

ESG Integration Forum US 2020

Building value for the long-term

Thursday, December 3 – Friday, December 4, 2020

LIVE AND VIRTUAL

About the event

The **ESG Integration Forum** exists to bring together corporate stakeholders from legal, finance and sustainability teams to learn how to better respond to investors' ESG expectations.

ESG is evidently more important than ever for listed companies and at this interactive, virtual event, we look at how **trends** are developing in ESG as a result of the events of 2020 and will focus on the **actions** you can take to help your investors make informed voting and investment decisions.

Agenda at a glance

All times below are in ET (Eastern time)

Time (ET)	Thursday, December 3: ESG trends
9.45 am	Welcome to the ESG Integration Forum
10.00 am	Opening keynote: How will the future of work impact ESG integration?
10.30 am	How can corporate boards navigate climate risks?
11.30 am	Networking break
11.45 am	Materiality breakouts round one: Learn how companies in your sector are managing their most relevant ESG risks
12.15 pm	Getting buy-in from the board: Setting targets around social and human capital factors
1.00 pm	Networking break
1.15 pm	Materiality breakouts round two: Learn how companies in your sector are managing their most relevant ESG risks
1.45 pm	Linking climate reporting to the bottom line: Debunking different types of climate risk
2.30 pm	How artificial intelligence is evolving the ESG landscape
3.15 pm	Closing keynote: Standardization developments in ESG ratings and frameworks
4.00 pm	Summary and end of day one
Time (ET)	Friday, December 4: ESG actions
10.45 am	Welcome back to the ESG Integration Forum & morning networking
11.00 am	Reinventing ESG reporting: A shift from what has happened to where we are going
11.45 am	Workshop: Taking the next step in your ESG journey
12.30 pm	Networking break
12.45 pm	ESG and the earnings call: Integrating long-term thinking into short-term discussions
1.45 pm	Covid-19 as a catalyst for better year-round engagement on ESG
2.30 pm	Networking break
2.45 pm	Generating decision useful data: Understanding the ESG ecosystem and how they use your disclosures
3.30 pm	Preparing for the next AGM season
4.15 pm	Summary and close of forum

[Detailed agenda below](#)

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Agenda – Thursday, December 3: ESG trends

All times below are in ET (Eastern time)

9.45 am Welcome to the ESG Integration Forum

Laurie Havelock, editor-at-large, IR Magazine

10.00 am Opening keynote: How will the future of work impact ESG integration?

The ESG integration forum's mission since its inception has been to help internal stakeholders at companies work together to better respond to investor expectations on environmental, social, and governance factors. As remote working becomes more commonplace, we look at what is needed from the leadership, the board, investor relations, governance and sustainability teams to insure ESG is integrated throughout the businesses and stakeholders have a good understanding of your ESG impacts.

Moderator: Laurie Havelock, editor-at-large, IR Magazine

Helle Bank Jorgenson, chief executive officer and founder, Competent Boards

Eric Wetlaufer, board member, Niyogin

10.30 am How can corporate boards navigate climate risks?

The current pandemic has reinforced the need for directors to understand and navigate business disruption. There are important lessons to learn from COVID that can be applied to the environmental, social and governance risks we face ahead. Here, we discuss the tools and recommendations for corporate directors to understand the impact of ESG risks on their business and how boards can address these issues as a part of their core risk oversight role.

Moderator: Ben Maiden, editor-at-large, Corporate Secretary

Peggy Foran, chief governance officer, vice president and corporate secretary, Prudential Financial

Kellie Huennekens, Head of ESG research, Nasdaq

Veena Ramani, senior program director for capital market systems, Ceres

11.30 am Networking break

11.45 am Materiality matters part one: Learn how companies in your sector are managing their most relevant ESG risks

A series of short and sharp sector-specific discussions outline the material issues for your sector and share how companies are measuring, managing, reporting and communicating around these factors. We cover the following sectors: **Utilities and consumer goods**.

Moderator: Steven Wade, head of event content, IR Magazine

Utilities: Nicholas Ashworth, head of investor relations, National Grid

Consumer goods: Jaana Quaintance-James, chief sustainability officer, Global Fashion Group

12.15 pm Getting buy-in from the board: Setting targets around social and human capital factors

Given the increased investor interest in social and human capital issues, we investigate how this translates into your IR, governance and sustainability activities. We go into detail around the process of setting targets, specifically getting buy-in from management throughout the organization and confidence from the board on setting public targets for 'S' factors.

Moderator: Ben Maiden, editor-at-large, Corporate Secretary

Meredith Benton, principal and founder, Whistle Stop Capital

Melodie Craft, vice president of legal affairs, risk management and corporate secretary, McGrath RentCorp

Ron Schneider, director of corporate governance services, DFIN

Gillian Emmett Moldowan, partner, Shearman and Sterling

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1.00 pm **Networking break**

1.15 pm **Materiality matters part two: Learn how companies in your sector are managing their most relevant ESG risks**

A series of short and sharp sector-specific discussions outline the material issues for your sector and share how companies are measuring, managing, reporting and communicating around these factors. We cover the following sectors: **Healthcare, TMT and industrials**.

Moderator: Steven Wade, head of event content, *IR Magazine*

Healthcare: Mevina Caviezel, director of corporate branding & responsibility, Sonova Group

Industrials: Holly Gillis, head of investor relations, The Go-Ahead Group

TMT: Jonathan Vaas, vice president of investor relations and associate general counsel, Adobe

1.45 pm **Linking climate reporting to the bottom line: Debunking different types of climate risk**

The TCFD movement is gaining momentum and changes the way that companies and investors are looking at how climate-related risks impact their businesses and, in this session, we take a deep dive into physical and transitional risks and examine how they relate to your businesses.

Moderator: Ben Ashwell, editor, *IR Magazine* and Corporate Secretary

Adeline Diab, ESG analyst, Bloomberg Intelligence

Tim Dunn, chief investment officer, Terra Alpha Investments

Frank Kelley, corporate governance manager, DFIN

2.30 pm **How artificial intelligence is evolving the ESG landscape**

This session looks ahead at how the buy-side are using alternative data and AI to inform their decision making and understanding of risks. In addition to understanding the types of alternative ESG data that companies are using we also examine how Covid-19 has changed the ESG landscape.

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*

Mike Chen, director of portfolio management, PanAgora asset management

3.15 pm **Closing keynote: Standardization developments in ESG ratings and frameworks**

There have been significant developments made this year around standardizing ESG reporting with framework providers, standard setters and ratings agencies endorsing a move towards comprehensive corporate reporting. We have also seen the IFRS propose a new body – the Sustainability Standards Boards. However, many investors have also developed their own framework toward ESG. In this session, we aim to get a better understanding of what investors are looking for and what informs their voting and investing decisions.

Moderator: Ben Ashwell, editor, *IR Magazine* and Corporate Secretary

Patrick Bryden, head of ESG research, Scotiabank

Ray Cameron, head of investment stewardship, BlackRock

Emily Kreps, global director of capital markets, CDP

Marc Siegel, standards board member, SASB

4.00 pm **Summary and end of day one**

Ben Ashwell, editor, *IR Magazine* and Corporate Secretary

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Agenda – Friday, December 4: ESG Actions

All times below are in ET (Eastern time)

10.45 am **Welcome back to the ESG Integration Forum**

11.00 am **Reinventing ESG reporting: A shift from what has happened to where we are going**

In this session, we share examples of how companies are responding to ESG reporting trends. Covering all aspects from presentation, content and delivery, this hands-on session will keep you updated on the latest trends in ESG reporting and show you how you can implement this into your own processes.

Moderator: Laurie Havelock, editor-at-large, IR Magazine

Wesley Gee, sustainability director, Works Design

Ian Roe, partner, MerchantCantos

Beth Sasfai, senior vice president of governance and chief ESG officer, Verizon

11.45 am **Workshop and open Q&A: Taking the next step in your ESG journey**

During this interactive workshop, we will be answering questions around taking the next step in your ESG journey. Whether you are looking to start your ESG program, take your reporting to the next level, update your materiality assessment or understand what actions you can take to stay ahead of the curve, this peer-led session will get you answers!

Laurie Havelock, editor-at-large, IR Magazine

12.30 pm **Networking break**

12.45 pm **ESG and the earnings call: Integrating long-term thinking into short-term discussions**

While a traditional earnings call focuses on quarterly financial results, investors and issuers alike understand that longer-term strategic content, including ESG content, can also be critical to convey a company's outlook. Given that ESG performance can directly impact financial performance, how can issuers begin to include this type of content into the traditional quarterly call format?

Moderator: Ben Ashwell, editor, IR Magazine and Corporate Secretary

Cynthia Curtis, senior vice president of sustainability, JLL

Todd Hicks, chief executive officer, Intelligize

Brian Tomlinson, director of research, Chief Executives for Corporate Purpose

Tensie Whelan, director, NYU Stern School of Business

1.45 pm **Covid-19 as a catalyst for better year-round engagement on ESG**

As ESG engagement from the buy-side becomes more formalized, we look at best practice in ESG engagement and ask whether the move to virtual will create better year-round engagement with investors, ratings agencies, proxy advisors and other stakeholders. We also share best practice around hybrid, virtual and in-person ESG and governance roadshows - and AGMs.

Moderator: Ben Maiden, editor-at-large, Corporate Secretary

Simon Ball, senior vice president of product, Intrado

Alexandra Higgins, managing director, Okapi Partners

Amelia Pan, partner for ESG and investor engagement, Brunswick Group

Wendy Cassity, executive vice president and chief legal officer at Nuance Communications

2.30 pm **Networking break**

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2.45 pm **Generating decision useful data: Understanding the ESG ecosystem and how they use your disclosures**

In this discussion, we aim to understand what ESG ratings agencies, investors and proxy advisers use (and what they don't!). This session will provide a better overview on the type of information investors are using to help inform their voting and investment decisions. We will hear from various stakeholders on what you should be disclosing, including (or excluding) around ESG factors.

Moderator: Ben Ashwell, editor, *IR Magazine* and corporate secretary

Chad Spitler, chief executive officer, Third Economy

Nora Duke, executive vice president of sustainability and chief human resource officer, Fortis

3.30 pm **Preparing for the next AGM season**

In our final session, we look at how best to prepare for your next AGM by focusing on the hot topics likely to be raised by activists and your shareholders. We will focus on the best way to prepare and manage some of these challenges.

Moderator: Ben Maiden, editor-at-large, Corporate Secretary

Michael Fein, executive vice president and head of US operations, Kingsdale Advisors

Timothy Smith, director of ESG shareowner engagement, Boston Trust Walden

Joe Vicari, ESG practice lead, Broadridge

Derek Windham, vice president, associate general counsel for corporate, securities and finance, Hewlett Packard Enterprise Company

4.15 pm **Summary and close of conference**

Ben Ashwell, editor, *IR Magazine* and Corporate Secretary

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