

IEN Initiatives & Working Groups

Overview, How to Join & Sponsorship Information

The Intentional Endowments Network (IEN) connects endowments & foundations, asset managers, investment consultants & OCIOs, nonprofit partners, and individuals in a peer-learning network that encourages and supports institutions in adopting investment strategies that create an equitable, low-carbon, and regenerative economy.

Join our community of [over 210 active member organizations](#) to connect with peers, stay up to date on the latest best practices, develop partnerships, and advance the field of sustainable investing.

One way to connect with the Network is by [joining an IEN Initiative](#). Current IEN Initiatives span three main higher education capital pools (endowments, retirement plans, and student-managed investment funds) and three programmatic focus areas (net zero, justice, diversity, equity and inclusion [JEDI], and shareholder engagement).

Goals of IEN Initiatives

IEN Initiatives offer a forum where IEN Members can engage in topical conversations, build their professional networks and expertise, feel comfortable sharing successes, challenges, and requests for support, and developing resources and tools to advance the field.

Initiatives Structure

IEN initiatives typically have the following structure:

- Led by Co-Chairs from the IEN Membership & an IEN Staff Member
- Steering Committee - open to IEN members by invitation that meets periodically (bi-weekly, monthly, bi-monthly or quarterly)
- Working Group - open to all IEN members that meets periodically (typically quarterly)
- Topical Listservs and other engagement forums (i.e. LinkedIn Groups) for resource & questions, open to all IEN members

Current Initiatives

- **Justice, Diversity, Equity and Inclusion (JEDI)**
Advances education and advocacy for endowments in considering JEDI factors throughout the investment process, including diverse manager selection, JEDI-focused investment vehicles, and shareholder engagement on JEDI themes.
- **Net Zero Portfolios**
Convenes and supports endowments in learning about Net Zero Portfolios, making commitments, and participating in shareholder engagement efforts to get portfolio companies onto decarbonization pathways aligned with the 1.5 degree C warming target.
- **Shareholder Engagement**
Supporting endowments in using their rights as corporate shareholders to engage portfolio companies via proxy voting and other engagement strategies.
- **Investment Governance**
Support higher education trustees on how sustainable investing strategies relate to their fiduciary duties.
- **Sustainable Retirements**
Support institutions in ensuring retirement plans include strong options that consider material ESG factors in the investment process.
- **The SIILK Network**
Connects faculty, staff, and students involved in student-managed investment funds and sustainable investing curriculum to share best practices and resources.

How to Join an Initiative

Endowments, foundations or other institutional asset owners: IEN Membership includes access to each Initiative, including the topical listservs, working group meetings, and the option to join Steering Committees of the initiative at no additional cost.

For investment managers, consultants, individuals, and others: IEN Membership includes access to the topical listservs and open calls of each Initiative; and the opportunity to join the Initiative's Steering Committee, by invitation, with sponsorship of the initiative.

IEN Initiative Steering Committees & Sponsorship

Participation in IEN initiative Steering Committees is by invitation. Members can express interest in joining Steering Committees to highlight your organizational leadership and expertise in this field, and contribute to shaping the direction, focus and activities of the Initiative and affiliated working groups.

Benefits include:

- Listing on IEN website and materials and participation in periodic calls of the Steering Committee (frequency set by the committee - typically monthly or quarterly)
- Prioritized opportunities to present and speak at IEN webinars and events related to the initiative and to set the agenda for educational programming
- Brand awareness and recognition as an initiative leader via targeted media campaigns, IEN's website (40,000+ visitors annually), social media (to 3,000+ subscribers), initiative materials, reports and publications, and email (4,000+ subscribers) including IEN's Weekly News Round-up and our quarterly Newsletter;
- Opportunities to participate in additional small focus group and workshop conversations with asset owners.

For higher education endowments, foundations, and other institutional asset

owners: IEN Membership includes the opportunity to participate in initiative Steering Committees at no cost, pending space available and approval by the co-chairs. Asset owners are welcome to sponsor initiatives to demonstrate their support and leadership.

Lead Sponsors:

- Asset Management Firms: **\$50,000 per year¹** (*limited to 4-6 managers*)
- Investment Consultants / OCIOs: **\$10,000 per year**

Supporting Sponsors:

- Asset Management Firms: **\$25,000 per year**
- Investment Consultants / OCIOs: **\$5,000 per year**

¹ IEN is committed to making justice, equity, diversity, and inclusion (JEDI) part of the culture and the strength of our organization and work. If you would like to participate in an IEN Initiative Steering Committee, but find the required financial contribution a barrier to entry, please reach out to info@intentionalendowments.org to discuss.

Additionally, if interested in participating in more than one Initiative, package discounts are available.

Benefits	Lead Sponsors	Supporting Sponsors
Recognition	Top-level recognition with large logo on the respective initiative's webpage on IEN's website, as well as in any materials and presentations related to that initiative, including weekly recognition in IEN's Weekly News Round-up (4,000+ subscribers)	Secondary recognition with medium logo
'Leadership Level' membership	'Leadership Level' member of IEN, highlighted at the top of IEN's member list wherever it is shared (website, annual report, etc.)	Same 'Leadership Level' recognition
Steering Committee & Co-Chairs	Participation in regular meetings of the respective initiative's Steering Committee and first priority to serve as Co-Chair of the initiative	Participation in regular meetings of the respective initiative's Steering Committee
Quarterly IEN member meetings	Opportunity to design, lead and present at all four quarterly meetings of the respective initiative open to the whole IEN membership	Participation and opportunity to present at 1-2 of the quarterly meetings
Reports & Resources	Identify and lead the development of any reports, tools, or resources that the respective initiative might develop with top-level recognition	Opportunities to contribute to and be recognized in these resources
IEN events	First priority for speaking opportunities related to the initiative at IEN in-person convenings, including IEN's annual <i>Higher Education Climate Leadership Summit</i> (February 5-7, 2023) and a fall Forum (date TBD)	Opportunities to speak related to the initiative at these convenings
IEN webinars	First priority to speak on and propose webinars related to the initiative (target 1-4 per year)	Opportunities to speak on webinars (1-2 per year)
External conferences	First priority for speaking on external conference panels related to the initiative (as opportunities arise, target 1-3 per year)	Opportunities to speak on these panels (target 1 per year)
Asset owner focus groups	First priority to participate in asset owner focus groups to hear from asset owners on their challenges and interests and share expertise in an educational format	Opportunities to participate as warranted based on expertise / content

To express interest in joining an Initiative or Initiative Steering Committee, select the Initiative of interest on [the IEN website](#) and reach out to the contact listed on the Initiative landing page.