

# 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!	
10.40 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	Meet the attendees: Networking	
12.00 pm	Climate Change: What investors want	
12.45 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 shoe-string	Integrating ESG into the board room
1.45 pm	How to use ESG to drive better stock performance and reduce your cost of capital	
2.15 pm	Meet the attendees: Networking	
2.30 pm	Beyond the proxy: Mastering year-round ESG engagement	
3.00 pm	Shareholder ID and targeting ESG investors	
3.30 pm	Data gathering and prioritizing your efforts	
4.00 pm	Summary of discussions and end of the 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!**

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

Ben Ashwell presents an overview of the latest IR Magazine and Corporate Secretary's 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

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

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

In this session, we look to understand the type of ESG proposals and factors that are top of mind for shareholders, which issues are gathering support from investors and which ESG issues are likely to attract future proposals.

- Learn about the ESG issues that should be top of mind for boards
- Understand what funds are trying to accomplish in their proxy voting
- 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

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

**Matt DiGuseppe, vice president of research & ESG, Diligent**

**Manisha Singh, senior portfolio manager, AIG Funds**

**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 discuss global drivers for ESG and whether the US is likely to follow suit.

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

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

**Alex Gold, head of ESG and chief executive officer, BWD Strategic**

**Neil Stewart, director of corporate outreach, Value Reporting Foundation**

**Lizbeth Wright, vice president and chief counsel for corporate and securities, Eaton Corporation**

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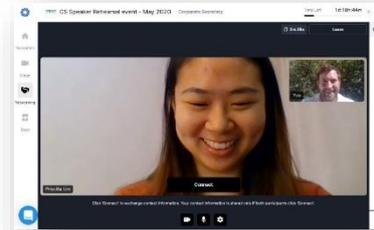
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### 11.45 am **Meet the attendees: Networking**

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

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### 12.00 noon **Climate Change: What investors want**

Climate change has been the talk of the proxy season, but what exactly are investors' expectations of companies regarding their approach to climate reporting and action?

- Understand the top trends and critical issues related to climate change
- Learn how companies can integrate climate considerations into their organizations and produce informative, decision-useful disclosures related to climate change
- Hear about Wellington's approach to climate change research, advocacy and integration into its engagement and investment processes

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

**Ari Frankel, managing director and head of ESG, Solebury Trout**

**Chris Goolgasian, senior managing director and director of climate research, Wellington Management**

### 12.45 pm **Roundtable discussion: Your ESG questions answered**

Join this unique and interactive session for an open discussion related to all aspects of ESG. This is an opportunity to share experiences, opinions and understand how your peers are approaching their own ESG programs.



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

### 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

### **Strengthen the board's relationship with ESG**

An increasing number of boards are setting public climate targets, and companies start linking executive compensation to ESG metrics. Join this session to learn how to manage the relationship that 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 it has impacted decision making in the business

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- Learn how to get buy-in from management and the board on your ESG disclosure efforts
- Understand how to approach public targets and ensure the board are comfortable committing to these targets

**Moderator: Ben Ashwell, editor, Corporate Secretary and *IR Magazine***  
**Andrea DeMarco, senior vice president of investor relations, corporate communications and ESG, Norwegian Cruise Line Holdings**  
**Eliza Riego, head of product and service innovation, TMX Group**  
**Hunter Wells, vice president of investor relations, Century Communities**

**Moderator: Ben Maiden, editor-at-large, Corporate Secretary**  
**Eileen Kamerick, non-executive director, ACV Auctions, Legg Mason Closed End Funds, AIG Funds, Associated Banc-corp and Hochschild Mining**  
**Chad Spitler, founder and chief executive officer, Third Economy**

### 1.45 pm **How to use ESG to drive better stock performance and reduce your cost of capital**

Discuss the role ESG plays in improving financial performance and the impact it has depending on the stage of your ESG journey.

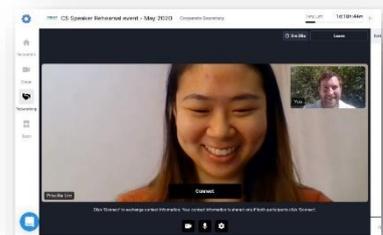
- Understand the drivers behind ESG's ability to improve Return on Equity and cost of capital
- Learn about the extent that financial performance is impacted depending on your level of reporting in comparison to peers
- Discover whether leading, laggard, or improving companies benefit more from ESG reporting

**Moderator: Ben Ashwell, editor-at-large, Corporate Secretary and *IR Magazine***  
**Ulrich Atz, research fellow, NYU Stern Center for Sustainable Business**  
**Tensie Whelan, director, NYU Stern Center for Sustainable Business**

### 2.15 pm **Meet the attendees: Networking**

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### 2.30 pm **Beyond the proxy: Mastering year-round ESG engagement**

Asset owners and asset managers have stepped up their approach to active ownership, and Covid-19 has changed the nature of communications between corporates and the capital markets. Engagement and communication with the buy-side and sell-side are critical to a well-run investor-facing ESG program, and this session will explore how companies can capitalize on the opportunities for increased engagement outside of the proxy season.

- Discuss the benefits of continuous shareholder engagement around ESG issues
- Learn how to get the balance right between achieving a continuous conversation on ESG with the markets and maximizing management's time
- Discover how to develop a proactive approach to off-season engagement to clarify what investors want from ESG information.

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

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**Martin Jarzebowski, director of ESG and responsible investing, Federated Hermes**  
**Mei Ni Chu, director of investor relations, Voya Financial**  
**Joe Vicari, managing director and practice lead for communications and customer experience, Broadridge**

### 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 those firms and indexes that are most relevant to you.

- Debate what is more important: Narrative, data or ESG scores as capital markets and ESG continue to evolve
- Understand the different collection methods that 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 with them in a way that resonates with their efforts

**Moderator: Ben Ashwell, editor, Corporate Secretary and IR Magazine**  
**Chad Reed, vice president, investor relations and ESG, Hannon Armstrong**  
**Maheen Sayeed, senior associate, IHS Markit**

### 3.30 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 10-K 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 utilize your ESG data to mitigate risk and add value to your stakeholders

**Moderator: Ben Maiden, editor-at-large, Corporate Secretary**  
**Alexandra Deigman, head of investor relations, Lazard**  
**Jennifer Motles, chief sustainability officer, Philip Morris International**

### 4.00 pm Summary of discussions and end of the conference

[Sign up now](#)

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