

360-degrees for Mission - How leading European foundations use their investments to support their mission and the greater good

A new Mistra report showcases European foundations that implement SRI and impact investment strategies. The report can help other foundations use their investment portfolios to enhance the pursuit of their mission.

The Swedish Foundation for Strategic Environmental Research (Mistra) today released a report entitled *360-degrees for Mission - How leading European foundations use their investments to support their mission and the greater good* (pdf, 6 MB), showing how adopting socially responsible investment (SRI) and impact investment strategies can advance a foundation's mission. The report, authored by David Imbert and Ivo Knoepfel of onValues Ltd., includes case studies of eight leading foundations, selected for the variety of their investment approaches and their willingness to share their learning experiences.

"Sustainable investing allows foundations to achieve competitive financial returns while contributing to the greater good. Over the past decade, Mistra has successfully developed an investment policy that is consistent with our mission of sustainable development. This report is our way of raising awareness and communicating the opportunity to other European foundations" says Lars-Erik Liljelund, Mistra's Executive Director.

The report centres on interviews with trustees and officers from eight of the most successful European foundations in the area of SRI and impact investment: the Church of Sweden (Svenska kyrkan); Deutsche Bundesstiftung Umwelt DBU; Dreilinden gGmbH; Fondation du Luxembourg; Fondazione Cariplo Fonds 1818; Friends Provident Foundation, and Mistra.

The case studies combine personal reflections with investment strategy details, providing a window into a wide range of foundations with respect to their size, institutional heritage, geographic locations and investment approaches.

The report synthesizes the key lessons learned over years of investment experience and complements this with general information on SRI and the emerging field of impact investing. While the viability of these investment approaches is the most central message of the report, the case studies and the surrounding discussion also provide a candid assessment of the challenges that foundations face in implementing SRI and impact investing. The report directs interested foundations to a wide range of resources available to support them in building sustainable investment capacity.

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