

# Additional Resources for Foundations Interested in Mission Investing

## ASSOCIATION OF SMALL FOUNDATIONS

[www.smallfoundations.org/tools-resources/browse-by-topic/investments/impact-investing/](http://www.smallfoundations.org/tools-resources/browse-by-topic/investments/impact-investing/)

ASF is a membership organization of donors, trustees, employees and consultants of foundations that have few or no staff. Its website includes a resource page on mission investing that tackles a variety of topics such as a step-by-step process for getting started in MI, engaging with trustees and a handbook on responsible investments across asset classes.

## AS YOU SOW

[www.asyousow.org](http://www.asyousow.org)

As You Sow promotes environmental and social corporate responsibility through shareholder advocacy, coalition building and innovative legal strategies. It builds coalitions with shareholder allies including socially responsible investors (SRIs), pension funds, labor groups, foundations and faith-based investor communities to educate and encourage companies to reform policies and practices with negative environmental and social impacts. If dialogue alone is insufficient, it files shareholder resolutions and reaches out to institutional investors, media outlets and proxy analysts to raise awareness and advocate for change.

## CERES

[www.ceres.org](http://www.ceres.org)

Ceres is a nonprofit organization mobilizing business and investor leadership on climate change, water scarcity and other sustainability challenges. Ceres directs the Investor Network on Climate Risk (INCR), a network of over 100 institutional investors with collective assets totaling more than \$11 trillion. Ceres also directs Business for Innovative Climate & Energy Policy (BICEP), an advocacy coalition of nearly 30 businesses committed to working with policymakers to pass meaningful energy and climate legislation.

## CONFLUENCE PHILANTHROPY

[www.confluencephilanthropy.org](http://www.confluencephilanthropy.org)

Based in New York City and Oakland, Calif., Confluence Philanthropy is a network of more than 200 private, public and community foundations that are committed to moving philanthropy towards mission-aligned investments. From its annual conference, to webinars and trainings, to working groups focused on specific areas of investment and change strategies, Confluence's programs translate learning and connection into concrete action. It is a recognized affinity group of the Council on Foundations.

## DIVEST-INVEST PHILANTHROPY

[www.divestinvest.org](http://www.divestinvest.org)

Divest-Invest Philanthropy is a coalition of U.S. and global foundations pledged to divest from fossil fuel companies and invest a portion of their assets in the clean energy economy. They are calling for other philanthropies to join them. Foundations now join the rapidly growing divestment movement among colleges, cities, states, pension funds and religious institutions, a moral movement of our time.

## GLOBAL IMPACT INVESTING NETWORK (GIIN)

[www.thegiin.org](http://www.thegiin.org)

A sponsored project Rockefeller Philanthropy Advisors, GIIN addresses systemic barriers to effective impact investing by building critical infrastructure and developing activities, education and research that attract more investment capital to poverty alleviation and environmental solutions. GIIN-authored publications are available online along with an Impact Investment Profile series, investor spotlights and a listing of upcoming events. GIIN is based in New York.

### FOUNDATION CENTER'S TOPICAL RESOURCE LIST FOR GRANTMAKERS

[www.foundationcenter.org/grantmakers/topicalresources/list20.html](http://www.foundationcenter.org/grantmakers/topicalresources/list20.html)

The Foundation Center's mission-related investing resource list includes several publications on a range of topics related to MRI published by the Center and others in the sector such as Rockefeller Philanthropy Advisors, FSG Social Impact Advisors, the Association of Small Foundations, Blueprint Research & Design and Social Investment Forum.

### INITIATIVE FOR RESPONSIBLE INVESTMENT

[www.hausercenter.org/iri](http://www.hausercenter.org/iri)

The Initiative for Responsible Investment at Harvard University's Hauser Institute for Civil Society serves as a research center on fundamental issues and theories underlying the ability of financial markets to promote wealth creation across asset classes, while creating a stronger society and a healthier environment. It is in partnership with Mission Investors Exchange (see below) to promote the use of investments as tools for foundations to achieve philanthropic goals.

### MISSION INVESTORS EXCHANGE (MIE)

[www.missioninvestors.org](http://www.missioninvestors.org)

A project of Philanthropy Northwest, the Seattle-based Mission Investors Exchange is where philanthropic innovators exchange ideas, tools and experiences to increase the impact of their capital. Members include more than 200 foundations and mission investing organizations. MIE offers workshops, webinars, a three-day Mission Investing Institute, a biennial national conference and networking events such as one-day briefings and workshop sessions at regional and national affinity group conferences. It is in strategic partnership with the Initiative for Responsible Investment (IRI) of the Hauser Institute for Civil Society at Harvard University (see above).

### THE FORUM FOR SUSTAINABLE AND RESPONSIBLE INVESTMENT (US-SIF)

[www.ussif.org/](http://www.ussif.org/)

US SIF is the U.S. membership association for professionals, firms, institutions and organizations engaged in sustainable and responsible investing. US SIF and its members advance investment practices that consider environmental, social and corporate governance (ESG) criteria to generate long-term competitive financial returns and positive societal impact. The "Education Center" on its website includes a suite of resources such as online and live courses and numerous publications. It has published a resource guide for foundations titled "Mission in the Marketplace."

### WALDEN ASSET MANAGEMENT

<http://www.waldenassetmgmt.com/>

Walden Asset Management is the largest institutional investment manager in the sustainable and responsible investment (SRI) industry. It is the SRI practice of employee-owned Boston Trust & Investment Management Company and has been providing portfolio management services to socially responsive investors since 1975.

