



Trustee Leadership Workshop

Monday, September 10th, 2018 | San Francisco

Session Moderators:

- Shannon Rohan, Director, Responsible Investment, Shareholder Association for Research and Education
- David Wood, Director, Initiative for Responsible Investment at the Hauser Institute for Civil Society, Center for Public Leadership, at the Harvard Kennedy School of Government

8:00 – 8:30	REGISTRATION
8:30 – 9:30	Welcome and Introductions Welcome from the CWC and introductions of session moderators and participants.
9:30 – 10:45	Roundtable Discussion: Addressing Labour Issues in your investments: Recent trustee experiences This session will profile recent experiences where trustees have been able to effectively address a labour issue in their portfolio with examples from different asset classes. The discussion will consider key factors for success including clear policies as well as greater international collaboration and coordination to address specific cases.
10:45 – 11:00	BREAK
11:00 – 12:15	Asset Manager Accountability: Moving managers from talk to action The session will provide an overview of current manager accountability initiatives (e.g.: Diverse Asset Manager Initiative) including examples of asset owner efforts to hold managers to account for specific decisions. In addition, the session will look at how to get better reporting from managers on issues that matter to trade union trustees including on fees, diversity, key votes and engagement outcomes.
12:15 – 12:30	Closing Remarks and Wrap Up

In collaboration with:

