

The ESG Integration Forum

Summer 2021

Thursday, July 15, 2021

Virtual event: Live and available on replay

Respond to increasing investor and regulator ESG expectations

Brought to you by *IR Magazine* and Corporate Secretary, [the ESG Integration Forum](#) brings together **in-house governance, investor relations and sustainability professionals**. The forum reflects on the emerging issues from the proxy season, discusses the latest trends and shares ESG best practices.

What makes our format unique?

Our forums consist of a series of fast-paced, **high-level briefings** followed by an interactive speaker Q&A, virtual roundtable sessions and networking. This format provides the **perfect balance between learning** from various stakeholders in the ESG ecosystem and **making new connections**.

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Agenda at a glance

All times in ET (Eastern time)

Time	Thursday, July 15	
10.30 am	Welcome to the ESG Integration Forum – Summer 2021!	
10.35 am	NEW: Research rockpiles – The latest stats and facts on ESG	
10.45 am	What have we learned about investor ESG trends from the proxy season?	
11.15 am	ESG trend watch: International drivers and domestic policy	
11.45 am	How the ESG ecosystem is evolving	
12.30 pm	Roundtable discussion: Communicating your ESG message during the transition back to in-person engagements	
1.15 pm	Getting started and managing ESG on a shoestring	Integrating ESG into the boardroom
1.45 pm	Meet the attendees: Networking	
2.00 pm	Can ESG ratings predict future ESG news and stock price reactions from the market?	How to use ESG to drive better stock performance and reduce your cost of capital
2.30 pm	Data gathering and prioritizing your efforts	
3.00 pm	Shareholder ID and targeting ESG investors	
3.30 pm	Presentation: Closing keynote	
3.45 pm	Summary of discussions	
4.00 pm	End of conference	

[Detailed agenda below](#)

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Agenda in detail

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Time **Thursday, July 15**

10.30 am **Welcome to the ESG Integration Forum – Summer 2021!**

10.35 am **NEW: Research rockpiles – The latest stats and facts on ESG**

Ben Ashwell presents an overview of the latest *IR Magazine* and Corporate Secretary research on ESG.

- Hear the latest research from the perspective of companies and investors
- Track the ESG trends by understanding what has changed in the past 12 months
- Take home facts and figures related to how your peers are approaching ESG

10.45 am **What have we learned about investor ESG expectations from this proxy season?**

In this session, we examine the types of ESG proposals that are gathering support from shareholders and discuss which ESG issues are likely to attract future proposals.

- Learn about the ESG issues that should be top of mind for boards
- Discover where the gap is between management and shareholders on ESG-related proposals
- Discuss emerging trends like say-on-climate and whether it is likely to have an impact in the US in the future

11.15 am **ESG trend watch: International drivers and domestic policy**

The Biden administration seems intent on putting the US back in the driving seat on climate action and, with Gary Gensler appointed as chair of the SEC, we look at the impact this may have on global drivers for ESG and whether the US is likely to follow suit.

- Learn about the implemented changes in policies globally and debate whether they will soon apply in the US
- Understand the impact and unintended consequences of increased ESG regulation
- Debate whether ESG disclosure will become mandatory in the US and what form it will take

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11.45 am How the ESG ecosystem is evolving

From internal constituents, standard-setters and framework developers to data providers, coalitions and proxy advisers, understanding the key players in ESG becomes ever-more complex. In this session, we will discuss developments in the ESG ecosystem and provide more clarity on working with different constituents.

- Understand the role different players have in the ESG ecosystem and how companies can engage with these entities
- Learn about the interconnectivity between rating agencies, frameworks, assurers, data providers, advisers and coalitions and how the world of ESG operates
- Discuss the benefits of focusing on your own metrics or looking at external guidelines, and hear which frameworks are preferred by companies and investors

12.30 pm

Roundtable discussion: Communicating your ESG message during the transition back to in-person engagements

As we move from the shared challenge of all issuers and investors operating digitally, the easing of restrictions will create an imbalanced situation where the ability to meet will differ from institution to institution. In this session, we look at the implications for engaging with stakeholders and examine the practical solutions.



- How will the transition from shared restrictions to differing situations between regions alter the way you approach ESG communications with shareholders, proxy advisers and ratings agencies?
- Learn about the communication tactics and resources companies use to deliver the message about ESG practices to the right audiences
- Active engagement and voting are mechanisms investors are increasingly using to influence company ESG practices. In this session, we investigate whether virtual and hybrid meetings improve real-time communications with shareholders

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1.15 pm **Getting started and managing ESG on a shoestring**

All ESG programs need to start somewhere and not everyone has the luxury of unlimited resources to dedicate to an ESG program. This session will focus on the steps you can take when starting or ramping up your ESG program and prioritizing efforts as a small or mid-cap issuer.

- Understand what activities are needed to start creating an ESG story that resonates with investors
- Discover which metrics and frameworks are most important to prioritize for an ESG program in its infancy
- Learn how to get buy-in from management and the board on your ESG disclosure efforts

Integrating ESG into the boardroom

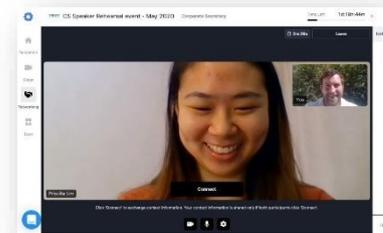
Setting public climate targets and linking compensation to ESG metrics are becoming more common. Learn how to develop the relationship the board has with ESG.

- Hear how teams have presented a forward-thinking strategy to their board to ensure buy-in from the top
- Learn about the ESG metrics that companies link to executive compensation and how they have impacted decision-making in the business
- Understand how to approach public targets and ensure the board is comfortable committing to these targets

1.45 pm **Meet the attendees: Networking**

Match with other attendees for a short, fun introduction using our virtual networking tool: it's as easy as 1-2-3:

1. Visit the networking area and click connect
2. Get randomly matched with another attendee for a three-minute introduction
3. Exchange contact information or move on to the next attendee: it's up to you!



2.00 pm **Can ESG ratings predict future ESG news and stock price reactions from the market?**

Interpret the ESG ratings on your company and understand the importance of consensus in predicting future market reactions to ESG-related news.

- Hear examples of the usefulness of ESG ratings as predictors of future ESG-related news
- Learn about the magnitude of market reactions to future news stories and the relationship with ratings agency consensus
- Discuss whether these findings alter how you manage your relationship with ESG ratings agencies

How to use ESG to drive better stock performance and reduce your cost of capital

In this session, we discuss the role ESG has in improving financial performance. Join this session to discuss the scale of impact ESG has at programs of differing levels.

- Understand the drivers behind ESG's ability to improve return on equity and cost of capital
- Learn about the extent to which financial performance is impacted depending on your level of reporting in comparison with peers
- Does it pay to be a leader, laggard or improving company when it comes to reaping benefits from ESG reporting?

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2.30 pm **Data gathering and prioritizing your efforts**

In this session, we will discuss the latest trends and share best practices on identifying, collecting and disclosing material ESG information.

- Understand the latest reporting trends and whether corporate reporting can evolve beyond the 10K to enable better ESG disclosure
- Learn how to identify material issues and improve your systems for collecting and disclosing relevant data
- Turn data into action: Understand how to use your ESG data to mitigate risk and add value to your stakeholders

3.00 pm **Shareholder ID and targeting ESG stakeholders**

We talk about the best way to find the investors that fit with your ESG profile and share how to communicate your data and story with the firms and indexes most relevant to you.

- Debate what is more critical – narrative, data or ESG scores – as capital markets and ESG continues to evolve
- Understand the different collection methods investment firms and indexes use and which qualities they look for in sustainable companies – and learn where to focus your efforts
- Discuss how best to identify investors and communicate your ESG risks and opportunities in a way that resonates with their efforts

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