

REC

The Responsible Endowments Coalition (REC) works to build and unify the college and university-based responsible investment movement, both by educating and empowering a diverse network of individuals to act on their campuses, and by fostering a national network for collective action. We empower young people to defend human rights and the environment while making both corporations and universities accountable to global stakeholders. Our goal is to foster social and environmental change by making responsible investment common practice amongst colleges and universities, and to support the next generation of activists with a new and powerful toolkit.



REC thanks the following contributors to the Critical Issues in Responsible Endowment Management Session

Scott Budde, Managing Director, Global Social and Community Investing, TIAA-CREF

Josh Humphreys, Harvard University and the Center for Social Philanthropy, Tellus Institute

Adam Kanzer, Managing Director and General Counsel, Domini Social Investments

Ruth Kelley, Manager, Columbia University Advisory Committee on Socially Responsibly Investing

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Responsible Endowments Coalition

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responsible
endowments
coalition

2009

6th Annual National Conference

October 2 – 4, 2009

Wharton School of Business, Univ. of Pennsylvania
Huntsman Hall, 3730 Walnut Street, Philadelphia PA

October 2, 2009

- 9:30AM – Conference Registration at Wharton, JMHH F85
- 9:30AM – Welcome and Introduction to REC and Agenda,
Cheyenna Weber, REC Organizing Director, JMHH F85
- 10:00AM – Defining the Problem and the Values You Wish to See,
JMHH F85
- 11:15AM – Lunch, JMHH F85
- 12:00PM – Workshop Block A
– Endowments and Responsible Investment 101,
REC Staff & Board, JMHH F85
– Troubleshooting Your School's Policy, REC Staff, JMHH F70 & F90
- 1:15PM – Break
- 1:30PM – Workshop Block B
– The Palestinian Call for Boycott, Divestment and Sanctions,
Jay Cassano, JMHH F70
– Models for Building a New Economy,
Tom Pierson, JMHH F85
- 2:45PM – Bringing Justice to HEI with Sarah Roberts & Mike Hachey,
Organizers for UNITE-HERE, Worker Delegation from
HEI Hotels and Students from HEI Campus Campaigns,
JMHH F85
- 3:30PM – HEI Rally
- 5:00PM – Dinner, JMHH F85
- 6:00PM – Group Dynamics & Collective Liberation Training,
Training for Change, JMHH F85
- 8:30PM – Return to Hostel

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Student Organizer Program

During the summer, Student Organizers attend an intensive two-week training program in New York to prepare for their year of work. During the school year they do outreach for our conferences, connect with neighboring campuses to promote REC as well as create new resources for their peers.



October 3, 2009

- 9:00AM – Breakfast at Wharton, JMHH F85
- 9:30AM – Welcome and Introduction to Agenda, JMHH F85
- 10:00AM – Growing Our Movement: Feedback on REC National Strategy, JMHH F85
- 11:00AM – Workshop Block C
- Understanding Your Endowment from Your Money Manager's Perspective, Aaron Podolny, JMHH F85
 - How Your Campus Endowment Can File Its Own Shareholder Resolution, Sanford Lewis, JMHH F70
 - Stop Talking to Yourself: Recruiting and Engaging Your Campus, Olivia Grugan, JMHH F92
- 12:15PM – Lunch, Presentation, Benchmark Asset Managers
- 1:15PM – Workshop Block D
- Understanding Your Endowment from Your Money Manager's Perspective, Aaron Podolny, JMHH F85
 - How to Set up and Manage a Student Run Endowment, Thomas Meyer, JMHH F70
 - Community Investment Strategies, Dan Apfel, JMHH F94
- 2:30PM – Break
- 2:45PM – Workshop Block E
- Beyond On-Campus Sustainability: Combating Climate Change through Investments, Nadia Eghbal and Atlee Mcfellin, JMHH F94
 - HEI Workers Rising, UNITE-Here, UPenn SLAP, Yale Responsible Endowment Project, JMHH F70
- 4:00PM – Break

October 3, 2009

- 4:15PM – Workshop Block F
- Understanding Your Endowment from Your Money Manager's Perspective, Aaron Podolny, JMHH F85
 - Navigating Bureaucracy, Managing Power: Working Within an Institution, Neil Makhija, JMHH F92
 - Proxy Voting and Beyond, REC Staff, JMHH F94
- 5:30PM – Dinner at LGBT House
- 6:00PM – Open Spaces Conversations
- 9:00PM – Return to Hostel

October 4, 2009

- 9:00AM – Breakfast at Wharton, JMHH F85
- 9:30AM – Welcome and Introduction to Agenda, JMHH F85
- 10:00 AM – Strategy & Tactics Training, Ruckus Society, JMHH F85
- 12:00PM – Student Steering Committee Nominations, JMHH F85
- 12:15PM – Lunch (Student Steering Committee Meeting), JMHH F85
- 1:00PM – Closing, JMHH F85

Student Organizer Program

At REC, we know that leadership skills must be actively nurtured and developed in our youth, and thus we work not only to change the way colleges and universities address their social and environmental impact, but also to provide the next generation of activists with the tools of responsible investment to help them to be as effective leaders as possible. REC's Student Organizer program gives students an opportunity to learn in-depth about responsible investment and cultivate leadership skills in an intensive year-long program.



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October 2, 2009

Critical Issues in Responsible Endowment Management: A Special Workshop for Colleges and Universities

Co-produced with Columbia University Advisory Committee on Socially Responsible Investing, the Center for Social Philanthropy and the Sustainable Endowments Institute

University of Pennsylvania, Houston Hall,
3417 Spruce Street, Philadelphia, Pennsylvania

9:30AM – Registration

10:00AM – Welcome and Introduction

10:05AM – Best Practices: Transparency and Access to Endowment Portfolios

10:55PM – Tools: Proxy Voting, Research and Analysis

12:00PM – Lunch with Topic Tables

1:15PM – Beyond Proxy Voting

2:30PM – Final Discussion, Lessons Learned and Closing Remarks

3:00PM – Reception

We hope that you will join us next year for the Responsible Endowments Coalition's 7th Annual National Conference featuring more than 125 students, trustees and administrators from around the country!

