, social and governance focus to sustainability, I&D results are also included in the company’s annual sustainability report.

Communication and Reporting
Micron Technology is another company with a focus on material environmental, social and governance (ESG) issues and reporting to Global Reporting Initiative standards. Therefore, D&I is included in its sustainability reporting as part of its overall sustainability communications. The two functions also share a communications staff lead to support alignment, and the D&I lead sits on the Sustainability Executive Council which helps the function embed further into the business.

Information Sharing
Encouraging regular meetings between the teams enables them to share information and collaborate where specific opportunities arise. At QVC, the functions meet every two weeks to discuss tactical overlaps. They also share sponsorship opportunities in the community.

Community Engagement
At Gap, the Foundation and Global Sustainability functions are in the same department, where the teams can collaborate on shared community engagement activities, such as promoting both environmental sustainability and women’s empowerment for the factories in GAP supply chains.
CREATING A BETTER TOMORROW AT SODEXO

Founded in 1966 in Marseilles, France, Sodexo has nearly 460,000 employees in 72 countries across the globe and has become a recognized leader in both D&I and CR. Both functions are considered part of the global business strategy.

Sodexo has taken a distinct approach where Corporate Responsibility is an anchor in our business strategy. It is part of our brand promise under the CR global roadmap, Better Tomorrow 2025 and as such encompasses D&I, community, environment. The strategy emphasizes three areas, as an employer, service provider and corporate citizen to improve quality of life. Progress in all these areas is tracked against measurable targets. Actions in each of these areas may be take place in different functions such as supply chain, marketing, HR, D&I, but collectively they form the narrative of who we are; a company that, through Corporate Responsibility, does good while doing well.

Sodexo’s North American region presents an example of how the two functions can work together toward their common purpose. Here, D&I and CR report to the same individual, with separate leaders over diversity and sustainability. In addition, the teams are highly matrixed, connecting into the global corporate responsibility and diversity functions. Governance structures like the Better Tomorrow Leadership Committee and Global Diversity & Inclusion Leadership Team often bring agenda topics that lead to greater awareness of BOTH functions. The U.S. D&I and CR teams meet together on a regular basis for team building, leadership development and strategic planning sessions. As a result, these people connections help drive connections in related workstreams. Team members regularly seek input from each other, for example, frequently sharing messaging in communications. They also partner on efforts in the community and ultimately progress in CR and D&I are reported through Better Tomorrow 2025.
“Sodexo is keenly focused on our clients and customers. Client and customer expectations evolve rapidly in response to changing social and environmental concerns. Therefore, our Diversity & Inclusion and Corporate Responsibility teams are both critical to helping us understand and meet the needs of our rapidly changing marketplace.”

SAROSH MISTRY
Chair
Sodexo North America & CEO
Worldwide Homecare

Our Corporate Responsibility Roadmap

BETTER TOMORROW 2025

<table>
<thead>
<tr>
<th>9 COMMITMENTS</th>
<th>INDIVIDUALS</th>
<th>COMMUNITIES</th>
<th>THE ENVIRONMENT</th>
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<tbody>
<tr>
<td>AS EMPLOYER</td>
<td>Improve the Quality of Life for our employees</td>
<td>Ensure a diverse workforce and inclusive culture that reflects and enriches communities we serve</td>
<td>Foster a culture of environmental responsibility within our workforce and workspaces</td>
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<tr>
<td>AS SERVICE PROVIDER</td>
<td>Provide and encourage our consumers to access healthy lifestyle choices</td>
<td>Promote local development, fair, inclusive and sustainable business practices</td>
<td>Source responsibly and provide management services that reduce carbon emissions</td>
</tr>
<tr>
<td>AS CORPORATE CITIZEN</td>
<td>Fight hunger and malnutrition</td>
<td>Drive diversity and inclusion as a catalyst for societal change</td>
<td>Champion sustainable resource usage</td>
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CREATING A BETTER TOMORROW:
SODEXO’S APPROACH

In terms of communication, Sodexo produces a global integrated report each year that covers our financial position, environmental sustainability, diversity and more—all aligned to our mission to improve quality of life. We also provide shared messaging to common stakeholders through our sales and public relations teams, with shared marketing collateral and digital communications that cover both topics.

The two functions focus on development of our services to engage consumers with special offers and promotions connected to a calendar of diversity days or opportunities for waste reduction. Sustainable seafood, local sourcing, supplier diversity and climate-friendly diets have all been made priorities for culinary development and the supply chain.

When it comes to community engagement, connections are made between efforts on behalf of the environment, diversity, wellness, anti-hunger and other priorities. For example, Sodexo’s Parent Schools Partnership, which grew from the company’s partnership with the Mexican American Legal Defense Fund, teaches parents in the Latino community to prepare fresh produce. Meanwhile, The Green Bronx Machine partnership improves the lives of at-risk children and prevents hunger while teaching young people to grow their own food sustainably.

While each function maintains a strong subject matter expertise, with Diversity & Inclusion focused largely on our people and Corporate Responsibility focused largely on the environmental and social impacts of our services, both are engaging with our communities and learning to leverage each other’s strengths. Each collaboration in turn leads to more alignment and more opportunities to create transformative, valuable impact under the umbrella of our CR strategy, Better Tomorrow 2025.

To learn more visit Sodexo FY18 Integrated Report and Sodexo’s Corporate Responsibility site.
WHAT HAVE YOU OBSERVED?

This research project was started based on our personal experience in the fields of Diversity and Inclusion and Corporate Responsibility. We noticed more conferences seeking to address the intersections and opportunities between these two fields and in some cases, as with Sodexo North America, the two functions aligning under one lead. Our goal is to advance the field of practice by describing the trends we have observed and then start a broader conversation that will help us create the future for the management of both Corporate Responsibility and Diversity & Inclusion as we work together toward our common purpose.

Do you see these two fields evolving? Do you see them as distinctly separate fields of practice? What are the best practices, challenges and benefits of aligning them vs. keeping them distinctly separated? Are the trends in the U.S. different from those in other parts of the world?

Please share your opinions with us at: https://bit.ly/2XsE7zb

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