



BOSTON COLLEGE
CARROLL SCHOOL OF MANAGEMENT
Center for Corporate Citizenship

**Institute for
Responsible Investment**

AGENDA

The Evolution of Responsible Investment Consulting

April 2, 2009

Institute for Responsible Investment

Boston College Center for Corporate Citizenship

Chestnut Hill, Massachusetts

8:15 – 8:45 am

Breakfast and Networking

8:45 – 9:00 am

Welcome and Introductions

David Wood, Director, Boston College Institute for Responsible Investment

9:00 – 9:15 am

Goals for the Day

David Wood, Director, Institute for Responsible Investment

9:15 – 10:30 am

State of the Field

- Who is asking for information on responsible investing—are institutional clients driving the process? What challenges does responsible investment present for consultants?
- Why is your firm interested in responsible investment?
- What is driving the market generally?
- What are the barriers to responsible investment
- What is scalable in the market?
- How does the financial crisis affect this work?

10:30 - 10:45 am

Break

10:45– 11:45 pm **Crafting a Methodology: Identifying Tools to Advance the Field**

- What are the tools and products needed for responsible investment to move towards a developed practice within the consulting business?
- How do you identify responsible investment opportunities?
- How do you benchmark these opportunities?
- What role does public methodology play in developing the field?

11:45 – 12:45 pm **Responsible Investment in Practice**

- What do responsible investment allocation strategies look like?
- Specific topics of responsible investment: community development, environment, affordable housing, etc.
- Specific vehicles: public equity, private equity, fixed-income, real estate, etc.
- Cases: what are concrete examples where investable products have performed successfully, or not, along responsible investment goals.
- Infrastructure: what public goods could be created to reduce transaction costs for consultants in serving responsible investment goals.

12:45 – 1:45 pm **Lunch**

1:45 – 2:45 **Advancing the agenda: Next steps for the field of responsible investment consulting**

- What field-building work can be undertaken to overcome barriers, and help realize solutions? What work should be prioritized? Which stakeholders should be engaged?
- What is the potential for collaborative work among the investment consultancy industry to advance responsible investment practices more generally? In what context would such work be most effective?

2:45 pm **Wrap-up and Adjourn**