

# The ESG Integration Forum – 2021

## December 1-2, 2021

### Live and virtual

#### 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**.

#### Agenda at a glance

All times in Eastern Time (ET)

[Sign up](#)

#### Day one

Time	Wednesday, December 1	
10.15 am	<i>Welcome to the ESG Integration Forum 2021!</i>	
10.30 am	<b>An introduction to dynamic materiality</b>	
11.15 am	<b>Meet the attendees: Networking</b>	
11.30 am	<b>Staying ahead of the SEC on reporting and disclosure</b>	
12.30 pm	<b>A cost-benefit analysis on assured ESG data</b>	
1.15 pm	<b>Meet the attendees: Networking</b>	
1.45 pm	<b>A guide to automating ESG reporting</b>	
2.15 pm	<b>Meet the attendees: Networking</b>	
2.30 pm	<b>ESG for small and mid-cap companies</b>	<b>Understanding ESG and fixed income</b>
3.15 pm	<b>The who, what, where, how and when of ESG engagement</b>	
4.15 pm	<b>Summary of discussions</b>	
4.30 pm	<b>End of day one</b>	

#### Day two

Time	Thursday, December 2	
10.30 am	<b>Welcome to the ESG Integration Forum – 2021!</b>	
10.45 am	<b>The role of companies in the race to net-zero</b>	
11.45 am	<b>Meet the attendees: Networking</b>	
12.15 pm	<b>How to facilitate board oversight on ESG</b>	
1.15 pm	<b>Meet the attendees: Networking</b>	
1.30 pm	<b>Getting the right metrics for social, human capital and diversity factors</b>	
2.30 pm	<b>Meet the attendees: Networking</b>	
2.45 pm	<b>Ask me anything: An investor Q&amp;A</b>	
3.45 pm	<b>Summary of discussions</b>	
4.00 pm	<b>End of conference</b>	

[Detailed agenda below](#)

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## Agenda in detail

All times in Eastern Time (ET)

**Time**      **Wednesday, December 1**

**10.15 am**    **Welcome to the ESG Integration Forum – 2021!**

**10.30 am**    **An introduction to dynamic materiality**

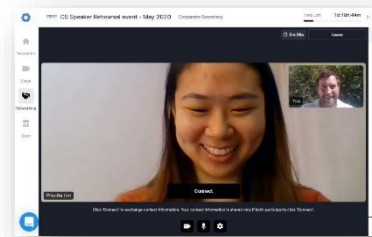
Material ESG issues are more fluid than ever before; what is material today may not be tomorrow, and what is not material today may be tomorrow. As stakeholders become more empowered, we examine how to approach materiality in an agile way, taking into account all stakeholder views.

- Understand the concept of dynamic materiality and why is it vital in measuring and managing your ESG risks and opportunities
- Hear examples and best practices for conducting a materiality assessment
- Learn how to stay up-to-date with the risks and opportunities that impact your business in this rapidly evolving area

**11.15 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.

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!



**11.30 am**    **Staying ahead of the SEC on reporting and disclosure**

Given the expectation that the SEC will demand increasingly higher disclosures around ESG issues, we discuss what companies can do to improve their practices related to identifying, collecting and reporting decision-useful ESG data.

- Hear views about how emerging ESG reporting legislation is likely to impact corporate issuers
- Discuss how best to plan for expected SEC reporting requirements around ESG factors
- Learn how to keep up with and prioritize disclosure expectations from various stakeholders

**12.30 pm**      **A cost-benefit analysis on assured ESG data**

The regulatory focus on ESG requirements is likely to increase the reliance on external assurance for ESG data. This session examines auditing trends, discusses the benefits and challenges, and shares best practices related to auditing ESG data.

- Discuss whether ESG audits will become necessary via regulation or market trends
- Understand how companies overcome the workload challenges for auditing data as ESG data becomes more real-time focused
- Debate whether assured data is likely to help inclusion in ESG indexes
- Learn about the practices and systems companies should put in place to report and audit ESG-related metrics

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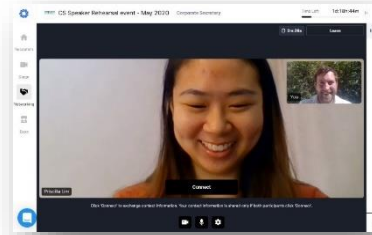
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## 1.15 pm **Meet the attendees: Networking**

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## 1.45 pm **A guide to automating ESG reporting**

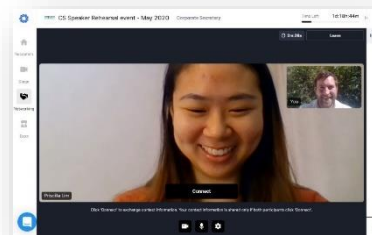
Preparing and reporting ESG information can be time-consuming and takes resources away from managing ESG risks. This session explores how advances in technology can help reduce reporting fatigue, streamline data collection, and provide decision-useful information to investors in real-time.

- Learn about the pros and cons of automating ESG data collection
- Understand which ESG-related metrics can be collected and reported in a smooth automated manner
- Discover how to use automation tools to analyze and tell a story about how ESG factors impact your business

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

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## 2.30 pm **ESG for Small and mid-cap companies**

ESG leaders in the small and mid-cap space can benefit from index inclusion and reduced cost of capital. Yet, the challenges for small and medium-sized companies are unique. In this session, we examine ESG trends and challenges which are specific to small and mid-cap companies.

- Discover market trends related to ESG for small and mid-cap companies
- Discuss how to demonstrate the benefits of ESG reporting to engage internal stakeholders, management and the board
- Discover how targeting analysis for small cap companies is evolving to include ESG-focused investors

## **Understanding ESG and fixed income**

As green-bonds and ESG-linked loans become more varied and popular, this session investigates how companies can raise capital through ESG related fixed-income vehicles.

- Learn about the increased innovations in green bonds and ascertain why they might be a good fit for your company
- Understand how fixed-income managers view ESG-related risks and how their approach differs from equity managers
- Hear fixed-income investor expectations of public companies

## 3.15 pm **The who, what, where, how and when of ESG engagement**

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As investors take a more active role, using their influence to change behavior at companies around ESG issues, we explore the changing nature of conversations between issuers and investors. We discuss the best approaches and vehicles for strategic engagement with investors related to ESG topics.

- **Who** companies prioritize engagement with; portfolio managers, analysts, ESG or stewardship teams – and how to tailor your approach for each stakeholder
- **What** topics investors are looking to address, and how you can align discussions with the fundamental time horizon of portfolio managers
- **Where** these discussions can take place; from traditional engagements such as proxy season, roadshows investor days and earnings calls to bespoke ESG broadcasts, social media and governance roadshows
- **How** to tell your ESG story and communicate decision-relevant information to your shareholders
- **When** are ESG discussions are most constructive, and how companies can build ESG into their year-round engagements with investors

**4.15 pm**    **Summary of discussions**

**4.30 pm**    **End of day one**

# The ESG Integration Forum – 2021

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**Time**      **Thursday, December 2**

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

Recap from day one's discussions

**10.45 am**    **The role of companies in the race to net-zero**

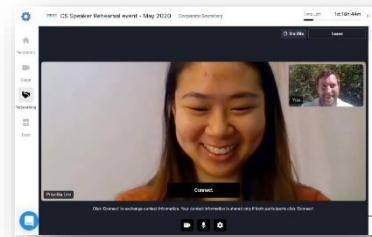
As companies commit to science-based targets related to climate change and the SEC seeks to develop climate-disclosure rules, we take a deep dive into climate action. We specifically explore setting targets and developing disclosures around carbon emissions.

- Discuss what format climate disclosures should take
- Understand which climate targets are most effective and how companies can develop time relevant goals linked to carbon emissions
- Learn how to begin measuring and benchmarking greenhouse gas emissions
- Discover investor expectations of public companies in the area of climate action

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

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**12.15 pm**    **How to facilitate board oversight on ESG**

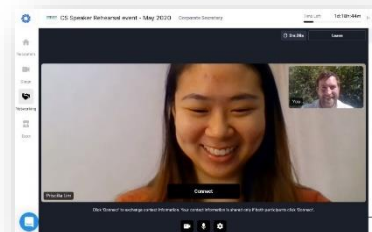
Boards of public companies are increasingly required to have more oversight on ESG factors. This session examines the current state of board oversight on ESG risks and opportunities and how to improve ESG oversight through composition and education.

- Discuss what directors, executives and departments should form the ESG disclosure committee
- Learn how to educate your board around ESG risks and opportunities
- Understand how to improve shareholder engagement on ESG at the board level

**1.15 pm**    **Meet the attendees: Networking**

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**1.30 pm**    **Getting the right metrics for social, human capital and diversity factors**

Social factors are subject to increased scrutiny, yet they can be among the most difficult to measure and analyze. During this deep dive into social factors, we look at how both companies

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and investors measure and evaluate issues such as human capital management, corporate culture and social license to operate.

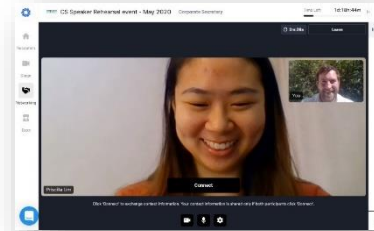
Furthermore, the SEC has approved rule changes proposed by Nasdaq that put in place new board diversity mandates and related public disclosures regarding composition. We will also examine what this means for public companies and disclosures around diversity and inclusion activities.

- Learn about emerging performance indicators related to social risks and opportunities
- Understand the challenges of qualitative and quantitative disclosures in human capital management and decide what works for your company
- Discuss whether mainstream investors will include diversity requirements in their governance policies

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

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## 2.45 pm **Ask me anything: An investor Q&A**

In this final session we offer a live Q&A with a panel of investors and analysts to share their views on the evolving ESG space and their expectations of public companies.

- Hear from a range of investors about their priorities for public companies in 2022
- Have your most pressing questions answered by investors and analysts
- Understand investor requirements from public companies to inform your future ESG strategies

## 3.45 pm **Summary of discussions**

## 4.00 pm **End of conference**

Sign up

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