

Embedding responsible investment: change management for next-generation ESG

A one-day training workshop
6 February 2019, London

The field of responsible investment and ESG is maturing. Experienced practitioners know that real integration of RI/ESG into an investment institution – whether that is an asset owner or an asset manager – is about change management. Alongside technical knowledge of ESG issues and their financial implications, leading this change successfully requires highly developed ‘soft’ skills – including communication, listening, building trust and collaboration, organisational networking, and understanding and shaping an organisation’s culture at all levels. Beyond the numbers and the spreadsheets, this is about people, and about being a leader within the organisation. These are the skills you will strengthen on this programme.

If you work in environmental and social risk in a bank, or in corporate sustainability or CSR, you face many of the same challenges. This programme is suitable for you too.

Why take part in this programme?

On this highly interactive programme you will develop as a leader of change and of your team by:

- learning new skills for communicating and embedding responsible investment within your organisation
- hearing how senior peers have incorporated RI into the mindsets and culture of their organisation
- developing techniques to support your team in working more effectively with portfolio managers and other colleagues throughout your organisation.

What will you learn on this programme?

By participating in this programme, you will:

- Strengthen your ability to lead change by enhancing your communication, dialogue and listening skills
- Gain greater self-awareness of your management and leadership style
- Gain knowledge of how Heads of Responsible Investment/ESG have used soft skills to build alignment of objectives and mindsets with portfolio managers and other functions
- Learn coaching techniques that will enable you to develop your team’s ability to operate more effectively throughout your organisation.



What will you gain from this programme?

- Greater confidence and ability to act as a trusted partner with all relevant business and organisational functions
- Improved understanding between RI staff, investment professionals and other teams
- New ideas and approaches for putting RI and ESG at the heart of your organisation
- Enhanced team leadership skills
- Stronger skills and capabilities within the RI/ESG team or function
- Stronger networks with peers.

How will your organisation benefit from this programme?

As a result of your participation in this programme, your organisation will see:

- Investment and other organisational decisions that reflect stronger integration of RI/ESG
- Strengthened relationships internally (across teams) and externally (e.g. with clients, external investment managers, members/beneficiaries)
- More effective achievement of RI goals and other business and organisational objectives.

Who is this programme for?

This programme is for Heads of RI/ESG, senior RI/ESG team members and others who lead RI within their organisation – e.g. portfolio managers with designated RI responsibility. It is also suitable for people responsible for environmental and social risk or corporate sustainability in banks and other financial services organisations.

Who are the facilitators?



Rob Lake

Rob has worked in RI for nearly eighteen years and in sustainability for thirty years. He was:

- Head of Governance and Engagement at Henderson Global Investors, London – where he led engagement with companies in all sectors and worked with portfolio managers to integrate findings into investment decisions;
- Head of Sustainability and Governance at APG, Amsterdam – where he developed the organisation’s first RI policy and worked with in-house investment teams across all asset classes to implement it; and
- Director of Responsible Investment at UN PRI – where he had responsibility for work programmes on ESG integration, engagement and academic research.

Since mid-2013 he has worked independently, advising pension funds and asset managers in countries including Australia, Canada, Iceland, the Netherlands, Norway, Singapore, Sweden, the UK and the US. He has also acted as a consultant to OECD; to the UNEP Inquiry on the Design of a Sustainable Financial System; to the PRI, where he has recently completed a project on asset owner boards and responsible investment; and to the State Street Center for Advanced Research, taking part in a global project on purpose and change in asset management. He is also the founder of Authentic Investor – an initiative to reconnect value and values in investment and finance by enabling people to re-discover what is most important to them and to explore ways to reflect this more fully in their work.



Sarah Rozenthuler

Sarah Rozenthuler is a leadership consultant, dialogue coach and published author with over 15 years’ experience working internationally as a professional psychologist across Europe, Asia, Australia and the USA.

Sarah has coached and facilitated at a senior level for clients including BP, Rolls Royce, Intellectual Property Office, PwC, EY, Standard Chartered Bank, World Bank and International Finance Organisation. With extensive, in-depth expertise in the practice of multi-stakeholder dialogue, Sarah specialises in coaching senior leaders and their teams to access their collective intelligence, resolve systemic challenges and have the conversations that matter most.

Sarah is a Chartered Psychologist and accredited workplace mediator. Life-Changing Conversations, Sarah’s first book, was published by Watkins in the UK, USA and Australia in 2012. Her work has been featured in the Financial Times, the Sunday Times and the BBC online.

Location

This event will be held at Initiatives of Change, 24 Greencoat Place, London SW1P 1RD, UK. The venue is centrally located and is easily accessible from London’s airports.

Cost

The fee for this programme is GBP 950.

How to book

To book a place and pay by credit card, visit <https://embeddingresponsibleinvestment.bpt.me/>

To book a place and pay by invoice, please contact Rob Lake: rob.lake@authenticinvestor.org