



ESG Navigator™

ENVIRONMENT • SOCIAL • GOVERNANCE

ESG Navigator Webinar

July 22, 2021





Participants

Company	Pre-Registered
• Burns	Doug Dietrich
• Consumers	Linda Hilbert; Jessica Spagnuolo
• Danaher	Jeff Ryberg; Tricia McGriff; Kimberly Tuyn
• Diodes	Sheana Chen
• Duke Energy	Julie Hyde
• Goodyear	Ashley Fahey
• Hexion	Syd Lindquist
• Lear	Rich O'Herron
• Marriott International	Claire Cutting; Juliette Van Vleck

Company	Pre-Registered
• Materion	Jon Newton
• Medtronic	Ginny Cassidy
• NextEra Energy	Morgan McCall
• Otis	Matt Turner
• PPG	Mike Corcoran
• Steelcase	Jonathan Prins*
• SYF	Brian Alexander
• Trane Technologies	Ben Tacka
• UPS	Andria Smith
• Wyndham	Rishi Shah

* = First webinar



Agenda

Updates *(10 minutes)*

- ESG Ratings Survey
- Download ESG Ratings Maps Directly
- Investor Pages (*“What Feeds What”* etc.)
- Example CEO Pitch Deck

Tracking Best Practices *(20-25 minutes)*

- Updating ESG Navigator’s best practices
- Full group discussion: How does your company monitor competitor ESG actions and best practices?

Join Options and Pricing FY-2022: Sneak Preview *(15-20 minutes)*

- Preliminary thoughts
- Breakout group discussion
- Full group discussion

Next Steps *(5 minutes)*



2021 Game Plan



Reinforce the Foundation

- Major KSI (Maturity Map) Review
- ESG Ratings Analysis (MBA team)
- Enhancements
 - Welcome Page
 - Signposts
 - Branding

Simplify

- Simplify initial data entry (TCB & ESGN)
 - E or S or G or Strategy
 - Pick one and dive in
- Add “*ESG Ratings Maps*” (partial) to Option A
- Excel Options
 - Upload
 - Download

Q1 2021

Q2 2021

Q3 2021

Q4 2021

Update and Upgrade

- MBA/MS (UM) Team
 - ESG Ratings Analysis
 - Strategy Review
- Upgrade Key Features
 - Participant Pie Charts
 - Excel Toolkit
 - Migrate *ESG Ratings Maps*
 - *Who Bought Who*
 - *What Feeds What*

ESG Ratings
Survey

Launch FY-22

- Update Join Options
 - Solicit input in Q3
 - Launch in September
- Website Simplification
 - *Know Your Position*
 - *Chart Your Course*
 - *Navigate Changes Ahead*



ESG Ratings Survey



ESG Navigator™
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ESG Navigator: ESG Ratings Survey

We have crafted this survey at the request of many ESG Navigator members. They tell us the subject of ESG ratings comes up at every C-Suite and board meeting – and they want current insights and data to share. (The last major survey of this nature conducted by The Conference Board was in 2016.)

The survey has been designed and shaped by ESG Navigator members during our past two monthly webinars. The survey consists of nine (9) questions. The individual questions may appear long because we include a total of 17 external ESG frameworks and rating organizations; however, you will find you can complete each question quickly. You should be able to complete this survey in 15-20 minutes, perhaps less.

The full results will be available to all companies that complete the survey. We plan to share only a summary of the results more broadly.

Your data submitted will remain confidential. We request information on name and company simply to be able to track the quality of the inputs and to avoid multiple submissions from the same company.

* Required

Update

- **Corporate EcoForum Partnership**
 - CEF Chair: *“absolutely top-notch survey; brilliantly done; totally comprehensive”*
 - CEF launch: May 17, 2021



Website Migration of *ESG Ratings Maps*

We have moved ESG Performance Maps to be a direct download from <https://esgnavigator.com/>

Section	E#	Element Name	Avg. Score	KSIs	CDP	GRI	SASB	TCFD	BB	DISI	FTSE	ISS	MSCI	Sust.	Vigeo	Eco-V	CK	JUST	ERC
Gov	1	Co. Purpose & Values	1.70	5															34
Gov	2	CEO & C-Suite Leadership	1.83	6															10
Gov	3	Board of Directors Leadership	1.00	7															40
Gov	4	Goals & Metrics	2.57	7															59
Gov	5	Culture & Organization	1.40	5															34
Gov	6	Stakeholder Engagement	2.17	6															38
Gov	7	Disclosure & Reporting	1.25	6															74
Str	8	Strategic Planning	1.14	7															56
Str	9	Innovation, R&D	1.67	6															39
Str	10	Custs. & Markets	1.71	7															29
Str	11	Products, Services, & Solutions	2.29	7															51
Env	12	Operations - Env. Footprint	2.56	8															72
Env	13	S. Chain - Env. Footprint	1.00	7															62
Env	14	Products - Env. Footprint	1.75	8															54
Soc	15	Workplace	2.57	7															62
Soc	16	S. Chain - Social Impacts	1.13	8															58
Soc	17	Community - Social Impacts	1.93	7															36



ESG Navigator's *ESG Ratings Maps*

ESG Ratings Maps

- Detailed analysis of methodologies vs. ESG Navigator criteria
- ERC = ESG Ratings Coverage (degree of overlap)

ESG Ratings Maps

- "Stoplight" analysis
- Multiple levels of detail:
 - By KSI (114)
 - By Element (17) →
 - By Section (4)
- Many have shared with C-Suite and Board

KSI	Section	KSI Name	CDP	GRI	SASB	TCFD	BB	DJSI	FTSE	ISS	MSCI	Sust.	Vigeo	Eco-V	CK	JUST	ERC
1.1	Gov	Co. Purpose	○	●	○	●	○	○	○	○	○	○	○	○	○	○	12
1.2	Gov	ESG/S in Vision, Mission, Values, & Policies	○	●	○	●	○	○	●	○	○	○	●	○	○	○	23
1.3	Gov	ESG/S Commitments (by Board and/or C-Suite)	●	○	○	○	●	○	●	○	●	●	●	●	●	○	38
1.4	Gov	Managing Long-Term Viability of Core Biz.(es)	●	●	○	●	●	●	●	●	●	○	●	○	○	○	46
1.5	Gov	Key Biz. Decisions Tied to ESG/S Risks & Opportunities	●	●	○	●	●	●	●	●	○	○	●	○	○	○	46

Section	E#	Element Name	Avg. Score	KSIs	CDP	GRI	SASB	TCFD	BB	DJSI	FTSE	ISS	MSCI	Sust.	Vigeo	Eco-V	CK	JUST	ERC
Gov	1	Co. Purpose & Values	1.70	5	●	●	●	●	●	●	●	●	●	●	●	●	●	●	34
Gov	2	CEO & C-Suite Leadership	1.83	6	●	●	●	●	●	●	●	●	●	●	●	●	●	●	10
Gov	3	Board of Directors Leadership	1.00	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	40
Gov	4	Goals & Metrics	2.57	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	59
Gov	5	Culture & Organization	1.40	5	●	●	●	●	●	●	●	●	●	●	●	●	●	●	34
Gov	6	Stakeholder Engagement	2.17	6	●	●	●	●	●	●	●	●	●	●	●	●	●	●	38
Gov	7	Disclosure & Reporting	1.25	6	●	●	●	●	●	●	●	●	●	●	●	●	●	●	74
Str	8	Strategic Planning	1.14	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	56
Str	9	Innovation, R&D	1.67	6	●	●	●	●	●	●	●	●	●	●	●	●	●	●	39
Str	10	Custs. & Markets	1.71	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	29
Str	11	Products, Services, & Solutions	2.29	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	51
Env	12	Operations - Env. Footprint	2.56	8	●	●	●	●	●	●	●	●	●	●	●	●	●	●	72
Env	13	S. Chain - Env. Footprint	1.00	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	62
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Soc	16	S. Chain - Social Impacts	1.13	8	●	●	●	●	●	●	●	●	●	●	●	●	●	●	58
Soc	17	Community - Social Impacts	1.93	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	36





ESG Ratings Analysis:

What's the data behind the “bubbles” and heat maps?

KSI	Section	KSJ Name	Score	HR!	CDP	GRI	SASB	TCFD	BB	DJSI	FTSE	ISS	MSCI	Sust.	Vigeo	Eco-V	CK	JUST	ERC
1.5	Gov	Key Business Decisions - ESG/S	0.5	!	●	●	●	●	●	●	●	●	●	●	●	●	●	●	46
2.1	Gov	CEO/C-Suite Approach to ESG/S	1.5	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	12
3.4	Gov	Board Agendas re ESG/S	1.5	!	●	●	○	●	●	○	○	○	○	○	○	○	○	○	46
4.6	Gov	Accounting for ESG/S Externalities	1.0	!	●	●	●	●	●	○	○	○	○	○	○	○	○	○	69
5.4	Gov	Unwritten Rules of the Game	1.0	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	15
8.3	Str	Strategy: Enterprise Risk	1.5	!	●	●	●	●	●	○	○	○	○	○	○	○	○	○	73
8.6	Str	Use of Scenario Planning	1.0	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	65
9.1	Str	ESG/S & Innovation	1.5	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	65
10.1	Str	ESG/S Approach to Customers	2.0	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	46
11.1	Str	PSS Value Proposition	2.5	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	46
12.1	Env	Energy Purchased	2.5	!	○	○	○	○	○	○	○	○	○	○	○	○	○	○	65
13.1	Env	Supply Chain Env. - Approach	1.5	!	●	○	○	○	○	○	○	○	○	○	○	○	○	○	65
15.3	Soc	ESG/S Benefits: Recruitment & Retention	3.0	!	○	○	○	○	○	○	○	○	○	○	○	○	○	○	54

Section	#	Element Name	Avg. Score	KSIs	CDP	GRI	SASB	TCFD	BB	DJSI	FTSE	ISS	MSCI	Sust.	Vigeo	Eco-V	CK	JUST	ERC
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Gov	2	CEO & C-Suite Leadership	1.83	6	●	●	●	●	●	●	●	●	●	●	●	●	●	●	10
Gov	3	Board of Directors Leadership	1.00	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	40
Gov	4	Goals & Metrics	2.57	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	59
Gov	5	Culture & Organization	1.40	5	●	●	●	●	●	●	●	●	●	●	●	●	●	●	34
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Soc	17	Community - Social Impacts	1.93	7	●	●	●	●	●	●	●	●	●	●	●	●	●	●	36

A circle ('bubble') indicates the degree to which that organization covers that KSI subject:

- = **HIGH DEGREE** of coverage
- ◐ = **PARTIAL** coverage
- = **LITTLE OR NO** coverage

COLOR MATRIX - Summarizes the color scheme used (for circles and heat map squares).

Your Self-Assessment Score	Ratings Organization - Coverage		
	High	Med.	Low
High 3.0 - 4.0	green	green	green
Med. 1.5 - 2.5	yellow	yellow	light green
Low 0.5 - 1.0	red	yellow	light green



Updated Website Information & Graphics

- **General “Wiki” information re ESG ratings**
 - ABCs of ESG Frameworks and Ratings
 - *Master Map* of ESG Frameworks and Ratings
 - ESG Reporting Frameworks
 - ESG Ratings: *Who Bought Who*
 - ESG Ratings: *What Feeds What*
- **ABC Company ESG Ratings Maps – COMING THIS WEEK**



ESG Frameworks & Ratings: *Master Map*

Information Flow

Companies

Collect, validate, and publish ESG data and other information.

ESG Reporting Frameworks

Provide standardized content and structure for reporting of ESG data and information

Major Players

- CDP
- GRI
- IIRC
- TCFD
- Value Reporting Foundation
 - IIRC
 - SASB

ESG Data Providers and Ratings

Aggregate ESG data and/or conduct independent ESG rating of companies, making data and ratings available to public or investor customers

Major Players

- Bloomberg *Terminal*
- CDP *Company Scores*
- ISS *ESG Ratings*
- LSEG *FTSE Russell & Refinitiv*
- Morningstar *Sustainalytics*
- Moody's *Vigeo Eiris*
- MSCI *ESG Research*
- S&P Global
- Corporate Knights *Global 100*
- EcoVadis *Scorecard*
- JUST Capital *Rankings*

ESG Stock Indices and ESG Bonds

ESG Stock Indices - A mutual fund or exchange traded fund (ETF) designed to follow certain preset (ESG) rules; the fund then tracks a specified basket of underlying investments

ESG Bonds - Bond instruments where terms are linked to the issuer's ESG performance (e.g. carbon intensity, ESG rating)

Major Players

- Bloomberg SASB ESG Index Family
- FTSE ESG Index Series
- MSCI ESG Indexes
- S&P Dow Jones Sustainability Indices
- "Green Bonds" or "Sustainability-linked Bonds"

Click - for more information...

ABC's

of ESG Frameworks & Ratings

ESG Reporting Frameworks

Who Bought Who

What Feeds What

NOTE: The ESG Navigator Team thanks Dr. Alex Gold, Head of ESG and CEO of BWD North America, for assistance in updating and reviewing the ESG ratings' content on our Knowledge Hub – including the graphics and the "ABC's of ESG Frameworks and Ratings."



ESG Reporting Frameworks Provided by The Conference Board



www.globalreporting.org

PURPOSE: Help organizations report on economic, environmental & social impacts considering a wide range of interests.

AUDIENCE: Broad set of stakeholders

WHERE TO REPORT: Corporate sustainability report

FOCUS AREAS:
ENVIRONMENT
SOCIAL
GOVERNANCE



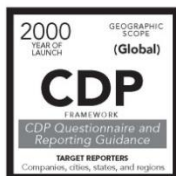
INFORMATION TO REPORT:

- **General disclosures:** Organization's profile, strategy, ethics and integrity, governance, stakeholder engagement practices, and reporting process.
- **Economic:** Performance, market presence, indirect economic impacts, procurement practices, anti-corruption and anti-competitive behavior.
- **Environment:** Materials, energy, water and effluents, biodiversity, emissions, effluents and waste, environmental compliance, and supplier environmental assessment.
- **Social:** Employment labor/management relations, occupational health and safety, training and education, diversity and equal opportunity, nondiscrimination, freedom of association and collective bargaining, child labor, etc.

PRESCRIPTIVE OR FLEXIBLE:

Prescriptive

SECTOR FOCUS: Agnostic (+ some sector-specific guidance)



www.cdp.net

Capture environmental performance data related to GHG emissions, water, forests, and supply chain.

Investors, buyers, other stakeholders

CDP's online reporting platform



- **Climate change:** Risks and low-carbon opportunities.
- **Forest:** How organizations produce, source, and use major soft commodities associated with detrimental impacts on natural resources.
- **Water security:** Company's management, governance, use, and stewardship of water resources.
- **Supply chain:** Management of climate change, forest and water security.

Prescriptive

Specific



www.integratedreporting.org

Establish Guiding Principles and Content Elements allowing companies to produce "integrated reports."

Investors

Stand-alone integrated report



- **Organizational overview** and external environment.
- **Governance structure:** How it supports ability to create value in the short, medium & long term.
- **Business model** of the organization.
- **Risks and opportunities** that affect the ability to create value over the short, medium & long term; how those issues are dealt with.
- **Strategy** and resource allocation.
- **Performance:** Extent to which objectives were achieved for the period; outcomes and their effect on capitals.
- **Outlook:** Challenges and uncertainties likely to be encountered; implications for the business model and future performance.
- **Basis of presentation:** How the organization determines what to include in its integrated report.

Flexible

Agnostic



www.sasb.org

Facilitate disclosure of material sustainability information in SEC filings.

Investors

SEC Form 10-K, 20-F filings



- **Environment:** Corporate impacts on the environment.
- **Social capital:** Human rights, protection of vulnerable groups, local economic development, access to and quality of products, and services, affordability, responsible marketing, and customer privacy.
- **Human capital:** Issues affecting employee productivity (e.g., employee engagement, diversity, and incentives and compensation).
- **Business model and innovation:** Impact of sustainability issues on innovation and business models, and the integration of these issues in a company's value-creation process.
- **Leadership and governance:** Management of issues inherent to the business model or common practice in the industry that are in potential conflict with the interests of broader stakeholder groups.

Prescriptive

Specific



www.fsb-tcfd.org

Encourage firms to align climate-related risk disclosures with investors' needs.

Investors, lenders, insurers

Annual financial filings (e.g., annual report)



- **Governance:** Governance around climate-related risks and opportunities.
- **Strategy:** The actual and potential impacts of climate-related risks and opportunities on the organization's businesses, strategy, and financial planning where such information is material.
- **Risk management:** How the organization identifies, assesses, and manages climate-related risks.
- **Metrics and targets:** The metrics and targets used to assess and manage relevant climate-related risks and opportunities where such information is material.

Flexible

Agnostic (+ some sector-specific guidance)

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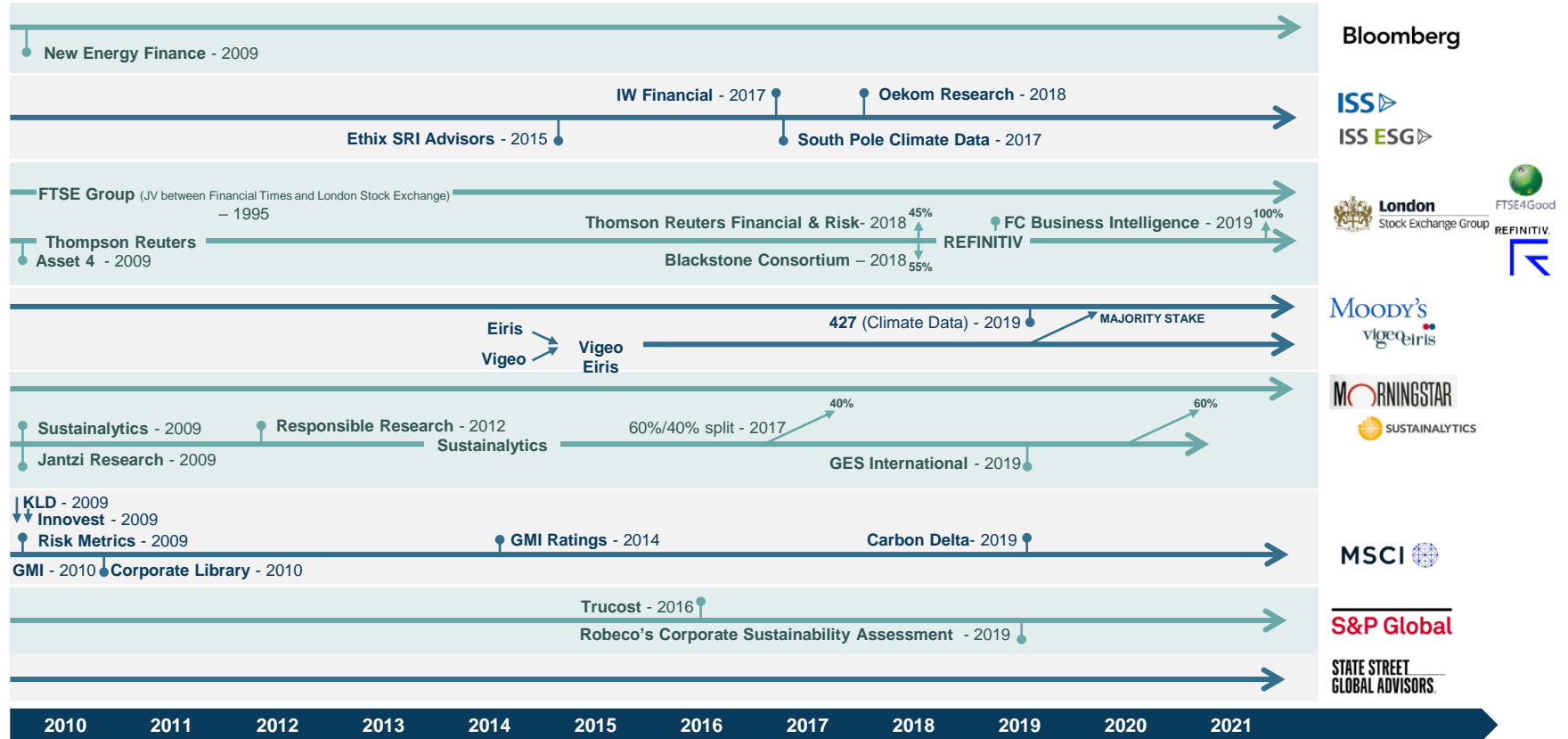
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ESG Navigator Knowledge Hub – Investors

11

ESG Ratings: “Who Bought Who”



ESG Ratings: “What Feeds What”

Target Customer Focus

- FINANCIAL
- CUSTOMER
- PUBLIC

Information Sources

- COMPANY DATA
- REVIEW
- QUESTIONNAIRE

Abbreviations

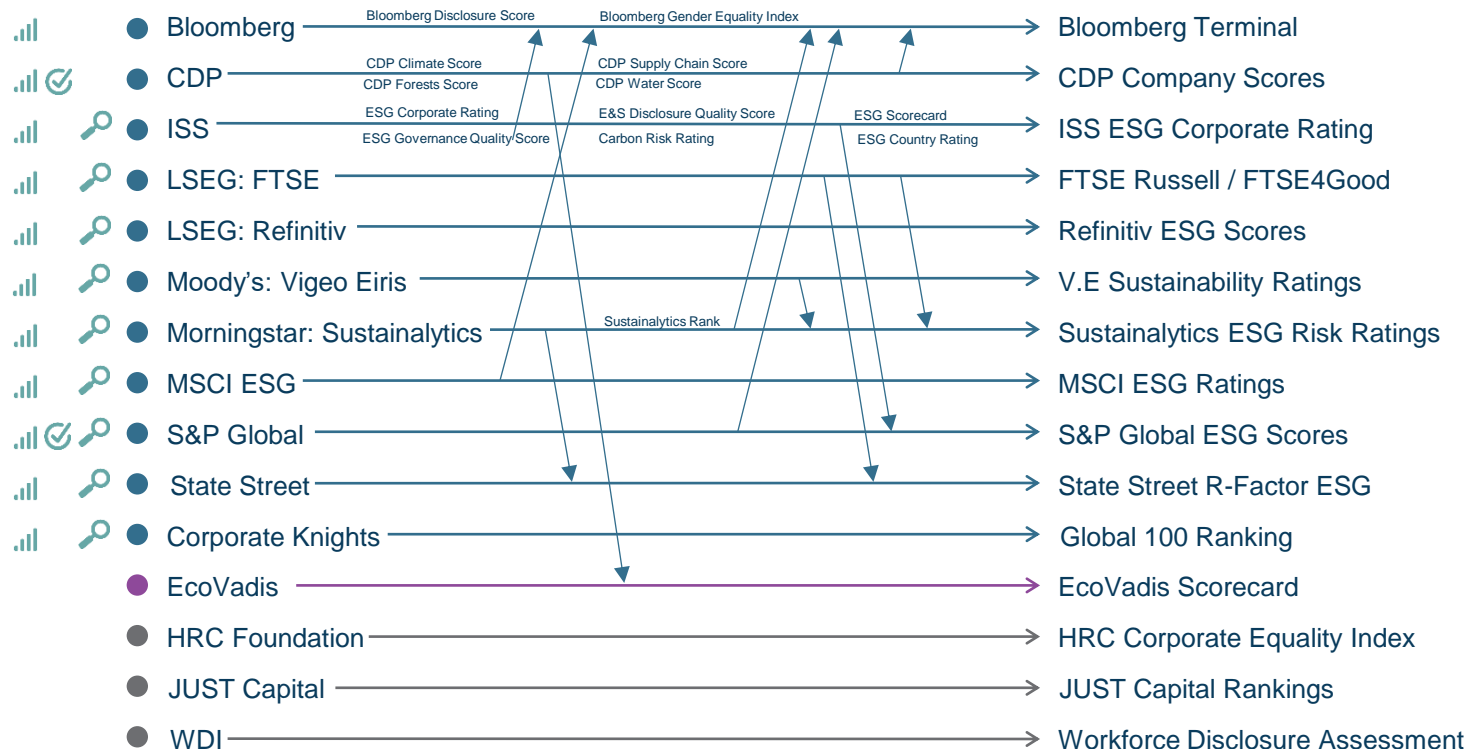
ISS: Institutional Shareholder Services

LSEG: London Stock Exchange Group

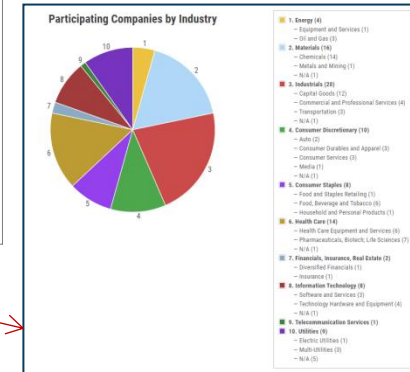
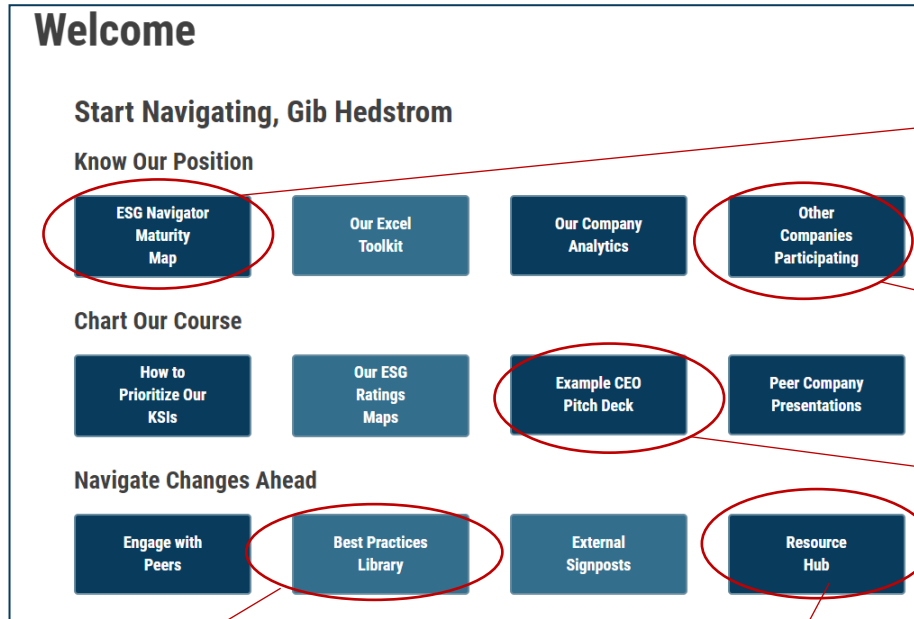
HRC: Human Rights Campaign

WDI: Workforce Disclosure Initiative

Owner: Brand



Welcome Page: Updates



- Download Excel file of ~750 best practices – sortable by company, topic, etc.
- Investors: “Who Bought Who”
- Investors: “What Feeds What”
- Etc.

Agenda

Updates *(10 minutes)*

- ESG Ratings Survey
- Download ESG Ratings Maps Directly
- Investor Pages (“*What Feeds What*” etc.)
- Example CEO Pitch Deck

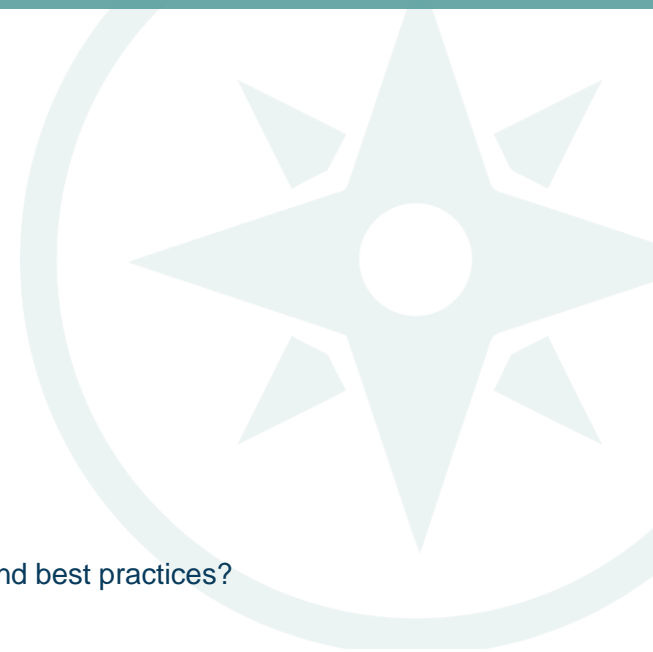
Tracking Best Practices *(20-25 minutes)*

- Updating ESG Navigator’s best practices
- Full group discussion: How does your company monitor competitor ESG actions and best practices?

Join Options and Pricing FY-2022: Sneak Preview *(15-20 minutes)*


- Preliminary thoughts
- Breakout group discussion
- Full group discussion

Next Steps *(5 minutes)*



Best Practices Excel Download

Included in Options B, C and for a fee a-la-carte for Option A

 ESG Navigator <small>ENVIRONMENT • SOCIAL • GOVERNANCE</small>				ESG Navigator - Best Practices Library	
				Current Best Practices on esgnavigator.com -- Comments welcome re additions, changes, deletions	
Section	Element	KSI	KSI Name	Company	Best Practice "Blurb"
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Ecovative	Core mission is to envision, develop, produce and market earth friendly materials to help rid the world of toxic, unsustainable materials.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Interface	Founder Ray Anderson's vision was to lead the way to the next industrial revolution by becoming the first sustainable corporation, and eventually a restorative enterprise. This led to "Mission Zero" promise to eliminate any negative impact the company has on the environment by 2020.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Neste (Finland)	Facing headwinds and market devaluation in oil refining, transformed the company to develop sustainable sources of energy.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	NRG Energy	Former CEO David Crane wanted to "transform our company, our industry and our society...towards a distributed generation-centric, clean energy future featuring individual choice."
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Ørsted	Known as Danish Oil and Natural Gas until 2017, began a bold transformation in 2009 - reinventing itself as a top-to-bottom renewable energy company.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Patagonia	Founder Yvon Chouinard aimed to create a profitable company without losing your soul. The company's mission: "Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis."
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Tesla	"Tesla Motors was created to accelerate the advent of sustainable transport." Declared their entire patent portfolio open source to stimulate the adoption and further growth of the electric vehicle market.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Trane Technologies	Spun off from Ingersoll Rand in early 2020 as a pure-play climate company that creates "efficient and sustainable solutions for buildings, homes, and transportation," with Mike Lamach continuing as CEO.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Unilever (NL)	"We cannot close our eyes to the challenges that the world faces. Business must make an explicit and positive contribution to addressing them," says former CEO Paul Polman.
Governance	Purpose & Values	1.1	Company Purpose (CEO's View re the Role of Company in Society)	Waste Management	Former CEO David Steiner transformed the company from a disposal company wanting customers to increase waste- to a services company helping its customers reduce waste.





FULL GROUP DISCUSSION

Tracking Competitors and Best Practices – Q1

How does your company track ESG best practices – by industry sector peers and across all industry?

- Formal vs. informal
- Organization: within ESG team or separate team?
- What are the key sources of information?



FULL GROUP DISCUSSION

Tracking Competitors and Best Practices – Q2

What information is most valuable – as your company tracks ESG best practices?

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Agenda

Updates *(10 minutes)*

- ESG Ratings Survey
- Download ESG Ratings Maps Directly
- Investor Pages (“What Feeds What” etc.)
- Example CEO Pitch Deck

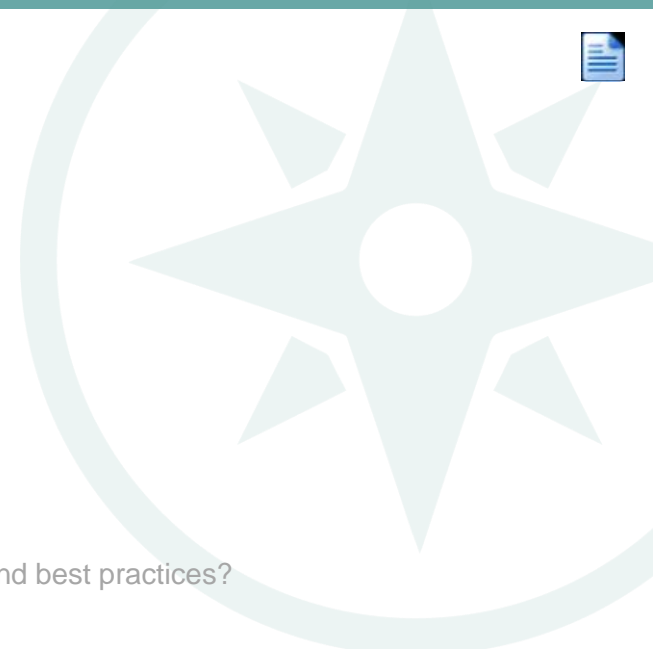
Tracking Best Practices *(20-25 minutes)*

- Updating ESG Navigator’s best practices
- Full group discussion: How does your company monitor competitor ESG actions and best practices?

Join Options and Pricing FY-2022: Sneak Preview *(15-20 minutes)*

- Preliminary thoughts
- Breakout group discussion
- Full group discussion

Next Steps *(5 minutes)*





ESG Navigator Membership Options

BENCHMARKING

To Who?

Vs. What?

+ ESG RATINGS

+ EXTRAS

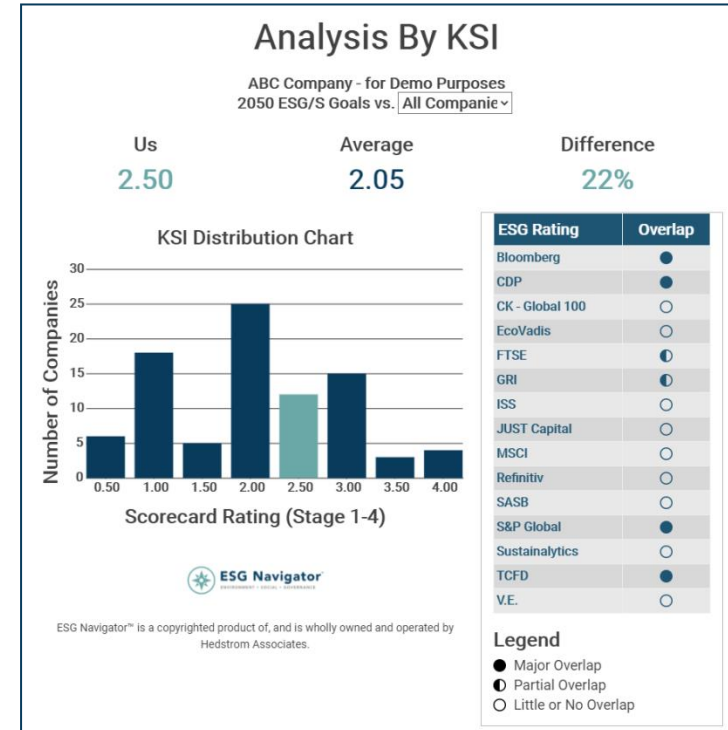
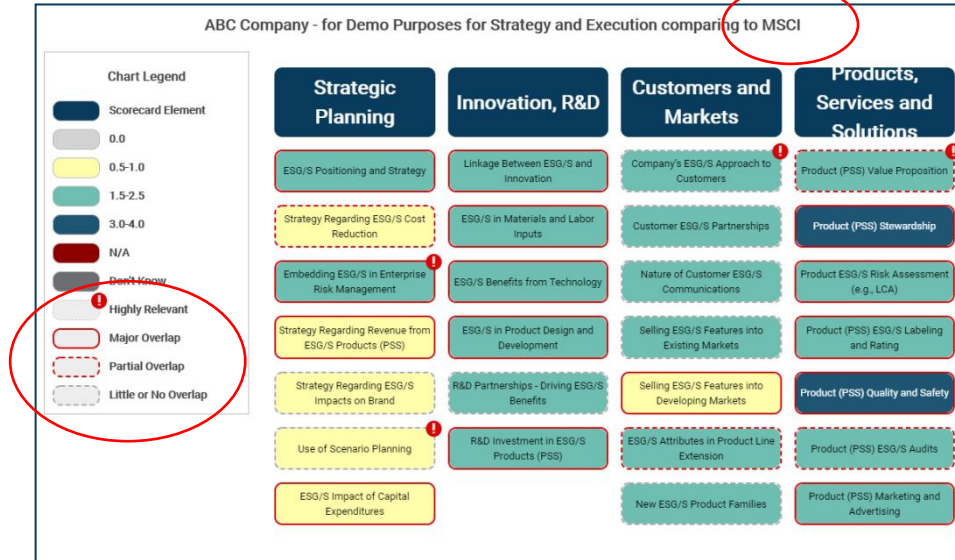
FREE	<ul style="list-style-type: none"> All Industry My Industry Sector <ul style="list-style-type: none"> Overall By Section (E+S+G+Strategy) <p>= 16 SUMMARY ANALYTICS</p>	<ul style="list-style-type: none"> View full ESG Ratings Maps for ABC Company (interactive bubble charts, heat maps, dashboard, etc.) View my company data for CDP; S+P only 	<ul style="list-style-type: none"> Monthly Webinars CEO Pitch Deck (Partial) Knowledge Hub (partial) – e.g., Investor Pages (ABC's etc.)
STANDARD	<p>All of the above – PLUS</p> <p>My Industry Sub-Sector</p> <ul style="list-style-type: none"> By Element By KSI By Prioritized KSI <p>= 456 DRILL DOWN ANALYTICS</p>	<p>All of the above – PLUS</p> <ul style="list-style-type: none"> Download full ESG Ratings Maps 24/7/365 for my company Rainbow Charts by Section (E+S+G+Strategy) – showing ESG ratings overlap 	<p>All of the above – PLUS</p> <ul style="list-style-type: none"> CEO Pitch Deck (Full) Knowledge Hub (full) Excel Toolkit Best Practices Excel Download
PREMIUM	<p>All of the above – PLUS</p> <ul style="list-style-type: none"> By Size (revenue) By Size (FTE/headcount) By Headquarters Location Public vs. Private [Under development] <ul style="list-style-type: none"> By prioritized KSI vs. <ul style="list-style-type: none"> 15 ESG Ratings KSI criteria Best Practices <p>= 1,000+ DRILL DOWN ANALYTICS</p>	<p>All of the above – PLUS</p> <ul style="list-style-type: none"> 114 KSI bar charts showing overlap of 15 ESG ratings KEY BENEFIT: Opportunity during the year to have immediate and early access to all new ESG Navigator features, tools, website enhancements under development 	<p>All of the above – PLUS</p> <ul style="list-style-type: none"> Quarterly ESG Strategy Forum Signposts (current news) ESG Ratings Survey 2021 Results KEY BENEFIT: Opportunity during the year to have immediate and early access to all new ESG Navigator features, tools, website enhancements under development



Special Advanced Membership Features

Option B and Option C

Option C Only





BREAKOUT GROUPS

FY-2022 Join Options – Q1

Do you like the three “levels” of Join Options?

1. Any additional features and benefits?
2. Other ideas?

BREAKOUT GROUP FEEDBACK



BREAKOUT GROUPS

FY-2022 Join Options – Q2

What ideas do you have to grow membership?

1. Current Option C members offer reference phone call with prospects
2. Create 20-30 minute video that peer organizations (e.g., CEF) can share with their membership?
 - 5 minutes intro by member
 - 15-20 minutes Gib overview
 - 5 minutes ending by member
3. Other?

BREAKOUT GROUP FEEDBACK

Agenda

Updates *(10 minutes)*

- ESG Ratings Survey
- Download ESG Ratings Maps Directly
- Investor Pages (“*What Feeds What*” etc.)
- Example CEO Pitch Deck

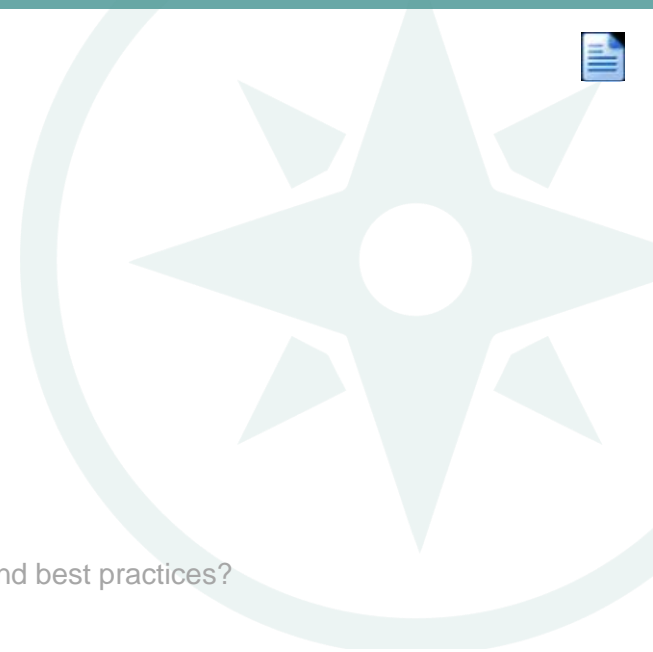
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Join Options and Pricing FY-2022: Sneak Preview *(15-20 minutes)*

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- Breakout group discussion
- Full group discussion

Next Steps *(5 minutes)*





Next Steps

FOR US

- **ESG Ratings Survey**
 - Newsletter follow-up
 - Outreach to ESG Navigator network – encourage to update/input data
- **Intro to ESG Navigator**
 - Get started pdf
 - Short video
- **Website Enhancements**
 - Get Started page for non-registered people
 - Simplify RATE pages to encourage starting small: E + S + G + Strategy – Q3-2021
 - Design a partial ESG Ratings Maps feature for (free) Option A users – Q3-2021

FOR YOU

- **June 30: Update Your Data**
 - Plan your next update now!
 - Complete by September 30 please
 - Update online
 - You can always revise
 - Request Excel (if applicable)
- **Budget Season**
 - September renewal date
 - Invoicing available September 1
 - Same basic structure planned





ESG Navigator™

ENVIRONMENT • SOCIAL • GOVERNANCE

THANK YOU!