

# Environment, Social and Governance - Reporting and Disclosure

## FACULTY PROFILES



### **Jamie Bonham**

Director, Corporate Engagement

#### ***NEI Investments***

Jamie Bonham, B.Sc. is Director, Corporate Engagement at NEI Investments. Jamie has over fifteen years of experience in researching and engaging with companies on environmental, social and governance (ESG) issues. At NEI he oversees the implementation of the ESG program across the NEI portfolio to support NEI's thesis that companies can mitigate risk and take advantage of emerging business opportunities by integrating best ESG practices into their strategies and operations. This includes a focus on conducting direct, collaborative dialogues with companies and policy makers on key ESG issues.

He has also authored numerous submissions and reports on topics ranging from climate change policy and environmental oversight to the duty to respect human rights.

## FACULTY PROFILES



### **Donato Calace**

VP of Accounts and Innovation

#### ***Datamaran***

Dr. Donato Calace is the Vice President of Innovation and Accounts at Datamaran. He contributes to global innovation projects for the firm and heads the business development and account strategy.

He is a member of the EFRAG Task Force on reporting of non-financial risks and opportunities and linkage to the business model.

A passionate expert in his field, in June 2016, Donato was awarded a Ph.D. in the international program “The Economics and Management of Natural Resources” developed by the LUM Jean Monnet University – Italy, Megatrend University, Belgrade (Serbia), China Three Gorges University (CTGU – China), Louisiana Tech University (USA) and Saint Petersburg State Forest Technical University (SPbSFTU – Russia).

During his PhD and visiting period at Cass Business School, he focused on the relationship between non-financial disclosure and environmental performance; reporting and market value; national culture and non-financial risks reporting. His areas of expertise and research include materiality analysis, ESG integration, and risk management associated to non-financial issues. The results of his doctoral research are available here. He presented results of his studies in international conferences and published on scientific journals such as the International Journal of Sustainable Development, and specialized reviews such as Ethical Boardroom. His academic publications are listed here.

His definition of materiality for the Encyclopedia of the United Nations Sustainable Development Goals edited by Springer has been downloaded more than 1000 times.



### **Louise Champoux-Paillé**

C.M., C.Q. F.Adm.A. ASC, MBA, Économist, Executive in Residence

#### ***John Molson School of Business***

An economist by training, Louise Champoux-Paillé holds an MBA, a master’s degree in museology and a certificate in governance from Laval University. She has successfully completed the governing for non profit excellence program of the Harvard Business School. Breaking new ground in a number of senior management positions, she has served as founding president of the Bureau des services financiers du Québec and executive vice-president of the Ordre des administrateurs agréés. Her research and volunteer work have helped promote good governance, ethics and women’s access to strategic roles. In her career, she has served on numerous boards, including the Quebec state corporation SAAQ and the Ste-Justine Hospital.

In 2012, the Québec government named Ms. Champoux-Paillé a member of the Ordre national du Québec and in 2016, she was appointed to the Order of Canada for her contributions as an administrator and for her commitment to promoting women in governance.

## FACULTY PROFILES



### **Sarah Chapman**

Global Chief Sustainability Officer

#### ***Manulife***

As the Global Chief Sustainability Officer, Sarah is responsible for leading the ongoing development and execution of Manulife's sustainability, community investment and sponsorship strategy and oversees and guides Manulife's environmental, social & governance (ESG) reporting and disclosures. Before joining Manulife, Sarah was National Director of Sustainability & Social Impact advisory at Deloitte in Canada. Previously, Sarah worked for Hitachi as the Senior Lead of the global Social Innovation business, based out of Sydney, Australia. She has her PhD in Corporate Social Responsibility from the Centre for Corporate Governance at the University of Technology, Sydney (Australia), Master's in Management from Bond University, and a Bachelor of Science from Western University (Canada).



### **Carrie Christopher**

ESG Director

#### ***Splunk, Inc.***

Carrie Christopher is a seasoned, multi-sector reporting and ESG professional with more than 15 years experience leading initiatives for corporate reporting, climate disclosures; materiality assessments and ESG research, ratings and rankings responses for publicly traded companies. She brings a strong understanding of the rapidly evolving ESG reporting space and is actively engaged in the global convergence of non-financial and financial reporting standards designed to communicate long-term value creation to investor audiences. Carrie recently stepped into the newly-created role as Director ESG Programs at Splunk Inc. (technology sector) and has served on the SASB Standards Advisory Group member since 2018, taught more than 25 GRI Certified Training courses across the U.S. between 2010 and 2015, and first began developing sustainability reports and ESG ratings responses in 2005. Prior to her current role at Splunk, Carrie led the reporting practice at Newmont Corporation, one of the S&P 500's most transparent reporters. Carrie is delighted to share her knowledge and insights at the Infonex event. Opinions expressed are her own - Carrie is speaking at this event representing herself and is not an official spokesperson for Splunk Inc.

## FACULTY PROFILES



### **Jonas Cuypers**

Lead, ESG Research

#### ***Mackenzie Investments***

Jonas joined Mackenzie Investments in 2020 to support the development of capabilities and to enrich technical expertise of environmental, social and governance (ESG) factors in support of corporate strategy, investment management practices across 15+ investment teams and sustainable investment funds. Prior to Mackenzie, Jonas has worked alongside investment teams across asset classes at a leading European asset manager growing assets in sustainable funds and developing consistent practices and methodology to communicating ESG practices to clients and prospects.

Passionate about financial markets and doing right, Jonas embraces technical expertise in complex markets, a strong ability to work in a diverse workplace and the strength to adapt to change.

Jonas is a CFA charterholder and graduated with a Master of Science, Business Engineering from University of Leuven in Belgium.



### **Wesley Gee**

Director of Sustainability

#### ***Works Design***

Combining academic expertise with extensive professional experience, Wesley leads Works Design's sustainability practice. He provides guidance in stakeholder engagement, materiality and performance measurement, as well as ESG/sustainability communications and reporting. Wesley contributed to the development of the GRI Guidelines and Standards and served on sector working groups with the Sustainability Accounting Standards Board (SASB). He has been a judge for CPA Canada's Corporate Reporting Awards and is a faculty member for the Corporate Responsibility and Sustainability Institute at The Conference Board of Canada. He also lectures for the Sustainability Diploma and MScSM program at the University of Toronto. Before joining Works Design, Wesley was senior sustainability consultant at Stantec and senior advisor at Canadian Business for Social Responsibility (CBSR). He holds a Master's in Sustainable Business from the University of Leeds.

## FACULTY PROFILES



### **Michela Gregory**

Director, ESG Services

#### ***NEI Investments***

Michela Gregory is Director, ESG Services at NEI Investments. She is actively involved in NEI's corporate engagement work and spearheads dialogues with companies across a number of sectors including tech, consumer staples, consumer discretionary and pharmaceuticals. Prior to joining NEI, Michela was based in Ghana with an impact investor focused on early-stage investment in sub-Saharan Africa.

She is a lawyer by trade, and practiced plaintiff-side class actions law in Canada across various legal issues including: securities litigation, product liability, consumer protection and price fixing issues. Michela holds a B.A. in Honours Business Administration from the Ivey Business School and a J.D. from Osgoode Hall Law School.



### **Victor Guo**

President

#### ***FrontLine Advisors Inc.***

Victor is the President of FrontLine Advisors Inc. Victor is responsible for the North American Business where he leads a team of experienced governance professionals.

Victor has over a decade of capital market experience where he established himself as an expert in corporate governance advisory work with an in-depth focus on shareholder activism, M&A and executive compensation. Prior to joining FrontLine, Victor was Executive Vice President, Governance Special Situations at Kingsdale Advisors where he was involved in more than 50 contested situations and devised sophisticated governance strategies for both corporate and activist clients. His high-profile signature wins include FrontFour & Sandpiper in their action against Granite REIT and Crescent Point in their defense against Cation Capital. He also provided expert analysis and practical solutions to corporate clients on their corporate governance and executive compensation strategies.

Prior to Kingsdale, Victor was Vice President of M&A and Proxy Contest Research for Institutional Shareholder Services Inc.'s ("ISS") U.S. and Canadian research teams where he covered and provided vote recommendations to institutional clients for over 80 North American proxy contests as well as more than 1000 M&A transactions. He also opined on a number of high-profile say-on-pay votes during his 5-year tenure at ISS. Victor led the Canadian M&A group/division team at ISS Canada, where he assembled and trained the M&A research team.

Victor holds an MBA in Finance and Blue Ocean Strategy from INSEAD and a Bachelor of Commerce degree (Double Specialist in Commerce & Finance and Economics, Minor in Mathematics) from the Rotman School of Management at the University of Toronto. Victor is a CFA charterholder.

## FACULTY PROFILES



### David Hackett

Partner

#### *Baker McKenzie*

David Hackett advises senior management, legal departments and Boards of major corporations and nonprofits on compliance, risk, environmental and sustainability matters. He regularly advises Fortune 500 companies on ESG matters. He also serves as outside counsel for the UNGC US Board, the World Resources Institute and the Prince of Wales Charitable Foundation Accounting For Sustainability (A4S), as well as serving as Chair of the World Business Council for Sustainability North America Board.

Prior to Baker, David was a trial attorney with the Environmental Enforcement Division of the US Department of Justice. At Baker McKenzie, David has served as the managing partner of North America, a member of the Global Executive Committee, and Chicago office managing partner. He has also been the North America Chair of both the Compliance Practice Group and the Banking, Finance and Major Projects Practice Group.

He is a graduate of Haverford College and the University of Pennsylvania Law School.



### Eric Hespeneide

Chairman, Board of Directors

#### *Global Reporting Initiatives (GRI)*

Eric Hespeneide is currently the Chairman of the Global Reporting Initiative's (GRI) Board of Directors. He previously served as GRI's Interim Chief Executive from July 2016 to January 2017 and was the inaugural Chairman of the Global Sustainability Standards Board from January 2015 to June 2016.

Eric served as a Global Leader of Deloitte Touche member firms' Sustainability group within Audit and Enterprise Risk Services. He represented DTTL in various forums such as the World Business Council for Sustainable Development, GRI and the Working Group of the International Integrated Reporting Council (IIRC).

He previously chaired the American Institute of Certified Public Accountants (AICPA) Sustainability Assurance and Advisory Task Force and is currently a member of the Task Force. He was a key contributor to the development of the AICPA's *Attestation Engagements on Sustainability Information*. Eric currently serves on the International Auditing and Assurance Standards Board (IAASB) Project Advisory Panel for its EER Assurance Project.

## FACULTY PROFILES

### **Dexter John**

President and CEO

#### ***Gryphon Advisors***

Director

#### ***Organigram Holdings Inc.***

Director

#### ***Financial Services Regulatory Authority (Ontario)***

Dexter is the President and Chief Executive Officer of Gryphon Advisors Inc. Dexter is responsible for the North American business where he leads a team of experienced governance and financial professionals.

With over 25 years of experience in capital markets, Dexter has a strong knowledge of corporate law and a thorough understanding of financial markets. From his work at major Canadian law firms, boutique investment banks to his tenure at the Investment Dealers Association, Ontario Securities Commission and the Toronto Stock Exchange, Dexter has a strong public equities market background as well as significant regulatory experience.

Dexter's career as a director and board advisor spans more than 10 years. He was the Chairman of Partners Real Estate Investment Trust, director of Augustine Ventures Inc. (now Red Pine Exploration). Dexter currently sits on the board of Organigram Holdings Inc. where he is a member of the Audit committee, Nominating and Governance Committee and Chair of the Investment Committee and he was recently appointed to the board of the Financial Services Regulatory Authority (Ontario).

Dexter holds the ICD.D designation and received his law degree from Queen's University and holds a Mathematics for Commerce degree from York University.



### **Dan O'Brien**

Partner, Sustainability and Climate Change Leader

#### ***PwC Canada***

Daniel O'Brien is a Partner with PwC Canada and leads the Sustainability and Climate Change practice in Western Canada. Dan's career has focused on working with organizations to understand and manage environmental risk and support strategy to adapt and align with the future economy. He works with companies across sectors, advising on carbon reduction strategies, energy management programs, low / zero emission transportation, and environmental management systems. Dan also has significant experience in impact measurement and has completed economic, environmental and social impact assessments for both major projects and government funding programs. He focuses on effective measurement and assessment of ESG information, both in terms of assessing performance but also for identifying and managing risk and opportunity.

## FACULTY PROFILES



### **Geoff Pegg**

Director, Sustainability and Environment

#### **TELUS**

Geoff has been the head of sustainability and environment at TELUS since 2011. After ten years in customer experience and operations roles both locally and internationally, he has led TELUS' award-winning sustainability strategy, governance and disclosure, including establishing TELUS' long-term climate-related and targets and initiating TELUS' leading practice of linking executive and team member pay to sustainability objectives.

A Clean 16 honouree for leadership in sustainable development and clean capitalism in Canada, Geoff has also earned his GCB.D from Competent Boards and a Graduate Certificate in Governance Essentials from the University of Toronto's Rotman School of Management.



### **Eric Pitt**

Climate Finance Consultant

#### **Ceres**

Eric Pitt is an experienced capital markets and technology executive with a deep interest in addressing climate change. Eric is a consultant to the Ceres Accelerator for Sustainable Capital Markets, where he does policy and program work advocating for pro-growth, climate-aligned investment principles. He is an advisor to and investor in several companies and funds focused on climate solutions. Previously, Eric was a Managing Director in the fixed income markets at JP Morgan for 15 years, responsible for much of their US credit trading business. During the first decade of his career, Eric worked in software. He graduated from Harvard College with a degree in Physics and has an MBA from Columbia University.

## FACULTY PROFILES



### **Veena Ramani**

Senior Program Director, Capital Market Systems

#### **Ceres**

Veena leads Ceres' work on critical market levers that will help scale the transition to sustainable capital markets. This includes governance systems that companies should put in place at the corporate board level to allow for effective board sustainability oversight. She also oversees Ceres work to engage financial regulators on climate change as a systemic risk, under the umbrella of the Ceres Accelerator for Sustainable Capital Markets.

Veena is the author of the 2020 Ceres report, *Addressing Climate as a Systemic Risk: A call to action for US Financial Regulators*, which makes the case that climate change poses systemic risk to US financial markets, and outlines over 50 action steps that financial market regulators can take to address this risk.

Veena has also authored and co-authored a number of reports on board sustainability governance including *View from the top: How corporate boards can engage on sustainability performance* (2015), *Lead from the top: Building sustainability competence on corporate boards* (2017), *Systems Rule: How board governance can drive sustainability performance* (2018), *Getting Climate Smart: A primer for corporate directors in a changing environment* (2018) and *Running the Risk: How Corporate Boards Can Oversee Environmental, Social and Governance (ESG) Issues* (2019).

Veena has been interviewed in a number of corporate governance publications around governance for sustainability, including in the Cover Story of the 2017 Fall Edition of C Suite Magazine. Her work has been featured by NACD, Corporate Secretary, Pensions and Investment, CQ Roll Call, Marketwatch, Ethical Boardroom, GreenBiz, Huffington Post, Environmental Leader and Responsible Investor.

From 2006 to 2015, Veena managed the relationships with a wide portfolio of Ceres Company Network members, including the financial services sector and the electric power sector. Veena worked with boards and senior company management on opportunities to integrate sustainability into their business structures and decision making, including policy and program development, disclosures and stakeholder engagement processes. Prior to Ceres, Veena worked as a management consultant with CDM, an environmental consulting firm and focused on providing a variety of sustainability services to clients in the public and private sectors. Veena also spent three years with Integrative Strategies Forum, a Washington, D.C.-based nonprofit organization working on developing national and international policy solutions on sustainable development, building consensus and coalitions among civil society groups on these issues and lobbying government representatives. Before that, Veena practiced law in India.

Veena received a Masters in Law degree from Washington University in St. Louis and a B.A. LL.B (Honors) degree from National Law School from India University, Bangalore.

## FACULTY PROFILES



### **Peter Richardson**

Climate Strategist

#### ***Manifest Climate***

Pete brings over 15 years of experience advising clients on international law and development projects, with a focus on climate change, energy and infrastructure. Pete previously worked in London, Sydney, Jakarta and Chicago, before arriving in Toronto.

Qualified as a lawyer in Canada and England and Wales, Pete was previously a partner and head of major projects (Canada) at Baker McKenzie.

During his career, Pete has acted on a number of high-profile domestic and international projects, including the development and commercialization of utility-scale renewable energy facilities, innovative technology, corporate PPAs and sustainable infrastructure. During his time in Canada, Pete has also worked on indigenous rights projects.

Pete's experience cuts across development, M&A and compliance. Pete holds a Masters of International Law from the University of Sydney, and an MA in jurisprudence from Oxford University.



### **David Rutherford**

VP, ESG Services

#### ***NEI Investments***

David Rutherford is VP, ESG Services at NEI Investments. He originally joined NEI as VP Marketing in August 2016 with a mandate to lead the re-positioning of the organization around the core value proposition of Responsible Investing (RI). In his current role since May 2019, David is leading NEI's renowned ESG team and program with the goal of reinforcing and growing the NEI's leadership position within the highly competitive RI space.

He holds an undergraduate degree in Urban and Regional Planning from Ryerson University, a Master's Degree in Social Psychology from the London School of Economics, and a Graduate Diploma in Social Responsibility and Sustainability from the University of Toronto, where he won the President's Award for Innovative Practices for his examination of the impact of investor purpose on the wealth management and investment advice industries.

## FACULTY PROFILES



### **Roxanne Sharif**

Account Manager

#### ***Datamaran***

As an Account Manager at Datamaran, Roxanne applies her knowledge of ESG issues and experience with data analysis to support global companies in the development of sustainability strategy, reporting and risk management processes.

With a background in public advocacy leading cross functional groups within organizations such as Sierra Club and the U.S. Green Building Council, Roxanne helps Executive leadership to understand their external and emerging ESG risks in a fast-changing regulatory environment in the US and abroad.

She has an MBA in Sustainability from Bard University in New York where she concentrated her studies in Change Management and Finance. Roxanne has also a Bachelors in Communications and Media as well as a BA in Contemporary Art Practice from Chapman University in Orange, CA.

Roxanne has 5+ years experience working with various stakeholders including corporate, government, academic and NGO members on business resilience planning and delivering progress to achieve global Sustainable Development Goals.



### **Neil Stewart**

Director of Corporate Outreach

#### ***Sustainability Accounting Standards Board (SASB)***

Neil Stewart joined SASB in 2020 as its New York-based Director of Corporate Outreach, bringing more than 25 years of experience in and around investor relations and corporate governance. Previously he was at Citigroup as VP IR Advisory on the ADR team, helping non-US issuers develop IR and ESG strategies. Formerly Editorial & Research Director of both IR Magazine and Corporate Secretary magazine, Neil is well known for having led a global lineup of conferences and awards events. He is currently president of NIRI NY, the New York chapter of the National Investor Relations Institute.

## FACULTY PROFILES



### **Coro Strandberg**

President

***Strandberg Consulting***

Faculty Member

***Governance Professionals of Canada***

Corporate Director

***BC Lotteries Corporation***

Coro Strandberg is a leading expert in corporate social purpose, sustainability and social responsibility, with over thirty years' experience in the field. As President of Strandberg Consulting, she specializes in Purpose Governance, Sustainable Boards, Sustainability Strategy, Sustainable Risk Management, Sustainable Supply Chains and Sustainable Industry Associations. She is a Corporate Director of BC Lotteries Corporation, and a member of their Governance and Social Purpose Committee, and has over 15 years of corporate director experience in the financial sector, including three as Chair of the Board. She is a faculty member of the Conference Board of Canada's Director's College and of Governance Professionals of Canada where she trains Directors and Corporate Secretaries respectively on the board's role providing oversight of sustainability performance and corporate purpose. She is an Associate with Canadian Business for Social Responsibility and a member of the Canadian Office of the Auditor General's Senior Advisory Panel. In 2015 she was named the top CSR Consultant in Canada. As a thought leader, she publishes research and opinions on next generation sustainability practices on her website at [www.corostrandberg.com](http://www.corostrandberg.com).



### **Davinder Valeri**

Executive Director, A4S Canadian Chapter

***Chartered Professional Accountants of Canada***

Davinder is a CPA, CA, with extensive business operations leadership experience from a variety of organizations, including Ontario Power Generation, Atomic Energy of Canada Limited and KPMG Global Infrastructure Advisory. With a deep understanding of energy, infrastructure and financing, she has been responsible for all facets of decision making to achieve organization goals and objectives. At CPA Canada, Davinder leads a team that conducts technical research to develop guidance and thought leadership on emerging and current issues related to strategy, risk, technology, finance, management, climate change and sustainability to support CPA members in business, government and not for profit to be more resilient, adaptive and innovative. Davinder is also the Executive Director of the Canadian Chapter of The Prince's Accounting for Sustainability CFO Leadership Network and sits on the Board of Directors for the Boys and Girls Clubs of Canada.

## FACULTY PROFILES



### **Michael Zimonyi**

Head of Policy

#### ***The Climate Disclosure Standards Board (CDSB)***

Michael leads CDSB's policy and external affairs work. He joined CDSB in 2012 and focuses on policy and corporate engagement and oversees external affairs. Prior to joining CDSB, Michael has worked at a global pharmaceutical corporation and at the sustainability think tank Forum for the Future. Michael has a degree in Chemistry with Environmental Science from the University of Birmingham, studied Sustainable Finance at the University of Oxford and is a member of the Royal Society of Chemistry. He is also a member of the UK Financial Reporting Council's Stakeholder Advisory Panel and former member of the EFRAG European Lab Project Task Force on Climate-Related Reporting.