

Responsible Investment Forum

New York 2023

The Responsible Investment Forum: New York 2023

North America's #1 event for ESG in private markets

1-2 March, Convene 117 West 46th Street, New York

Day one: 1 March

7:30

Registration and networking breakfast

08:30

PEI Welcome

Erin Wolfe, Senior Conference Producer, **PEI**

08:33

Co-Host remarks

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

08:37

Chair remarks

Bruce Simpson, Advising ESG Board Member, **Multiple Firms**

08:40

Opening Keynote

Elizabeth Seeger, Board Member, **International Sustainability Standards Board**

Andrew Siwo, Director of Sustainable Investments & Climate Solutions, **New York State Common Retirement Fund**

09:10

Solidifying your ESG strategy

- Between all the different initiatives out there today, it can be difficult to figure out how to continue to build out the best ESG strategy for your firm.
- Practical steps for ESG program streamlining and how to accurately measure each silo: E, S, and G.
- Understanding reporting requirements and certain regulatory concerns surrounding ESG inquiries.

Visit the [agenda page](#) for the latest updates.

For programme information contact Erin Wolfe erin.w@peimedia.com

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Moderator: **Alan Kao**, Principal, **Ramboll**

Lindsay Rosenstein, Vice President, **Crestview**

Allison Spector, Head of ESG, **One Rock Capital Partners**

Ritika Chandra, Head of ESG and Senior Vice President, Strategic Resource Group, **TA Associates**

Carl Johan Renstrom, Partner, **EQT**

09:50

27 years to net zero, are we on track?

- Current state of U.S. companies and their carbon programs and how close they are to matching the goals set out by the Paris Agreement
- Understanding geopolitical changes and how that is affecting companies' ability to get to net-zero.
- Practical tips to put a plan into action, NOW!

Moderator: **John Fleming**, Partner, **ERM**

Kate McCauley, Vice President in the Environmental, Social and Governance Group, **Ares Management**

Jimmy Yan, Director of ESG, **New York City Comptroller's Office**

Michael Cappucci, Managing Director for Compliance and Sustainable Investing, **Harvard Management Company**

Bethany Brantley, Head of ESG, **IPI Partners**

10:30

Making ESG data work for you

- Practical steps for data intake, storage, examination, and identifying possible data gaps.
- Analyzing ESG data to drive progress on ESG value creation.
- Identifying ESG reporting quality and rooting out any biases in data

Max Hong, Chief Executive Officer, **Malk Partners**

Heidi DuBois, Global Head of ESG, **AEA Investors**

Morgan Sheil, AVP Impact & Sustainability, **Energy Impact Partners**

Chenkay Li, Managing Director, Direct Equity Investments, **Hamilton Lane**

11:10

Networking break

11:40

The new ESG regulatory landscape

- new SEC proposals around ESG requirements for investment advisers and firms and understanding enforcement policies

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- keeping compliant with current SFDR mandates
- tactical solutions for ESG compliance within your firm and portfolio companies
- understanding consequences for ESG infractions & potentials surrounding loss of operating licenses

Rob Esposito, Senior ESG Counsel, **Apollo Global Management**

Tracy Harris, Independent Director, **District of Columbia Retirement Board Trustee**

Kristina Wyatt, Deputy GC and SVP of Global Climate Reporting, **Persefoni**

Mary Beth Houlihan, ESG & Impact Partner, **Kirkland & Ellis**

12:20

Digital infrastructure and technology for ESG considerations

- Using technology- driven solutions to create processes for sourcing, capture and processing, and validation to overcome data issues.
- Getting ESG portfolio engines to scale, is it better to build solutions internally or outsource to third parties?
- How to build up your digital infrastructure to protect company assets and data.

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

Avantika Saisekar, Managing Director, ESG, **Wafra**

Josh Green, Chief Operating Officer, **Novata**

Mackenzie Turner, Director of Impact & Policy, **Vistria PRG**

Joshua Brunert, Global Head of ESG Product Development, **Apex Group**

13:00

ESG and Deal Team Buy-in

Cornelia Gomez, Operating Principal & Global Head of ESG, **General Atlantic**

Winna Brown, Private Equity Client Service Partner and Americas ESG Leader, **Ernst and Young**

Tricia Winton, Partner & Global Head of ESG, **Bain Capital**

Machal Karim, Head of ESG, **Blue Owl**

13:40

Lunch

14:40 Stream A: Continued push towards Impact Investing <ul style="list-style-type: none">- Status of the impact landscape and where PE firms are beginning to	14:40 Stream B: ESG Strategy: The journey from day one to year X <ul style="list-style-type: none">- ESG Programs now require multiple functional experts	14:40 Stream C: ESG integration in private debt <ul style="list-style-type: none">- Proactive approaches to combat lack of	14:40 Stream D: Driving decarbonization in portfolio companies <ul style="list-style-type: none">- Discuss how GPs are establishing climate
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<p>implement strategies.</p> <ul style="list-style-type: none"> - Who should think about including impact funds and are there pros and cons to its implementation? - Expected trends in the impact space going into 2023 and beyond. <p>Moderator: Michael Eisenberg, Partner, ESG Services, ERM Michael Korengold, President & CEO, Enhanced Capital Partners Jones Thomas, Director, Capricorn Investment Group Rini Greenfield, Founding General Partner at Rethink Food Kyle Matter, Managing Director, Global Impact, KKR</p>	<p>to collaborate to solve the ESG problems that matter. We would talk about a few macro trends and ask how each role needs to deliver for their firms' success. The potential topics are: SFDR, ESG Data Collection and Usage, Carbon, and ESG Value Creation.</p> <p>Moderator: Chase Jordan, Partner/Principal, Ernst & Young Jean Gulliver, Director of Investor Relations, Court Square Kim Erle, Managing Director and Global Head of ESG, HIG Maha Eltooby, Chief Sustainability Officer & Managing Director, Brightstar Capital Partners</p>	<p>regulatory clarity and inadequate ESG data in private debt.</p> <ul style="list-style-type: none"> - Comparing approaches for syndicated loans, direct lending loans, and sustainability linked loans <p>Moderator: Snehal Shah, Reporter, New Private Markets, PEI Kristina Matthews, Head of Investor Relations & ESG, Brightwood Capital Advisors Tess Virmani, Deputy General Counsel & EVP, Public Policy, Head of ESG, Loan Syndications and Trading Association Priya Prasad Bowe, Managing Director, Head of ESG, Oaktree Capital</p>	<p>strategies and goals at the firm/fund level</p> <ul style="list-style-type: none"> - Review how these goals translate into specific initiatives for portfolio companies - Look at examples of how portfolio companies are operationalizing these through discrete decarbonization levers and programs <p>Moderator: Josh Hesterman, Managing Director, KPMG Ben Saunders, Principal, ESG, Apollo Global Management Irina Markina, Director of Impact and Sustainability, Ara Partners</p>
<p>15:20 Stream A: Building ethical, resilient and impactful supply chains for better returns</p> <ul style="list-style-type: none"> - Deeper understanding of supply chains as they pertain to eco-system and 	<p>15:20 Stream B: Case study: data understanding and retention for better ESG programs</p> <ul style="list-style-type: none"> - identifying key indicators for comprehensive ratings of ESG programs. - process of sorting through key data points to extract the most important 	<p>15:20 Stream C: Infrastructure and the energy transition</p> <ul style="list-style-type: none"> - The current state of the infrastructure market and detail the significant trends affecting 	<p>15:20 Stream D: Workshop: Analytics and benchmarking to build a stronger ESG program</p> <ul style="list-style-type: none"> - different benchmarks in the ESG space

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<p>human rights considerations.</p> <ul style="list-style-type: none"> - Navigating conflict zones and risk mitigation strategies for investors in foreign territories. - Addressing public health concerns within supply chains. <p>Moderator: Kristin Sjöholm, Managing Director, FTI Consulting Rob Celin, Principal & Chief of Staff, Tilia Sam Klass, Partner, Acre Venture Partners Tynesia Boyea Robinson, President & CEO, CapEQ</p>	<p>facts during a decision process.</p>	<p>the asset class and what to expect coming up in 2023.</p> <ul style="list-style-type: none"> - The importance of moving away from fossil fuel investments and into more renewable energy resource investments - Opportunities and key takeaways from the inflation reduction act. - The Role of Government in Building the Green Infrastructure Needed to Support the Energy Transition in the United States, Canada and abroad. <p>Peter Ellsworth, Senior Director, Ceres Eric Newman, Treasury Manager, City of Stamford Laura Fernandez, Managing Director, Transactions & Permitting / ESG, Kinterra Capital Andrew Harris, Head of ESG and Investor</p>	<ul style="list-style-type: none"> - the power of benchmarking and analytics - public market benchmarks for the private space - early data insights from the private markets - applying that data to your program <p>Lorraine Wilson, CIO and Head of ESG, Novata Carrie Braddock, Managing Director, Head of ESG & Impact, Silver Lake</p>
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		Relations, Tiger Infrastructure	
16:00 Networking break			
16:30 Stream A: Investor priorities in private equity - Greater desire for co-investment - How are investors allocating specifically for impact & ESG? - ESG considerations during fundraising. Neda Jafar , Partner, Kimmeridge Sheryl Schwartz , Chief Investment Officer, ALTI Jessica Pan , Principal, Global Private Equity, APG Asset Management Maximiliane Heidenblut , Head of ESG & Climate Products, Americas, MSCI	16:30 Stream B: Working group: SFDR and EU taxonomy in the US - What is the current status of the development and enactment of regulation? - What potential impacts will this regulation have on your firm? - What are the basic actions you should start doing to prepare? Corey Barnes-Covenant , Head of Strategic Sustainability Consulting, Ramboll	16:30 Stream C: The US real estate market: Building a green future - the push for using renewable resources and green construction materials in future building plans. - understanding property values and returns for green rental properties vs. properties with weaker environmental performance. - how funds are going about engaging tenants on sustainability. Peter Benson , Senior Reporter, Private Equity Real Estate, PEI Lauren Winkler , Senior Director, ESG, The Green Cities Company Dan Winters , Senior Director, GRESB Helen Gurfel , Head of Sustainability & Innovation, CBRE	16:30 Stream D: TBD
17:10 Stream A: Debate: Is launching an impact strategy detrimental to wider sustainability efforts?	17:10 Stream B: Workshop: Case study: Biodiversity - Working with portfolio companies to establish a biodiversity program	17:10 Stream C: Venture - Identifying the key priorities for ESG in VC - To what extent does a VC's business model contribute towards the	17:10 Stream D: TBD

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<ul style="list-style-type: none">- Consider the reasons to launch a separate impact strategy vs. addressing sustainability throughout the fund- Are ESG and impact differentiated enough for separated strategies?- The implications for ESG specialists on evolving approaches <p>Tania Carnegie, Global and US Lead for ESG, Private Equity and Asset Management, KPMG Pedro Henriques da Silva, Associate, Impact Investments, Global Endowment Management Abrielle Rosenthal, Chief Sustainability Officer, Chief Human Resources Officer, Managing Director New York, Towerbrook</p>	<ul style="list-style-type: none">- Identifying states where biodiversity decisions have the greatest impact- Moving beyond acquisition strategies to strategies that address habitat degradation, loss and fragmentation, and exotic species invasions.- Working with local groups to achieve conservation goals.	<p>resolution of an ESG challenge?</p> <ul style="list-style-type: none">- how best can we assess the value of an ESG orientated startup? <p>Peter Dunbar, Head of Private Equity, UNPRI Hilary Flynn, Partner, Senior Managing Director, Director of ESG, Private Investments, Wellington Management Pat Burtis, Partner, Amadeus Capital Partners</p>	
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17:30

Close of day one of conference followed by networking reception

Day two: 2 March

Visit the [agenda page](#) for the latest updates.

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08:00

LP Think Tank Breakfast in partnership with ILPA

Matt Schey, Senior Director, Sustainable Investing & Strategic Projects, **ILPA**

Max Hong, Chief Executive Officer, **Malk Partners**

GP working group breakfast

Gloria Mirrione, Executive Director, Head of Sustainable Finance & Impact Investing, Americas, **ACRE**

09:00

Chair's remarks

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

09:05

Opening keynote

Ben Morley, Partner & Associate Director, **Boston Consulting Group**

Samantha Hill, Managing Director, Sustainable Investing & Real Assets, **Canada Pension Plan Investment Board**

Megan Starr, Global Head of Impact, **Carlyle**

09:45

European influence: learnings from across the pond

- With Europe being traditionally ahead of the U.S. on responsible investing initiatives, what can we learn from our European counterparts and how are we implementing ideas coming out of the region?
- How is recent ESG regulation in the EU bound to affect ESG regulation in the U.S.?

Elsa Palanza, Managing Director, Global Head of Sustainability & ESG, **ICG**

Eimer Palmer, Partner, Global Head of ESG at **Pantheon Ventures**

Eric Bloom, COO & Head of Client Solutions, **Re:Co**

Marieke Boudeling, Principal, **MJ Hudson ESG & Sustainability**

Natasha Buckley, Vice President, ESG, **HarbourVest Partners**

10:25

Networking break

10:55

Rising importance of standardized ESG metrics and frameworks

- Creating long term financial performance by focusing on key success factors including carbon metrics, financial and business metrics, and governance metrics.
- Pros and cons to developing consistent and universal metrics
- Metrics in action case study examples

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Moderator: **David Wynn**, Chief Product Officer, **Greenstone**

Jeffrey Cohen, Managing Director, Head of ESG & Sustainability, **Oak Hill Advisors**

Sanaz (Kafayi) Raczynski, Head of Sustainability / ESG, **Kohlberg & Compan**

Ashley McNamee, Director of ESG, **Revelstoke Capital Partners**

11:35

Creating value through long-term ESG goals at the portfolio company level

Hear from three sustainability leaders within PE-sponsored portfolio companies on how they have developed informed and practical strategies to improve ESG performance, reduce operating costs, create opportunities for their employees, enhance their brands, and create real value for their investors and customers.

- How are they balancing the expectations of their PE sponsors with their other stakeholders?
- What are the key areas of ESG focus to improve performance and create real business value?
- What changes were fundamental to success? How have they driven those changes within their teams?
- How did green bonds factor into deal financing and how will this be administered moving forward?
- Putting the shoe on the other foot: What did they wish PE sponsors knew about sustainability initiatives and strategies?

Abby Phenix, ESG Business Advisor, **Bridge House Advisors**

Amy Brackin, VP of Sustainability, **Liberty Tire Recycling**

Joy Fichiera, Sustainability Leader, **Moon Valley Nurseries**

Garrett Atwood, VP of Special Projects, **Eco Material Technologies**

12:15

Avoiding greenwashing in private markets

- Discrepancies across markets on what constitutes greenwashing and how we can address a and streamline standards.
- Understanding the role of data and reporting to prove sustainability efforts.
- Tangible ways to avoid greenwashing and protect your firm.

Jennifer Wildroutd, Vice President of ESG, **Sun Capital Partners**

Marianne Voss, Chief ESG Officer, **Webster Equity Partners**

Julia Lamorelle, Senior Vice President, **Malk Partners**

Jennifer Wilson, CEO & Founder, **Re:Co**

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

12:55

End of conference and lunch