

Committee on Investor Responsibility

Thursday, August 5, 2021



In June 2017, the UNH Foundation's Investment and Finance committee established the Committee on Investor Responsibility. Sustainability is a core value at the University of New Hampshire, and it underpins our academics, research and practice. As part of UNH's ongoing institution-wide commitment to sustainability, the UNH Committee on Investor Responsibility (CIR) was formed to help promote and support the foundation in sustainable, socially responsible investment practices and policies.

Operating Principles

- The UNH Endowment Fund is capital of the University of New Hampshire Foundation (UNHF) created by donors, invested and managed for the benefit of the University of New Hampshire, and providing funding to support the academic, research and public service missions of the university.
- The primary investment objective of the endowment is to achieve the highest long-term return-on-investment assets that are compatible with the university's risk tolerance and time horizons and consistent with prudent investment practices.
- "Sustainable investment" practices are consistent with this objective in that they entail consideration of short- and long-term risks of environmental, social and/or corporate harm — which can present financial risk for investors.
- By acting in an advisory role to the Investment Committee (IC), the CIR can increase the IC's capacity for making informed and prudent decisions regarding the management of the endowment. As the role of the CIR is informational, all decision-making authority will continue to rest with the IC and UNHF Board of Directors.

Roles and Responsibilities of the Committee

- Research opportunities relevant to the sustainable investment of the foundation's endowment monies — including opportunities that may arise for increased

shareholder engagement or proxy voting, as well as specific investment strategies or opportunities.

- Consider proposals from the UNH community (e.g., students, staff, faculty, alumni, etc.) relevant to sustainable investment of endowment monies.
- Make recommendations to the I&F.
- Help educate and inform the broader UNH community about sustainable investment practices in general and about UNH's sustainable investment practices in particular.

Committee Composition and Operations

- The CIR is comprised of 10-14 members, including representatives of alumni, faculty, students, staff, the IC, the Sustainability Institute, and the investment industry. The ideal member will have a demonstrated interest in the area of responsible investing and a dedication to the advancing the missions of the foundation and UNH.
- The committee meets bimonthly or as called by chair.
- The committee sets goals annually, identifying priority actions and/or research.

Membership – Fall 2020

- Julie Gorte – Impax Asset Management (Chair)
- Paul Anderson '90 – Ironwood Investment Management (Alumnus)
- Molly Betournay '05/'09G – Clean Yield Asset Management (Alumna)
- Ned Dane '88 – Aidentified LLC (Past IC Chair and Alumnus)
- Alexys Gilcreast '18 – Ballentine Partners (Alumna)
- Erik Gross G'97 – Treasurer, UNH Foundation (Staff and Alumnus)
- Lisa Olsson '22 (UNH Student)
- Matt Oriente'23 (UNH Student)
- Austin Perea '14 – SunPower Corporation (Alumnus)
- Sarah Samuels '94 -- NEPC LLC (IC Chair and Alumna)
- Steve Trzaskoma – COLA and former Sustainability Institute Fellow (Faculty)
- Fiona Wilson – UNH Sustainability Institute and Paul College (Staff and Affiliate Faculty)
- Sarah Wilkinson '22 – (UNH Student)
- Cameron Wake '93G – EOS/Sustainability Institute (Faculty, Alumnus)

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University of New Hampshire

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