INVEST FOR CHANGE

Starter checklist

Research

☑ Analyse university investment policy

Why do this?

Find out what the university has committed to, or more importantly what it *hasn't* committed to. This can help you decide where to focus your campaign and get an idea of where the university is on its journey to responsible investment.

How to do this?

Investment policies should be publicly available online. You can often find them in the policy section of your university's website or on the sustainability pages. Read and highlight any key statements or commitments. Use our Developing a responsible investment policy resource to help you see what a best practice responsible investment policy should look like.

☑ Analyse university financial statements / accounts

Why do this?

University financial statements will help you find out basic information about university investments. This could be the size of their investment pot, the investment managers and any specific investment activity over the past year. This will again, help you get an idea of what kind of asks are relevant to your university context.

How to do this?

All universities publicly publish their financial statements online annually. These will be in the governance section of your universities webpage or you can use the Charity Commission's website & search function (or here for Scottish universities).

Typically, you will find a list of their investment managers (if they use one) within the first 3-5 pages alongside any other external service providers used. Information on investments aren't always as easy to identify, and may be broken down between endowment, property, other restricted and unrestricted assets. Details can be found toward the end of the accounts typically listed as 'fixed asset investments', 'investments ', 'endowment' or similar. There is usually also a paragraph or two about the organisation's investment policy and performance.

☑ Check or send a Freedom of Information request

Why do this?

Freedom of Information (FOI) requests are used to get information from public bodies, who are legally obliged to release certain information. If your university does not publish information

about its investments, you can use previous FOIs, or send your own, to find information out. Before doing this however, it may be better to first ask the university for this information.

How to do this?
To directly ask the university for specific information, check out our Template for initial university engagement and consider including a question about policy.

If thinking about FOIs, you can first use the website What Do They Know to find out if an FOI has previously been submitted as what the response was.

If you want to submit an FOI, you need to make sure the information cannot be accessed freely, and that you ask specific and clear questions. Also, be aware that the university has 20 working days to reply so you will probably not get a quick response. You can follow guidance on submitting an FOI here, and find the details for submitting one on your universities webpage.

☑ Email your students' union (SU)

Why do this?
Your SU should be able to give you a bit of background to help you get a better understanding of the context: historic campaigns on investments, current student groups in this area and some information about university structure and who to talk to.

How to do this?
Your SU may have a campaigns coordinator, or similar, that you could email with queries, or set up a meeting with. You could also try contacting your SU officers. You should be able to find contact information for both these on your SU website.

Engage

☑ Write to the university

Why do this?
To effect change in the university's investment practices, you'll need to engage with the university. Building a good relationship here will be key to success. Reaching out initially can also give you an opportunity to ask some questions and further your knowledge of your university investments and how they work on your campus.

How to do this?
Use our Template for initial university engagement resource to help you compose an email to the university.

☑ Pass students' union (SU) policy

Why do this?
Your SU can support you to campaign if they are mandated to by the SU student council (or similar). The support they offer will be defined by what is specified in the policy, so think about what support you might need. SU support will also give you some weight in conversations with the university, as you can prove your campaign is of importance to the student body.

How to do this?

Use our Template students' union policy resource to help you create a policy. You can then work with a student councillor (most student councils will have an environment role or similar), SU officer or SU staff that oversees democracy to help you take your policy to council, build support and get it passed.

☑ Build coalition of supports

Why do this?

Having a range of support, from students to academics to trade unions to alumni, will help you build pressure. It will add legitimacy to your asks and will show the university that this will be popular thing to do.

How to do this?

Consider writing an open letter or petition and sharing it online with key groups of people. Try reaching out to your university's trade union branch, academics in related fields, local groups campaigning on environmental and social justice, any alumni connections from previous campaigns such as divestment and, of course, current student groups. For the content of the letter, use our resource bank, specifically our Student campaign guide, to help formulate and articulate your beliefs and ask.

☑ Reach out to student groups

Why do this?

Finding out which other student groups are campaigning, or interested, in this area will help you get a full picture of the context you are operating in and may also help you build a campaign team!

How to do this?

Have a look on your SU website at student groups working on environmental or social justice – or contact your SU student activities team (or similar) and ask them to point you towards any relevant groups. Look at groups focusing on sustainability, campaigning and campaigning. Check out if there are any groups who are working, or did work, on divestment. Think about reaching out to groups focussing on issues that investment could support, i.e. societies campaigning against homelessness might be interested in a plan to ask the university to invest in social housing.

Strategise

☑ Formulate asks

Why do this?

A clear aim will not only focus your campaign but will provide a clear basis for engagement from the university. It will also help you articulate your campaign to both supporters and targets – and measure success!

How to do this?

Using your research, take an hour to conduct a mapping exercise with anyone involved in the campaign. Use our Formulating a campaign aim and asks resource to help you map out your aim.

You could also use the campaigning section (page 11) of our Student campaign guide for our example and tips to formulate clear asks and plan your campaign.

☑ Map student priorities on campus

Why do this?

It may be useful to link your campaign focuses to issues that currently have strong student support on campus. This will help you build a campaign with wide support, as well as making sure university investments are genuinely acting in the interests of the student body.

How to do this?

Look at what campaigns are running on campus, through both the SU (get in touch with your SU officers to see what they think!) and student groups. Tap into your networks to ask students what it is they care about. You can also check out what national priorities are by having a look at NUS and NUS officer campaigns. Finally, investigate current local issues, campaigns and campaign groups: social media and local council webpages may be of use for this. Get all these pieces of information together and work out what the reoccurring themes are - try and do this with a range of those involved in the campaign to make sure you get a range of perspectives!