

# Responsible Investment Forum New York 2024

## Responsible Investment Forum New York 2024 Agenda

February 20 – 21

### Day One: February 20

#### 07:45 LP Only Think Tank Breakfast In partnership with ILPA

*Join fellow LPs for breakfast and peer-to-peer discussion around the challenges and opportunity sets LPs are facing pertaining to sustainable investing heading into 2024. Discussion will take place under Chatham House rule.*

*This is a closed door session for LPs only, no service providers.*

Co-facilitator: **Isabelle Burgess**, Senior Associate, **ILPA**

Co-facilitator: **Julia Lamorelle**, Senior Vice President of GP Advisory, **Malk Partners**

#### 08:30 Introduction from PEI & PRI

**Charles Gould**, Head of Sustainable Finance Events, **PEI Group**

**Aditya Vikram**, Head of Private Equity, **UNPRI**

#### 08:45 Chairperson's opening remarks

# Responsible Investment Forum New York 2024

**Bruce Simpson, GP, Agetech Capital**

## **08:50 Global perspectives on sustainability in U.S. Private Equity**

- Assessing the extent to which polarization is impacting advancements in sustainability within U.S. private equity
- Evaluating the position of the U.S. Compared to Europe: is the gap narrowing or widening?
- Delving into the viewpoints of U.S. GPs regarding the adoption and implementation of net-zero targets

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

**Vincent Lecat**, Head of Impact & ESG, **Development Partners International LLP**

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

**Mackenzie Drutowski**, Partner, **Kirkland & Ellis**

**Rajith Sebastian**, Head of ESG and Sustainable Investing, **New York State Insurance Fund (NYSIF)**

## **09:30 Practical tips for how heads of sustainability should be engaging with their investment teams**

- Strategic alignment and impactful collaboration
- Communicating effectively to bridge the gap with the investment team
- Incorporating ESG into due diligence and throughout the investment cycle
- Collaborate with and learn from investment teams: examples of what works

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

**Serge Younes**, Head of Sustainability, **Investindustrial**

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

**Nathalie Viens**, Managing Director and Head of Asset Management – Private Infrastructure, **CBRE Investment Management**

# Responsible Investment Forum New York 2024

**Angela Jhanji**, Managing Director, Sustainability - Private Capital, **EQT Partners**

## **10:10 ESG Data Convergence Initiative update: creating value for GPs and LPs in private equity**

- What has the EDCI learnt about ESG in Private Equity from the second year of the initiative?
- To what extent is the initiative helping LPs and GPs to solve the data challenge?
- How firms leverage the data to gain new insights and drive value creation
- How is technology helping the EDCI?
- What's next for the initiative in 2024?

Moderator: **Tim Mohin**, Partner and Director, **BCG**

Co-Facilitator: **Ben Morley**, Partner and Associate Director, **BCG**

**Samantha Hill**, Head of Sustainability Integration, Global Leadership Team, **CPP Investments**

**Catherine Isabelle**, Senior Director, Sustainability and Climate Innovation, **PSP Investments**

**Carletta Ooton**, Head of ESG, **Apollo Global Management**

**Heleen van Poecke**, Co-Founder and CEO, **KEY ESG**

## **10:45 Fireside chat: the continued evolution of Ares climate strategy**

- Measurement to management – Why tracking the right KPIs is critical for climate success
- Advancing on the climate journey while keeping the final destination flexible
- Building a cohesive climate vision for a complex portfolio

Moderator: **Josh Hesterman**, Managing Director, ESG Advisory, **KPMG**

# Responsible Investment Forum New York 2024

**Adam Heltzer**, Partner, Head of ESG, **Ares**

**Joe Indvik**, Principal, Climate Strategy Lead, **Ares**

## 11:10 Coffee & networking

### 11:40 To what extent does ESG drive portfolio value creation

- How do sustainability strategies increase profitability and sell-on value
- Showing the value of ESG work: can this be used to fight the backlash?
- To what extent does implementing sustainability increase resilience?
- Case studies from real PE investments

Moderator: **Peter Ekman**, Senior Vice President - ESG Value Creation, **Malk Partners**

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

**Tensie Whelan**, Professor, Director, **NYU Stern Center for Sustainable Business**

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

**Allegra Day**, ESG Director, **Cinven**

### 12:20 Fostering inclusion and diversity: insights, challenges, and best practices

- Overcoming barriers to making progress on DEI
- What could recent Supreme Court judgements mean for businesses DEI strategies?
- The importance of operationalising DEI and taking out the controversy
- Case studies of what works well

Moderator: **Marianne Voss**, Managing Director and Chief ESG Officer, **Webster Equity Partners**

# Responsible Investment Forum New York 2024

**Johnathan Medina**, Global Head of DE&I, **Macquarie Asset Management**

**Anthony Oni**, Managing Partner, **Energy Impact Partners**

## **12:50 Portfolio company perspectives on sustainability and ESG performance improvement**

- How are portfolio companies balancing the expectations of their PE sponsors with their other stakeholders?
- Are sponsor ambitions aligned with portfolio company customer expectations?
- Investigating the collaborative strategies employed by portfolio companies in partnership with their investors.
- What are the key ESG focus areas to improve performance and create real business value?

Moderator: **William Pleasant**, Sustainability Business Advisor, **Bridge House Advisors**

**Don Anderson**, Owner, **Portfolio Solutions**

**Beverly Gates**, Executive Vice President and Chief Legal Officer, **Monogram Foods**

**Allison Gosselin**, Director, environmental, social and governance, **Graham Partners**

## **13:20 Lunch**

<u>Track A</u> <u>IMPACT INVESTING</u>	<u>Track B</u> <u>TECH &amp; DATA</u>	<u>Track C</u> <u>REGULATION</u>	<u>Track D</u> <u>ANY OTHER BUSINESS</u>
<b><u>14:15</u></b> Landscape of impact investing: emerging managers, fundraising and returns	<b><u>14:15</u></b> Fostering collaboration and leveraging technology to overcome ESG data challenges <ul style="list-style-type: none"><li>• How do/should ESG and digital teams intersect at fund and portfolio level?</li></ul>	<b><u>14:15</u></b> Outlook on federal and state ESG disclosure <ul style="list-style-type: none"><li>• Assessing the implications for assessment, reporting and transparency</li></ul>	<b><u>14:15</u></b> Driving diversity at portfolio companies <ul style="list-style-type: none"><li>• Promoting diverse leadership across your portfolio</li></ul>

# Responsible Investment Forum

## New York 2024

- Which investment themes are taking off in the impact market?
- Which investment propositions are resonating most with impact allocators?
- How are first-time and emerging managers approaching fundraising?

Moderator: **Chase Wisnowski**, Head of Multi-Strategy, SVP, **Malk Partners**

**Eimear Palmer**, Partner, Global Head of ESG, **Pantheon Ventures**

**Jessica Pan**, Senior Portfolio Manager, Private Equity, **APG Asset Management**

**Christina Anzel**, Director, **Generation Investment Management**

**Karin Bouwmeester**, ESG Lead Private Equity, **PGGM Investments**

How can they all drive value for the deal team?

- Crafting strategic alliances: navigating IT and Tech collaborations
- Comparing approaches from large firms to the mid-market

Moderator: **Jakob Schenker**, Director, ESG and Climate Advisory Practice, **KPMG**

**Lindsay Rosenstein**, Principal and Head of ESG, **Crestview Partners**

**Lindsay Gibson**, Vice President, **Permira**

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

**Heleen van Poecke**, Co-Founder and CEO, **KEY ESG**

- Providing clear and consistent climate-related information to LPs
- Where next for US regulators?

Moderator: **Robert Esposito**, Managing Director and Senior Counsel, ESG, **Apollo Global Management**

**Daniel Silverberg**, Managing Director, **Capstone**

**Katie Blum**, Principal, **Holtara**, powered by **Apex Group**

- Overcoming barriers to diversity and inclusion in portfolio businesses
- Fostering inclusivity to drive innovation and performance
- Measuring Progress: tracking and reporting on diversity advancement

Moderator: **Bob Dannhauser**, Senior Advisor, **Shift project**

**Ashley McNamee**, Managing Director, ESG, **Revelstoke Capital Partners LLC**

**Shaun Chaudhuri**, Principal, **The Westly Group**

**Adriana Becerra Cid**, Sustainable Investment Lead for Private Assets, **Lombard Odier Asset Management**



# Responsible Investment Forum New York 2024

**15:00**

**Delivering real world change: doing impact investing like you mean it**

- What are some of the best practices in executing a credible impact creation plan?
- Are we seeing a link between greater impact and higher valuations of assets?
- How are funds engaging their portfolio companies to deliver on impact performance?

Moderator: **Eunice Chapon**, Director - Operations and Business Development, **BrightEdge - American Cancer Society**

**Fran Seegull**, President, **U.S. Impact Investing Alliance**

**Deborah La Franchi**, Founder & CEO, **SDS Capital Group**

**15:00**

**Assessing AI's impacts on Sustainability and the Sustainability Role**

- Exploring AI's potential to streamline ESG assessments during due diligence and enhancing ESG performance across investments
- Leveraging AI across the whole investment cycle
- How should AI developments impact ESG assessments
- What are the most material impacts from AI on sustainability

Moderator: **David Wynn**, Director of Product Marketing (Sustainability), **Cority**

**Di Rifai**, Chair, **Creating Future Us**

**Mohammad Rasouli**, AI Expert for Investment, **Stanford University**

**15:00**

**Navigating changing regulations as a global investor**

- Double materiality not accepted in US like Europe
- Divergence politically between US and rest of the world
- How will antitrust laws impact cross-border M&A?

Moderator: **Sheryl Schwartz**, Chief Investment Officer, **ALTI**

**Matthew Johns**, ESG, **IH International Advisors**

**Phil Benyola**, Director of Private Equity, **Bessemer**

**Jennifer Colson**, Senior Managing Director & Global Head, ESG, **BCI**

**15:00**

**Revolutionary approaches to Decarbonization**

- What does best practice look like when decarbonizing a portfolio company?
- Addressing the financial shortfall in decarbonization Initiatives
- An exploration of emerging and innovative investment strategies

Moderator: **Saleh ElHattab**, Founder and CEO, **Gravity**

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

**Gayatri Sarkar**, Founder and CEO, **Advaita Capital**

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

# Responsible Investment Forum

## New York 2024

<p><b>Chavon Sutton</b>, Senior Investment Director, Sustainable and Impact Investing Research, <b>Cambridge Associates</b></p>	<p><b>Sylvain Forté</b>, CEO &amp; Co-founder, <b>SESAMm</b></p> <p><b>Walter Vigouliouk</b>, Head of sustainable Investing, private markets, <b>Manulife</b></p>		<p><b>Barrett Lawson</b>, Director, <b>Anthesis</b></p>
<p><b>15:45</b> <b>Impact in decarbonization and climate investing</b></p> <ul style="list-style-type: none"> <li>• What investment opportunities has the IRA legislation enabled?</li> <li>• Which types of assets are promising to deliver carbon abatement and sequestration?</li> <li>• How are funds measuring their climate impact?</li> </ul> <p>Moderator: <b>Suha Gillani</b>, Director of ESG &amp; Impact Value Creation, <b>ERM</b></p> <p><b>James Mackey</b>, Managing Director, Investments, <b>Climate Investment</b></p>	<p><b>15:45</b> <b>Moving from data accumulation to data utilization</b></p> <ul style="list-style-type: none"> <li>• Understanding the limitations of relying solely on portfolio company data and delving into broader ESG metrics</li> <li>• Fostering effective collaboration between private equity firms and lenders to share ESG data</li> <li>• Exploring strategies to effectively convey ESG data between different stakeholders</li> </ul> <p>Moderator: <b>Nicole Peerless</b>, Head of Global Business Engagement, <b>Pulsora</b></p>	<p><b>15:45</b> <b>How regulation can drive value creation: practical tips for ESG professionals</b></p> <ul style="list-style-type: none"> <li>• Using reporting and disclosure requirements to your advantage</li> <li>• Building a track record and credibility using data</li> <li>• Engaging effectively with investors and portfolio companies</li> </ul> <p>Moderator: <b>Daniel D'Ambrosio</b>, Partner, <b>Kirkland &amp; Ellis</b></p> <p><b>Joshua Brunert</b>, Global Head of ESG Product Development, <b>Holtara, powered by Apex Group</b></p>	<p><b>15:45</b> <b>Defining what is meant by stewardship for private equity</b></p> <ul style="list-style-type: none"> <li>• How does stewardship apply to private equity investing?</li> <li>• Fiduciary duty vs stewardship: is there tension between them?</li> <li>• What are the responsibilities of PE managers in terms of stewardship</li> </ul> <p>Moderator: <b>Haben Berhe</b>, Senior Responsible Investment Manager, US, <b>UNPRI</b></p> <p><b>Katherine Treuer</b>, Principal, <b>Generate Capital</b></p>



# Responsible Investment Forum

## New York 2024

<p><b>Valerie Shen</b>, Partner and Chief Operating Officer, <b>G2 Venture Partners</b></p> <p><b>Zack Montebell</b>, Vice President, <b>NY Green Bank</b></p>	<p><b>Greer Howard</b>, Vice President, ESG, <b>Oaktree Capital Management</b></p> <p><b>Rachel Hurley</b>, Head of Sustainability, <b>Paine Schwartz Partners</b></p> <p><b>Jeffrey Cohen</b>, Managing Director, Head of ESG &amp; Sustainability, <b>Oak Hill Advisors</b></p> <p><b>Karin Bouwmeester</b>, ESG Lead Private Equity, <b>PGGM Investments</b></p>	<p><b>Abrielle Rosenthal</b>, Chief Sustainability Officer, <b>TowerBrook</b></p>	<p><b>Peter Dunbar</b>, Principal - Responsible Investment, <b>StepStone Group</b></p> <p><b>Irina Markina</b>, Managing Director, Chief Decarbonization Officer, <b>Ara Partners</b></p> <p><b>Leela Ramnath</b>, Head of Sustainability Strategy, <b>Warburg Pincus</b></p>
--	---	---	---

**16:30 Coffee & networking**

**16:50 Working Group Series A**

*This closed door session (GP and LP only, no service providers) allows for an interactive roundtable discussion with designated facilitators.*

<p><b>Working Group A</b> <b>EDCI Benchmarking</b></p> <ul style="list-style-type: none"> <li>Learn how GPs and LPs are harnessing the EDCI benchmark</li> </ul>	<p><b>Working Group B</b> <b>Decarbonizing value chain emissions</b></p> <ul style="list-style-type: none"> <li>Understanding scope 3 emissions complexity</li> </ul>	<p><b>Working Group C</b> <b>Integrating tech and sustainability</b></p> <ul style="list-style-type: none"> <li>How to successfully balance</li> </ul>	<p><b>Working Group D</b> <b>Working with portfolio companies</b></p> <ul style="list-style-type: none"> <li>How do you help link sustainability</li> </ul>	<p><b>Working Group E</b> <b>Solving ESG data compliance and reporting challenges</b></p>	<p><b>Working Group F</b> <b>What data looks like for sustainability reporting in private equity</b></p>
--	---	--	---	---	--

# Responsible Investment Forum

## New York 2024

<ul style="list-style-type: none"> <li>• Explore the full suite of EDCI benchmark functionality</li> <li>• Overview of EDCI partnerships with ESG tech platforms</li> <li>• Case studies of how private equity funds are engaging</li> </ul> <p>Co-facilitator: <b>Ben Morley</b>, Partner and Associate Director, <b>BCG</b></p> <p>Co-facilitator: <b>Joshua Kriesberg</b>, EDCI Member Engagement Lead + Sustainability Consultant, <b>BCG</b></p> <p>Co-facilitator: <b>Allegra Day</b>, ESG Director, <b>Cinven</b></p> <p>Co-facilitator: <b>Irina Markina</b>, Managing</p>	<p>and current state of private markets</p> <ul style="list-style-type: none"> <li>• Practical implementation steps to improve data collection, quality and transparency.</li> <li>• Case studies and industry resources to advance emissions reduction via supplier engagement</li> </ul> <p>Co-facilitator: <b>Nandini Hampole</b>, Principal, ESG &amp; Responsible Investing, <b>Bregal</b></p> <p>Co-facilitator: <b>Jessica Clavette</b>, ESG Manager, UK, <b>Equistone</b></p> <p>Co-facilitator: <b>Maria Liby-Troein</b>, Associate Partner, <b>Bain &amp; Company</b></p>	<p>technology with expertise</p> <ul style="list-style-type: none"> <li>• What can and should be automated</li> <li>• What aspects require more hands on approach</li> <li>• How can technology play a role in advancing a sustainability strategy</li> </ul> <p>Co-facilitator: <b>Kyle Flick</b>, Director of Services, <b>Novata</b></p> <p>Co-facilitator: <b>Brett Juliano</b>, Head of Sustainability, <b>THL Partners</b></p>	<p>engagement and action to value creation</p> <ul style="list-style-type: none"> <li>• What are tools and resources that you can provide / bring to the table</li> <li>• How do you balance top-down ESG demands from sponsors vs. ESG demands from strategic customers?</li> <li>• In the event of ESG “fatigue”, what are some ESG focus areas that create value for the sponsor and the company?</li> <li>• What are some approaches that help setup post-close ESG engagement during the pre-investment due diligence phase?</li> </ul>	<ul style="list-style-type: none"> <li>• How should investment and compliance teams work together to ensure data accuracy and documentation?</li> <li>• How can compliance ensure that all LP ESG commitments are implemented?</li> <li>• How are LP reporting requirements changing?</li> <li>• How can data platforms be used to serve multiple, and sometimes contradictory, regulatory and investor reporting requirements?</li> </ul> <p>Co-facilitator: <b>Luke Wilcox</b>, Partner and Head of ESG Data and Analytics, <b>ACA Group</b></p>	<ul style="list-style-type: none"> <li>• Breakout: Challenges with data – pain points when reporting</li> <li>• Breakout: Tools, resources, best practice – what does good look like? How can we improve the quality of data?</li> <li>• Key takeaways, opportunities, best practice advice</li> </ul> <p>Facilitator: <b>David Wynn</b>, Director of Product Marketing (Sustainability), <b>Cority</b></p>
--	---	--	--	--	---

# Responsible Investment Forum New York 2024

Director, Chief Decarbonization Officer, <b>Ara Partners</b>  Co-facilitator: <b>Heidi DuBois</b> , Global Head of ESG, <b>AEA Investors</b>			Co-facilitator: <b>Jeff Gibbons</b> , Chief Growth Officer, <b>Bridge House Advisors</b>  Co-facilitator: <b>Jennifer Flood</b> , Sustainability, Head of North America, <b>Investindustrial</b>  Co-facilitator: <b>Peter Ellsworth</b> , Senior Director, <b>Ceres</b>	Co-facilitator: <b>Neil Mandal</b> , Director of Strategic Initiatives, <b>Corbin Capital</b>  Co-facilitator: <b>Gloria Radeff</b> , Chief Administrative Officer and Head of Business Development, <b>Libremax</b>	
---	--	--	---	---	--

17:00 Cocktail reception

19:00 End of day one of the conference

# Responsible Investment Forum New York 2024

## Day Two: February 21

### 08:00 Invitation only LP and GP Breakfast briefings - Stewardship in Private Equity

This networking session will explore the topic of stewardship in private equity. We will talk about when to engage during the investment life-cycle, whom to engage to ensure a successful engagement, what to engage on and how to engage with portfolio companies as well as the wider markets. We will explore these topics using one of the ESG issues as an example and will also present data/findings from the PRI reporting data to substantiate discussions. There will be a fireside chat with investors as well as a discussion with the participants in the room around this topic.

*This is a closed door session for GPs and LPs only, no service providers.*

Co-facilitator: **Aditya Vikram**, Head of Private Equity, **UNPRI**

Co-facilitator: **Haben Berhe**, Senior Responsible Investment Manager, US, **UNPRI**

Co-facilitator: **Jennifer Coulson**, Senior Managing Director & Global Head, ESG, **BCI**

Co-facilitator: **Serge Younes**, Head of Sustainability, **Investindustrial**

### 09:05 Opening remarks

**Snehal Shah**, Senior Reporter, **PEI**

### 09:05 Opening remarks

**Bruce Simpson**, GP, **Agetech Capital**

09:10 Building a long-term vision for ESG data	09:10 Making biodiversity and natural capital relevant to PE investing - TNFD V4.0: what does it mean for investors?
--	---

# Responsible Investment Forum New York 2024

- Being more strategic about data collection: to what extent is it possible when GPs collect what LPs ask?
- Analysing what data is actually being used for: can GPs and LPs work together?
- Evaluating the role of third-party ESG assessments in complementing internal data
- To what extent can data be used to prove to LPs that ESG adds value to investments?

Moderator: **Snehal Shah**, Senior Reporter, **PEI**

**Tara Mei Smith**, ESG Integration Officer, **NYC Office of the Comptroller**

**Laura Fernandez**, Principal, Regulatory Affairs and Sustainability, **Kinterra Capital**

**Lexi Wachter**, Director ESG, **General Atlantic**

**Julian Seelan**, Managing Director - ESG Strategy & Product Development, **ACA**

- Leveraging biodiversity data in investment decisions
- To what extent does work on biodiversity interlink with climate strategy?
- Where and how can private equity fund managers incorporate natural capital solutions in their investment strategy?

Moderator: **Rodolfo Jaffe**, Managing Consultant, Ecology and Biodiversity, **Ramboll**

**Evelina Olago**, Managing Director of Client & Strategy, **Just Climate**

**Jennifer Pryce**, President and CEO, **Calvert Impact**

**Denise Odaro**, Head of ESG, **PAI Partners**

## 09:50 Managing increasing climate transition litigation risk

- Why is there growing risk of climate transition litigation risk for private equity?
- What are the key areas of climate transition litigation risk?
- How is best to mitigate that risk, or to tackle it when litigation arrives?

Moderator: **Ulysses Smith**, ESG Senior Advisor, **Debevoise & Plimpton**

**Shannon Selden**, Partner, **Debevoise & Plimpton**

## 09:50 Supply chain sustainability and human rights

- Which issues are funds focusing on when it comes to supply chain ESG risks at their portfolio companies?
- Considering the latest regulatory landscape in North America
- Working with portfolio companies to deliver more resilient supply chains
- Showcasing successful case studies that show how you can drive positive change

# Responsible Investment Forum New York 2024

**Beth Jones**, Senior Managing Directors – Risk & Investigations, **FTI Consulting**

Moderator: **Tim Mohin**, Partner and Director, **BCG**

**Ariel Giumarelli**, Partner, **Kirkland & Ellis**

**Daryl Kennedy**, Sustainability & Investor Relations Manager, **Piva Capital**

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

**Candice Brenet**, Head of Sustainability, **Ardian**

**10:30** Coffee & networking

**11:00** Fireside Chat - Ownership Works: why employee ownership is catching on in private equity

- An update on who is signed up to the initiative
- The advantages of aligning incentives between employees and management
- Why ownership cultivates a focus on long-term strategic growth
- Case studies from private equity where ownership is working

**Pete Stavros**, Partner Co-Head of Global Private Equity, **KKR**

*In conversation with*

**Winna Brown**, Americas Private Equity ESG Leader, **Ernst & Young LLP**



# Responsible Investment Forum New York 2024

## 11:30 Sustainability and Climate Integration in Private Credit

- State of the market and comparison with other asset classes
- How investors and managers have collaborated to enhance transparency in private credit
- New solutions/ initiatives in the market to facilitate three way engagement on Sustainability and Climate issues
- What's next?

Moderator: **Abdulla Zaid**, Vice President, Private Capital Research, **MSCI**

**Michael Kashani**, Managing Director, **Apollo Global Management**

**Debra McCoy**, Partner, **Bain & Company**

**Matt Kaczmarek**, Managing director, **Blackrock**

## 12:05 Cutting through the noise: AI and Private Equity

- How should sustainability teams be looking to bring in AI expertise? External consultants vs. in-house specialists
- Mobilizing the right C-suite and board members to champion a Responsible AI Strategy
- Balancing the investment opportunity with ESG considerations
- Case studies of what leading firms are doing now

Moderator: **Chandini Jain**, Founder & CEO, **Auquan**

**Ercan Ucak**, Vice President, **Cerberus Capital Management**

**Donna Bebb**, Head of ESG, **Thoma Bravo**

# Responsible Investment Forum New York 2024

**12:35 The big debate: how can PE deal with the ESG backlash in a proactive and positive way**

Moderator: **Bruce Simpson**, GP, Agotech Capital

**Tynesia Boyea-Robinson**, President and CEO, CapEQ

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

**Peter Ellsworth**, Senior Director, Ceres

**13:15 Lunch**

**14:00 Working Group Series B**

*This closed door session (GP and LP only, no service providers) allows for an interactive roundtable discussion with designated facilitators.*

<b><u>Working Group A</u></b> <b>Building a plan for biodiversity</b> <ul style="list-style-type: none"><li>• The business case for biodiversity</li><li>• How to assess and disclose nature-related impacts, dependencies, risks, and opportunities</li><li>• Challenges associated with biodiversity accounting and reporting</li></ul>	<b><u>Working Group B</u></b> <b>Beyond Emissions Reporting &amp; Planning: How Taking Decarbonization Action Wins Portfolio Company Trust</b> <ul style="list-style-type: none"><li>• Tackle key challenges in carbon reporting and decarbonization, highlighting the engagement of portfolio companies through innovative strategies.</li></ul>	<b><u>Working Group C</u></b> <b>Integrating AI into sustainability</b> <ul style="list-style-type: none"><li>• AI's role in advancing sustainability research: support deal sourcing, ESG due diligence, and controversy monitoring</li><li>• AI for impact assessment, good governance, and reporting</li><li>• Practical implementation steps for integrating AI into sustainability</li></ul>	<b><u>Working Group D</u></b> <b>Sharing best practices for improving ESG to drive value at portfolio companies</b> <ul style="list-style-type: none"><li>• Playbook examples of what has worked to drive value creation and ESG improvements</li><li>• Experiences of investing substantially to drive multiple expansion</li></ul>
--	--	--	---

# Responsible Investment Forum New York 2024

<p>Co-facilitator: <b>Rodolfo Jaffe</b>, Managing Consultant, Ecology and Biodiversity, <b>Ramboll</b></p> <p>Co-facilitator: <b>Sara Copp Franz</b>, Managing Consultant, Biodiversity and Ecosystems, <b>Ramboll</b></p>	<ul style="list-style-type: none"><li>• Convert carbon data into actionable insights for impactful decarbonization and cost reduction, utilizing technology and analytics.</li><li>• Showcase successful transitions from carbon reporting to decarbonization plans in PE firms and portfolio companies.</li><li>• Propose creative solutions for decarbonization projects in mature investments, emphasizing technology-enhanced collaboration.</li></ul> <p>Facilitator: <b>Saleh ElHattab</b>, Founder and CEO, <b>Gravity</b></p>	<p>workflows — and lessons learned/common pitfalls</p> <p>Facilitator: <b>Auquan</b></p>	<ul style="list-style-type: none"><li>• How to value downside protection from sustainability initiatives</li></ul> <p>Co-facilitator: <b>Johan Nordenson</b>, Operating Partner, Value Creation and ESG, <b>Altamont Capital Partners</b></p> <p>Co-facilitator: <b>Seth Reynolds</b>, Americas SaT Sustainability Leader, <b>Ernst &amp; Young LLP</b></p> <p>Co-facilitator: <b>Jennifer Essigs</b>, Head of Sustainability, <b>AE Industrial</b></p>
--	---	--	---

15:00 Close of conference