

Responsible Investment Association Australasia

Three-Year Strategy
Financial Year
2016–2018

Our overarching goal: **To see more capital being invested more responsibly**

RIAA works to shift more capital into sustainable assets and enterprises and shape responsible financial markets to underpin strong investment returns and a healthier economy, society and environment.

The four overarching levers in to achieving this goal are:

- 1 Driving bottom up demand** – tapping the growing consumer interest in responsible investing and using that demand as a lever to influence the full investment chain
- 2 Shifting policy and regulation** to help set the rules of the game to be more conducive to long term responsible investment
- 3 Develop and strengthen the capacity of investment professional members** as key change agents tasked with deepening the way RI is done
- 4 Working with superfunds** on progressing responsible investment as influential economic agents on both the direction of financial markets and the broader economy and society.

Our work will focus on three key domains:

- 1 The Market** – to drive demand and shift investment practice, working at both a retail and institutional level
- 2 Our Members** – to be an active, informative and invaluable hub for responsible investment in our region, connecting our members and building the capacity of the industry
- 3 The Organisation** – to build a strong and sustainable financial and operational base to be an impactful organisation

RIAA is ambitious and cognizant of the urgency to achieve our goals.

In the next three years, RIAA will report on progress against indicators including:

Measuring the movement of capital into responsible investment products: targeting a growth in funds within Core Responsible Investment from 2.5% of TAUM to 10% in three years

The impact of responsible investors through their active ownership practices: progress more impactful RI industry through the use of all the tools available to active owners

The shift in policy & regulatory settings that enable a more responsible investment approach: progress on shifting policy settings for long term, responsible financial markets

Measuring our success:

**The market:
drive demand &
shift investment
practice**

CORE WORK PILLAR

MAJOR ACTIVITIES INCLUDE

Delivering tools for investors (of all stripes) **to navigate towards RI products and advice**

- Relaunch RI Cert Program
- Launch a Fund Finder webtool
- Build our adviser network and program

Strong voice for the industry in media and comms

- Continue to strengthen RIAA's position in the media and other communications as the sensible voice uniquely positioned to talk to consumer and investor audiences on ESG and ethical issues.

Setting the rules of the game with a focus on Policy that supports long term responsible investment

- Deliver a Policy Platform for Responsible Financial Markets that then drives our policy and advocacy work

Collaborate with key stakeholders to amplify our impact

- Continue to collaborate in a targeted way with partner organisations to amplify our agenda and strengthen our voice.

**Our members:
deliver strong &
practical value**

CORE WORK PILLAR

MAJOR ACTIVITIES INCLUDE

Be the hub of relevant and timely ESG and ethical information

Provide a strong platform for our members to connect and network, whilst building capacity

Deliver a strong annual offering of events, briefings, roundtables, webinars & working groups including

- Our 2 annual conferences (Australia and NZ)
- RI Benchmark Report
- Annual Investor Field Trip
- Targeted events for different segments and geographies of our membership
- Working groups
- Increasing our NZ presence and activities
- Deliver more research including practical briefings with the aim of providing useful guides and summaries to build the capacity of our members.

**Our organisation:
RIAA. Strong &
impactful**

CORE WORK PILLAR

MAJOR ACTIVITIES INCLUDE

Ensure a strong sustainable financial and operational base sufficient to deliver a strong impact.

Build revenues to increase RIAA's resources and lift our impact

RESPONSIBLE INVESTMENT ASSOCIATION AUSTRALASIA

Level 9, 387 George Street
Sydney, NSW 2000 Australia

+61 2 8228 8100
info@responsibleinvestment.org
responsibleinvestment.org

The Responsible Investment Association Australasia (RIAA) is the peak industry body representing responsible and ethical investors across Australia and New Zealand. RIAA is a growing active network of over 150 members managing more than \$500 billion in assets, including super funds, fund managers, consultants, researchers, brokers, impact investors, property managers, community banks, community trusts and financial advisers.

RIAA's goal is to see more capital being invested more responsibly. RIAA works to shift more capital into sustainable assets and enterprises and shape responsible financial markets to underpin strong investment returns and a healthier economy, society and environment.