



ESG INTEGRATION FORUM – SUMMER

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

AGENDA

8.15 am **Registration opens**

8.45 am **Welcome to the ESG Integration Forum**

Ben Maiden, editor-at-large, Corporate Secretary
Michelle Williams, partner, Clifford Chance

8.55 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-at-large, Corporate Secretary
Rebecca Corbin, founder and CEO, Corbin Advisors
Ki Hoon Kim, associate general counsel, HPE
Jessica McDougall, director of investment stewardship, BlackRock

9.50 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
Steve Nickelsburg, partner, Clifford Chance
Mindy Lubber, chief executive officer, CERES

10.25 am **Morning networking break**

10.55 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
Chris Gray, VP, sustainability and ESG, UnitedHealth Group
Emmanuelle Palikuca, managing director, head of sustainability advisory, Alliance Advisors**

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-at-large, Corporate Secretary
Keir Gumbs, chief legal officer, Broadridge
Cynthia Cummis, sustainability and climate expert leader, Deloitte**

12.10 pm **Finding sustainable investors that match your company profile**

This session examines how companies to better understand the ESG priorities of your shareholders using a data-driven approach, and how to benchmark your ESG ownership against that of your peers, and ways to target investors whose profile fits your ESG story.

- Understand the ESG priorities of your shareholder base better
- Benchmark the gaps in your register compared to your peers as it relates to ESG ownership
- Learn how to better target ESG-related investors

**Moderator: Laurence Taylor, senior conference producer, IR Magazine & Corporate Secretary
Christopher Stroh, executive director, market intelligence, S&P Global Market Intelligence**

12.40 pm **Lunch**

1.40 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-at-large, Corporate Secretary

Richard Gluckselig, VP, associate general counsel and corporate secretary, Regeneron

Alexandra Higgins, managing director, Okapi Partners

Tim Ring, senior vice president and corporate secretary, MetLife

2.25 pm

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

Sarah Altschuller, business and human rights counsel, Verizon

Nadira Narine, senior program director, ICCR

Tejal Patel, executive director, SOC Investment

3.10 pm

Investor fire-side chat & Q&A: Learn how buy-side expectations around ESG issues are changing

Here we will discuss how investors are integrating ESG into their investment decisions in 2023.

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

- *Learn the red and green flags investors have when it comes to ESG engagement, communications and stewardship*
- *Buy-side perspective on what constitutes 'material ESG issues' and linking ESG metrics to executive compensation*
- *Hear investor forecasts on ESG trends in the context of macro and political headwinds*

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

Daniel Hanson, managing director, senior portfolio manager, head of sustainable equity team, Neuberger Berman

3.40 pm

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
- Progressing the conversation around DE&I issues
- Staying ahead on privacy and cybersecurity issues
- ESG activism: how are tactics evolving?

Ben Maiden, editor-at-large, Corporate Secretary

4.30 pm

Closing remarks and networking drinks

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