

Symposium on Corporate Responsibility & Responsible Investment: Past, Present, and Future

COLUMBIA UNIVERSITY

Low Memorial Library

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Hosted by

High Meadows Institute and Columbia University's Sustainable Investing Research Initiative (SIRI), in partnership with the Corporate Responsibility Initiative (CRI) at the Harvard Kennedy School



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Introduction

Over five decades, Corporate Responsibility (CR) and Responsible Investment (RI)* have evolved from peripheral initiatives to institutionalized fields with a global influence on corporate governance, strategy, capital allocation, disclosure, and stewardship.

Yet, at a time of political polarization, climate acceleration, geopolitical fragmentation, rising inequality, and technological disruption, the question is no longer whether the fields have matured, but whether they can drive the system-level thinking and large-scale systemic change required to transition to a more inclusive, sustainable low-carbon economy.

This symposium proceeds from this system-change hypothesis: it assumes that the next stage of progress will require a commitment to a systemic change strategy that can engage the core of the capital market system and key industry value chains and policy ecosystems.

Day 1 focuses on diagnosis and stress-testing the current CR and RI fields and strategies for change. Day 2 focuses on identifying key pathways for leverage, redesign, and a five-year strategic direction.

* **Terminology:** In this document, *Corporate Responsibility (CR)* and *Responsible Investment (RI)* are used as inclusive terms encompassing CSR, Corporate Citizenship, Corporate Sustainability, Sustainable Finance, SRI, ESG integration, and related approaches.

Symposium steering committee

- **William Burckart** – CEO, The Investment Integration Project (TIIP)
- **Caroline Flammer** – A. Barton Hepburn Professor of Economics, Professor of Climate and of Business, Director of the Sustainable Investing Research Initiative (SIRI), Columbia University
- **Deborah Leipziger** – Consultant and Author, The Leipziger Group
- **Steve Lydenberg** – Founder and Chairman, The Investment Integration Project (TIIP)
- **Jane Nelson** – Director, Corporate Responsibility Initiative at the Harvard Kennedy School’s Mossavar-Rahmani Center for Business and Government
- **Chris Pinney** – President and CEO, High Meadows Institute
- **David Wood** – Adjunct Professor of International and Public Affairs and the Brandmeyer Fellow for Impact and Sustainable Investing, Columbia University

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Thursday, May 7

DAY 1 — Understanding the Fields, their Evolution and Current Dynamics

9:00 – 9:30 AM Registration & Coffee

9:30 – 9:45 AM Opening Welcome & Framing

Facilitators: Caroline Flammer, Jane Nelson, Chris Pinney, David Wood

Purpose: Establish shared intellectual discipline and objectives

- Welcome from High Meadows Institute, Columbia University’s Sustainable Investing Research Initiative (SIRI), and the Corporate Responsibility Initiative (CRI) at the Harvard Kennedy School
- Why this moment represents a potential paradigm inflection point
- Introduction to three guiding lenses:
 1. Historical evolution
 2. Systems context
 3. Strategic redesign

9:45 – 11:00 AM Session 1: Defining the Fields — Origins, Evolution, and Convergence (75 minutes)

Facilitator: Jane Nelson

Discussants: David Grayson, Steve Lydenberg

Purpose: Establish a shared understanding of what CR and RI set out to achieve and how they have evolved

Illustrative Milestones: Sullivan Principles/South Africa divestment, UN Global Compact, UN PRI, GRI, stewardship evolution

Format: Scene-setting (20 min) + moderated dialogue (45 min) + plenary reflection

11:00 – 11:15 AM Break

11:15 AM – 12:30 PM Session 2: Norm-Setting, Rule-Making & Accountability — Tools, Practices, and Limits (75 minutes)

Facilitator: David Wood

Discussants: Michael Lent, Sandra Waddock

Purpose: Assess which accountability mechanisms have genuinely shifted behavior

Discussion Focus:

- Coalition building & voluntary standards
- Disclosure frameworks (GRI, TCFD, ISSB, CDP)
- Stewardship & engagement (ICCR, Climate Action 100+, Engine No. 1)
- Voluntary vs. mandatory regimes

Key Tensions:

- Enforcement vs. signaling
- Voice vs. exit
- Greenwashing and credibility

12:30 – 12:40 PM Book launch for *The Handbook of System-level Investing*, with editors Jon Lukomnik and William Burckart

12:40 – 1:30 PM Networking lunch

1:30 – 2:45 PM **Session 3: Stress Testing the Fields in a Fragmenting and Disruptive Global Economy** (75 minutes)

Facilitator: Chris Pinney

Discussants: Judy Samuelson, Simon Zadek

Purpose: Evaluate whether historical strategies remain viable under current conditions – rather than a general environmental scan, this session will function as a structured stress test

Three Analytical Axes:**1. Political Legitimacy**

- Anti-ESG backlash
- Polarization & populism
- Sovereignty vs. global standard-setting

2. Market Structure

- Capital concentration & dominance of passive funds
- Growth of private markets
- State capitalism & geopolitics

3. Technological Disruption

- AI-driven disruption, transparency, and modeling
- Data concentration
- Transition risk analytics

Outcome: Clear identification of structural constraints shaping the next phase

2:45 – 3:00 PM Break

3:00 – 4:15 PM Session 4: Companies, Capital Markets, and Systemic Change (75 minutes)

Facilitator: Jon Lukomnik

Discussants: Jake Barnett, Doug Chia, Catherine Howarth

Purpose: Examine how a systems lens reshapes strategy and scale

Outcome: Shared understanding of enterprise/portfolio/system interactions and leverage points

4:15 – 4:30 PM Break

4:30 – 5:15 PM Plenary Synthesis: What Has Actually Changed? (45 minutes)

Facilitators: Caroline Flammer, Jane Nelson, Chris Pinney, David Wood

Purpose: Integrate insights from Sessions 1–4

Celebrating our work together

5:15 – 6:00 PM Reception

6:00 – 9:00 PM Dinner & Informal Dialogue

Friday, May 8

DAY 2 — Designing the Future

8:30 – 9:00 AM Coffee

9:00 – 10:30 AM **Session 5: Strategic Leverage Points for the Next Phase** (90 minutes)

Facilitator: William Burckart

Discussants: Jake Barnett, Sherwat Elwan Ibrahim, Mirtha Kastrapeli

Purpose: Pivot from diagnosis to redesign

Identify 3–5 high-leverage strategic shifts capable of materially accelerating and scaling systemic impact over the next five years

Opening Frame (20 minutes): From Sustainability / Responsibility 2.0 to 3.0 — What Actually Changes?

Outcome: Shortlist of priority leverage areas for field-level advancement

10:30 – 10:45 AM Break

10:45 – 11:45 AM **Session 6: Planning for the Next Five Years — What Should the Fields Do Now?** (60 minutes)

Facilitator: Caroline Flammer

Discussants: Ingrid Dyott, Cynthia Williams

Purpose: Translate insights into actionable, forward-looking strategies

Working groups focus on: Strategic leverage points identified in session 5

Outcome: Short, concrete strategy prototypes grounded in institutional and political reality

11:45 AM – 12:00 PM Break

12:00 – 12:30 PM **Session 7: Archive & Field-Building Legacy Session** (30 minutes)

Facilitator: Deborah Leipziger

Discussants: Bob Massie, Jane Nelson

Purpose: Introduction to the Corporate Responsibility & Responsible Investment Archive at Columbia SIRI and Archive Initiative in the UK

- Preserving the intellectual evolution of the fields
- Invitation to contribute materials and oral histories
- Positioning the Archive as infrastructure for the next paradigm phase

12:30 – 1:15 PM Closing Plenary: Synthesis, Commitments & Next Steps (45 minutes)

Facilitators: Caroline Flammer, Jane Nelson, Chris Pinney, David Wood

- Consolidation of priority strategies
- Identification of shared commitments
- Clarification of post-symposium opportunities and actions:
 - Collaborative research
 - Field coordination
 - Institutional pilots
 - Archive support

1:15 PM Lunch & Adjournment