LIVE WEBINAR

Five best practices
for supercharging your ESG performance

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Our speakers

Jazmyne Simon

Solution Architect
Goby

Joe Christian

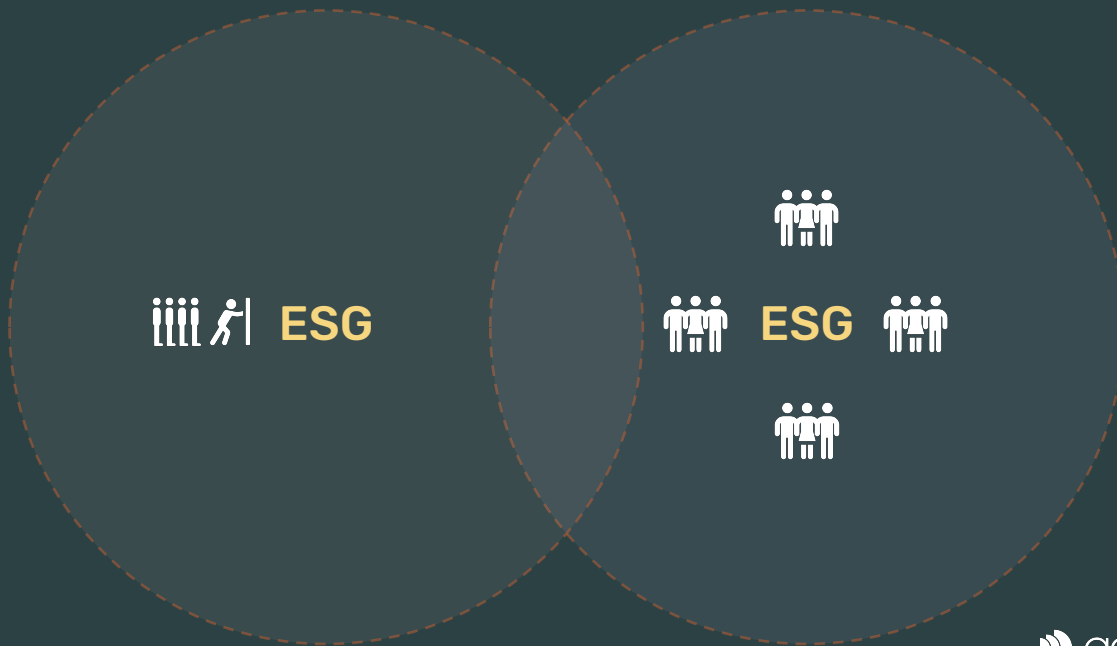Managing Director
Wintrust Funds Group

Kylie Ford

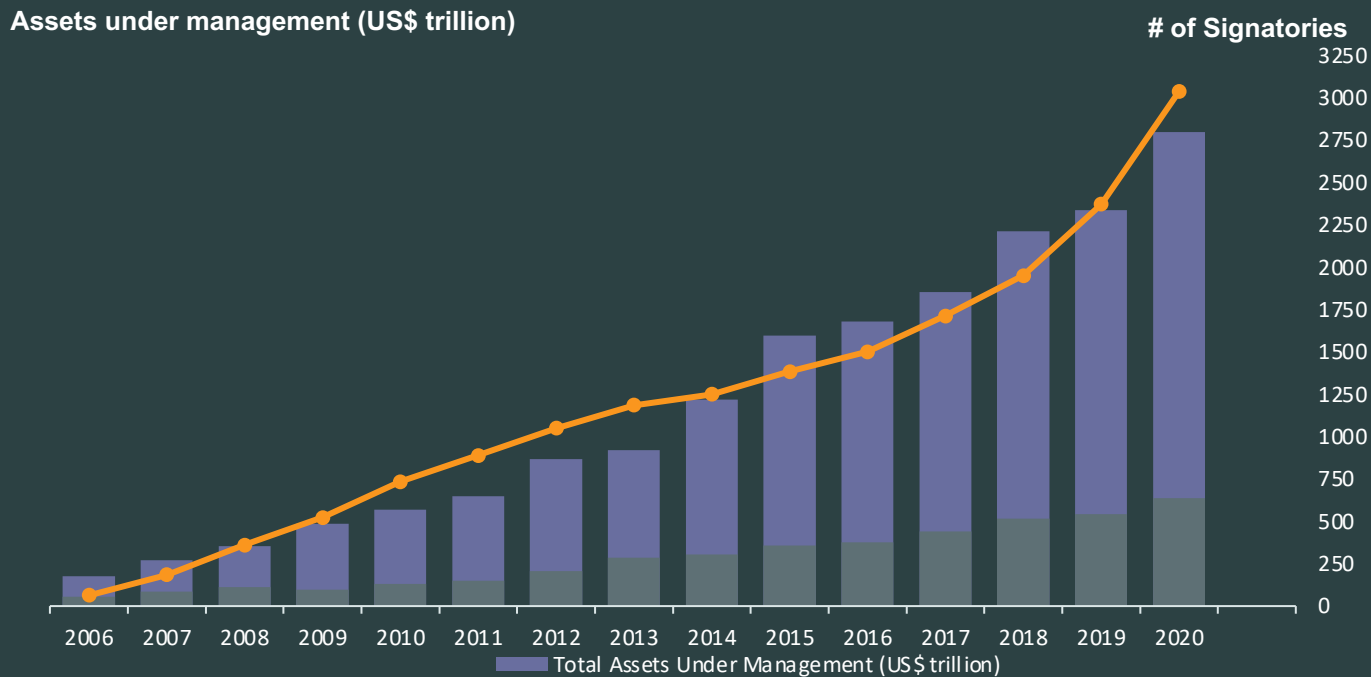Principal Consultant - ESG
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Five best practices

1. Identify your drivers

2. Benchmark within your industry

3. Get a baseline of what's already in place

4. Assess materiality and engage stakeholders

5. Set goals

Identify the driver

Benchmark within your industry

- Where do you stand?

- What are your peers doing?

- What conversations are being had?

- What does best in class look like?

Multiple disclosure frameworks

Reporting frameworks

Guidance frameworks (standards)

Third-party aggregated frameworks

Get a baseline of what's already in place

Data dimensions

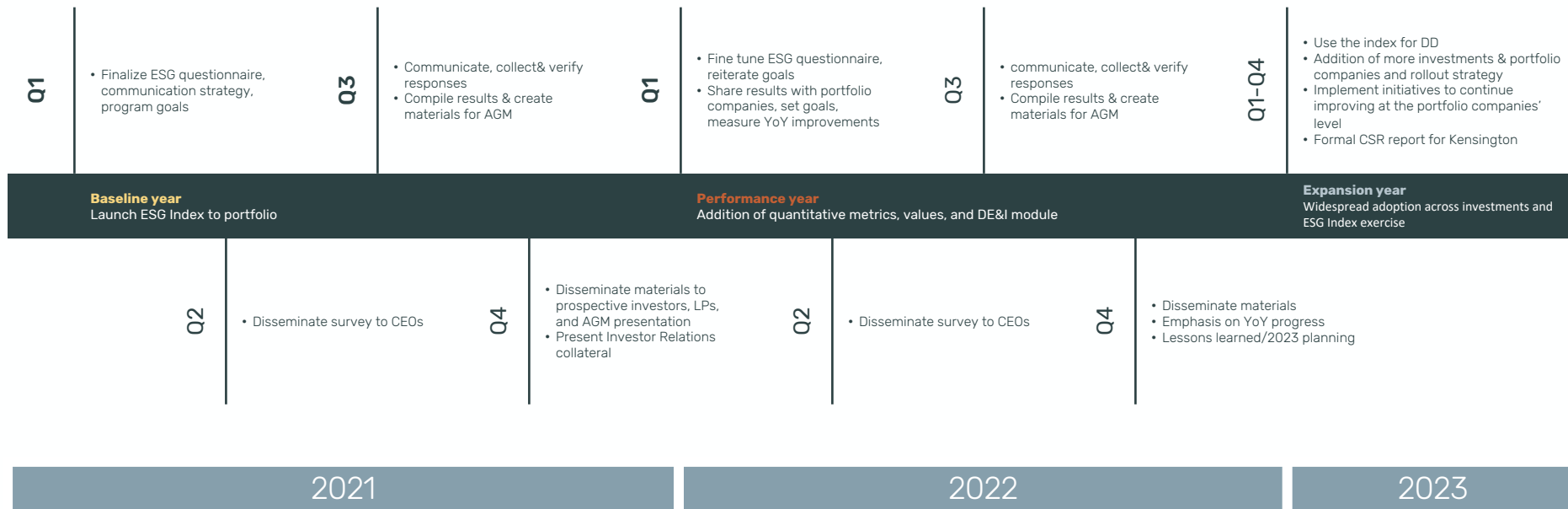Comparing performance by:

Market

Industry

Asset class

Fund vintage

Time period

Industry standards (GICS or other)

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Timeline | Setting baselines & tracking progress

Q1
- Finalize ESG questionnaire, communication strategy, program goals

Q3
- Communicate, collect& verify responses
- Compile results & create materials for AGM

Q1
- Fine tune ESG questionnaire, reiterate goals
- Share results with portfolio companies, set goals, measure YoY improvements

Q3
- communicate, collect& verify responses
- Compile results & create materials for AGM

Q1-Q4
- Use the index for DD
- Addition of more investments & portfolio companies and rollout strategy
- Implement initiatives to continue improving at the portfolio companies' level
- Formal CSR report for Kensington

Baseline year
Launch ESG Index to portfolio

Performance year
Addition of quantitative metrics, values, and DE&I module

Expansion year
Widespread adoption across investments and ESG Index exercise

Q2
- Disseminate survey to CEOs

Q4
- Disseminate materials to prospective investors, LPs, and AGM presentation
- Present Investor Relations collateral

Q2
- Disseminate survey to CEOs

Q4
- Disseminate materials
- Emphasis on YoY progress
- Lessons learned/2023 planning

2021   2022   2023

Materiality and stakeholder engagement

- Talk to the people that will be impacted
- Talk to portfolio companies

#4

Investor & stakeholder interest

- Reporting & Disclosure
- Transparency & Best Practices Alignment
- Health & Well-being
- Third-degree Engagement

- Science-Based Targets
- Global Take
- Finance & Resilience-focused Frameworks

Stakeholder engagement

Framework alignment

Target setting & data-based ESG growth

- Performance Tracking
- Efficiency & Performance
- Risk-based Business Strategy
- GHG Emissions Reduction

Who needs to be involved & when?

#1: Identify goals

Corporate Leadership

ESG Leadership

#2: Introduce to key stakeholder groups and draft topics

Regional and Departmental Leadership
Business Development teams

#3: introduce a draft of general goals and align with the rest of the organization

Management and Analytics Teams

Organizational Partners

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ESG Materiality Matrix

Legend:
- Employee Health & Safety
- Cross-functional strategies and communication
- Diversity & inclusion
- Proactive identification of building performance opportunities
- Proactive identification of risks & planning for risks
- Target & market alignment

Importance to stakeholders (vertical axis: Major / Moderate)
Impact on business (horizontal axis: Moderate / Major)

Top-center quadrant:
- Comprehensive ESG training (E,S,G)

Top-right quadrant:
- GHG performance (E)
- Energy performance (E)

Middle-center quadrant:
- Health & Well-being program (S,G)
- Cross-functional ESG taskforce (E,S,G)
- Employee ESG targets & goals (G)
- Climate risk assessments (E,S,G)
- Employee survey (S,G)
- Compliance strategy: regulatory requirements (G)
- Benchmarking ordinances and ENERGY STAR (E, G)

Middle-right quadrant:
- ESG Policy (E,S,G)

Bottom-left quadrant:
- Waste performance (E)

Bottom-center quadrant:
- Green leases (E,S,G)
- New acquisitions: ESG checklist (G)
- Forward-looking targets (E,G)
- D&I standards, goals and tracking (G)
- Water performance (E)
- Tenant engagement (E,S,G)
- Green financing (G)
- Renewable energy (E)
- Reporting alignment (E,S,G)
- D&I Training (G)

Bottom-right quadrant:
- Cohesive third-party ESG engagement (S,G)
- Air quality (E)

Goal setting

- Qualitative vs. quantitative
- Revisit on a regular basis
- Internal goals vs. external goals

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ESG Materiality Roadmap

	Q4 2020			Q1 2021			Q2 2021			Q3 2021			Q4 2021		
	10/20	11/20	12/20	01/21	02/21	03/21	04/21	05/21	06/21	07/21	08/21	09/21	10/21	11/21	12/21

Cross-functional strategies and communication
- Employee ESG targets & goals (11/20–12/20)
- Cross-functional ESG taskforce (11/20–12/20)
- Comprehensive ESG training (12/20–03/21)
- ESG policy (11/20–12/20)
- Comprehensive 3rd party engagement (12/20–03/21)

Diversity & inclusion
- D&I standards, goals and tracking (01/21–03/21)
- D&I Training (04/21–11/21)

Employee Health & Safety
- Comprehensive ESG training (01/21)
- Employee survey (01/21)
- Health & Well-being program/policy (01/21)

Proactive identification of building performance opportunities
- Comprehensive ESG training (01/21)
- GHG performance (ongoing) (12/20–12/21)
- Energy performance (12/20–03/21)
- Green leases (12/20–02/21)
- Air quality (12/20–04/21)
- Water performance (03/21–05/21)
- Tenant engagement (03/21–05/21)
- Renewable energy (03/21–12/21)
- Waste performance (09/21–12/21)

Proactive identification of risks & planning for risks
- Climate risk assessment (08/21–11/21)
- Compliance strategy: regulatory requirements (01/21–03/21)
- New acquisitions: checklist (01/21)
- Green financing (01/21–09/21)

Target & market alignment
- Forward-looking targets (05/21–12/21)
- Reporting alignment (03/21–05/21)
- Benchmarking ordinances and ENERGY STAR (01/21–03/21)

Ongoing items
- ESG materiality assessment (10/20)
- Asset performance data onboarding (10/20)
- Asset performance data gathering (10/20–12/21)
- GRESB gap assessment (10/20)

Contact us!

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