

Responsible Investment Forum: West Palo Alto 2024

Past Agenda

Day One

9:00

Chairperson's opening remarks

Michael Eisenberg, Partner, ESG Integration & Impact Investing Lead, **ERM**

9:10

Fireside chat: 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**

Topaz Simply, Head of ESG, **GI Partners**

9:35

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**

10:20

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 Integration & Impact Investing Lead, **ERM**

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

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Will Relle, ESG Director, **HarbourVest Partners**
Nick Abel, Portfolio Manager, **CalSTRS**

11:05

Coffee & Networking

11:35

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**

12:25

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)**

12:55

Lunch

Stream A	Stream B
14:00 Insights from west coast fund managers on impact investing	14:00 The continued evolution of ESG in Venture Capital

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- 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?

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

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**

- 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

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

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, Lead of Responsible Innovation, **General Catalyst**

2:40

Impact value creation toolbox: how to generate value from an impact strategy

- 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?

2:40

Private Debt: to what extent is ESG now a leading issue for credit investors?

- 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?

Moderator: Michael R. Littenberg, Partner, **Ropes & Gray**

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<p>Moderator: Jay Mason, Partner, North America M&A Lead, ERM</p> <p>Jennifer Flood, Head of North America Sustainability, Investindustrial</p> <p>Jenny Roy, Vice President Marketing, Patch</p> <p>Danny Zouber, Managing Director, North Sky Capital</p>	<p>Adriana Becerra Cid, Sustainability Manager Private Assets, Lombard Odier Asset Management</p> <p>Brittany Agostino, Vice President, ESG – US Credit Lead, Ares Management</p> <p>Teresa Cutter, Head of ESG & Impact, White Oak Global Advisors</p>
<p>3:20</p> <p>Investor views on climate tech</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</p> <p>Leola Ross, Deputy CIO and Head of ESG, Seattle City Employees' Retirement System</p> <p>Adam Goehner, Director, ESG, BCI</p>	<p>3:20</p> <p>Real assets and ESG integration</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</p> <p>Gingee Prince, Chief Impact Officer and Managing Director, Enhanced Capital</p> <p>Jennifer Lin, Chief Compliance Officer, Fundamental Advisors</p>

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4:00

Short Break

4:20

Interactive Working Group Sessions

These working groups will allow the audience to join an interactive roundtable discussion with designated expert facilitators

4:20

Building a responsible approach to AI in private equity

- 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

Facilitated by **Chris Kauffman**, Principal, General Catalyst

4:20

Keeping up with regulatory changes in North America and globally

- Making sense of latest SEC proposals
- How should US managers be engaging with SFDR
- Knowledge sharing and war stories

Facilitated by **Mark Green**, Senior Relationship Manager, US, UNPRI

4:20

Building an ESG data plan throughout the investment cycle

- Using ESG data during due diligence
- Integrating ESG data into value creation plans
- Learnings from those being innovative with data

Facilitated by **Daniela Arias**, Senior Manager, ESG Advisory, Crowe LLP

5:00 Networking reception

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Day Two

8:00-8:50

Invitation only **GP/LP Breakfast Briefing**

8:55 Chairperson's opening remarks

Michael Eisenberg, Partner, ESG Integration & Impact Investing 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**

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

Patrick Burtis, Partner, **Amadeus Capital**

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

10:45

Networking break

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11:15

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**

12:00

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**
Danielle Dobson, Vice President, **HarbourVest Partners**
Rommel A. Marseille, Managing Director, Head of North American Capital Formation, **DigitalBridge**
Melissa Lopez, Managing Director of Investments, **The James Irvine Foundation**

12:45 Chairperson's closing remarks

Michael Eisenberg, Partner, ESG Integration & Impact Investing Lead, **ERM**

12:50

Short break

1.00 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**

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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 *facilitated by Mohammad Rasouli*, AI expert for Investment, **Stanford University**
6. How US Companies Should Prepare for CSRD *facilitated by Corinna Kester*, Manager, Strategic Sustainability Consulting, **Ramboll**