

# Tools for Assessing Your Foundation's Portfolio Webinar Summary



The Canadian Coalition  
for Green Health Care  
Coalition canadienne pour  
un système de santé écologique

A summary of key resources shared in a **Healthy Capital program** webinar on assessing foundation portfolios for sustainable investment risk and performance.

## OVERVIEW

**Hosted by:** the [Canadian Coalition for Green Health Care \(CCGHC\)](#)

**Presenter:** Ayo Olatunji, Director of Responsible Investing, [CMA Impact Inc](#)

**Webinar recording:** [EN](#) | [FR](#)

Every foundation is at a different stage of the sustainable investing journey. Free, publicly available tools can help you engage with investment managers on climate and environmental, social and governance (ESG) factors, regardless of your size or resources. You can engage them to:

- Assess how they are managing climate and sustainability risks and how they are seizing opportunities
- Assess how they are aligned with your mission and commitments to sustainability and climate

## SUMMARY

### Free Resources to Benchmark Your investment Managers

#### 1 Sustainable Investment practices — ShareAction's [Point of No Returns](#)

Rankings of 76 of the world's largest investment managers on ESG sustainable investment practices. Useful for non-Canadian managers; ask them on where they rank and why.

#### 2 Voting practices — ShareAction's [Voting Matters Report](#)

Analyzes how 70 major investment managers voted on sustainability resolutions in 2024. Ask your managers how they voted your shares.

#### 3 Climate commitment — Net Zero Asset Managers Initiative (NZAM)

Check if your managers are [signatories](#) and ask about their current climate commitments.

#### 4 Climate practices — Investors for Paris Compliance (I4PC) Report

A [scorecard](#) for Canadian bank-owned investment managers on climate disclosure, transition strategies, and emissions. Use it to ask precise, evidence-based questions of your bank managers.

## Practical Steps to Take with Your Investment Managers

- **Annual due diligence:** Include ESG questions in your due diligence questionnaire (DDQ). Less is more – ask fewer, sharper questions and evolve them year over year.
- **Watch list reviews:** Factor ESG performance into how you evaluate managers.
- **Quarterly reporting:** Request proxy voting summaries each quarter (or at least annually).
- **Holdings-level data:** Ask whether your manager has engaged with key long-term holdings on climate and how they voted at those companies' Annual General Meetings (AGMs)

## Portfolio-Level Tools

- **MSCI, ISS, Sustainalytics, Morningstar** – The information provided by these ESG data providers are often used by investors; consider a free trial to identify metrics you'd want your manager to provide on an ongoing basis.
- **Morningstar.ca** – Free tool to look up ESG and carbon risk scores for Electronically Traded Funds (ETFs) and mutual funds in your portfolio.
- **Principles for Responsible Investment (PRI)** – Many investment managers are signatories (members), check the [directory](#) to see if yours are. Signatories have an annual disclosure obligation, and receive an assessment of sustainable investment performance to compare to a peer sample. You can check their [transparency report](#). Ask your managers for their assessment report, which provides an independent ESG rating.
- **SHARE** (Shareholder Association for Research & Education) – Offers engagement programs and a [due diligence questionnaire](#). SHARE also provides other services like proxy voting audits.

## On Carbon Footprinting

Start small, ask just one equity investment manager to provide a carbon footprint report for their portfolio. Build from there. [York](#), [Simon Fraser](#), and [Queen's University](#) are cited as good models for right-sized carbon disclosure.

## TOP RECOMMENDATIONS FOR THE NEXT 12 MONTHS

1

**Start the dialogue with your asset managers** – even one conversation will meaningfully elevate the relationship within a year.

2

**Collaborate with peers** – the [Healthy Capital Program](#) and SHARE's affiliate membership are great vehicles for shared learning.

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*Disclaimer. This is a summary of a webinar hosted by the CCGHC for informational purposes only and does not constitute investment or legal advice.*

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