ESG & RIM/IG: Better Together

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Sue Trombley, MLIS, FAI

Managing Director of Thought Leadership

sue.trombley@ironmountain.com

sue_trombley

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Session Goal

- Inspire and motivate you to understand your role in achieving ESG goals
- Introduce new concepts for involvement at your organizations
- Gain buy-in to make Sustainability the 9th principle

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Agenda

- ➢ What is ESG?
- ➢ ESG reporting
- ➢ Our influence
- ➢ Sustainability: the ninth Principle?

What is ESG?

Environmental, Social and Corporate Governance is an evaluation of an organization's collective conscientiousness for social and environmental factors.

It is typically measured by a score that is compiled from data collected surrounding specific metrics related to intangible assets within the enterprise.

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ESG: Environmental

Renewable fuels
Greenhouse gas emissions reduction
Energy efficiency
Water management
Recycling processes
Emergency preparedness

Addresses climate risk & resilience

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ESG: Social

Health and safety
Working conditions
Employee benefits
Diversity, equity and inclusion
Human rights
Impact on local communities

Addresses social good in the workplace & beyond

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ESG: Governance

Ethical standards
Board diversity and governance
Stakeholder engagement
Pay for performance
Shareholder rights

Addresses fairness and accountability

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Reporting is essential

- Shareholders
- Investors
- Employees and recruits
- Customers/clients
- Government regulators

Data must be authentic and accurate!

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Regulators

SEC
https://www.sec.gov/sec-response-climate-and-esg-risks-and-opportunities

Summary of SEC response:
https://corpgov.law.harvard.edu/2021/05/28/sec-regulation-of-esg-disclosures/

EU Directive 2014/95/EU:
https://ec.europa.eu/info/business-economy-euro/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting_en

UK sustainability reporting requirements:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/772723/Sustainability_report_19.pdf

Global Reporting Initiative (GRI) - Standards for reporting:
https://www.globalreporting.org/standards/

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Actions to take

- ➢ Map data sources (internal and external)
- ➢ Review your Records Retention Schedule
    - ○ Do you need a new records class?
    - ○ Do you need to modify the retention period for already existing records or records class?
    - ○ Should you add new data/record types to your RRS?

Partner with your ESG team/person

Example of existing Record Class

AUD1020	**Government Compliance and Reporting** Records created, managed, and/or submitted to governmental agencies in order to comply with federal, state, provincial or other requirements. These records may also include compliance with requirements for environmental reporting,...		
Global	Period: 10 Years	Trigger: The date the record is created.	
KZ	Period: Permanent	Trigger: Retain permanently.	
RS	Period: 20 Years	Trigger: The date the record is created.	
HU	Period: Maximum 8...	Trigger: For information received in connection with client due di...	
US	Period: 6 Years	Trigger: The date the record is created.	
CH	Period: Maximum 5...	Trigger: For documents connected with a Money Laundering Re...	
IT	Period: Maximum 2...	Trigger: For consumer data collected for marketing purposes, th...	
IT	Period: Maximum 1...	Trigger: For data collected for customer profiling purposes, the ...	
ES	Period: Maximum 2...	Trigger: For personal data processed through a whistelblowing s...	

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RIM & IG Influence on Sustainability

The Reality

Climate change is here.

It is not some far off event that we can worry about later.

What can we do about it now?

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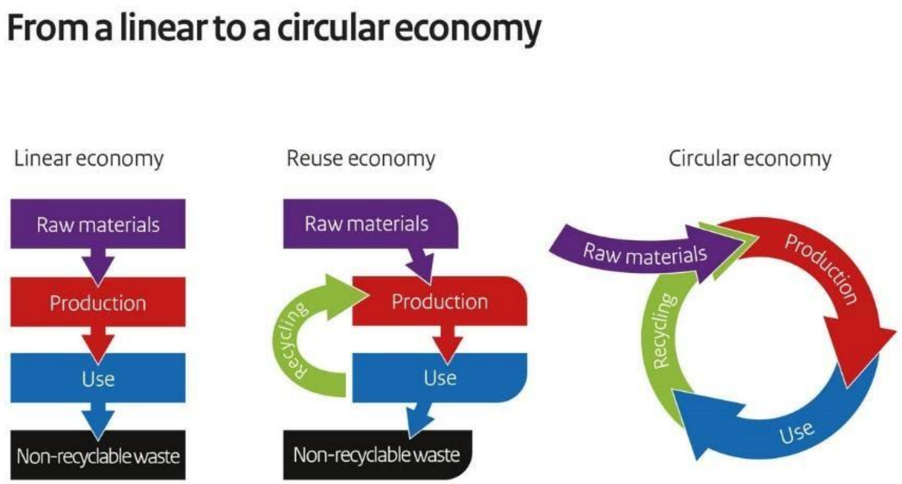
Sustainability: More than Green

The ability for something to be sustained – *finding ways to use what we have* rather than consuming more natural resources.

Design out waste and pollution

Retain products for as long as possible



https://www.government.nl/topics/circular-economy/from-a-linear-to-a-circular-economy

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"Sustainability is bigger than a PR stunt or a green product line, bigger even than a heartfelt but occasional nod to ongoing efforts to save the planet.

Imagined and implemented fully, sustainability **drives a bottom-line strategy to save costs, a top-line strategy to reach a new consumer base, and a talent strategy to get, keep, and develop creative employees**."

Adam Werbach, Former CEO Sierra Club

Individuals and mutual funds driving socially responsible investing

"The tectonic shift towards sustainable **investing is accelerating**."

Larry Fink, Chairman and CEO, BlackRock

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Carbon Neutral / Net Zero Achievement

Commitment to achieve carbon neutrality by 2040 or sooner

Alaska Airlines
Amazon
Apple
BMW
BP
Coca-Cola
Delta
Disney
Ford
Hilton
GM
IBM
Iron Mountain
Ikea
John Deere
McDonalds
Microsoft
Salesforce
Walmart
Uber

Emissions: Measured in 3 Ways

1) Directly by heating or cooling a building or from manufacturing, transportation, etc.
2) Indirectly from electricity consumed onsite, but generated elsewhere.
3) Indirectly from upstream or downstream which typically has the highest percentage of emissions.

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RIM managers can have the highest impact through sourcing or disposing of materials.

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RIM Pro Influence and Impact

Paper-free/less goal

Less paper = less trees/water/energy for manufacture

Less toner = less ewaste, packaging materials

Shred programs

Shred-all

Understand vendor process: (maceration/shred) and where it goes

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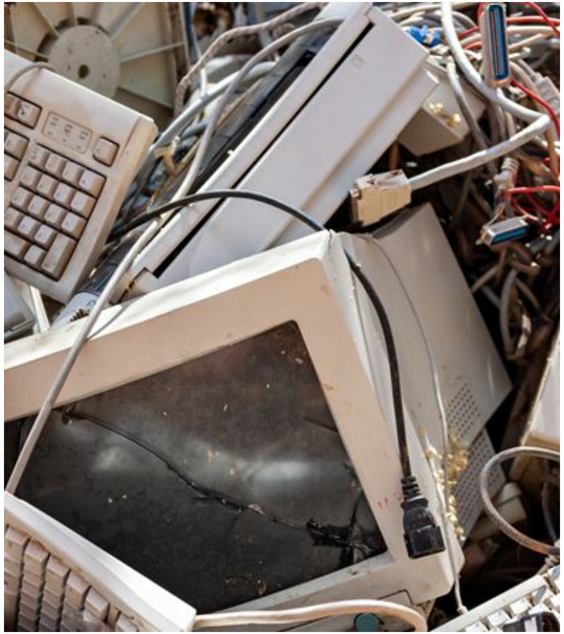
eWaste

Program for secure and sustainable destruction or recycling of IT assets, mobile devices, servers

Understand vendor process and where the by-product goes to mitigate risk of exposure of sensitive and private information



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In 2019, 53.6 million tons of ewaste generated globally = 16 lbs/person

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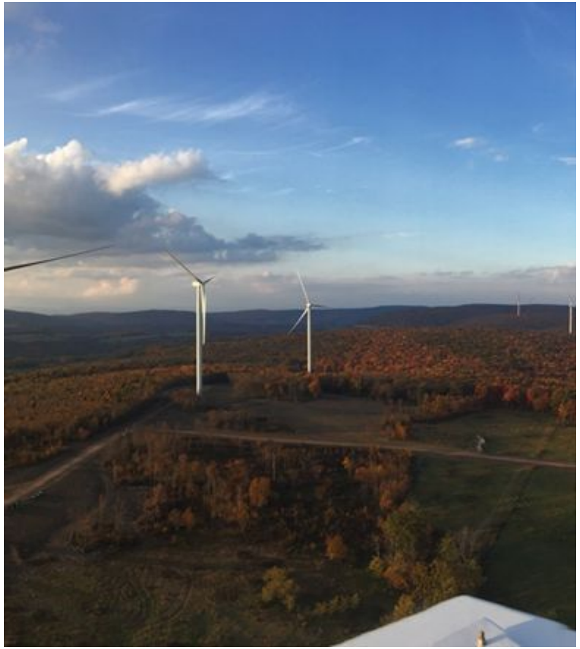
Data centers

Promote use of co-located data centers for more efficient, shared energy consumption

Ask how data centers are powered?

Ability to issue carbon credits or comparable "points"



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Office transformation

Input to design

- ➢ New space
- ➢ Reconfiguration
- ➢ Consolidation

Closures

- ➢ Compliant and sustainable management of assets
- ➢ Secure destruction of eligible paper and assets
- ➢ Resale/reuse of office furniture and equipment

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Governance

- Clean-up ROT to maximize efficient storage
- Destroy paper records when eligible = less space required = less energy consumed
- Update policies and procedures to align with Sustainability goals
- Are there new records to measure Sustainability goals, such as “activity data”?
- How to ensure sustainability of digital files?

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RIM team opportunities

Enable remote workers

- ➢ Less commuting
- ➢ Less office space required

Digital acceleration

- ➢ Automated workflow
- ➢ Transition to born digital

Limit ability to print

- ➢ Journey to paperless!

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Vendor Management

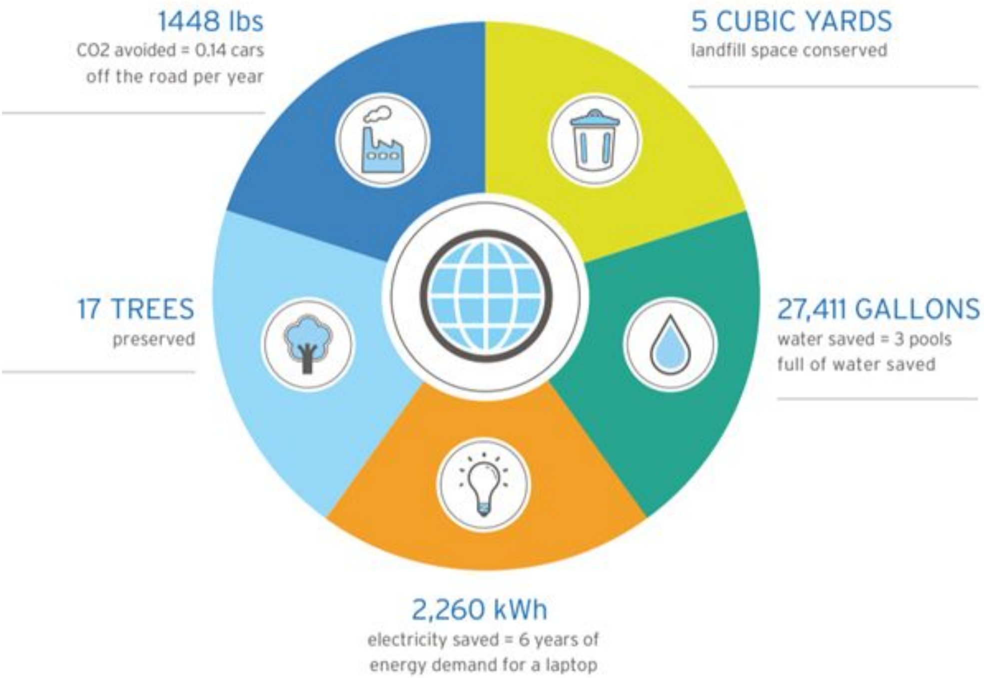
Sustainability essentials

How transparent are they?

Do they provide reporting?

Facilities and vehicles powered by alternative energy?

How climate resilient are your suppliers (and their suppliers)?



The Ninth Principle?

Accountability
Transparency
Integrity
Protection
Compliance
Availability
Retention
Disposition

Sustainability

An organization shall at all times make choices in support of environmental Sustainability goals, including reduction in use of paper products, responsible disposition of information assets and selecting vendors who demonstrate a commitment to Sustainable business practices.

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What's Next for RIM Pros?

Make purposeful decisions and actions as individuals

Be a change agent for your organization

- ➢ Engage stakeholders - old and new
- ➢ Understand business strategy and commitments
- ➢ Present Info Management POV

Advocate for 9th Principle!

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Committed to Sustainability

We are committed to reducing our impact on the environment while driving value to our customers, investors and the communities in which we operate. We strive to improve our environmental performance and initiate innovative projects and activities that reduce cost, build resiliency and further reduce our impacts on the environment.

77% RENEWABLE ELECTRICITY ACROSS GLOBAL FACILITIES

TOP 25 U.S. BUYER OF RENEWABLE ELECTRICITY

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Q & A

Thank You!