

May 26 - 27, 2021 • Virtual Conference

# Environment, Social and Governance - Reporting and Disclosure

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**Jamie Bonham**  
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Strandberg  
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**David Rutherford**  
NEI Investments

... and more



Professional Development

- Understand the surging investor-led movement requiring issuers to provide enhanced disclosure of ESG practices
- Learn how investors make use of ESG in their investment decisions
- Provide the ESG disclosures and sustainability reports investors need
- Know the merits and limitations of key reporting frameworks to meet the needs of the street (GRI; SASB; IIRC; TCFD)
- Learn about social and human capital accounting
- Embed ESG into your business processes and strategy
- Hear about trends and best practices in ESG communication and reporting
- Make sustainability risks and opportunities transparent in standardized reporting
- Understand how the pandemic has further increased the legitimacy of responsible investing

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## DAY ONE PROGRAM AGENDA: WEDNESDAY, MAY 26, 2021

10:00 - 10:15 EDT



### Welcome and Opening Remarks from the Chair

**Coro Strandberg, President, Strandberg Consulting, Faculty Member, Governance Professionals of Canada, Corporate Director, BC Lotteries Corporation**

10:15 - 11:00 EDT



### What Is Fueling the Explosive Rise of ESG in Investing - Pre and Post COVID 19?

**Veena Ramani, Senior Program Director, Capital Market Systems, Ceres**

**Eric Pitt, Climate Finance Consultant, Ceres**



To successfully shift to an ESG focus you need to recognize the forces driving it. Once you understand why investors now care so much about ESG issues, you can make changes within your organization to maximize long-term value for shareholders and stakeholders. This session will focus on the factors promoting the heightened focus on ESG.

- Financial returns
- Growing demand
- Fiduciary duties redefined
- Focus on materiality
- The integration of ESG into financial analysis
- ESG activism by investors

11:00 - 12:00 EDT



### How Mackenzie Uses ESG to Make Investment Decisions

**Jonas Cuypers, Lead, ESG Research, Mackenzie Investments**

- 85% of CFA Institute members take ESG factors into consideration in their investing
- This session showcases how ESG is not only used by sustainable investors that want to allocate capital according to their values, but also by more traditional investors who acknowledge that some ESG factors are economic factors, especially in the long term
- Mackenzie Investments applies a multi-boutique approach with different investment approaches ranging from responsible investing where one focuses on mitigating ESG risks to impact investing where one targets a specific sustainability outcome
- Jonas will guide you through the different investment strategies at Mackenzie and how each of these use ESG data in the investment analysis and decision making process.

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12:00 - 12:45 EDT    Break

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## DAY ONE PROGRAM AGENDA: WEDNESDAY, MAY 26, 2021

12:45 - 13:45 EDT



### **Evaluating Frameworks: Understanding Merits and Limitations of Key Frameworks to Meet the Needs of the Street**

**Moderator: Peter Richardson, Climate Strategist, Manifest Climate**



**Eric Hespenheide, Chairman, Board of Directors, Global Reporting Initiatives (GRI)**

**Neil Stewart, Director of Corporate Outreach, Sustainability Accounting Standards Board (SASB)**



**Michael Zimonyi, Head of Policy, The Climate Disclosure Standards Board (CDSB)**

- Identifying the framework that is most relevant to your investors
- The need for ESG disclosure that will result in information that is some combination of clear, coherent, consistent, comprehensive, complete, concise and comparable
- What disclosure regime do key stakeholders in Canada want Canadian public companies to follow?
- What framework is expected to win out and become the standard?
- Impact on board and management decisions on what is becoming an emerging consensus around the TCFD framework and SASB standards



13:45 - 14:30 EDT



### **Evolving Expectations on Board Oversight- Elevating Purpose & ESG on the Board Agenda**

**Louise Champoux-Paillé, C.M., C.Q. F.Adm.A. ASC, MBA, Économist, Executive in Residence, John Molson School of Business**



**Coro Strandberg, President, Strandberg Consulting, Faculty Member, Governance Professionals of Canada, Corporate Director, BC Lotteries Corporation**

Over the past few years, we've seen environmental, social and governance issues gain importance in the boardroom, driven by shareholders and rising stakeholder expectations. Increasingly boards see ESG as an opportunity to improve long term value creation and not a simple check-the-box exercise. Companies are expected to play a stronger role in society. Yet, it is not clear how to navigate these issues at the board table.

We will review these trends by looking at:

- ESG competencies that will increasingly be required of directors
- Including ESG in risk management, strategy and executive compensation
- Board oversight of the company's purpose and stakeholder relations and how to get started

14:30 - 14:45 EDT      Break

## DAY ONE PROGRAM AGENDA: WEDNESDAY, MAY 26, 2021

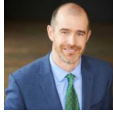
14:45 - 15:30 EDT



### **The Power and Potential of Engagement**

**David Rutherford, VP, ESG Services, NEI Investments**

**Jamie Bonham, Director, Corporate Engagement, NEI Investments**



**Michela Gregory, Director, ESG Services, NEI Investments**

- Impact of engagement when engagement is successful
- How engagement instills longer term perspectives
- How shareholder power can be used to influence corporations on particular issues and actions
- Engaging with companies through
  - Dialogue
  - Filing shareholder resolutions
  - Active and informed proxy voting
- Communication
- Learning
- Political dynamics – facilitating internal and external relationships for companies
- Benefits and challenges of individual versus collective forms of engagement
- Barriers and enablers to engagement success



15:30 - 16:15 EDT



### **Environmental and Social (Human Capital) Accounting**

**Davinder Valeri, Executive Director, A4S Canadian Chapter, Chartered Professional Accountants of Canada**

- Difficulties assigning a value for intangible assets on a balance sheet
- Lack of consensus or information on how businesses can measure and assess the value of their social and human capital resources
- How investors integrate social and human capital accounting into decision making
- Developing resilient and sustainable business models by putting numbers to the issues that will affect the future of your organization
- Key challenges organizations face when using social and human capital accounting
- Embedding the management of environmental and social issues into business processes and strategy

## DAY ONE PROGRAM AGENDA: WEDNESDAY, MAY 26, 2021

16:15 - 17:00 EDT



### How Do Companies Take Advantage of Grants, Credits & Offsets?

**Peter Richardson, Climate Strategist, Manifest Climate**

- Understanding the global climate incentive framework
- How to identify incentives of interest
- Practical tips for the ESG leader to foster stakeholder engagement
- Learning from others: common mistakes and pitfalls when evaluating climate incentives
- Learning from others: identifying and leveraging best practice

17:00 EDT

**End of Day One**

### SPONSORSHIP AND EXHIBITION OPPORTUNITIES

Increase your visibility with senior business strategy, technology, analytics, and business intelligence professionals at *Environment, Social and Governance - Reporting and Disclosure*. A limited number of sponsorship options are available.

For more information or to check availability, contact our sponsorship department by telephone at 416.507.4202, or by email at [sponsorship@infonex.com](mailto:sponsorship@infonex.com).

## DAY TWO PROGRAM AGENDA: THURSDAY, MAY 27, 2021

10:00 - 10:10 EDT



### Welcome and Opening Remarks from the Chair

**Wesley Gee, Director of Sustainability, Works Design**

10:10 - 11:15 EDT



### Trends and Best Practices in ESG Communication and Reporting

**Wesley Gee, Director of Sustainability, Works Design**

**Geoff Pegg, Director, Sustainability and Environment, TELUS**

**Sarah Chapman, Global Chief Sustainability Officer, Manulife**



- Reporting formats
- Building ESG into publicly filed documents
- Why ESG reporting is a basis rather than a replacement for dialogue
- Strategic communication for long-term success
- Purpose and intergenerational obligations statement
- Improved engagement between the C-Suite, board, CFO
- The need for an integrated report that shows integrated thinking
- Need for a materiality analysis that identifies the ESG issues that affect financial performance
- Quarterly calls to explain progress on ESG targets and how the targets are contributing to financial performance

11:15 - 12:00 EDT



### How to Integrate ESG Within Corporate Strategy

**Dan O'Brien, Partner, Sustainability and Climate Change Leader , PwC Canada**

The most effective ESG strategy is one that is fully integrated within corporate strategy to drive long term value creation.

- How ESG integration within corporate strategy drives long term value creation
- Focusing on the ESG opportunities, as opposed to the risks
- Key steps to integrating ESG within corporate strategy

12:00 - 12:45 EDT      Break

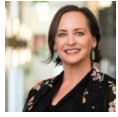
## DAY TWO PROGRAM AGENDA: THURSDAY, MAY 27, 2021

12:45 - 13:30 EDT



### **Materiality Matters: How to Prioritize ESG to Strengthen Your Management Approach and Disclosure**

**Wesley Gee, Director of Sustainability, Works Design**



**Carrie Christopher, ESG Director, Splunk, Inc.**

Defining an organization's sustainability priorities is often determined by conducting a materiality assessment, which can involve a combination of industry research, stakeholder engagement and executive and Board consultation.

- But how can it be conducted in a way that will support an organization's governance and strategic roadmap, in addition to strengthening its performance measurement and corporate reporting?
- And what role is data playing when knowing the nuances is increasingly important?

This session will bring together seasoned sustainability executives to present their experiences in materiality, to share what they have learned, where they believe this space is evolving, and how organizations can make the most of an assessment - to build the case for positive change.

13:30 - 14:15 EDT



### **Expectations for 2021 ESG Proxy Season and Proxy Reporting**

**Dexter John, President and CEO, Gryphon Advisors, Director, Organigram Holdings Inc., Director, Financial Services Regulatory Authority (Ontario)**

**Victor Guo, President, FrontLine Advisors Inc.**

- Environmental, social and governance factors will have an outsized impact on contested elections
- Shareholder activism is on the rise
- Proactive companies should be prepared to address at least three key ESG considerations in 2021 fights:
  - Prioritizing Board diversity
  - Demonstrating social consciousness
  - Misalignment of executive incentive plans
  - Showing environmental awareness
- How Institutional Shareholder Services (ISS) is tying voting recommendations on directors to how individual directors, committees or the full board oversee ESG issues
- Proxy fights/Shareholder proposals to force companies to build ESG considerations into their long-term strategy
- Proxy resolutions and proxy voting as an aspect of the active ownership strategy for sustainable investing

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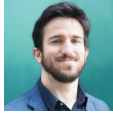
14:15 - 14:30 EDT      Break

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## DAY TWO PROGRAM AGENDA: THURSDAY, MAY 27, 2021

14:30 - 15:15 EDT



### How Technology Can Help You Identify ESG Risk and Opportunity

**Donato Calace, VP of Accounts and Innovation, Datamaran**

**Roxanne Sharif, Account Manager, Datamaran**



Stakeholders and decision makers increasingly want to understand companies' ESG impacts, and with this comes a demand for robust data on external and emerging risks, ensuring greater accuracy, credibility and timeliness of the data. Technology is essential to support these processes.

By determining what is material you can manage emerging ESG risks robustly, direct resources and prepare strategies for the longer run, ensure investors and stakeholders have the information they need, and respond quickly to regulatory and reporting changes. Ultimately, this helps to improve internal processes across ESG, finance and risk teams, as well as engagement with the Board as they demand more information from management.

15:15 - 16:00 EDT



### What the Biden Administration Means for ESG and the Impact on Canada

**David Hackett, Partner, Baker McKenzie**

- New policy objectives and initiatives
- Expectation that SEC will take up the issue of ESG
- Existing disclosure standards
- Environmental disclosure
- Board level diversity disclosure
- Workforce diversity, equity and inclusion
- Increased disclosure of non-financial reporting on social and environmental impacts
- Encouraging ESG investing
- Review of the rule viewed as a barrier to ESG funds
- Environmental Protection Agency
- Environmental Justice
- Regulatory action impacting ESG related risk
- Human rights issues

16:00 EDT

**End of Day Two**



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