

# Developing an ESG Strategy for Your Portfolio – New Hybrid Format



We are proud to now offer our first hybrid course, a departure from our classic 1 day classroom courses in person. The new format will split the content into 3 sessions, once a week, designed to create bite sized learning for your convenience.

Led by Jennifer Wilson, the Founder & CEO of Re:Co Insights, a tech-powered advisory company helping private equity clients accelerate ESG outcomes and value creation in tandem.

Day	Date (Wed.)	Format	Time		Duration
1	03/12/2024	Digital	13:30	15:30	2h
2	10/12/2024	Digital	13:30	16:30	3h
3	11/12/2024	Digital	15:00	17:30	2h30

## Agenda | Day 1

13:30 - 14:00	Welcome & Introduction <a href="#">Jennifer Wilson, Re:Co Insights</a>
14:00 - 15:30	The Regulatory Context: <a href="#">Henriika Hara &amp; Sarah-Jane Denton, Travers Smith</a> <ul style="list-style-type: none"><li>• Task-force on Climate-Related Disclosures (TCFD)</li><li>• Sustainable Finance Disclosure Regulation (SFDR) and its UK adoption (SDR)</li><li>• Sustainability reporting, sustainability outcomes and impact.</li></ul>

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## Agenda | Day 2

13:30 - 14:15	LP Requirements & Expectations: from fundraising to reporting <b>Manuela Fumarola &amp; Michael Eisenberg, ERM</b>
14:15 - 15:15	Strategic prioritization in ESG: Identify your top priorities as a fund and determine what will make a difference to your portfolio companies. <b>Eric Bloom, Re:Co Insights</b>
15:15 - 16:15	Integrating responsible investment into the investment cycle. <b>Maria Carradice, Mayfair Equity</b> <ul style="list-style-type: none"> <li>• Taking a strategic approach to ESG from due diligence to portfolio management.</li> <li>• Measuring ESG (quantitative and qualitative): Deciding what to measure and what to report on</li> <li>• Impact is not ESG but where's the intersection?</li> </ul>
16:15 - 16:30	Key Takeaways and Discussions <b>Jennifer Wilson, Re:Co Insights</b>

## Agenda | Day 3

15:00 - 16:00	Fireside chat discussing best practice in responsible investment integration. <b>Tim Clare, Anthesis</b> <ul style="list-style-type: none"> <li>• Benchmarking 'good vs. great' across the investment lifecycle</li> <li>• Running an effective preinvestment analysis (due diligence, evaluation)</li> <li>• Analysing a company for its management and approach to the most material ESG issues</li> <li>• Board level engagement on the key issues</li> </ul>
16:00 - 16:45	ESG Open Forum <b>Luise O'Gorman, Aon</b> <ul style="list-style-type: none"> <li>• Key environmental themes beyond climate.</li> <li>• Greenwashing</li> <li>• Connecting ESG with value creation.</li> </ul> What's next for ESG and the private markets.
16:45 - 17:30	Conclusions and Takeaways <b>Jennifer Wilson, Re:Co Insights</b>