G&A Institute ~ Consulting, Strategy, and Research Services

Helping Leaders & Organizations Recognize, Understand & Address Critical ESG Factors
To Build More Sustainable Enterprises In The Corporate, Social & Public Sectors

Governance & Accountability Institute, Inc. is a private sector consulting, strategy, and research services company focused on the key issues of sustainability and corporate responsibility. We serve the leaders and boards of organizations in the corporate sector and in the investment community.

The Institute provides a portfolio of services and resources to help managers detect, identify, understand, monitor, quantify, analyze, address, and communicate their progress in meeting sustainability challenges.

We work closely with clients to effectively navigate the sustainability journey.

We help clients to better understand the importance of key ESG performance factors that increasingly affect and shape corporate reputation, market valuation and public & industry perception. G&A Institute assists corporations in creating and executing winning strategies that maximize return on investment at every step of their Sustainability Journey.

We help organizations recognize, understand and address sustainability issues to address stakeholder and shareholder concerns. And we assist in structuring and managing third party engagements to assist managements in resolving issues of concern to key stakeholders.

The focus on corporate ESG performance is about understanding and addressing critical issues of prime importance to investors and stakeholders affecting companies in the investors’ portfolios.

The Institute resources are designed to support such organizational functions and specialty areas as: Sustainability, Enterprise Risk Management (ERM); Environmental Health & Safety (EHS); Corporate Social Responsibility (CSR); Stakeholder Engagement; External & Public Affairs; Marketing; Board Stewardship; Legal / Litigation; Human Resources; Investor Relations (IR); Corporate Communications; Financial Analysis…and more.

G&A Institute is the exclusive Data Partner for the Global Reporting Initiative (GRI) in the USA, United Kingdom and the Republic of Ireland. In 2013 we analyzed over 600 US Sustainability reports from a wide range of industries and sectors, and geographies, and encompassing a wide range of stakeholders, ESG issues, and data. No other consulting organization has the depth and breadth of knowledge related to U.S. corporate sustainability & responsibility reporting. Analyzing these many corporate and institutional reports has enabled us to structure many unique resources for our clients.
Briefly, our sustainability-focused services include: Counseling & Development of Strategies; Sustainability Disclosure and Structured Reporting; Materiality Assessments; Stakeholder Engagement; Benchmarking; Investor Relations resources focused on sustainable investment; Communications; Coaching, Team Building & Training; Issues Monitoring & Customized Research; Third Party Recognitions.

No matter where your organization may be in its sustainability journey – just beginning, or far along and the process maturing – the G&A Institute team can assist. We design our service offerings and resources to accommodate client needs at every stage in the journey, to enhance the journey by assisting in the navigation of issues and challenges that are posed by today's dynamic, global business environment.

**G&A Institute is GRI's Exclusive US, UK, and Ireland Data Partner**

The G&A Institute is the exclusive GRI Data Partner in the United States of America. In this role it is our responsibility to monitor, collect and analyze every sustainability, corporate responsibility, or corporate citizenship report issued by US entities (domestic companies and non-US entities issuing reports for their US operations). This includes analysis of GRI-compliant, GRI-Referenced, and Non-GRI reports, in various formats – print, digital, hybrids.

We serve as a central clearinghouse for sustainability reporting in the three countries. You can receive immediate news of sustainability and responsibility reports published in these countries in several ways - via our web sites, or Twitter accounts. Our databases created from these activities enable us to keep our finger on the pulse of corporate sustainability, and help our clients become sustainability leaders and receive more return on their investment.

Citing the quality of our work, GRI now demonstrates our systems and methods as a model for data partners around the world (in other geographic areas). In 2012 the Institute was given the honor of being invited to be the sole data partner for the United Kingdom and The Republic of Ireland in addition to continuing our duties in the USA.

Governance & Accountability Institute, Inc. is also an Organizational Stakeholder of the Global Reporting Initiative. We provide GRI with trend analysis and often conduct research with GRI and their partners.

**G&A Institute Team’s Communications Background & Services**

We are known for our work by many media organizations; journalists, editors, broadcasters and platform publishers and they are regularly in touch with the G&A team as reliable sources.

Key media outlets know that we have the most complete data, information and intelligence on trends, stories, and innovations in the corporate sustainability field. Because we have been doing this for over seven years we have built many strong relationships with media and are known as the definitive, "go to" source for this information. Among these relationships we enjoy are with sustainability editors at

Since the founders, Hank Boerner and Louis Coppola launched G&A Institute they have developed effective communications platforms for sharing of information and intelligence - web sites, newsletters, social media platforms, and other channels. These channels command attention in the sustainability space and the Institute has developed a loyal and dedicated following that relies on us for sustainability, corporate responsibility, Socially Responsible Investing (SRI) and ESG-related information.

In our own channels and on our platforms we feature and highlight stories, articles, companies and people that we feel would be interesting to our connections in the corporate, investing, NGO, media, government, and other sectors. These web properties include:

- www.accountability-central.com
- www.sustainabilityhq.com
- www.ga-institute.com/Sustainability-Update (blog)
- Numerous social media outlets such as multiple Twitter accounts, Facebook, LinkedIn Groups, and more.
- Sustainability HQ Highlights newsletter -- http://www.sustainabilityhq.com/index.php?id=3427

Our weekly newsletter - "SustainabilityHQ Highlights" - has a loyal readership of around 10,000 subscribers who have expressed interest in learning more about sustainability topics that we share. The readers are from various sectors and backgrounds, such as media, corporate CSR leaders, SRI and mainstream investors, NGOs, Academic Institutions, Government, and other important stakeholders focused on ESG issues.

At G&A we partner with publishing, news organizations, financial and business information providers - these include CR Magazine, Ethical Corp, Financial Times, Bloomberg, Responsible Investor, Sustainable Brands, TBLI, the Better Business Bureau, and others on promoting their events to our audiences. They rely on us to help build awareness and attendance to these events and in return we have unique relationships which we leverage for our clients.

Our communications team is focused on Sustainability / CSR / SRI, and our systems and resources, tools, relationships, data, knowledge, and experience base are unparalleled when it comes to this area of focus. We provide more value for our clients in this area than any other communications firm. And we consistently deliver results that are above and beyond the expectations of our client.
G&A Institute Team's Investor Network Background & Services

G&A Institute team members have important affiliations that are resources for the types of services highlighted above. We are members of the sustainable investment trade association, the Forum for Sustainable & Responsible Investment (US SIF), and its analyst arm, SIRAN (Sustainable Investment Research Analysts Network). We collaborate closely with Bloomberg, Thomson Reuters, MSCI, IW Financial, GMI Ratings, Robeco SAM, and a number of other independent third party service providers (some also manage assets for their clients). Louis Coppola is a member of the SIRAN research committee, and Hank Boerner is vice chairman of the New York Society of Securities Analysts’ sustainable investment committee (NYSSA). He is also contributing editor and governance commentator for Corporate Finance Review (a Thomson Reuters journal for financial executives), since 2002.

Investor Services Support - Objectives

Our IR service support includes such resources as:

- Crafting messages for the mainstream and SRI communities to position the company's sustainability story among key connections and thought leaders;

- Building greater investment community awareness and appreciation of our clients sustainability journey;

- Ensuring that third party sustainable investment data providers have more complete and accurate information on the company, to encourage the service providers to portray our clients in the best possible light (these independent firms welcome such assistance; more accurate and complete information on companies benefits all parties);

- Helping our clients access new sources of capital, within the existing shareholder base, and in identifying and engaging with sustainable investors focused on long-term appreciation for sources of new capital.
G&A Institute's Original Research

The Governance & Accountability Institute team conducts research, often in collaboration with leading information service organizations, on corporate sustainability reporting trends. These research efforts are broadly shared as part of our education mission. Recent research reports are available free for download at www.ga-institute.com/research-reports/

2012 Corporate ESG / Sustainability / Responsibility Reporting – Does It Matter?  
Analysis of S&P 500® Companies’ ESG Reporting Trends & Capital Markets Response

GRI Focal Point US in Collaboration with Bloomberg LP & G&A Institute Assurance Trends Study  
Analysis & Survey of Companies In the USA & Their Assurance Practices of Sustainability Data

2011 Corporate ESG / Sustainability Reporting - Does it Matter?  
Analysis of Fortune 500® Companies’ ESG Reporting Trends & Capital Markets Response
G&A Services & Resources - Highlights

G&A Institute is an independent private sector consulting and research organization with resources and services structured to support corporate and investment community clients in every phase of their sustainability journey. Highlights of our suite of services and tools designed for progressive steps:

Strategies, Advice & Consulting

- Introduction to ESG performance / sustainability / socially responsible investing (SRI)
- Workshops for staff (customized learning sessions)
- Briefing for management (public perceptions, organization’s public sustainability profile)
- Strategy suggestions / scoping sustainability journey - roadmaps
- Organizing team(s) (structuring internal processes; support for teams)
- Ongoing strategies and tactical advice for internal teams
- Making the Business Case and Making the Investment Case (internal support for teams)
- Investor Perception Surveys / Analysis / Engagement with SRI analysts and asset managers

Development of Sustainability Strategies & Programs

- Competitive analysis of peers and competitors (detailed charting and comparisons)
- Gap analysis of existing sustainability information (easy move - Non-GRI to GRI, or G3.1 to G4)
- Materiality assessments (critical element of GRI reporting, especially with G4 Framework)
- Stakeholder engagement (advice, research, facilitation – this aids in Materiality process)
- Coaching, executive training and education (ongoing, periodic)
- Development of unique programs and initiatives (positioning for leadership roles)
- Support for senior management and boards - strategic thinking

Publication of the Sustainability Report

- Advice on disclosure and reporting approaches / disclosure / aiming for transparency
- Verifying compliance with recognized reporting standards
- Data aggregation and presentation (to better measure/manage)
- Writing and editing (from advice to hands-on assistance)
- Graphic design and web production (all formats)
- Full suite of video services (production & distribution)
- Alignment with GRI Framework (very important part of reporting process)
- Assurance for GRI reports (ensuring the trustworthiness of your data for important stakeholders)
- Guidance with the GRI Application Level Check, Materiality Matters Process or other engagements

Investor Relations / Sustainability / Responsibility Focus

- Profiling of shareholder list to identify sustainability opportunities
- Crafting sustainability messages for investors - mainstream and sustainable investors
- Identifying potential new sources of capital focused on sustainability
- Arranging meetings with prominent SRI / Investor community members
Identifying / Profiling / Engagement with important third party investor sustainability data providers
- Ensure sustainability data at third party providers are accurate, complete, and in the best light
- PR & Communications assistance for leading sustainable investment communications platforms

Report Launch & Developing Third Party Recognition

- Distribution through G&A’s unique communication channels - global reach
- External PR and communications support services to generate broader visibility
- Introduction of client to key sustainability media connections
- Developing media coverage - through relationships with leading CSR and SRI editors
- Positioning organization, leaders and reports for third party awards and recognitions (liaison with awards organizations; preparation of entries; response to queries)
- Match third party information and profile with company realities (correct incomplete or inaccurate information that analysts and stakeholder access)
- Positioning for leading reputational lists, rankings and ratings
- Assistance in responding to queries from third parties
- Assistance with structuring 3BLMedia / CSRwire service programs