

**Endowment Investing and Climate Goals Workshop**  
**Wednesday, February 15<sup>th</sup>**  
**12:30 – 3:30pm**

IEN is hosting a workshop at the Second Nature Summit on endowment investing and climate goals.

The session will focus on:

- How endowment investing can support institutional climate goals and successful implementation of the Paris Climate Agreement
- Results of a recent white paper developed by IEN titled *Investing in Clean Energy: Campuses and Endowments*
- The opportunity for better financial performance through smart investing in a wide range of climate solutions – renewables, efficiency, food, avoided deforestation, transportation, resilient infrastructure, etc.
- Ensuring endowment managers understand climate risk and are adequately considering these issues to fulfill their fiduciary duties
- A framework under-development by WRI for aligning portfolios with the goals of the Paris Agreement
- Examples from how other campuses and endowments are approaching this topic

The workshop will be very interactive, with much of the time spent at small round tables discussing these issues with investment industry experts and your peers. The Chatham House Rule will apply.

*Confirmed and invited participants include:*

- Garrett Ashley, VP of Advancement, The California State University
- Geeta Aiyer; President, Boston Common Asset Management; and Trustee, Sierra Club Foundation
- Wendell Brase, University of California
- David Dinerman, Trustee, Hampshire College
- Alice DonnaSelva, Investment Consultant, Prime Buchholz
- Robert Johnson, President, Becker College
- Jonathan Lash, President, Hampshire College
- Maria Lettini, Farm Animal Investment Risk & Return (FAIRR)
- Elizabeth Lewis, Head of Sustainable Investing, World Resources Institute (WRI)

- Bob Litterman, Chair of Risk Committee, Kepos Capital; Chairman of the Board, Commonfund; Trustee, World Wildlife Federation
- Ken Locklin, Impax Asset Management
- Amir Mohammadi, Vice President for Finance and Administration, Slippery Rock University
- Morgan Olsen, Arizona State University
- Seren Pendleton-Knoll, Program Director, UC Berkeley Haas School of Business, Center for Responsible Business
- Rick Shangraw, ASU Foundation
- Wim Wiewel, President, Portland State University

## Description

Signatories of the Second Nature Climate Commitment are at the vanguard of climate action - setting a powerful example for students and all of society on doing what is scientifically necessary to avert the worst impacts of climate disruption. However, most colleges and universities are in the very early stages of considering how the impacts of endowment investments either support or work against our shared goal of achieving climate neutrality and creating resilient campuses and communities.

This 3-hour workshop will bring together presidents, endowment staff, trustees, and other key campus stakeholders with leading experts in the field of sustainable investing and non-profit governance to explore how college and universities, as investors, can support their mission and their sustainability goals. There are many dynamic factors to consider - from the implications of the Paris Agreement for business and investments, issues related to fiduciary duty and financial performance of low-carbon investments, and demands from students and others for fossil fuel divestment.

This workshop will be highly interactive, with plenty of opportunity to engage with peers and industry experts to address your specific questions on these topics. We will use the Chatham House Rule, to ensure a confidential atmosphere where we can speak freely and answer your burning questions on these topics -- and enable you to return to your campus with actionable next steps.

At the conclusion of this activity, participants will be able to:

1. Identify the major strategies for assessing and addressing climate risk in the context of an endowment portfolio
2. Identify and give examples of investment opportunities in various asset classes that contribute to climate solutions
3. Develop a strategy for integrating endowment investment practices in the institutional climate action plan