SERVICE 04

ESG Ongoing Monitoring & Reporting

■ Illustrative Scenario

CLIENT PROFILE

Client Type	Community Foundation
AUM	$175 million
Location	Atlanta, Georgia
Situation	ESG framework in place but no ongoing monitoring capability; board receiving annual ESG report from consultant with 6-month lag; donor inquiries about ESG performance going unanswered
Engagement	ESG Ongoing Monitoring & Reporting | $5,500/month retainer

THE CHALLENGE

A $175 million community foundation had invested in ESG framework design two years earlier but had no mechanism for ongoing monitoring. Their ESG consultant produced an annual report that arrived with a 6-month data lag, leaving the investment committee unable to respond credibly to donor inquiries about current ESG positioning or to act on emerging manager-level ESG issues in real time.

The foundation's investment committee met quarterly and needed current, board-ready ESG reporting to accompany each meeting — covering manager-level ESG score changes, regulatory developments affecting their holdings, and progress against the board's stated sustainability goals. They also needed a single point of contact who understood their specific ESG priorities and could answer donor inquiries promptly.

VERDE ADVISORS APPROACH

Verde Advisors established a quarterly ESG monitoring and reporting cadence for the foundation, combining manager-level data aggregation, regulatory tracking, and custom reporting tailored to the investment committee's specific information needs.

Each quarter, Verde produces a 15–20 page ESG Portfolio Report covering overall portfolio ESG score movement, individual manager score updates and commentary, material ESG events (controversies, leadership changes, policy violations) at portfolio companies, regulatory developments affecting the foundation's holdings or reporting obligations, and a dashboard tracking progress against the board's five stated ESG goals.

Verde also serves as the foundation's first point of contact for ESG-related donor inquiries, drafting responses and briefing materials on short timelines to ensure the foundation presents a credible, consistent ESG narrative to its community.

KEY DELIVERABLES

- Quarterly ESG Portfolio Report (15–20 pages) — board-ready, investment committee format
- Manager ESG score tracking — quarterly updates with trend analysis and material change alerts
- Regulatory development briefings — SFDR, SEC climate disclosure, ISSB updates as they occur
- ESG goal progress dashboard — tracking foundation's 5 board-adopted ESG commitments
- Donor inquiry response support — drafted responses within 48 hours of request

• Annual ESG summary report for public disclosure and donor communications

OUTCOMES & RESULTS

Quarterly	48hr	5
Reporting Cadence (vs. Annual)	Donor Inquiry Response Time	ESG Goals Actively Tracked

This is an illustrative scenario based on the types of engagements Verde Advisors is equipped to deliver. Client details are hypothetical.