



CUIR

COALITION of UNIVERSITIES for RESPONSIBLE INVESTING

STRATEGIC PLAN 2011-2013



COALITION OF UNIVERSITIES FOR RESPONSIBLE INVESTING STRATEGIC PLAN 2011 - 2013

CURI is a groundbreaking multi-stakeholder forum for responsible investing initiatives at universities across Canada.

This strategic plan sets out CURI's mission, vision, values, objectives and implementation strategies for achieving positive change and long-term sustainability.





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Our vision

Our guiding vision is a future where the investment decisions taken by universities contribute to the long-term sustainability of communities, the environment and the economy.

Our mission

CURI works collaboratively to increase the awareness and integration of social, environmental and governance issues as part of a responsible approach to investing by universities in Canada.

Our values

The following values are at the heart CURI, and influence how we will carry out our mission.

Integrity, Trust and Accountability

CURI strives towards the highest standards of integrity, trust and accountability in our activities. We tie these activities directly to our mission and strategic objectives in order to foster transparency and good governance. In acting as a forum for dialogue, we will work to bridge differences among stakeholders by relying on these values.

Partnerships

CURI values the insights and expertise of our partner organisations. We will continue to work with those that share our belief in the critical role that university investments can play in a more sustainable future.

Diversity

CURI is committed to diversity and is inclusive of people of all ethnic, religious and socio-economic backgrounds, sexual orientation and ability.

Organisational sustainability

CURI recognizes that its work to mainstream responsible investing (RI) initiatives at universities has a long-term horizon. Therefore, we strive to deliver our mission with thoughtful strategic choices that ensure we have sufficient financial, human and material resources.



Our approach

CURI evolved out of a curious puzzle. While Canadian universities are perceived as centers for innovation and leadership on sustainability issues, approaches to investment decision-making by university administrators have not kept pace. In explaining this apparent disconnect, we found that information barriers – myths and mis-information – about responsible investment principles and policies are holding back progress. Moreover, dispersed issue-specific divestment campaigns send a weak signal about the broader range of available strategies that can help universities reconcile their long-term obligations to society with sound investment decision-making policies.

Although the challenge of achieving sustainable development is complex and multi-layered, university investment decision-makers and their stakeholders have a vital role to play in achieving this goal, particularly if they can act effectively within their own sphere of influence. As such, our approach is underpinned by a commitment to multi-stakeholder dialogue and responsiveness.

A multi-stakeholder approach

CURI believes in the right of all relevant stakeholders to contribute to respectful dialogue on how university investment-decisions are made. This includes creating the space for the voices of students, trustees, university administrators and faculty to voice and hear shared concerns.

Responsiveness

We understand that the information and capacity building needs of various RI stakeholders may vary and can change over time. Where possible, CURI seeks to understand the needs of key stakeholders and to co-create the appropriate tools, strategies and policies to support the uptake of responsible investing in different university settings.

In this respect, we draw on the concept of leverage - where a series of small, but well-focused actions and changes in structures can lead to significant, enduring improvements.



Our objectives & strategies

In keeping with our vision, mission and values, CURI will specifically work to:

1. Address knowledge barriers for RI at Canadian universities through targeted support and change-making research.
2. Champion the incorporation of RI at Canadian universities by providing thought leadership and solutions-based methods.
3. Build a nationally relevant and globally connected movement of RI stakeholders across Canadian universities by fostering cooperation and collaborative engagement
4. Strengthen CURI's capacity to be a functional and effective player in the local and global RI landscape.



I. Address knowledge barriers for RI at Canadian Universities through targeted support and change-making research.

To implement this strategic objective, we will:

- Benchmark RI policies and practices at North American universities on an annual basis, as a tool for monitoring and measuring progress.
- On request, provide strategic advice and information to student groups, administrators, trustees and faculty members interested in advancing RI initiatives on university campuses through collaborative dialogue.
- On request, assist university administrators and trustees to understand how environmental, social and governance (ESG) issues affect their investments.



2. Champion the incorporation of RI at Canadian universities by providing thought leadership and solutions-based methods.

To implement this strategic objective, we will:

- Launch an RI Declaration for Universities that will include a set of responsible investment values and principles developed with the input of relevant stakeholder groups. This will be coupled with a sign-on campaign aimed at university investment bodies.
- Develop an RI Guidance Framework for Universities that will include sample responsible investment policies, implementation guides and resources for university investment decision-makers.
- Where possible, actively call for and support the provision of RI curriculum, pedagogies and other learning tools to advance knowledge and expertise in the field of responsible investing.



3. Build a nationally relevant and globally connected movement of RI stakeholders across Canadian universities by fostering cooperation and collaborative engagement.

To implement this strategic objective, we will:

- Host the CURI Symposium, an event that will bring relevant stakeholders together to debate and advance big ideas in responsible investment for Canadian universities.
- Build supportive web-based and social media infrastructure to facilitate information exchange among stakeholders.
- Foster and strengthen key institutional partnerships with responsible investment research centers, academic networks, university administrator organizations and student coalitions.



4. Strengthen CURI's capacity to be a functional and effective player in the local and global RI landscape.

To implement this objective we will:

- Create an appropriate organisational form and membership structure for CURI.
- Develop and implement a high-impact communications strategy.
- Set up transparent and accountable financial infrastructure for CURI in the short-term, and identify robust, feasible revenue models that will support CURI's long-term development.
- Pro-actively manage governance issues.



Our structure

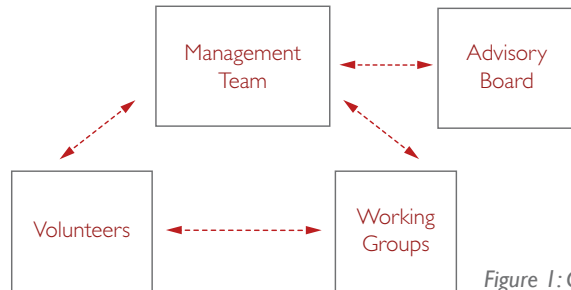


Figure 1: CURI's Functional Structure and Key Communication Pathways

Management Team

The CURI management team is collectively responsible for taking overall strategic decisions and ensuring the smooth implementation of the annual workplan. The team is coordinated by the CURI Chair, and includes directors who lead our work in the following functional areas: RI Research and Policy; RI Advisory Services and Resources; CURI Membership and Strategic Partnerships; Organizational Development.

Advisory Board

The CURI advisory board provides input on organizational strategy and CURI activities. The board includes university faculty, administrators and students, investment-decision makers and RI industry professionals.

Volunteers

CURI activities will be implemented with the support of volunteers that will provide part-time assistance for a variety of administrative, communications and research tasks.

Working Groups

As CURI's membership structure evolves, we anticipate coalition members and supporters will form working groups on a variety of RI-related themes. These working groups will be led by a chair and will develop networks of practice to share information and work together on specific projects or campaigns.

What comes next?

Our strategic plan was developed by the CURI management team. It is based on consultations with strategic advisors and the diverse group of stakeholders present at CURI's inaugural symposium held on 21 June 2011 in Victoria, British Columbia, Canada.

The plan provides a framework for implementing CURI's mission over a two-year period. It has sought to strike a balance between focus and flexibility, while fostering an innovative and ambitious organisation.

The CURI management team and volunteers will implement this plan with practical actions and clear indicators every year, so that we can track major milestones and progress.

We will also continue to consult our advisory board and partners on CURI's strategic direction to ensure we are maximising available opportunities to grow the organisation and have a positive impact on the Canadian and international RI landscape.





We invite you to join us in this exciting journey!



Coalition of Universities for Responsible Investing

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