



# United Nations Environment Programme

برنامج الأمم المتحدة للبيئة · 联合国环境规划署  
 PROGRAMME DES NATIONS UNIES POUR L'ENVIRONNEMENT · PROGRAMA DE LAS NACIONES UNIDAS PARA EL MEDIO AMBIENTE  
 ПРОГРАММА ОРГАНИЗАЦИИ ОБЪЕДИНЕННЫХ НАЦИЙ ПО ОКРУЖАЮЩЕЙ СРЕДЕ

## Finance Initiative

Innovative financing for sustainability

### UNEP FI North American Taskforce Event (NATF)

#### Assessing the Value of Sustainability Indices & Disclosure Initiatives

Thursday 2 October 2008, Boston, USA

State Street Corporation, State Street Financial Center, One Lincoln St., Boston, MA 02111  
Global Room, 7<sup>th</sup> Floor

Time	Topic	Speaker
08.00	Registrations	
<b>Morning session – Why non-financial disclosure matters</b>		
<b>Opening</b>		
08:45-08:50	Welcome	Sandra Odendahl, Director, Corporate Environmental Affairs, RBC Financial Group & Rick Pearl, Vice President, CSR Officer, State Street Corporation (Co-Chairs NATF)
08:50-09:00	Introduction	Ronald E. Logue, Chairman and CEO, State Street Corporation
<b>Key note speeches</b>		
9.00-09:30	The Arrival of Sustainability Issues	Marion Swoboda, Senior Equity Analyst, SAM Indexes GmbH
09:30-10:00	The Drive for Disclosure	Zoe Riddell, Vice President, Carbon Disclosure Project - USA
<b>Launch of UNEP FI / NATF Report on Sustainability Indices &amp; Disclosure Initiatives</b>		
10:00-10:45	NATF Survey Results: Assessing the Value of Sustainability Indices & Disclosure Initiatives	David Gardiner, Principal, President, David Gardiner & Associates, LLC
10:45-11:00	<b>Coffee break</b>	

<b>The Respondents' Perspective</b>		
11:00-12:15	<p>What does Sustainability Disclosure mean in Practice? Perceived Advantages / Disadvantages Trends Going Forward</p>	<p><i>Moderator:</i> David Gardiner, Principal, President, David Gardiner &amp; Associates, LLC</p> <p><i>Panelists:</i></p> <p>Beth Ginsberg Holzman, CSR Strategy and Reporting Manager, The Timberland Company</p> <p>Blair Feltmate, Director, Sustainable Development, Ontario Power Generation</p> <p>Tony Basson, Senior Manager, CIBC Environmental Risk Management</p> <p>Valerie Smith, Vice President, Environmental Affairs, Citigroup</p>
12:15-13:45	<b>Lunch</b>	
<b>Afternoon session – The scope of non-financial disclosure and what lies ahead</b>		
<b>The Stakeholders' Perspectives</b>		
13:45-15.00	<p>Same Information, a Variety of Uses Trends Going Forward</p>	<p><i>Moderator:</i> Zoe Riddell, Vice President ,Carbon Disclosure Project - USA</p> <p><i>Panelists:</i></p> <p>Paul Hilton, Director of Advanced Equities Research, Calvert &amp; Chair of UNEP FI's Asset Management Working Group</p> <p>Gregory Larkin, Senior Analyst, Innovest</p> <p>Mindy Lubber, President, CERES</p> <p>William Page, Principal, State Street Global Advisors</p>
15.00-15.15	<b>Coffee break</b>	

<b>Final Debate</b>		
15:15-16:30	The Future of Sustainability Reporting & Disclosure	<p><i>Moderator:</i> Allen L. White, Vice President and Senior Fellow, Tellus Institute and Director, Corporation 20/20</p> <p><i>Panelists:</i></p> <p>Esther Garcia, Ex- Head of Corporate Responsibility Services, Det Norkse Veritas</p> <p>Marion Swoboda, Senior Equity Analyst, SAM Indexes GmbH</p> <p>Jerome Tagger, Chief Operating Officer, Principles for Responsible Investment</p> <p>Thomas Kuh, Senior Vice President Director Indexes, KLD Research and Analytics, Inc.</p>
16:30-16.45	Presentation of the GRI Financial Services Sector Supplement	Regina Kessler, UNEP FI Programme Manager
<b>Close</b>		
16:45-17:00	Closing Remarks	<p>Sandra Odendahl, Director, Corporate Environmental Affairs, RBC Financial Group &amp; Rick Pearl, Vice President, CSR Officer, State Street Corporation (Co-Chairs NATF)</p>