



Greenway Conservancy Board of Directors invites proposals for investment advisory services of endowment portfolio

The Rose Kennedy Greenway Conservancy is requesting proposals for advisory services of the Conservancy's investment portfolio, approximating \$23 million.

Please review the [Request for Proposals \(RFP\)](#) for information on how to fully respond to this RFP. The RFP is available at this [link](#).

The selected respondent will advise the Investment Committee of the Conservancy's Board of Directors on appropriate investment strategies, products, managers, compliance monitoring, and other advisory consulting services in addition to providing detailed reporting in accordance with the Conservancy's policies.

The RFP contains an overview of the Conservancy and background on the Investment Committee and Management, along with a complete Scope of Services and a list of information required to be submitted.

RFP Schedule:

- Monday, November 8, 2021: RFP emailed out and posted on the Conservancy website
- Friday, November 19, 2021, 3pm: Any clarifying RFP questions due via email to admin@rosekennedygreenway.org
- Wednesday, December 1, 2021, 5pm: Answers posted on Conservancy website
- Wednesday, December 8, 2021, noon: RFP submissions, as a pdf, by email to admin@rosekennedygreenway.org
- 2022: Proposal review and finalist rounds

Proposals will be evaluated based on which Respondent proposes the best value to the Conservancy, as determined in the Conservancy's sole discretion based on the Conservancy's assessment of the key components of the submission detailed above – background, relationship management, investment management, diversity and inclusion, and reporting and fees – and the Conservancy's application of criteria including but not limited to the Respondent's experience, economic value, and approach to the delivery of services.

Please submit one electronic copy (PDF) of your responses to this RFP by **December 8, 2021** at noon to admin@rosekennedygreenway.org.