



ESG INTEGRATION FORUM – US

Thursday, July 13, 2023
Clifford Chance Offices, New York

AGENDA – JULY 13

8.30 am Registration opens

8.50 am Welcome to the ESG Integration Forum

Ben Maiden, editor, Corporate Secretary

9.00 am Setting the scene: A birds-eye view of ESG trends in 2023 and beyond

As the dust settles from this year's proxy season, we'll begin this conference by asking our panel how the conversation around ESG has changed, how it compares with last year, and which issues are gaining the most traction and attention.

- Reflect on new ESG trends from this year's proxy season
- Understand the impact of macro headwinds on sustainable investing
- Learn how investor and stakeholder ESG priorities are evolving

Moderator: Ben Maiden, editor, Corporate Secretary

Rebecca Corbin, founder and CEO, Corbin Advisors

Jessica McDougall, director of investment stewardship, BlackRock

9.45 am Regulatory update: Prepare for converging reporting requirements

After delays and an unprecedented number of comments, the SEC's final rule on climate disclosures approaches. Here we discuss the likely outcomes of these proposals, what the next steps are for companies, and how the requirements will (or won't) align with other global standards, including those set by the CSRD and ISSB.

- An updated look at the SEC climate proposal timeline and expected final requirements
- Understand how the reporting requirements will align with other reporting frameworks
- Discuss how regulatory requirements may align or conflict with SEC requirements

Moderator: Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary

Clifford Chance, speaker TBC

Mindy Lubber, chief executive officer, CERES

10.15 am Morning networking break

10.45 am A fragmenting movement: Communicating through ESG fatigue, skepticism and opposition

As the momentum behind ESG continues to grow, so too does its opposition. But how significant is this really for IR and governance teams, and how will it impact the movement overall?

Here we will discuss where the resistance is coming from, whether or not it should be accounted for in your sustainability messaging, and how companies can communicate their ESG story authentically.

- Debate the significance of the ESG pushback for public companies
- Learn how to communicate your ESG story in the context of growing opposition
- Discuss how best to align your ESG story with your overall corporate strategy

Moderator: Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary
Erika Karp, chief impact officer, Pathstone Capital

11.30 am Getting granular with data: Monitoring, measuring and managing your ESG performance

We still don't know which scopes will be included in the final SEC rulings, but across the world the demand for comparable, 'investor grade' ESG data continues to grow.

But the reporting landscape is constantly evolving and companies are finding themselves burdened with growing requests from investors, ratings agencies and regulators. How best to collect and report ESG information to all these different stakeholders?

- What are your peers focussing on? Discuss the latest trends in ESG data collection and reporting
- Setting science-based climate targets and implementing a clear transition plan
- Discuss how best to tackle the challenge of scope 3 reporting and third-party assurance
- Discover tools and technologies to enable more accurate and standardized ESG data management

Moderator: Ben Maiden, editor, Corporate Secretary
Joe Vicari, managing director and practice lead for communications and customer experience, Broadridge

12.15 pm Lunch

1.15 pm Governance trends: New expectations around board accountability and oversight

Following the collapse of SVB, the importance of good governance processes and an accountable, educated board is more critical than ever. What are the lessons learned from this, and how can governance teams support their boards at a time when voting policies have changed more than ever and companies face enhanced scrutiny?

Here we discuss how to identify and prepare for key governance risks, approaches to training and refreshing your board and ways to foster a culture of accountability across your organization.

- Learn how investor and proxy firm expectations around corporate governance and oversight are changing
- Hear how companies are approaching issues such as over boarding, onboarding, director education and term-limits
- Understand how informed your board needs to be on ESG: generalist vs specialist approach
- Share advice on staying agile: how often should you review your governance policies?

Moderator: Ben Maiden, editor, Corporate Secretary
Alexandra Higgins, managing director, Okapi Partners

2.00 Spotlight on social: Managing and communicating social capital to a range of stakeholders

This year's proxy season saw a number of high-profile racial equity audit proposals, highlighting the continued importance of DE&I issues in the mind of investors. As DE&I expectations increase, combined with rising living costs and new employee demands, companies should be re-evaluating the impacts human capital issues have on their business.

- Shareholder priorities: an overview of key human capital management trends this proxy season
- Go beyond board diversity: hiring and retaining a diverse workforce and reporting the right information
- Navigate new expectations on public companies to take a stand on social and political issues

Moderator: Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary
Nadira Narine, senior program director, ICCR
Emmanuelle Palikuca, managing director and head of sustainability advisory, Alliance Advisors

2.45 Investor Q&A: Learn how investor expectations around ESG issues are changing

Our panel of investors will answer any questions you have about how investors are integrating ESG into their investment decisions in 2023.

How are market conditions impacting their approach, and how can IROs leverage their company's ESG performance to better connect with existing and potential shareholders?

- Discuss the red and green flags investors have when it comes to ESG messaging and reporting
- Learn how investors engage with ratings agencies and how your score is integrated into their investment approach
- Hear investor forecasts on ESG trends beyond 2023

Moderator: Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary

3.30 Champagne roundtables: Exchange ideas with your peers

How the roundtables work:

- Choose any of the following topics –the power is in your hands!
- Join the relevant roundtable and discuss with your peers
- At the end of the session, hear a quick roundup from each table on what was discussed
- Enjoy a glass of champagne or a non-alcoholic beverage

Topics:

- Managing your ESG strategy with limited resources
- Giving yourself the best chance of success with ratings agencies
- Building and developing effective ESG teams
- Staying ahead on privacy and cybersecurity issues
- ESG activism: how are tactics evolving?

Ben Maiden, editor, Corporate Secretary

4.30 Closing remarks and networking drinks

Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary