

Responsible Investment Forum: San Francisco 2022

Agenda

Day 1 - Wednesday, September 14

8:30 am Registration and welcome breakfast

9:30 am PEI welcome and Chair's remarks

9:50 am Building and enhancing your ESG program

- Constructing a diverse portfolio
- Investor allocation and segment demands
- ESG influences when sourcing deals
- Setting DE&I goals
- Addressing short- and long-term ESG risks
- Consistent and comparable ESG data considerations
- Identifying greenwashing

Moderator:

Ryan Werffeli, Chief Operating Officer, **Malk Partners**

Panelists:

Michael Altschuler, Chief Administrative Officer & General Counsel, **Comvest Partners**

Daniel Ingram, Senior Vice President, ESG Lead, **Wilshire Associates**

Sanaz Raczynski, Head of Sustainability, **Kohlberg & Company**

10:35 am Tackling the social issue of climate change and net zero

- Setting targets for PE firms and their portfolio companies
- Consistent approaches for clarity and consistency
- Creating an expedited reduction plan
- Using standard metrics and customize reporting
- Strategies to address the risk of climate change
- Integrating technology and business models to produce impactful climate solutions



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Moderator:

Ryan Miller, SVP & GM, Global Financial Services, **Persefoni**

Panelists:

Laurel Peacock, Head of ESG, **NGP**

11:20 am Networking break

11:50 am Generating alpha with ESG data; real world examples

12:35 pm Human rights: Addressing the next ESG issue - Human Capital Management

- Understanding and identifying human rights issues
- Raising the level of awareness
- Effective due diligence on human rights issues within a portfolio company
- Mitigating legal and reputational risks
- Analyzing companies in the supply chain

Moderator:

Michael Littenberg, Partner, **Ropes & Gray**

Panelists:

Kathryn Mohan McDonald, Co-Founder, Head of Investments & Sustainability, **RadiantESG Global Investors**

1:20 pm Networking luncheon

Breakout sessions (choose one)

2:20 pm Track A: Next steps in ESG reporting

- Rules around climate disclosure
- ESG data conversion project
- Mitigating risk in portfolio management
- Measuring and assessing ESG performance over time
- Understanding the abundance of ESG frameworks

Moderator:

Bryce Klempner, Managing Director, **HarbourVest Partners**

Panelists:

Catherine Isabelle, Senior Director, Responsible Investment, **PSP Investments**
Julia Jaskolska, Co-Investments & ESG Lead, **CalPERS Private Equity**



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2:20 pm Track B: Investing with impact

- Defining and demonstrating impact investing
- Understanding impact performance
- LP commitments
- Key elements of reporting
- Identifying 'impact washing'
- Best practices for impact measurement and impact management

Panelists:

Justin Kulla, Partner of Impact Investing and Head of ESG, **TZP Group**

Breakout sessions (choose one)

3:05 pm Track A: ESG in private credit

- ESG integration within the private debt strategy
- Incorporating ESG factors into investment decisions
- Managing ESG-related risks and opportunities
- Transparency and accountability solutions

Panelists:

Priya Prasad Bowe, CFA, Managing Director and Head of ESG, **Oaktree Capital**
Sonia Rocher, Managing Director, **BlackRock**

3:05 pm Track B: Venture & ESG: How they work in tandem

- Due diligence expectations
- The role of DEI in the VC space
- Diversifying investment solutions
- Quantitative and qualitative metrics to track progress

Panelists:

Peter Dunbar, Head of Private Equity, **UNPRI**

3:50 pm Networking break

Interactive masterclasses (choose one)

4:20 pm

1. **Best practices for disclosing ESG to investors and the public**
2. **Data integration**
3. **Attracting ESG talent**



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4. **Due diligence best practices**
5. **Building a carbon program - greenhouse gas control**

5:00 pm Cocktail reception

Day 2 - Thursday, September 15

8:30 am Networking breakfast

9:30 am Chair's remarks

9:40 am Opening keynote

10:05 am **The Greenwashing Test: How are you doing**

Insights for investors on how best to identify these managers through understanding language, looking for jumps in data, and clarifying the small details.

- How to avoid greenwashing in marketing promotions and in disclosures.

Moderator:

Paul Barker, Partner, ESG & Impact, **Kirkland & Ellis**

Panelists:

Colin Etnire, Head of ESG, **BC Partners**

Alan Kao, Principal and Global Director, ESG Services, **Ramboll**

10:45 am **Integrating ESG in the venture capital space**

- With so much free capital in VC firms, how are we utilizing fund to allocate towards greener strategies?
- How the two areas are causing disruption in the market and what this means in the next year
- Continuing to Invest with Impact as ESG Becomes More Common

Moderator:

Chase Wisnowski, Vice President, **Malk Partners**

Panelists:

Luci Fonseca, Principal, **Base10 Partners**

Sonia Lagourgue, Purpose & ESG Leadership, **Georgian**



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11:15 am Diversity and equity as a business imperative

- The relationship between DEI and operating performance
- Steps to increase gender and minority representation: recruitment and retention
- Establishing and enhancing initiatives
- Creating a culture that supports inclusion
- Talent management priorities

Panelists:

Dörte Höppner, Chief Sustainability Officer/Managing Director, Fundraising and Investor Relations, **The Riverside Company**

Jennifer Lin, Chief Compliance Officer, **Fundamental Advisors**

Jon Samuels, Partner, Impact & Policy, **Vistria**

John Stewart, Founder, **MiddleGround Capital**

11:55 am Networking break

12:25 pm Compliance and regulatory best practices

- Avoiding greenwashing
- Compliance risks associated with ESG investing
- Steps and strategies to ensure ESG compliance
- Conducting internal reviews of ESG-related disclosures
- Strategies to streamline reporting across multiple investments
- Positioning your firm for maximum efficiency when reporting becomes mandatory

1:05 pm Governing and monitoring portfolio companies

- KPIs with ESG-linked value creation
- Effective ESG models to develop companies and bring change
- Creating a robust framework for monitoring, engagement, and reporting
- Leading by example via internal ESG policies and measures
- ESG demands of portfolio companies

Moderator:

Sofia Martos, Partner, ESG & Impact, **Kirkland & Ellis**

Panelists:

Tom Hodges, Partner and Head of the Long-term Equity Strategy, **Generation Investment Management**

1:45 pm Closing luncheon and end of conference



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