

## The Investment Integration Project Launches Working Group to Set Standards for Measuring System-level Influence

New Initiative will Support Investors
Determining Progress Towards Systemic
Social and Environmental Goals





announced the launch of a new project to measure system-level influence and increase adoption of commonly accepted impact standards. This project is supported with grant funding from the Tipping Point Fund on Impact Investing (TPF), a donor collaborative developed with the mission of creating and supporting public goods that are critical to the continued growth and fidelity of



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the impact investing market. The TIIP project will focus on developing and promoting a standardized framework for investors for measuring their impacts and influence on systemic risks, specifically income inequality and racial inequity.

"Investors are increasingly integrating ESG and impact factors into their investment analysis, and some investors are taking the next step to use system-level investing to manage their influence on the broader environment and social systems," said William Burckart, CEO of TIIP. "While these 'system-level investors' seek to align their investment

practices with global objectives such as net zero and the United Nations Sustainable Development Goals (SDGs), many struggle with determining whether they are achieving what they set out to achieve."

TIIP has convened a working group of industry leaders to review and validate the measurement framework, ensuring it meets the needs of pension funds, family offices and foundations to better integrate system-level investing approaches into their practices.

"High-quality data is an important ingredient of a well-functioning, efficient and transparent

capital markets system," said Jessie Duncan, Lead Program Officer for the Tipping Point Fund on Impact Investing. "To increase adoption of system-level investing, the market needs a standardized framework for measuring and managing system-level risks and impacts."

The project will identify how investors in the public and private markets can not only impact income inequality and racial inequity and align their investments with bigger-picture social goals, but also how they can influence the health of the broader social systems, supporting investments across all asset classes and promoting global well-being.

"So many frameworks exist to help investors measure how well they manage social and environmental risks and opportunities, how much impact they've had at the organizational level," said Lenora Suki, Managing Principal of Renaissouk LLC, and Chair of the Working Group. "This working group brings together leaders with applied experience to strengthen our industry's capacity to make vital systems healthier and more secure and, critically, to evaluate the results."

"This group of leaders are the right people needed to tackle the challenging issue of system-level influence and measurement," said Luther Ragin Jr. "We will be able to come together and establish a clear framework to help investors of all types understand how they are impacting systems and, in turn, how these systems influence their portfolios."

Members of the working group include:

- Jake Barnett, Managing Director, Sustainable Investment Solutions, Wespath Benefits and Investments
- Kieron Boyle, Chief Executive, Impact Investing Institute
- Vonda Brunsting, Director, Global Workers' Capital Project, Center for Labor and A Just Economy at Harvard Law School
- William Burckart, CEO, TIIP
- Bob Dannhauser, Senior Advisor, SHIFT Project
- Jessie Duncan, Program Officer, Tipping Point Fund on Impact Investing
- Melissa Eng, Senior Advisor, TIIP
- Lissa Glasgo, Independent
- Emilie Goodall, Head of Stewardship, Europe, Fidelity International
- Karim Harji, Programme Director, Oxford Impact Measurement Programme, Said Business School, University of Oxford
- Jim Hawley, Senior ESG Advisor, FactSet
- Lisa Hayles, Director, International Shareholder Advocacy, Trillium Asset Management
- Kirsty Jenkinson, Investment Director, Sustainable Investment and Stewardship Strategies team, CalSTRS
- Ellen Carey Maginnis, Independent
- Jessica Matthews, Global Head of Sustainable Investing, JP Morgan Private Bank
- Emmet McNamee, Head of Progression and Innovation, UN PRI
- Luther Ragin Jr., Independent

- Delilah Rothenberg, Founder and Executive Director, Pre-Distribution Initiative
- Lenora Suki, Senior Advisor & Consultant, Renaissouk LLC and Chair of Working Group
- Flory Wilson, Founder and CEO, Gender IDEAL
- Richard Woo, Board Member, Greater Tacoma Community Foundation

The output of the working group will be housed on TIIP's clearinghouse for system-level investing resources, <u>SAIL</u> (Systems Aware Investing Launchpad). With the inaugural investor cohort program now underway, TIIP is now starting a waitlist for a follow-on cohort of investors to help them use the SAIL resources, including the Community of Practice (CoPractice), implement the tools and guidance from the platform, and ultimately become the system-level investing champions at their firms. If you are interested, please contact TIIP at SetSAIL@tiiproject.com.

## The Investment Integration Project (TIIP)

TIIP's mission is to help investors understand how healthy social, environmental, and financial systems can benefit their portfolios. TIIP provides consulting services, applied research, and a turnkey solution (SAIL) that supports investors' pursuit of system-level investing, an advanced approach to sustainable and impact investing that focuses on managing systemic risks and investing in solutions to systemic problems. For more information, visit <a href="https://www.tiiproject.com">https://www.tiiproject.com</a>.

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