

Responsible Investment Forum San Francisco

Agenda | September 19-20, 2023

Committing to change, creating value, and driving growth

Day One – 19 September

9:00

Chairperson's opening remarks

Michael Eisenberg, Partner, ESG Services Lead, **ERM**

9:10

Building an ESG strategy in a fast-changing world

- How are west-coast managers approaching decarbonisation? What is needed for managers to progress faster?
- How are managers dealing with the ESG backlash in the US?
- Making use of AI: how are firms approaching frontier technology such as AI from an ESG perspective?
- What are ESG leaders predicting for the next decade?

Moderator: Angela Ty, Partner, KPMG

Alison Fenton-Willock, Director, Sustainable Investing, KKR

9:50

How should heads of sustainability work with the investment team?

- What does a good working relationship with the deal team look like?
- Getting a seat at the table at each stage of the investment process
- How to manage frictions with deal partners with other priorities?
- Examples of sustainability heads influencing investment decisions

Moderator: Alan Kao, Global Director, ESG Services, Ramboll

Priya Prasad Bowe, Head of ESG, Oaktree Capital

Whitney Hanson, Vice President, Kohlberg & Company

Andy Caine, COO & Partner, Frazier Healthcare Partners

10:30

LP & GP perspectives on solving the ESG data challenge

- How are initiatives such as the data convergence initiative helping to solve the data challenge?
- Are tech-focused managers based on the west-coast doing anything innovative on data?
- Overcoming issues with sharing portfolio company data
- Examples of GPs pushing back effectively on data to make the relationship more productive

Moderator: Michael Eisenberg, Partner, ESG Services Lead, **ERM**

Paul Yett, Director of ESG & Sustainability, **Hamilton Lane**

Will Relle, ESG Director, **HarbourVest Partners**

11:10

Coffee & Networking

11:45

Opportunities in the energy transition and climate tech

- Leveraging the Inflation Reduction Act to drive investments in climate tech
- The intersection of PE/venture/growth/infrastructure for investing in the energy transition
- Views on different areas of investing: why grid resiliency is seen as crucial for venture investors
- Examples of west-coast managers investing in climate tech

Moderator: Peter Ellsworth, Senior Director, **Ceres**

Monica Varman, Partner, **G2 Venture Partners**

Saloni Multani, Co-Head of Innovation & Expansion, **Galvanize Climate Solutions**

Eric Lee, Senior Vice President, **Aligned Climate Capital**

Nick Abel, Portfolio Manager, **CalSTRS**

Stephen Petricone, Managing Director, **HPS Investment Partners**

12:30

LP Keynote Interview

Conversation with a leading institutional investor on ESG as a returns enhancer, due diligence for managers and investor expectations.

Moderator: Snehal Shah, Reporter, **New Private Markets**

Andrew Collins, Head of ESG & Responsible Investing, **San Francisco Employees' Retirement System (SFERS)**

1:00

Lunch

Stream A	Stream B
<p>2:00 Insights from west coast fund managers on impact investing</p> <ul style="list-style-type: none"> Balancing profit and purpose: is there a trade off? How impact investors on the west coast can drive social and environmental change? How are investors addressing other pressing challenges such as the cost-of-living crisis and global food security? <p>Moderator: Snehal Shah, Reporter, New Private Markets</p> <p>Mandira Reddy, Director of investment analytics, Capricorn Investment Group Geoff Eisenberg, Partner, Ecosystem Integrity Fund Amelia Ahl, Director of Impact Management and Measurement, The Builders Fund</p>	<p>2:00 The continued evolution of ESG in Venture Capital</p> <ul style="list-style-type: none"> Is a more challenging fundraising environment causing LPs to put more pressure on VC's on ESG? How important is the role of ESG governance in the success of venture firms? To what extent is venture catching up with private equity? Deep dive into the VC DDQ and what it means <p>Moderator: Shu Dar Yao, Founder, Managing Partner, Lucid Capitalism LLC</p> <p>Eunice Chapon, Director of Operations and Business Development, BrightEdge (venture capital arm of the American Cancer Society) Danielle Jezienicki, Vice President of Sustainability, Grove Collaborative Carin Watson, Chief of Staff, General Catalyst</p>
<p>2:40 Impact value creation toolbox: how to generate value from an impact strategy</p> <ul style="list-style-type: none"> How is value creation different for impact funds to other PE strategies? To what extent do value creation plans and impact creation plans need to be integrated? How do PE and venture funds influence their portfolios? <p>Moderator: Jay Mason, Partner, North America M&A Lead, ERM</p> <p>Jennifer Flood, Head of North America Sustainability, Investindustrial Jenny Roy, VP Marketing, Patch</p>	<p>2:40 Private Debt: to what extent is ESG now a leading issue for credit investors?</p> <ul style="list-style-type: none"> Why do private debt investors need to consider ESG factors? Update on findings of latest PRI private debt survey What are the likely future trends in ESG in credit? <p>Moderator: Michael R. Littenberg, Partner, Ropes & Gray</p> <p>Adriana Becerra Cid, Sustainability Manager Private Assets, Lombard Odier Asset Management Brittany Agostino, Vice President, ESG – US Credit Lead, Ares Management Teresa Cutter, Head of ESG & Impact, White Oak Global Advisors</p>
<p>3:20 Investor views on climate tech</p>	<p>3:20 Real assets and ESG integration</p>

<ul style="list-style-type: none"> • Are investors comfortable with the risk/return on climate tech investments? • To what extent will institutional investors need to take on VC-type risk to gain exposure to support emerging climate technologies? <p>Moderator: Di Tang, Senior Investment Director, Cambridge Associates</p> <p>Anup Jacob, Partner, Activate Capital Leola Ross, Deputy CIO and Head of ESG, Seattle City Employees' Retirement System Adam Goehner, Director, ESG, BCI</p>	<ul style="list-style-type: none"> • Incorporating ESG considerations into real asset investments • Highlighting the social impact of real asset investments • Examining how ESG factors can be integrated into investment strategies to drive long-term value creation <p>Moderator: Chris Pyke, Chief Innovation Officer, GRESB</p> <p>Isela Rosales, Managing Director of Capital Markets, ESG and Sustainability, Bridge Investment Group Gingee Prince, Chief Impact Officer and Managing Director, Enhanced Capital Jennifer Lin, Chief Compliance Officer, Fundamental Advisors</p>	
<p>4:00 Short Break</p>		
<p>4:20 Interactive Working Group Sessions <i>These working groups will allow the audience to join an interactive roundtable discussion with designated expert facilitators</i></p>		
<p>4:20 Building a responsible approach to AI in private equity</p> <ul style="list-style-type: none"> • Outlining the scale of the opportunity for private markets • How can PF firms develop an approach with things moving so fast? • Dealing with job losses brought about by technological advances <p><i>Facilitated by</i> Chris Kauffman, Principal, General Catalyst</p>	<p>4:20 Keeping up with regulatory changes in North America and globally</p> <ul style="list-style-type: none"> • Making sense of latest SEC proposals • How should US managers be engaging with SFDR • Knowledge sharing and war stories <p><i>Facilitated by</i> Mark Green, Senior Relationship Manager, US, UNPRI</p>	<p>4:20 Building an ESG data plan throughout the investment cycle</p> <ul style="list-style-type: none"> • Using ESG data during due diligence • Integrating ESG data into value creation plans • Learnings from those being innovative with data <p><i>Facilitated by</i> Daniela Arias, Senior Manager, ESG Advisory, Crowe LLP</p>

5:00 Networking reception

For more information, visit our [website](#)



Day Two – 20 September

8:00-8:50

Invitation only **GP/LP Breakfast Briefing**

8:55 Chairperson's opening remarks

Michael Eisenberg, Partner, ESG Services Lead, **ERM**

9:00

Keynote: Double Bottom Line - How DBL Drives Both Financial Return and Environmental/Social Return

Moderator: Catherine Chen, Managing Director, Senior Consulting Group, **RBC Wealth Management**

Ira Ehrenpreis, Managing Partner, **DBL Partners**

09:30

Fireside Chat: How can technology help GPs and their portfolio companies improve on ESG year on year?

- Different benchmarks in the ESG space
- Power of benchmarks and analytics
- KPI's that matter
- Data collection, verification and portfolio engagement

Moderator: Amanda Murphy, Strategic Account Executive, **EcoVadis**

Allison Gosselin, Director, Environmental Social and Governance, **Graham Partners**

09:55

The intersection of technology, ESG, and social responsibility

- Exploring how technology can address environmental challenges but create other issues
- Examining the ethical implications of tech investments, including labor practices, diversity etc
- The role of investors in shaping the tech industry's approach to sustainability

Moderator: Nicole Engels, Chief Growth Officer, **ClimateCheck**

Amanda Roher, Senior Associate, **Blackhorn Ventures**

Dalia Rahman, ESG Specialist, Climate Lead, **Apax Partners**

Shu Dar Yao, Founder, Managing Partner, **Lucid Capitalism LLC**

Patrick Burtis, Partner, **Amadeus Capital**

Zoe Weinberg, Founder & Managing Partner, **ex/ante**

10:40

Networking break

11:10

Fireside chat: how a leading west-coast GP is defining their climate change strategy

- Integrating decarbonisation into the investment thesis
- Balancing the desire to climate change goals vs. dealing with the here and now
- Pursuing portfolio decarbonization across multiple asset classes
- Examples from the portfolio of making positive changes to add value

Moderator: Daniela Arias, Senior Manager, ESG Advisory, **Crowe LLP**

11:30

Portfolio company perspectives on sustainability

- How are portfolio companies balancing the expectations of their PE sponsors with their other stakeholders?
- How are portfolio companies working with their investors on developing a strategy?
- What are the key areas of ESG focus to improve performance and create real business value?
- Examples of working with other portfolio companies on sustainability initiatives

Moderator: Lisa Bongiovanni, Environmental Business Advisor, **Bridge House Advisors**
Verity Chegar, Board Member, International Sustainability Standards Board (ISSB), **IFRS Foundation**

Scott Chafin, Chief Commercial Officer, **ENTACT**

Suzanne Spradley, SVP, Chief Compliance Officer & Associate General Counsel, **NFP**

Todd Keller, Chief Operating Officer, **Marlabs**

12:15

Addressing diversity and inclusion in private equity

- Getting your own house in order
- Identifying and tackling unconscious bias in the hiring and investment process
- How diverse perspectives can lead to better investment outcomes
- Practical tips for addressing diversity at portfolio level

Moderator: Wendy Norton, Managing Director, **Norgay Partners**

Marlene Timberlake D'Adamo, Chief Diversity, Equity & Inclusion Officer, **Calpers**

Danielle Dobson, Vice President, **HarbourVest Partners**

Brian Giaquinta, Vice President, **DigitalBridge**

Melissa Lopez, Managing Director of Investments, **The James Irvine Foundation**

12:55 Chairperson's closing remarks

Michael Eisenberg, Partner, ESG Services Lead, **ERM**

12:55

Short break

1.05

Interactive roundtable discussions over Lunch

A seated lunch enabling you to join a table of market participants with similar interests and expertise. Attendees will have a mix of tables to choose from, each table having a host to steer discussions.

1. Practical steps to getting to net-zero *facilitated by* **Danny Zouber**, Managing Director, **North Sky Capital**
2. How ESG practitioners can influence deal teams *facilitated by* **Johan Nordenson**, Operating Partner, Value Creation and ESG, **Altamont Capital**
3. Unpacking financial leverage and human rights in value chains
4. Integrating biodiversity into decision making *facilitated by* **Gary Andrews**, **Independent**
5. How AI can help with climate resilience
6. How US Companies Should Prepare for CSRD *facilitated by* **Corinna Kester**, Manager, Strategic Sustainability Consulting, **Ramboll**