SUSTAINABLE ENDOWMENTS INSTITUTE

2005 10th Anniversary 2015

Cambridge, MA

May 7, 2015

WELCOME TO SEI@10

Thank you for joining us to celebrate all those involved in the first 10 years of the Sustainable Endowments Institute (SEI). We appreciate your collaboration and support for our research, education, and outreach dedicated to advancing resilient institutional responses to climate change.

Since 2005, SEI has grown from a glimmer of an idea to an organization with national reach and impact on campus sustainability, energy efficiency and endowment investment practices. Each year, our reports, case studies, and programs reach hundreds of institutions and many thousands of students, faculty, staff, administrators and alumni.

Along with celebrating our progress over the past decade, we are eager to continue working with you towards a world where institutions have highly efficient facilities powered by renewable energy as well as endowment portfolios focused on sustainable investment opportunities.

As a member of our community, your support has helped us expand our impact. Many thanks—we couldn't have done it without you!

Onward!

Mark, Em, Shoshana, Aaron, Jaime and the whole SEI Team

PROGRAM

WELCOME	Mark Orlowski Founder & Executive Director
INTRO	Lea Lupkin Research Fellow, 2009-2010
SPECIAL GUEST	Adam Gardner Guitarist/vocalist, Guster Co-founder, Reverb
INTRO	Shoshana Blank Senior Research Fellow
KEYNOTE	David Brancaccio Host, Marketplace Morning Report
CLOSING REMARKS	Mark Orlowski



OUR SPEAKERS



DAVID BRANCACCIO, Keynote

Host, Marketplace Morning Report

David Brancaccio is the host of American Public Media's Marketplace Morning Report. Marketplaceis the most popular business program in the United States. His reporting focuses on the future of the economy, financial and labor markets, technology, the environment and social enterprises.

In the early 1990s, Brancaccio was Marketplace's European correspondent based in London, and he hosted Marketplace's evening program from 1993 to 2003. He co-anchored the PBS television news magazine program NOW with journalist Bill Moyers from 2003 to 2005, before taking over as the program's solo anchor in 2005. His feature-length documentary film, Fixing the Future, appeared in theaters nationwide in 2012. Among his awards for broadcast journalism are the Peabody, the DuPont-Columbia, the Cronkite, and the Emmy.

Brancaccio has a bachelor's degree from Wesleyan University and a master's degree in journalism from Stanford University. He has appeared on CBS, CNBC, MSNBC, and BBC World Service Television; his newspaper work has appeared in the Wall Street Journal, the Baltimore Sun, and The New York Times. Brancaccio is author of the book Squandering Aimlessly, an exploration of how Americans apply their personal values to their money. His wife, Mary Brancaccio, is a poet and educator. He grew up in Waterville, Maine, and also attended schools in Madagascar, Ghana, and Italy. He enjoys public speaking, bicycling and photography.

ADAM GARDNER, Special Guest

Guitarist & vocalist, Guster and co-founder of Reverb



Adam keeps himself busy with two full-time jobs: Guster guitarist and REVERB Co-Director. Pre-REVERB, he lamented the fact that despite living an earth-friendly lifestyle at home, his band's tours left a big not-so-eco-friendly footprint. He knew many other artists felt the same way, so he reached out to his friends and peers in the music world and found resources (thanks Bonnie Raitt!) and guinea pigs (thanks Barenaked Ladies!) as REVERB figured out how to make touring – and the music industry in general – greener. Since 2004, REVERB has worked on over 150 major tours (Jack Johnson, Maroon 5, Dave Matthews Band, Sheryl Crow, Jason Mraz and many others), supporting over 3500 local and national environmental organizations and campaigns, and reaching over 18 million concertgoers face-to-face.

As the REVERB "music guy," Adam spends much of his time working with bands, managers, and various entities in the music industry. He also tends to talk a lot; he recently had the honor of testifying to Congress on two separate occasions: first about sustainable biodiesel, and later about illegal logging and the Lacey Act.

Adam grew up in New Jersey in "the garden part of the Garden State," exploring the woods and discovering what he was sure were ancient arrowheads. He left home for Tufts University, earning a B.S. in Psychology and thinking it didn't really matter which college he went to, only to meet both his wife and fellow band mates there.

SEI IN THE NEWS



SPECIAL THANK YOU

We'd like to express our gratitude to the following organizations for their insights, guidance and support over the past decade.

FOUNDATIONS

Barr Foundation

David Rockefeller Fund

High Meadows Foundation

Hull Family Foundation

Jessie Smith Noyes Foundation

John Merck Fund

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Merck Family Fund

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Rockefeller Brothers Fund

RSF Social Finance

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Vervane Foundation

Wallace Global Fund

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APPA, Leadership in Educational Facilities

Clinton Climate Initiative

National Wildlife Federation Campus Ecology

Responsible Endowments Coalition

Rocky Mountain Institute

Rockefeller Philanthropy Advisors

Second Nature

Vermont Energy Investment Corporation



HISTORY OF SEI

2005:
SEI opens its office in Harvard Square and hires its first three Summer Research Fellows.

2006: SEI hires first full-time staff person

2006: SEI publishes results from first ESG survey, which generates national media attention.

2007: First College Sustainability Report Card
The College Sustainability Report Card, or Green Report Card, is the first independent sustainability survey of higher education institutions. The first edition profiles 100 schools and generates a 90 percent survey response rate.

2005 2006 2007 2008 2009 2

2007: Campus Consciousness Tour
with Guster and The Format covers 7,000+ miles in biodiesel-powered tour buses visiting over 20 college campuses.

2008: College Sustainability Report Card
2009 published and interactive GreenReportCard.org website launches covering 300 colleges in all 50 U.S. States as well as several Canadian provinces.

2010: SEI publishes its first Greening the Bottom Line report.

2010: Minority-Serving Institutions Green Report
In partnership with UNCF's Building Green Initiative, SEI publishes the Minority-Serving Institutions Green Report. This is the first such report to survey more than 50 tribal colleges, Hispanic-serving institutions and historically black colleges and universities about their sustainability practices.

2011: Coal Divestment Campaign
SEI collaborates with As You Sow, Energy Action Coalition, Sierra Student Coalition and Wallace Global Fund to help student groups and partner organizations to advocate for colleges and universities to divest their endowments from coal companies.

2012: SEI releases Greening the Bottom Line 2012

Report highlights current trends based on new survey data and shares best practices, barriers to implementation, and growth of the GRF model—from 50 to 80 campuses in less than two years.

2015: The Billion Dollar Green Challenge crosses the $100 million level of cumulatively committed capital.

2011: Billion Dollar Green Challenge

The Challenge launches on the main stage at the Association for the Advancement of Sustainability in Higher Education's AASHE 2011 conference. The aim is to encourage colleges, universities, and other nonprofit organizations to invest a combined total of one billion dollars in self-managed revolving funds to finance energy efficiency. To date, The Challenge has over $110 million in committed capital.

2014: GRITS 1.0 Launches

The Green Revolving Investment Tracking System (GRITS) is a cloud-based web platform designed by SEI to help institutions track, and seamlessly share, detailed project data on energy/financial/carbon savings.

2014: SEI moves its offices from Cambridge to downtown Boston

010 2011 2012 2013 2014 2015

2011: Leadership in Energy Efficiency Financing (LEEF)

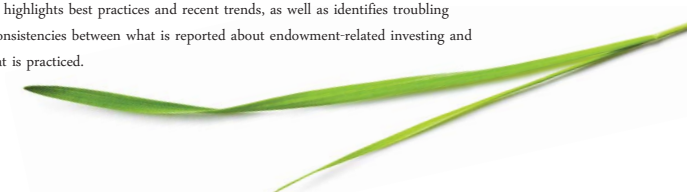
This New England-focused program helps implement green revolving funds (GRFs) at higher education, healthcare, municipal, and nonprofit organizations. Through the LEEF Network, dozens of schools gain access to new data, hands-on support, and development assistance to build strong foundations for establishing a GRF.

2015: SEI releases GRITS 1.1 on Earth Day—counting more than 150 institutions as users and helping share more than 650 energy and water efficiency projects through the GRITS Project Library.

2015: The New York Times features SEI in "Investing in Energy Efficiency Pays Off."

2014: Report on Endowment Investment Trends and Best Practices

SEI is the first organization to publish a report that independently analyzes AASHE's Sustainability Tracking, Assessment & Rating System (STARS) data on endowment investment policies. By reviewing 178 institutions' public reports, SEI highlights best practices and recent trends, as well as identifies troubling inconsistencies between what is reported about endowment-related investing and what is practiced.



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Microsoft

Microsoft New England (MSNE) is a major center for technical innovation and research. Located in the heart of Cambridge, Massachusetts, the MSNE campus includes two buildings—One Memorial Drive and the recently renovated One Cambridge Center. At the core of MSNE is the Microsoft New England Research & Development Center (NERD). NERD is a world-renowned research and software development center, and is home to teams working on critical products and services like Microsoft Office 365 and Microsoft SQL. NERD also serves as a center of gravity for the local tech community, having hosted more than 1,000 events and welcomed more than 100,000 visitors since opening in 2008.



Boston Common analyzes opportunities from a broader perspective, incorporating environmental, social, and governance drivers alongside traditional assessments. Some call this responsible investing. We call it smarter investing.

SEI has been a champion of smart investing for 10 wonderful years. Thank you for empowering universities to be thoughtful stewards of the environment and education.

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SEI STAFF:

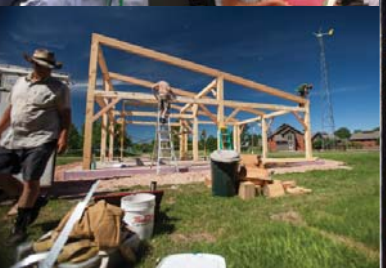
Shoshana Blank, Senior Research Fellow
Emily Flynn Pesquera, Associate Director
Aaron Karp, Senior Research Fellow
Mark Orlowski, Executive Director and Founder
Jaime Silverstein, Senior Research Fellow






Energy Efficiency Summit





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