

ESG2

For Institutional Shareholders, Public Company Management & Capital Markets Experts



PROGRAM CO-CHAIRS

HANK BOERNER & LOUIS COPPOLA
GOVERNANCE & ACCOUNTABILITY INSTITUTE, INC.

JUNE 20-21, 2016

BARUCH COLLEGE

55 LEXINGTON AVENUE

NEW YORK, NY

ENGAGE

with institutional shareholders, companies, ESG practice and capital markets experts on how to leverage favorable consideration in the capital markets from sustainable ESG practices

DISCOVER

emerging methodologies in assessing and presenting ESG performance to the capital markets

APPLY

the latest practices and technologies needed to set company performance and reporting expectations

ABOUT THE PROGRAM



PROGRAM DAY 1



TIME	DESCRIPTION
8:00-8:30 AM	Arrival & Continental Breakfast
8:30	Welcome Remarks Christopher P. Skroupa, Founder & Chief Executive Officer, Skytop Strategies
8:30-8:35	Opening Remarks Evan Harvey, Director, Corporate Responsibility, Nasdaq
8:35-8:45	Opening Remarks Hank Boerner, Chairman, Governance & Accountability Institute, Inc.
8:45-9:15	Opening Keynote The ESG Challenge: Finding a Common Language Between Institutional Investors and Public Company Leaders Presenter: Mindy Lubber, President, Ceres
9:15-9:30	Research Highlights: Ratings & Rankings – How Companies are Demonstrating ESG Performance Presenter: Mark Tulay, Member, Board of Directors, GISR
9:30-10:00	The Forest City Case Story: How Sustainability Ratings Garner Favor in the Capital Markets Discussants: Cora Lee Mooney, Director, Learning, BrownFlynn Jill Ziegler, Director, Sustainability & Corporate Responsibility, Forrest City Realty Trust
10:00-10:15	Topic Introduction: TBA Dan Winters, Head of North America, GRESB
10:15-	The Application of ESG Performance in Due Diligence of Potential

10:55	<p>or In-Portfolio Equities: Implications for Pension Funds & Other Fiduciaries</p> <p>Moderator:</p> <p>Panelists:</p> <p>Linda-Eling Lee, Global Head of ESG Research, MSCI</p> <p>Jennifer Leonard, Director, Manager Due Diligence, Cornerstone Capital Group</p> <p>Anders Thorendal, Chief Investment Officer, Church of Sweden</p> <p>Rob Wilson, Research Analyst, MFS Investment Management</p>
10:55-11:20	<p>Refreshment Break</p>
11:20-11:35	<p>Topic Introduction: Universal Ownership</p> <p>Presenter:</p> <p>Jon Lukomnik, Executive Director, IRRC Institute & Author, <i>What They Do With Your Money: How the Financial System Fails Us and How To Fix It</i></p>
11:35-12:25 PM	<p>The Debate on Universal Ownership: Its Implications for Stakeholder Relations in the U.S.</p> <p>Moderator:</p> <p>Jon Lukomnik, Executive Director, IRRC Institute & Author, <i>What They Do With Your Money: How the Financial System Fails Us and How To Fix It</i></p> <p>Panelists:</p> <p>Hank Boerner, Chairman, Governance & Accountability Institute, Inc.</p> <p>Adam Kanzer, Managing Director, Corporate Engagement & Public Policy, Domini Social Investments LLC</p> <p>Gianna McCarthy, Director, Corporate Governance, New York State Office of the Comptroller</p> <p>Mariela Vargova, Senior Vice President, Sustainability & Impact Investments, Rockefeller & Co.</p> <p>Ed Waitzer, Partner, Stikeman Elliot LLP</p>
12:25-12:40	<p>Topic Introduction: Institutional Investor Engagement</p> <p>Presenter:</p> <p>Michael Muyot, President, CRD Analytics</p>
12:40-	<p>Trends in Institutional Investor Engagement: Shifting Expectations</p>

1:30	<p>for Public Companies</p> <p>Moderator: Michael Muyot, President, CRD Analytics</p> <p>Panelists: Victoria Brown, Senior Program Officer, Robert Wood Johnson Foundation Chris Fowle, Vice President, Investor Initiatives, CDP Carly M. Greenberg, ESG Analyst, Walden Asset Management David Hackett, Partner, Baker & McKenzie Nadira Narine, Program Director for Strategic Initiatives, ICCR</p>
1:30- 2:30	<p>Networking Luncheon</p>
2:30- 3:00	<p>Keynote Address: Innovation, Entrepreneurship & ESG</p> <p>Presenter: Erika Karp, Founder & Chief Executive Officer, Cornerstone Capital Group</p>
3:00- 3:50	<p>Filling the Talent Gap on Boards: Independent Board Development Through the Lens of Proxy Access</p> <p>Moderator: Travis Antoniono, Investment Officer, Corporate Governance, CalSTRS</p> <p>Panelists: Eve Ellis, Financial Advisor & Portfolio Manager, Morgan Stanley Gregory E. Lau, Managing Director, Head of the Board Advisory Practice, RSR Partners Charlotte Laurent-Ottomane, Executive Director, Thirty Percent Coalition Jonathan Nelson, Manager, Corporate Governance Research, Sustainalytics Scott Zdrazil, Director, Strategy & Corporate Engagement, Office of the New York City Comptroller, Bureau of Asset Management</p>
3:50- 4:20	<p>Refreshment Break</p>
4:20-	<p>Concurrent Breakout Workshop Sessions Begin</p>

5:20	
	<p>Concurrent Breakout Workshop Session 1: SDG Adoption by Public Companies</p> <p>Discussion Leaders:</p> <p>Louis Coppola, Executive Vice President & Partner, Governance & Accountability Institute, Inc.</p> <p>Wanda Lopuch, Chair of the Board, Global Sourcing Council</p>
	<p>Concurrent Breakout Workshop Session 2: Corporate Reporting of ESG Performance</p> <p>Discussion Leaders:</p> <p>Tracey Rembert, Senior Manager, Investor Engagement, Ceres</p> <p>Katherine W. Schrank, President & Founder, ESG Advisor LLC</p>
	<p>Concurrent Breakout Workshop Session 3: Assurance of Sustainability Practices: Does it Add Value?</p> <p>Discussion Leaders:</p> <p>David Hackett, Partner, Baker & McKenzie</p> <p>Kristen Sullivan, Partner, Sustainability Services, Deloitte</p> <p>Gabriel Thoumi, Senior Fellow, Climate Finance, Climate Advisors</p>
5:20-5:50	<p>Breakout Session Findings & Plenary Q&A</p> <p>Moderator:</p> <p>Evan Harvey, Director, Corporate Responsibility, Nasdaq</p> <p>Discussion Leaders:</p> <p>Louis Coppola, Executive Vice President & Partner, Governance & Accountability Institute, Inc.</p> <p>David Hackett, Partner, Baker & McKenzie</p> <p>Katherine W. Schrank, President & Founder, ESG Advisor LLC</p>
5:50-5:55	<p>Closing Remarks</p> <p>Evan Harvey, Director, Corporate Responsibility, Nasdaq</p>
5:55-6:55	<p>Networking Reception</p>

 PROGRAM DAY 2


TIME	DESCRIPTION
8:15- 8:30 AM	Arrival & Continental Breakfast
8:30	Welcome Remarks Christopher P. Skroupa, Founder & Chief Executive Officer, Skytop Strategies
8:30- 8:45	The SEC Concept Paper: Call for Public Comment on Disclosure of Company-Related ESG Information Presenter: Hank Boerner, Chairman, Governance & Accountability Institute, Inc.
8:45- 9:15	Is There a Path to Value Through ESG? Presenter: Janine Guillot, Director, Capital Markets Policy & Outreach, SASB
9:15- 9:45	Sense from Sensibility: Praxair's 2020 Sustainable Development Strategy Presenter: Riva Krut, Vice President & Chief Sustainability Officer, Praxair, Inc.
9:45- 10:15	ESG Standards for the Financial Sector: Lessons from Emerging Markets Presenter: Atiyah Curmally, Principal Environmental Specialist, International Finance Corporation
10:15- 10:55	Endowment Carve Outs: Mission Alignment, Ownership Responsibility & Managing Along ESG Criteria Moderator: Panelists: Jenny Chan, Senior Investment Officer, Doris Duke Charitable

	<p>Foundation Stephen Viederman, President, The Network for Sustainable Financial Markets</p>
10:55-11:25	<p>Refreshment Break</p>
11:25-12:25 PM	<p>Concurrent Breakout Workshop Sessions Begin</p>
	<p>Concurrent Breakout Workshop Session 4: Building Out Stakeholder Engagement Discussion Leader: Jenn Crutchfield, Corporate Responsibility, Measurement & Reporting Lead, Adobe</p>
	<p>Concurrent Breakout Workshop Session 5: ESG-Related Risk & Value Creation for Public & Non-Public Companies Discussion Leader: Adam Kanzer, Managing Director, Corporate Engagement & Public Policy, Domini Social Investments LLC Mary O'Malley, Vice President, Corporate Governance, Prudential Financial, Inc. Joshua Cherry-Seto, Chief Financial Officer, Blue Wolf Capital</p>
	<p>Concurrent Breakout Workshop Session 6: When a Green Bond is Green – What Investors Need & What Issuers Wish to Show Discussion Leader: Thomas Kloc, Managing Director, US Sustainability Services Practice, KPMG LLP</p>
12:25-12:55	<p>Breakout Session Findings & Plenary Q&A Moderator: Discussion Leaders: Adam Kanzer, Managing Director, Corporate Engagement & Public Policy, Domini Social Investments LLC</p>
12:55	<p>Summit Adjourns</p>

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