



# 1<sup>st</sup> Internal Quality Report

November 2021

Created by EFMD



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## 1. EXECUTIVE SUMMARY

The 1st Internal Quality Report (IQR) reports the results of the periodical evaluations that took place from November 2020 until November 2021 and provide recommendations for the next steps of IFI. The results show that the project is progressing smoothly in terms of general management, training activities as well as outreach in spite of the general incertitude and possible delays caused by the covid pandemic. The partners are satisfied with the so far organisation and content while they recommend shorter (online) meetings, more group/interactive work and ways to receive the training material in advance. Efforts for the coordination of the projects in spite of the covid pandemic are being judged more than positively, and all the work packages are running on time with some activities being anticipates.

## 2. INTRODUCTION TO THE IFI PROJECT

IFI – Innovative Finance Inclusion in Academia and Field has been selected for EU co-funding by the EACEA (Education, Audio-visual and Culture Executive Agency) as an Erasmus+ programme for capacity building in higher education.

IFI Project aims to systematically align the Israeli higher education system with global changes and develop new capacities for inclusive social finance on three levels:

- (a) Eco-system & Infrastructure
- (b) Academy-Industry Cooperation
- (c) Research, Teaching & Training

IFI brings an interdisciplinary approach, stressing shifting focus is needed not only in finance but also in economics, law, technology, design and education.

Gathering European and Israeli experts, IFI project will act as a platform to foster integrated community and cultivating evidence-based standards and practices, building a scope of knowledge and case studies digital platform, training institutional investments, regulators and innovators, letting students practice ESG (Environmental, Social, and Corporate Governance) investments, and encourage innovation. All practices are key components of a thriving sustainable finance ecosystem and HEIs (Higher Education Institutions) capacity building. IFI is the first national consortium created explicitly to provide infrastructure, knowledge and innovation to further develop the sustainable and inclusive finance ecosystem in HEIs and field.

### The IFI consortium

- The Academic College of Tel Aviv Yaffo (the project coordinator)
- Sapir Academic College
- Kibbutzim College of Education
- The Hebrew University of Jerusalem
- Bezalel Academy of Art and Design
- Tel Hai College
- National Union of Israeli Students
- European Foundation for Management Development
- Ruprecht-Karls-Universität Heidelberg
- University of Deusto
- Erasmus Universiteit Rotterdam
- Università degli Studi di Padova
- SA Estonian Business School
- School Business Estonia

### 3. APPLIED METHODOLOGY

The evaluation tools used to monitor the activities for this reporting period are:

1. **Satisfaction surveys/questionnaires**, mainly for trainings and seminars. EFMD is making sure to follow up the project trainings and similar activities with surveys requesting the participants' evaluation of that activity.
2. **Qualitative review by the partners**, for tasks related to producing modules and other content related to Sustainable Finance (SF). Creating the peer-review committee and coordinating the peer-review process is under the EFMD responsibility. 2 partners-volunteers with knowledge on the module, content or other are invited each time to review the task against the requirements that the Plan has established for that particular task. Guidelines, directions, templates and other necessary information will be provided by EFMD in due time.
3. **Review by EFMD**, meaning review of the available material and public information administrative and other tasks such as number of participants in a training.

The results of the evaluations, help us assess whether the project is able to achieve the "points under review" that have been decided per WP, in coordination with the WP leader.

All results are summarised in the tables below, using the following symbols:



"Points under verification" has been achieved



It is progressing as planned



The partners or EFMD have recommendations for further improvement

## 4. PROGRESS OF THE PROJECT

### WP1 - Building a Community of Practice and Body of Knowledge

#### Main goals:

1. To establish a professional network and community of practice for HEIs and SF industry collaboration.
2. To train HEIs institutional professionals on project management in an interdisciplinary environment.
3. To analyse surveys' data on views, motivations and challenges around the subject of inclusion sustainable finance (SF).
4. To define the action plan, training policies and activities responsibilities for the next, development WPs.

#### Tasks:

1. Introduction & Establishment of Community of Practice (CoP) for SF - Requirements and definition of actors (December 2020).  
*(Organisation of a seminar to establish common understanding of the necessary terminology among the partners, start defining the characteristics of the CoP and establish the CoP).*
2. Sustainable Finance Framework - Building the evidence base: Typology of Sustainable Finance activities and policy levers (Academia and Field) in Europe and Israel - context setting for professional development vacuum and collective impact delivery (March 2021).  
*(Reports: SF practices in the field and SF practices in academia, following surveys, data collections and needs analysis).*
3. Work plans for task force teams (March 2021 – until the end of the project)  
*(A workshop when tasks force teams are finalised and the plan and objectives of each team is agreed).*

| Points under verification   | Minimum requirements  | Evaluation tools  | Results   |
|---|---|---|---|
| A balanced number of EU and IL institutions participate in the CoP (task 1)                           | Minimum 10 EU and 20 IL institutions (universities or leaders/executives, partner or non-partner) participated in the CoP   | Review of available data by EFMD (Participation will be measured by attendance in meetings, contribution of materials, and references to additional people beyond the consortium) | The CoP is hosted on the project Drive in which all partners from Israel and EU have access. In addition, The Israeli and EU experts invited in the WP1 activities have contributed to the CoP while the surveys (task 3) have engaged a big number of academics, students and corporate representatives from EU and Israel, more than 100 in total.  |
| The CoP encourages concretely online collaborative work among the participating institutions (task 1) | The CoP includes, among others, the following tools:<br>- Section to upload/download of documents<br>- Option to register in online group discussions<br>- Options to leave comments<br>- Access to the list of participating institutions<br>- Possibility to contact a participating institution<br>- Documentation of interactive workshop materials (e.g. concept boards) | Review of the produced material by EFMD   | All these tools are available to the partners via Drive.  |
| The partners feel confident to contribute to the CoP (task 1)   | Minimum 70% of the project management team agrees with this statement   | Survey  | The kick off meeting (24-26/11/2021) focused on clarifying WP1 and the partners' role in the CoP. According to the results of the survey that followed the meeting, more than 80% of the partners evaluated positively the aspects related to:<br>- their understanding of what it is expected from them in the start of the project<br>- their understanding of what it is expected from the rest of the partners in the start of the project<br>- the objectives of the project and their relation with the first activities<br><br><i>Annex 1.</i> |
| The CoP is a resource centre that includes materials helpful for the implementation of the            | The available materials cover at least the areas of:<br>- Mapping of current SF investments   | Qualitative review by the partners  | The CoP can be promoted and emphasised more during the project  |

|  |   |   |  |
|--|---|---|--|
| project activities (task 2)  | - Ventures and key social challenges in SF  |   | meetings and other activities as the space to share general research and other relevant material that the partners work on/with. Even if WP1 is completed, the project is constantly in search of such information and the CoP can offer the space for sharing it. |
| The SF in Academia and SF in Field reports, were based on the results of surveys addressing a sufficient number of IL stakeholders in the field (task 3) | Minimum participation in the survey:<br>Students >200<br>Faculty >50<br>Top management >20<br>Professionals (Israeli) >30 | Review of the available data by EFMD    | Until now the target is way over of what expected for the midterm:<br>436 Faculty (99 more than 50% completion)<br>73 Professionals (35 more than 50% completion)<br>2394 Students (1978 more than 50% completion)   |
| The task force teams operate according to a work plan created collaboratively by WP leaders and the partners (task 4)                                    | The plans are approved and available to all partners for reference  | Review of the produced material by EFMD | <i>Planned for later in the project</i>  |



## WP2 - Building tools. Establish a pool of cases for study and simulations

### Main goal:

Connect academics from interdisciplinary fields, field innovators and entrepreneurs and experts from the mainstream financial industry to establish framework for acceptable tools that can promote knowledge exchange between industry, academia and government (roadmap framework).

### Tasks:

1. Establish framework and guidelines for best cases collection and studying and simulation practices (May 2021 for seminar & October 2023 for the Case Studies).  
*(4-day workshop to establish the framework for effective knowledge exchange among academics, field innovators, entrepreneurs etc through the creation of case studies. The team will then start developing case studies that are in line with the framework and guidelines. The cases will be developed or collected by the consortium members and available on the portal).*
2. Creating open-source case studies portal - strategic planning and definitions of the portal and project website digital platforms (July 2021).  
*(Design a web portal for enabling case studies learning and simulation; adaptation and customization of case studies and simulation modules).*
3. Face the Case: Students, faculty and practitioners' visits to field partners in Israel and Europe (students will participate in study tours in Israel only). (June 2021 & March 2022, for each seminar).  
*(2 visits for IL faculty in EU which will also expose Israeli visitors to the supportive eco-system in Europe by providing examples and discussion on some European and international platforms for sustainable finance and development).*

| Points under verification   | Minimum requirements  | Evaluation tools   | Results  |
|---|---|--|--|
| The seminar was attended by academics as well as business stakeholders (task 1)   | At least 20 participants attend the seminar, coming from IL universities, finance, education and government     | Review of the available information by EFMD (list of participants etc) | <p>✓ 22 participants attended the seminar, representatives of the academic partners and EFMD.</p> <p>The seminar combined the academic expertise needed in order to present methodologies for writing case studies, with the perspective of non-academics, the “practitioners”, who presented their real-life cases.</p> <p>In addition to the project representatives from academia, the seminar invited non-academic speakers from:</p> <ul style="list-style-type: none"> <li>Jon Emaldi, Modragon Cooperative (SP)</li> <li>Vanessa Cento, from Progetto Quid (IT)</li> <li>Marina Fornasier, Insieme Cooperative Sociale (IT)</li> <li>Anna Biasin, Sefea Impact Investing Fund (IT)</li> <li>Erich Innerbichler, General Manager of Ethical Banking</li> </ul> |
| The attendees in the seminar were satisfied in terms of content, delivery and impact/usefulness of the seminar (task 1)         | Minimum 70% of the participants evaluated positively the content, delivery and impact/usefulness of the seminar | Survey/questionnaire   | <p>✓ More than 80% of the participants in the seminar evaluated positively all examined aspects, content, delivery and impact/usefulness of the seminar.</p> <p> QUICK TIP The participants in this activity recommended that for longer seminars some of the material could be shared in advance so that they have time to familiarise themselves with it.</p> <p><i>Annex 2.</i></p>   |
| The seminar resulted in the formulation of guidelines for preparing case studies in SF in the field and SF in Academia (task 1) | At least 20 case studies are completed by the end of the project  | Review of the produced material by EFMD                                | <p> A document including guidelines was created and distributed among the partners. The document is available on the project Drive and has been forwarded to all the partners.</p>   |

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|  |  |   | <p>It includes guidelines with regard to topic selection, templates as well as legal issues.</p> <p>Based on the guidelines, each academic partner was requested to prepare 1 case study and 2 mini case studies in topics related to SF.</p>                                    |
| The users of the portal are satisfied in terms of design and content available in the portal (task 2)                  | Minimum 70% of the users are satisfied in terms of design and content available in the portal  | Survey/questionnaire                        | <i>Planned for later in the project</i>  |
| The 2 visits are attended by Israeli students from partner and non-partner universities (task 3)                       | <p>Participants come from the fields of academia, finance, education and government</p> <p>At least 75 (15 students from each of the 5 Israeli HEIs) participants come from the fields of academia, finance, education and government.</p> | Review of the available information by EFMD | <i>Planned for later in the project</i>  |
| The attendees in the seminar are satisfied in terms of content, delivery and impact/usefulness of the seminar (task 3) | Minimum 70% of the participants evaluated positively the content, delivery and impact/usefulness of the seminars   | Survey/questionnaire                        | <p> More of the 80% participants evaluated positively the content, delivery and impact/usefulness of the seminars</p> <p> <b>QUICK TIP</b> Participants shared the need to talk more about the case studies and to focus on longer workshop to share the different analysis.</p> |



## WP3: Building body of Practice – Training programs for different stakeholders

### Main goal:

To train different professional groups separately and help participants familiarize themselves with the different dimensions of SF.

### Tasks:

1. From fiduciary duty to green taxonomy: Establishing traineeship programs for Israeli regulators on policy levers to foster SF (September 2021 the roundtable, November 2021 the seminar & April 2022 the meeting).  
*(A roundtable in Brussels (EFMD) for European and Israeli partners will be held with the participation of speakers from the EC to identify priorities areas of focus. Following this, there will be a seminar in Israel, with participants from academia and regulatory fields to discuss the interconnection and deep influence of finance regulation on public interests. An interdisciplinary meeting will follow the seminar in order to establish common knowledge of the results of the round table and seminar).*
2. From CSR to ESG: Establishing traineeship programs for Israeli investors in public and private sectors (January 2022 the seminar & June 2022 for the recommendations report).  
*(An academia-investment seminar to expose investors to (1) Options for investments in social solutions (2) options for using different finance practices to support sustainability. An interdisciplinary meeting will follow the seminar in order to put together recommendations for the IL context).*
3. From conservative bankers to machine learning in institutional portfolios: Establishing traineeship programs for Israeli technology pioneers, designers and social activists in the entrepreneurship, design and education sectors (October 2022 the seminar and January 2023 the report).  
*(The seminar will include an introduction to innovation in the finance world and SF entrepreneurship and innovation. It will provide benchmarking of current SF innovation strategies in Israeli academic accelerators and in Europe. An interdisciplinary meeting will follow the seminar to discuss the results and put together recommendations for the IL context)*

| Points under verification   | Minimum requirements   | Evaluation Tools   | Results   |
|---|--|--|---|
| The roundtable is attended by representatives of the policy, finance and regulatory sector from Israel as well as the EU (task 1) | At least 10 participants attend the round table, coming from Governmental bodies and relevant NGOs                   | Review of the available information by EFMD (list of participants etc) | <i>Planned for later in the project</i>   |
| The attendees in the roundtable are satisfied in terms of content, execution and impact/usefulness of the roundtable (task 1)     | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the round table | Survey/questionnaire   | <i>Planned for later in the project</i>   |
| The seminar is attended by representatives of public as well as private investing sector in Israel (task 2)                       | At least 10 participants attend the seminar, coming from the banking and finance sectors                             | Review of the available information by EFMD (list of participants etc) |  the first roundtable took place online, organised by the Rotterdam School of Management. More that 30 participants were online following the discussion on how to develop the seminar for the investing sector. |
| The attendees in the seminar are satisfied in terms of content, delivery and impact/usefulness of the seminar (task 2)            | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the seminar     | Survey/questionnaire   |  90% of the participant to the round table judged positively the content of the trainings, the interactive workshops and the usefulness of the seminar.  |
| The seminar is attended by a multidisciplinary body of participants coming from academia as well as industry (task 3)             | At least 10 participants attend the seminar, coming from technology, education and entrepreneurship sectors          | Review of the available information by EFMD (list of participants etc) | <i>Planned for later in the project</i>   |
| The attendees in the seminar are satisfied in terms of content, delivery and impact/usefulness of the seminar (task 3)            | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the round table | Survey/questionnaire   | <i>Planned for later in the project</i>   |

## WP5: Walk the talk - Israeli students-led ESG Investing Fund

### Main goals:

Prepare and establish the Israeli students-led ESG Investing Fund that brings together students, entrepreneurs and investors and create new models for sustainable enterprises with focus on innovation, execution, and long-term growth.

### Tasks:

1. Benchmarking - Learning from others (June 2021 the presentation of results).  
*(Identification of cases for benchmarking between similar ideas in Europe. Data collection and presentation of conclusions and report that will help prepare WP5.2)*
2. Building the fund business plan (April 2022)  
*(The Business plan with provisions for the management, operation and implementation of the Israeli students-led ESG Investing Fund)*
3. Getting to Know ESG (May 2022 – October 2022 for organising the training sessions).  
*(Training sessions specifically on ESG investments).*

| Points under verification  | Minimum requirements   | Evaluation Tools                        | Results   |
|--|--|---|---|
| The final report was developed following a standardised benchmarking methodology (task 1)  | <p>The applied benchmarking methodology includes at least the following:</p> <ul style="list-style-type: none"> <li>- Clear definition of the processes, results, outcomes or other that are being benchmarked</li> <li>- The paradigms which will be benchmarked have been identified</li> <li>- Data collection</li> <li>- Gap analysis</li> <li>- Identification of best practices</li> </ul> | Review of the produced material by EFMD | the first report on student-led ESG investment fund, was published on the platform and approved by the partners. The analysis cover 17 different student funds based mainly in Europe and the United States. The preliminary stage was aimed to identify cases for benchmarking that offer implementation of similar ideas mainly in the USA and Europe. This report summarizes the information that was presented in the first meeting of WP5 (Walk the talk - Israeli Students-led ESG Investing Fund) to identify cases for benchmarking, and the results of an independent research based on data and information available on the internet. A more structural analysis and identification of best practises will follow in the next stages of the project. |
| The business plan of Israeli students-led ESG Investing Fund was developed following a standardised methodology for business planning (task 2) | <p>The business plan includes provisions for at least the following:</p> <ul style="list-style-type: none"> <li>- Market analysis</li> <li>- Provided products and services</li> <li>- Management team</li> <li>- Financial plan</li> <li>- Operation plan</li> </ul>  | Review of the produced material by EFMD | <i>Planned for later in the project</i>   |
| The business plan of Israeli students-led ESG Investing Fund is realistic and relevant in the context of SF (task 2)                           | <p>The business plan tackles at least the following issues:</p> <ul style="list-style-type: none"> <li>- Regulation (related to investment fund and related to HEIs / CHE)</li> <li>- Focus on technology/innovation</li> </ul>  | Qualitative review by the partners      | <i>Planned for later in the project</i>   |
| The attendees in the seminar are satisfied in terms of content, delivery and impact/usefulness of the seminar (task 3)                         | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the seminar   | Survey/questionnaire                    | <i>Planned for later in the project</i>   |



## WP6 - Talk the walk. Training the trainers and teach the practitioner

### Main goal:

Teachers and instructors from different faculties will be trained to acquire knowledge and tools for further exploitation of the contents to secondary school classes (overcoming the obstacle of not providing finance education at school). The objective is to present innovative teaching materials and inspire the implementation in class.

### Tasks:

1. Train the trainers strategy and framework (April 2022)  
*(Organise “train the trainer workshops” that promote understanding of the field, its innovativity and elaborate on its application in different domains such as (finance, law, social studies etc)*
2. Study visits to summer schools at the University of Deusto (UD) (July 2021 and July 2022)  
*(The Summer schools in Spain will last for 1 week each. They are the first step towards launching a similar large-scale initiative in Israeli. The first summer school will provide directions and promote common understanding, while the second, will help the Israelis decide which aspects are relevant to their context and how they can implement them in Israeli).*
3. Training sessions for academics and mentoring on development of SF programmes (July 2022-May 2023 the internal training sessions at the partners, June 2023 the training sessions)  
*(Following the summer school experience, the trained will share the new knowledge with colleagues from the partner HEIs and from non-partner Israeli HEIs. Training sessions will be delivered internally in the partner HEIs and a summary training session that will be open to academic staff from non-partner HEIs will be held in summer 2023 in Israel)*



| Points under verification   | Minimum requirements  | Evaluation tools                   | Results  |
|---|---|------------------------------------|--|
| The attendees in the seminar are satisfied in terms of content, delivery and impact/usefulness of the seminar (task 1)  | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the seminar  | Survey/questionnaire               | More than the 70% of the partners judged the activity organised by the University of Deusto positively and judged useful the study tour.<br><br>The partners recommend more sharing activates as per more interaction between participants, in more conversational form as oppose to frontal lectures with Q&A's.  |
| The SF modules and content that were introduced to the seminar, were designed specifically to encourage replication in a school class (task 1)  | Subjects covered by the seminars, include among others:<br>- Pedagogy (approaches)<br>- Content (SF)  | Qualitative review by the partners | 2 Israeli partners, with academic background in the topics of the seminar were recommended by the project leader to be the reviewers of this activity.<br><br>Overall, both partners provided positive and detailed feedback with regards to the effectiveness of the seminar to cover the 3 topics examined here.<br><br>They both commended in particular the way the seminar covered the "connections with the industry" aspect and the respective lectures |
| Both summer schools are designed to provide the participants with the necessary knowledge regarding<br>- The organisation and management of such an initiative<br>- The theory and practice regarding SF (task 2) | For each summer school, UD in collaboration with the Israeli partners create in advance a detailed plan of activities that include, among others:<br>- Timeframe of activities<br>- Learning objectives<br>- Expected learning outcomes<br>- Format of the trainings<br>- Feedback mechanisms for the participants after the end of the summer school<br>- Channels of communications after the end of the summer schools | Qualitative review by the partners | In June 2021, a month before the first summer school took place in UD, the activity agenda was shared including the "goals of the seminar", ILOs and the format of the sessions.<br><br>During the seminar, the invited experts and participants had time to interact with the participants and establish channels of communication.<br><br>2 Israeli partners, with academic background in the topics of the seminar were recommended by                      |

|  |   |                                    |  |
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|  | <p>At the end of both summer schools at least the following topics regarding SF have been covered:</p> <ul style="list-style-type: none"> <li>- Theory - Models of SF</li> <li>- Practice - Connection to the industry</li> <li>- Pedagogical approaches for short term programs (including Inclusion of SF topics as part of BA\MBA programs)</li> </ul> |                                    | <p>the project leader to be the reviewers of this activity.</p> <p>Overall, both partners provided positive and detailed feedback with regards to the effectiveness of the seminar to cover the 3 topics examined here.</p> <p>They both commended in particular the way the seminar covered the “connections with the industry” aspect and the respective lectures.</p> <p> At the same time, the partners requested that in the next summer school and the upcoming project activities in general, special attention is placed on establishing common definition for key-terminology such as Sustainable Finance.</p> <p><i>Annex 3.</i></p> |
| The attendees in the seminars are satisfied in terms of content, delivery and impact/usefulness of the seminars (task 3) | Minimum 70% of the participants evaluated positively the content, execution and impact/usefulness of the seminar  | Survey/questionnaire               | <p> An average of 80% of the participants in the summer school in UD, evaluated positively the content, execution and impact/usefulness of the seminar.</p> <p> The participants in this activity recommended that more interactive and group work is included in the agenda of the next summer school.</p> <p><i>Annex 4.</i></p>   |
| The internal trainings attracted academic stakeholders from various faculties and services (task 3)                      | A minimum of 30 participants attended the internal trainings from academia and industry   | Qualitative review by the partners | <i>Planned for later in the project</i>  |
| The summary training session attracted participants from non-partner HEIs (task 3)                                       | A minimum of 30 participants attended the internal trainings, coming from 5 non-partners HEIs   | Qualitative review by the partners | <i>Planned for later in the project</i>  |

## WP8 - Dissemination and Exploitation

### Main goals:



1. To raise awareness to the project and its results, specifically to sustainable finance, among various stakeholders
2. To introduce and share with others innovative approaches to of sustainable and social finance
3. To present the project results to non-partner HEIs for the purpose of expanding its impact
4. To continue the implementation and to further develop the project outcomes and outputs after the project
5. To engage institutional decision makers and national HE and SF industry professionals in the project to get their support in the long-term.

### Tasks:

1. Define dissemination, exploitation and sustainability strategy, guidelines and work plan (February 2021)
2. Design, develop and maintain IFI website (December 2020).
3. Design and publish digital & non-digital materials (ongoing)
4. Carry out dissemination, exploitation and sustainability events (ongoing)  
*(Internal meetings, academic conference on SF practice in academia and academia-industry integrated cooperation, meetings with top managers, deans, and academics to demonstrate the knowledge, networks, practices and insights developed throughout the project lifetime, to discuss future utilization, maintenance and updating within the institution and to agree on further use of the deliverables by the partners and third parties. Networking events for students, graduates, and field expert professionals, to present opportunities, focusing on the added value of improved knowledge and creativity).*

| Points under verification  | Minimum requirements   | Evaluation tools                            | Results   |
|--|--|---|---|
| A customised dissemination & exploitation plan is delivered as scheduled             | The dissemination & exploitation plan includes:<br>- Definition of target groups<br>- Communication channels for reaching each target group<br>- Timeframe of dissemination activities<br>- Key message/objectives of the project to be communicated<br>- Each partners' role (task 1)   | Review of the produced material by EFMD     | A dissemination plan that covers all these aspects has been created and approved by all partners.<br><br>The 2 <sup>nd</sup> consortium meeting (15-17/06) dedicated considerable time to discussions regarding channels and methods of dissemination, with interactive tools inviting the partners to contribute actively in the discussions. A list of all initiatives so far, upcoming ones and other ideas was created as result.   |
| A customised, appealing website is delivered as scheduled (task 2)                   | By the midterm of the project and gradually until the end of the project, the website:<br>- has a gradually increasing number of visits<br>- is continuously updated with the project news an, materials and events<br>- is linked with all partners' websites<br>- is referenced in non-partners' websites  | Review of the produced material by EFMD     | An appealing, regularly updated website is in place from the early stages of the project. According to analytics, the website has since its set up, 789 site sessions, direct searches, from google, because of the newsletters or other (Annex 5).<br><br>QUICK TIP There is still some work to be done to link the website with all partners' website and manage this way a bigger outreach. This can be a first step to reaching out to the partners' networks online.   |
| The produced dissemination materials are reaching the defined target groups (task 3) | By the midterm of the project;<br>- There are minimum 100 subscriptions to the project newsletter<br>- The project printed materials have been demonstrated in at least 5 external events (online or physical) with overall 100 participants<br>By the end of the project:<br>- There are minimum 150 subscriptions to the project newsletter<br>By the end of the project:<br>- The project printed materials have been demonstrated in at least 8 external events (online or physical) | Review of the available information by EFMD | In addition to the website, the project has started using other dissemination tools including newsletters (6 since the beginning of the project and until September 2021), social media which are integrated with the project leader's social media.<br><br>Since the beginning of the project the newsletter had 70 subscriptions, and even if the project by midterm won't be able to do the five external events cause covid restriction, in the months of December and January the project materials will be demonstrated in two events, searching to hit the 100 participants targets. |



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| <p>The conferences and other events attract external participants and are attended by representatives of the target groups (task 4)</p> | <p>By the <u>midterm</u> of the project;</p> <ul style="list-style-type: none"> <li>- Minimum 2 events took place targeting academics</li> <li>- Minimum 1 event took place targeting business stakeholders</li> </ul> <p>By the <u>end</u> of the project;</p> <ul style="list-style-type: none"> <li>- Minimum 5 events took place targeting academics</li> <li>- Minimum 3 events took place targeting business stakeholders</li> </ul> | <p>Review of the available information by EFMD (list of participants, dissemination register etc)</p> | <p> An external event is organised by the Israeli forum of impact economy and Rothschild foundation on the 12.12.2021</p> <p> From the 25 till the 27 of January a meeting is planned with multiple stakeholders from industry and academy in Israel.</p> |
|---|--|---|---|

## WP9 - Management

### Main goals:

1. To ensure achievement of the project goals and objectives by implementing the project tasks on time and within budget, to deliver high-quality outputs and outcomes
2. To establish effective project organisation and infrastructure, including committees, procedures, tools and techniques
3. To create, maintain and lead a collaborative and open communication environment that will encourage the team to work synergistically towards the project mission

### Tasks:

1. Coordination and communications management (ongoing)
2. Administrative management and progress reports (ongoing)
3. Financial management and budget control (ongoing)

| Points under verification   | Minimum requirements  | Evaluation tools                            | Results   |
|---|---|---|---|
| The project management team is satisfied with the management of the project in terms of coordination, internal communication and execution of the project meetings (task 1) | Minimum 80% of the project management team evaluates positively the | Survey/questionnaire                        | 2 management meetings have taken place, the kick off in November 2020 and the 2 <sup>nd</sup> partners' meeting in June 2021.<br><br>Overall, more than 80% of the partners who consist the project management team evaluated positively the coordination, internal communication and execution of the project meetings.<br><br><b>QUICK TIP</b> Due to the constraints imposed by the online and hybrid formats, the participants recommend consistently shorter meeting with longer breaks<br><br><i>Annexes 1 &amp; 6.</i> |
| Internal and official reports submitted on time and were successful (tasks 2 & 3)   | -   | Review of the available information by EFMD | <i>Planned for later in the project</i>   |

## 5. CONCLUSIONS & RECOMMENDATIONS

- **In terms of project management and general coordination**, IFI is progressing smoothly (*Annex 7*), with small delays in the activities due to the constraints imposed by the COVID-19 pandemic. IFI has started transitioning from exclusively online to hybrid and then to face to face activities in Israel and in the EU. The meetings and other activities have been taking place in an overall collaborative and positive atmosphere allowing interaction and contribution from all partners. The partners appreciate the support that they receive from the project leader as well as the organisation, format and agenda of the meetings.

For the hybrid and online meetings, the partners recommended shorter meetings with longer breaks as more appropriate for the proposed agendas and this format. Based on the evaluations, the partners seem also confused regarding the platform that is used by the project in which all the project material can be found. It is recommended that this is reminded and possibly demonstrated during the next meetings.

During the month of October, a specific project management survey was distributed to the partners, the results are available on Annex 9. The general overview of the answers tells us that the partners judge very positively the management of the project but however, more efforts are needed to explain the projects objectives and to ensure that everyone feels as an important part of the project teams. The monthly reunion envisaged during the Padova meeting, should be a good solution.

- **In terms of training activities and content**, IFI is an ambitious project that aims to train the partners in new terminology, tools and methods in topics previously unknown for many of them. This is precisely the objective of the project anyway, to introduce “sustainable finance” in new academic fields beyond just economics and promote a culture of change in this domain. The evaluations of the trainings and seminars (surveys, partners’ reviews and observations) show that the project is on the right path to achieve this. The partners evaluated positively the content and delivery methodology of these activities, as well as the practicality and usefulness of the new knowledge. They understand what it is expected from them and how they can collaborate with the rest of the partners. For those already familiar with this field, IFI is contributing with original content and useful contacts with EU experts.

Because of the complexity of the topic for some of the partners, it is recommended that some of the materials of the lectures are shared in advance and give enough time to the participants to familiarise themselves with it. It would also be advised to promote additional group work bringing together partners with background in the field with those who are now starting. Along the same lines, for the upcoming activities, the agenda and other material can be accompanied by a summary of what was previously discussed as well as the terminology and definitions that have been clarified. To facilitate further connections with invited EU and Israeli experts, the project created a list of contacts and their information for the partners, who is available in the shared drive, also all the partners that agreed are presented in the dedicated project’s website page.

- **In terms of project dissemination and outreach**, IFI has great potential because of the originality of the topic and the experience of the project leader and of the partners in such issues. The website is indeed a very appealing one and the supporting tools such as newsletters and social media have started bringing results, by the end of the midterm the newsletter will hit the target of the 100 subscriptions. The project should find new solutions related to the dissemination to cope with the ongoing covid crisis, even stressing the importance of disseminating materials even if not in face-to-face meetings.



## 6. NEXT STEPS

The table below summarises the next steps and involved actors, regarding W. P7 and Quality Assurance:

|   | Expected month for completion        | Created by                         | Status                                 |
|---|--------------------------------------|------------------------------------|--|
| Internal Quality Plan                         | M3                                   | EFMD with material provided by the | Submitted and approved by the partners |
| 1st Internal Quality Report                   | M12                                  | EFMD with material provided by the | Submitted and approved by the partners |
| Regular evaluations of all project activities | Ongoing until the end of the project | EFMD with material provided by the | Ongoing until the end of the project   |
| Intermediate External Quality Report          | M 18                                 | External Evaluator                 | In progress                            |
| 2nd Internal Quality Report                   | M24                                  | EFMD with material provided by the | Starts in M12                          |
| 3rd Internal Quality Report (Final)           | M32                                  | EFMD with material provided by the | Starts in M24                          |
| Final External Quality Report                 | M 36                                 | External Evaluator                 | Starts in M18                          |

Table 1.





## ANNEXES

Annex 1 – IFI Kick Off meeting Survey

Annex 2 - IFI - WP2 Meeting #1: Establishing the framework

Annex 3.1 - Quality review by selected partners of the WP6 Summer school University of Deusto

Annex 3.2 - Quality review by selected partners of the WP6 Summer school University of Deusto

Annex 4 - IFI - WP6 Meeting #1: Study visit to summer school in University of Deusto

Annex 5 – Traffic Overview

Annex 6 - IFI - Consortium meeting #2, 15-17 June 2021

Annex 7 – IFI GANTT

Annex 8 - IFI - Project Management

Annex 9 - IFI - WP2 Meeting #2: Sustainability at UNIPD and within its community

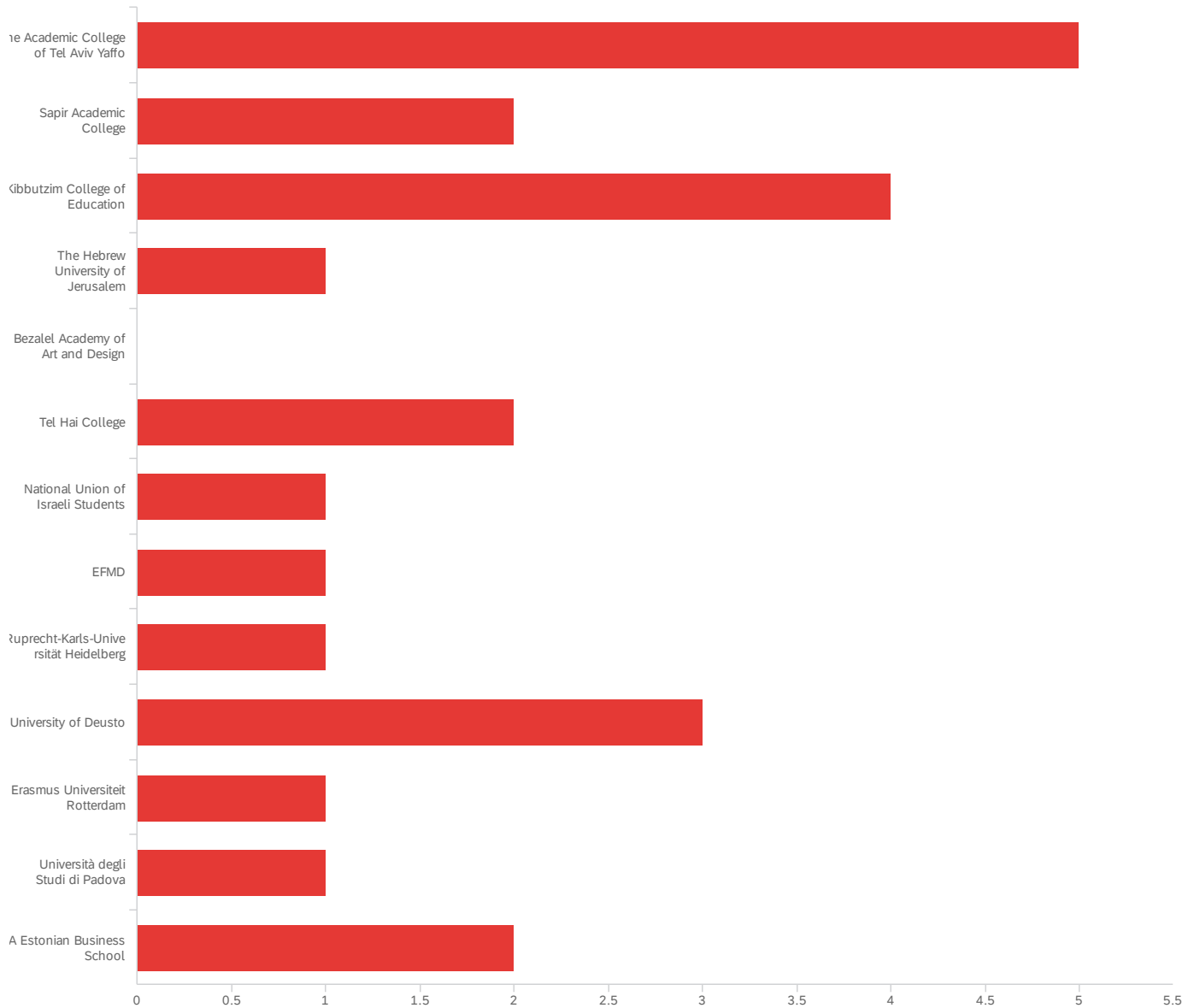
Annex 10 IFI - WP3 Meeting #1: Training for sustainability at Rotterdam School of Management, Erasmus University Rotterdam

# Default Report

IFI kick off

December 9, 2020 5:14 PM CET

Q28 - Please, select the institution that you represent.

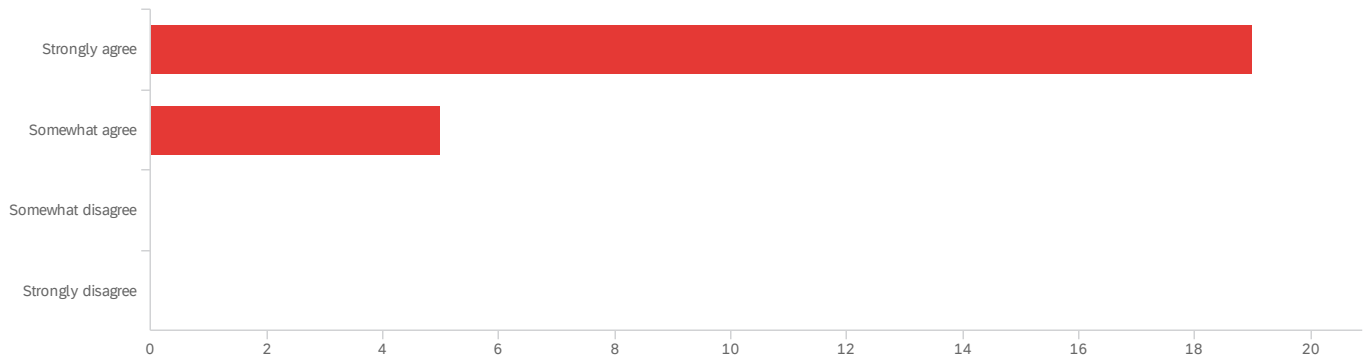


| # | Field                                  | Choice Count |
|---|--|--------------|
| 1 | The Academic College of Tel Aviv Yaffo | 5            |
| 2 | Sapir Academic College                 | 2            |
| 3 | Kibbutzim College of Education         | 4            |
| 4 | The Hebrew University of Jerusalem     | 1            |

| #  | Field                                 | Choice<br>Count |
|----|---------------------------------------|-----------------|
| 5  | Bezalel Academy of Art and Design     | 0               |
| 6  | Tel Hai College                       | 2               |
| 7  | National Union of Israeli Students    | 1               |
| 8  | EFMD                                  | 1               |
| 9  | Ruprecht-Karls-Universität Heidelberg | 1               |
| 10 | University of Deusto                  | 3               |
| 11 | Erasmus Universiteit Rotterdam        | 1               |
| 12 | Università degli Studi di Padova      | 1               |
| 13 | SA Estonian Business School           | 2               |
|    |                                       | 24              |

Showing rows 1 - 14 of 14

Q3 - 1. The time allocated for the kick off meeting was sufficient.



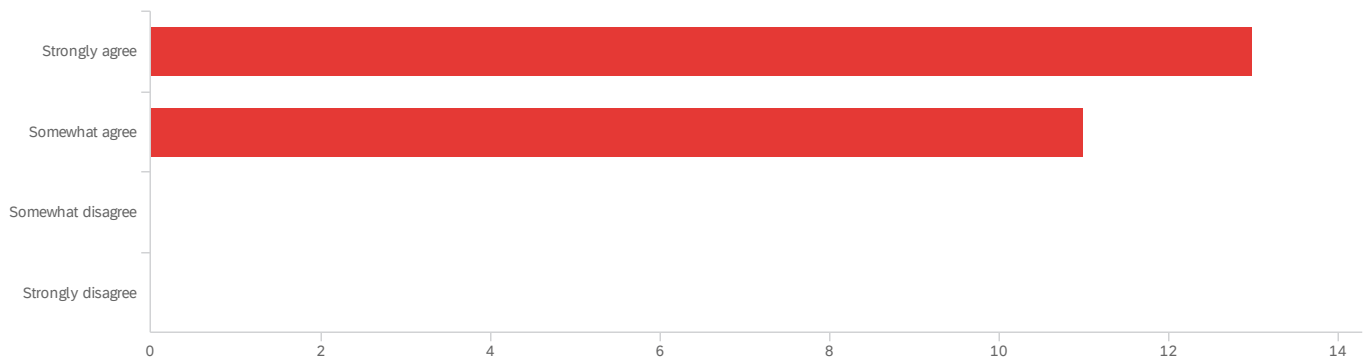
| # | Field             | Choice | Count |
|---|-------------------|--------|-------|
| 1 | Strongly agree    | 79.17% | 19    |
| 2 | Somewhat agree    | 20.83% | 5     |
| 3 | Somewhat disagree | 0.00%  | 0     |
| 4 | Strongly disagree | 0.00%  | 0     |

24

Showing rows 1 - 5 of 5

Q5 - Could you please explain the reasons why you disagree?

Q4 - 2. The platform used for the kick off meeting, allowed efficient communication.



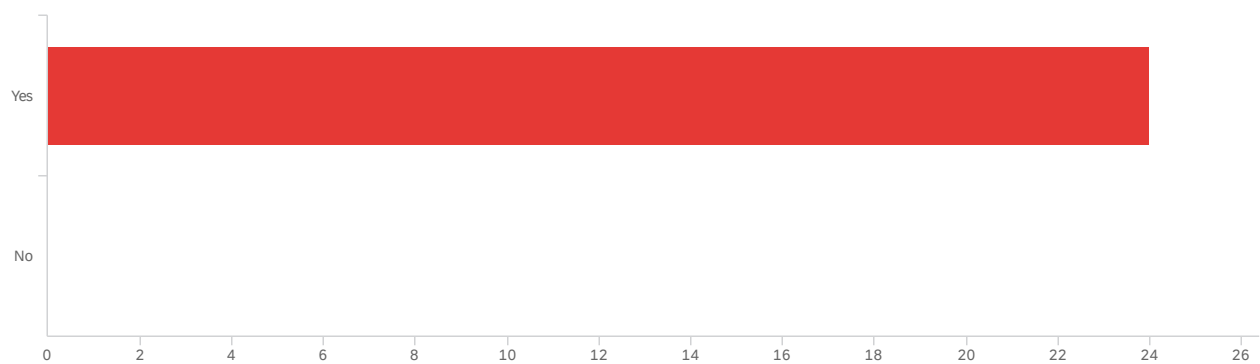
| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 54.17% 13    |
| 2 | Somewhat agree    | 45.83% 11    |
| 3 | Somewhat disagree | 0.00% 0      |
| 4 | Strongly disagree | 0.00% 0      |

24

Showing rows 1 - 5 of 5

Q6 - Could you please explain the reasons why you disagree?

Q7 - 3. I was informed about the meeting agenda, in advance of the meeting.



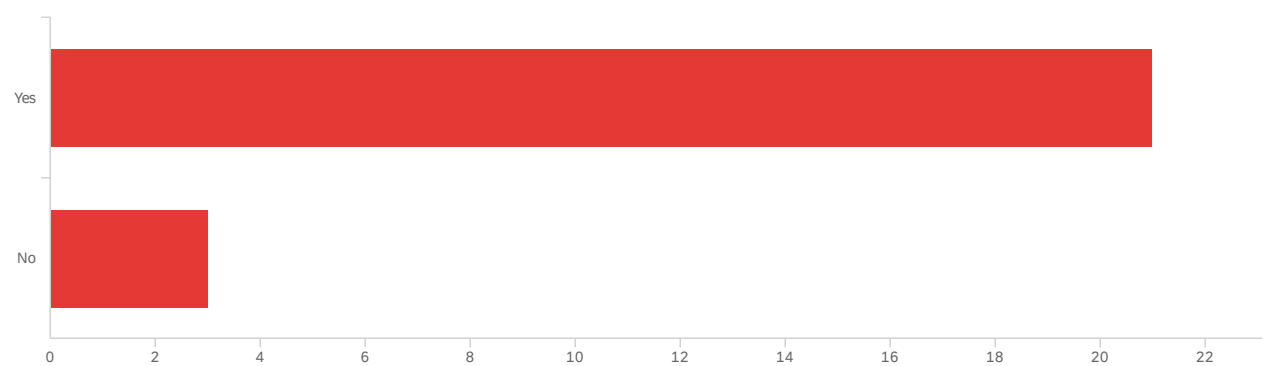
| # | Field | Choice Count |    |
|---|-------|--------------|----|
| 1 | Yes   | 100.00%      | 24 |
| 2 | No    | 0.00%        | 0  |

24

Showing rows 1 - 3 of 3



Q8 - 4. My tasks during the meeting were explained, in advance of the meeting.

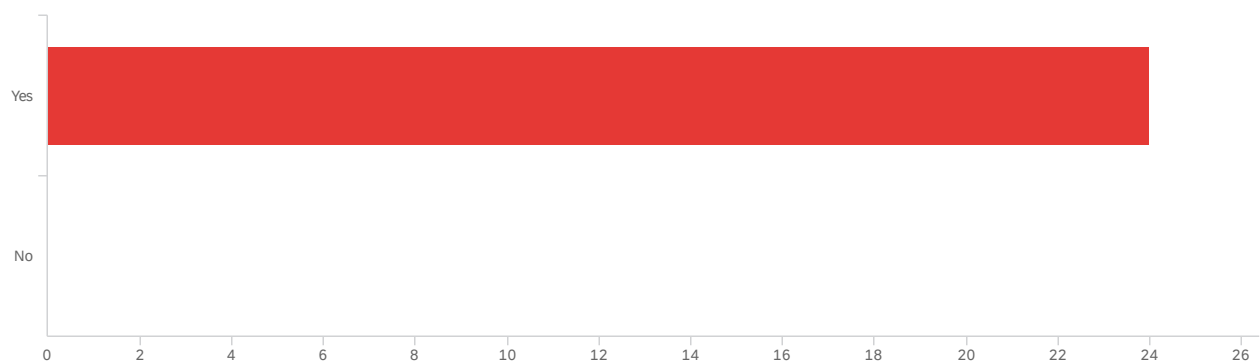


| # | Field | Choice | Count |
|---|-------|--------|-------|
| 1 | Yes   | 87.50% | 21    |
| 2 | No    | 12.50% | 3     |

24

Showing rows 1 - 3 of 3

Q9 - 5. All points of the meeting agenda were addressed.

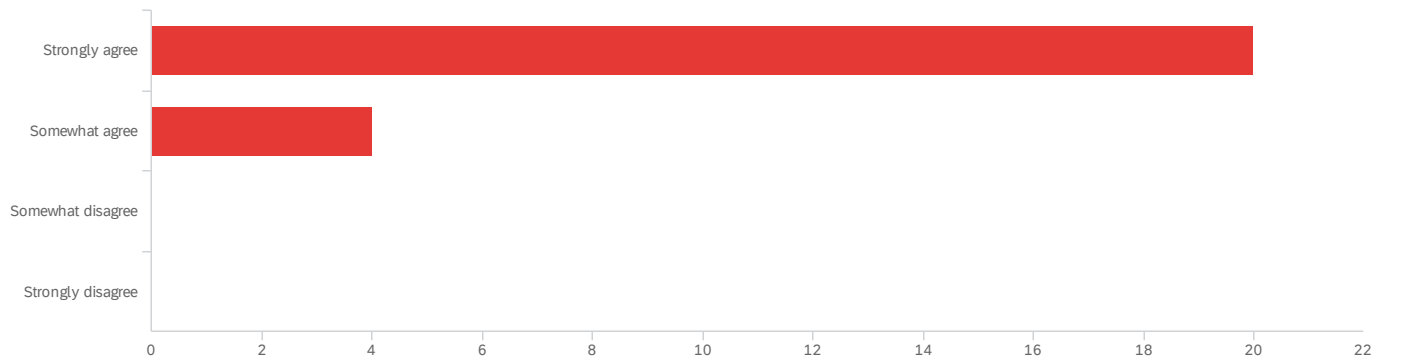


| # | Field | Choice Count |    |
|---|-------|--------------|----|
| 1 | Yes   | 100.00%      | 24 |
| 2 | No    | 0.00%        | 0  |

24

Showing rows 1 - 3 of 3

Q10 - 6. The meeting allowed me to have a better understanding of the project objectives.

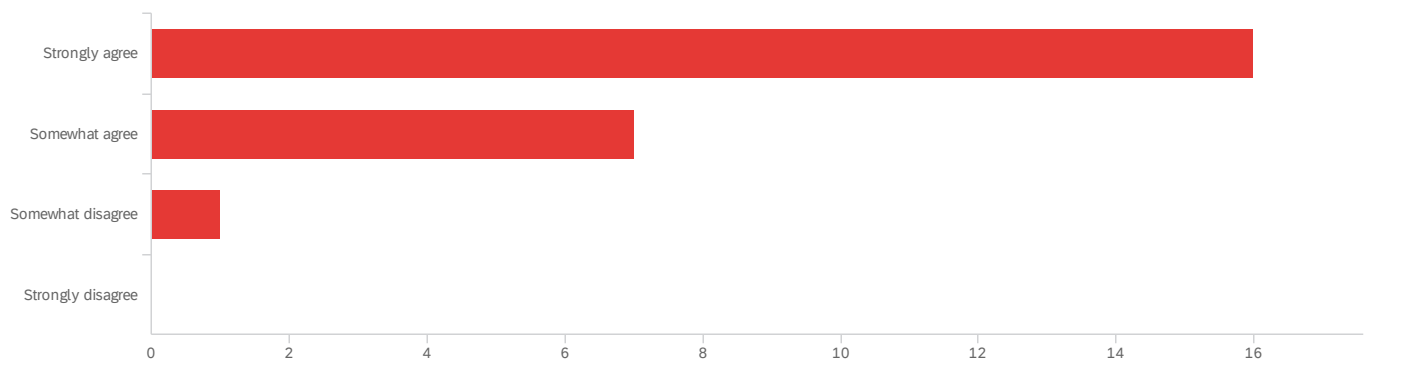


| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 83.33% 20    |
| 2 | Somewhat agree    | 16.67% 4     |
| 3 | Somewhat disagree | 0.00% 0      |
| 4 | Strongly disagree | 0.00% 0      |
|   |                   | 24           |

Showing rows 1 - 5 of 5

Q11 - Could you please explain the reasons why you disagree?

Q13 - 7. The meeting allowed me to have a better understanding of my institution’s role in the project.

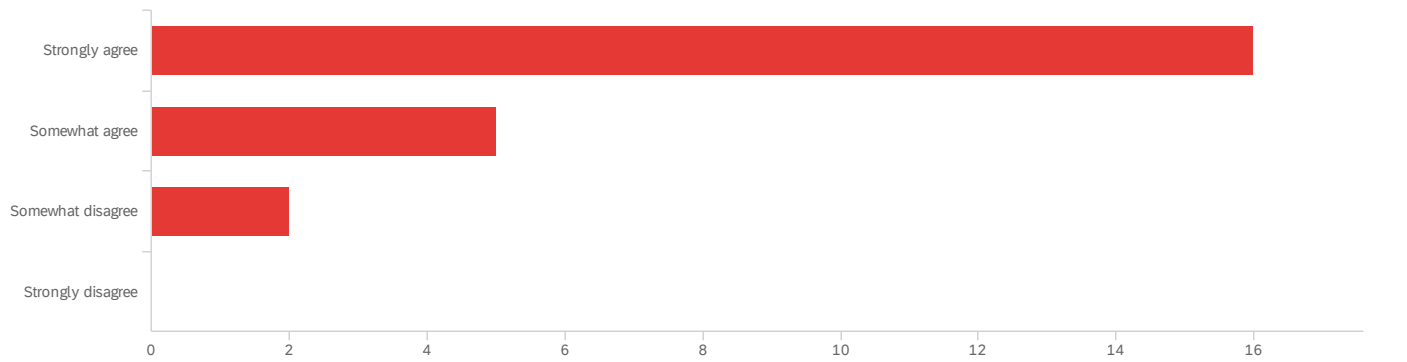


| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 66.67% 16    |
| 2 | Somewhat agree    | 29.17% 7     |
| 3 | Somewhat disagree | 4.17% 1      |
| 4 | Strongly disagree | 0.00% 0      |
|   |                   | 24           |

Showing rows 1 - 5 of 5

Q12 - Could you please explain the reasons why you disagree?

Q14 - 8. The meeting allowed me to have a better understanding of the other partners' role in the project.



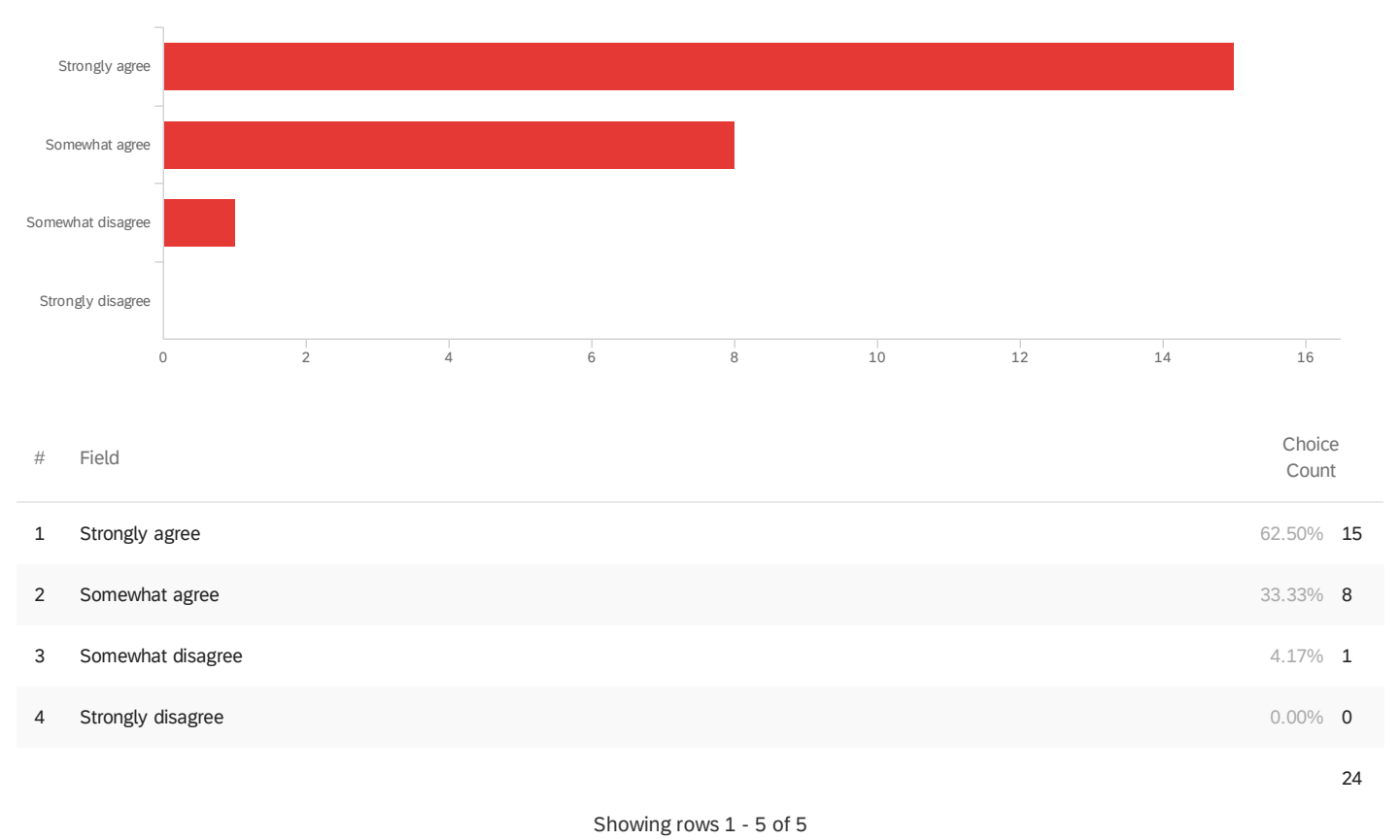
| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 69.57% 16    |
| 2 | Somewhat agree    | 21.74% 5     |
| 3 | Somewhat disagree | 8.70% 2      |
| 4 | Strongly disagree | 0.00% 0      |
|   |                   | 23           |

Showing rows 1 - 5 of 5

Q15 - Could you please explain the reasons why you disagree?

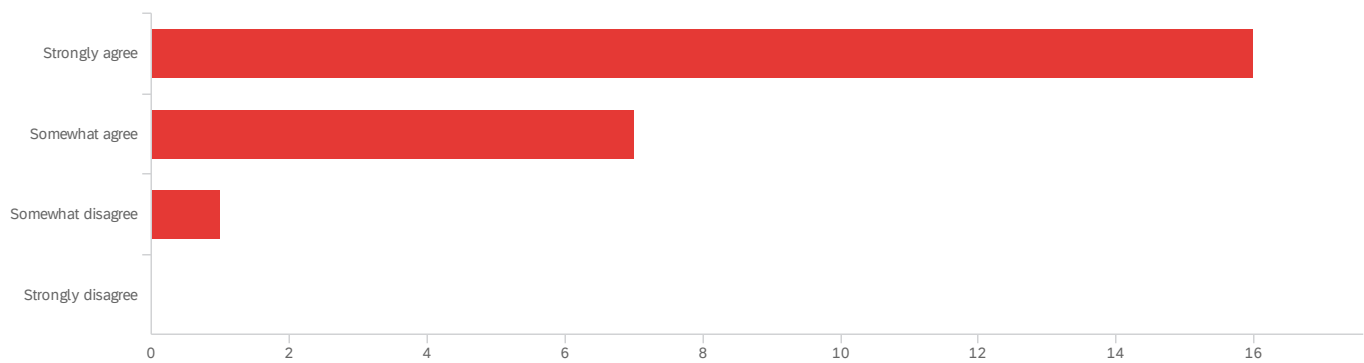


Q16 - 9. The meeting helped answer my questions with regards to the management of the project (budget, reporting etc..).



Q17 - Could you please explain the reasons why you disagree?

Q18 - 10. The meeting offered new knowledge on the topic of sustainable innovative finance.

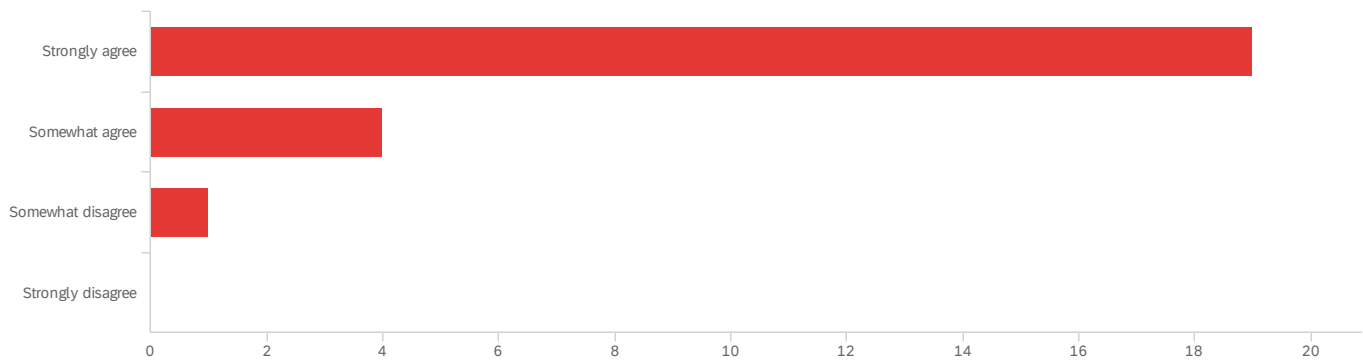


| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 66.67% 16    |
| 2 | Somewhat agree    | 29.17% 7     |
| 3 | Somewhat disagree | 4.17% 1      |
| 4 | Strongly disagree | 0.00% 0      |
|   |                   | 24           |

Showing rows 1 - 5 of 5

Q19 - Could you please explain the reasons why you disagree?

Q20 - 11. I felt welcome to participate in the discussions during the meeting.



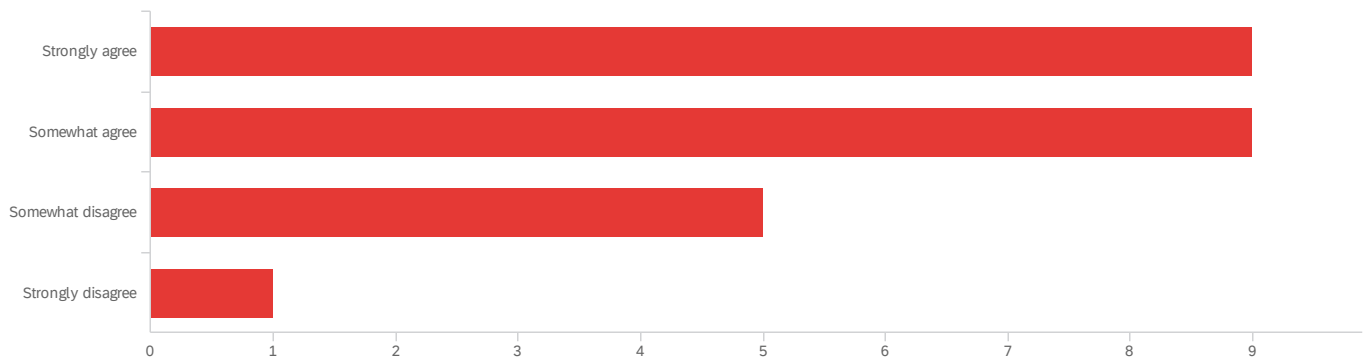
| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 79.17% 19    |
| 2 | Somewhat agree    | 16.67% 4     |
| 3 | Somewhat disagree | 4.17% 1      |
| 4 | Strongly disagree | 0.00% 0      |

24

Showing rows 1 - 5 of 5

Q21 - Could you please explain the reasons why you disagree?

Q22 - 12. It was easy to interact with the other participants in the meeting.



| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 37.50% 9     |
| 2 | Somewhat agree    | 37.50% 9     |
| 3 | Somewhat disagree | 20.83% 5     |
| 4 | Strongly disagree | 4.17% 1      |

## Q23 - Could you please explain the reasons why you disagree?

Could you please explain the reasons why you disagree?

---

Zoom platform is far less effective to know the others in comparison to physical meeting

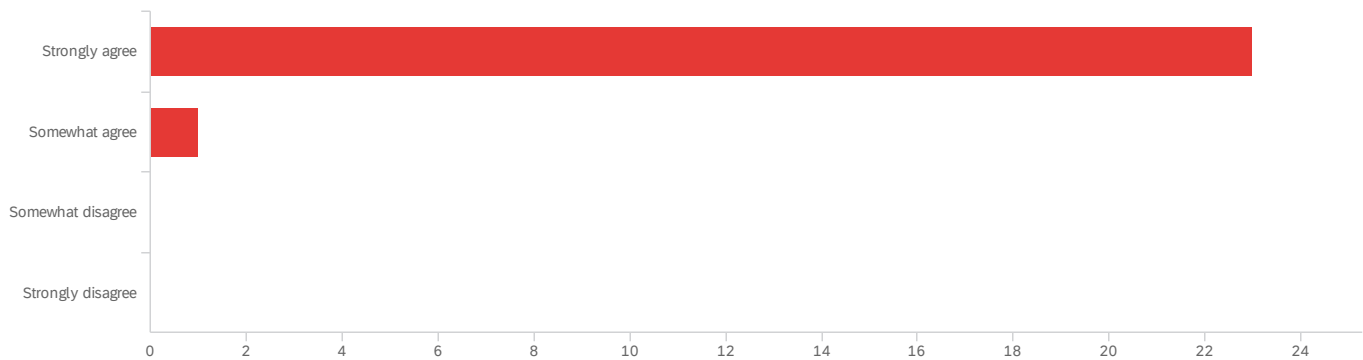
it was hard to have personal interaction, unofficial interaction.

there was not enough time to get to know each other and that is a big part of the project

The zoom platform can not replace face to face meeting. Concerning the consequences of online meeting ,the kick off meeting was great.



Q24 - 13. Overall, the meeting took place in a positive atmosphere.



| # | Field             | Choice Count |
|---|-------------------|--------------|
| 1 | Strongly agree    | 95.83% 23    |
| 2 | Somewhat agree    | 4.17% 1      |
| 3 | Somewhat disagree | 0.00% 0      |
| 4 | Strongly disagree | 0.00% 0      |

24

Showing rows 1 - 5 of 5

Q25 - Could you please explain the reasons why you disagree?

Q26 - 14. Please specify the pros and cons of the meeting with regards to the organisation (agenda, platform, allocated time, social event ...) and any recommendations for the next one.

14. Please specify the pros and cons of the meeting with regards to the org...

It was my first time participating in such a project. If there are many participants like me it might be useful to explain from first principles but I ended up getting info from other participants from my institution so it was no big deal.

The meeting was very well prepared and dealt with all necessary subejcts. Timing was very accurate. All in all a great success

Pros: Delivering the schedule and the planning of the meetings in advance, clarifying the goals of the meeting in advance, allocating time for presentations, creating an atmosphere of dialogue and friendships alongside setting a professional atmosphere. Cons: he planning of the breaks was very precise, but the meetings were always extended beyond their time, so there was no reasonable time for the breaks between the time slots.

My main issue is the budget excel that is almost impossible to work with. We need a fikle that we can SORT in order to make it easier to manage our part of the budget.

The only drawback was naturally the fact that it wasn't physical. Having said that, I think the organizers made great of ZOOM.

no comments. very well organizaed. I think the lectures enriched the interaction.

all was accurate, manaing thhe kickoff by zoom is not easy and it went great, the social event was short and sweet, the guest lectures were interesting - only issue is what is for the next step that was missing and all the recordings that we are still waiting for and could have been delivered earlier for those who missed a session (preferably at the same day)

The meeting included two wonderful keynote lectures. They opened my mind. It was orgenized; structured and bright. The order of the subjects was logical: Presentation of teams, presentation of projects. It is recommended to assist through the mstching process of the members to projects.

Q27 - 15. Please specify the pros and cons of the meeting with regards to themes and presentations (what you found lacking, what was discussed in more detail, critical notes and highlights from the led discussions, etc ...) and any recommendations for the next one.

15. Please specify the pros and cons of the meeting with regards to themes...

---

Themes were well chosen and specific to the project

Pros: Diverse lectures.

As a ZOOM meeting - it was too long.

They were all relevant and very much needed for kick off agenda. The key notes were EXCELLENT!

**End of Report**

# IFI - WP2 Meeting #1: Establishing the framework

Question 1    ... LIKERT SCALE

Overall, I would rate the workshop as

| Unsatisfying | Fair     | Good     | Very good |
|--------------|----------|----------|-----------|
|              | 2<br>13% | 3<br>19% | 11<br>69% |

16 Answered

1 Skipped

Question 2    ... LIKERT SCALE

I would rate the organisation of the workshop as

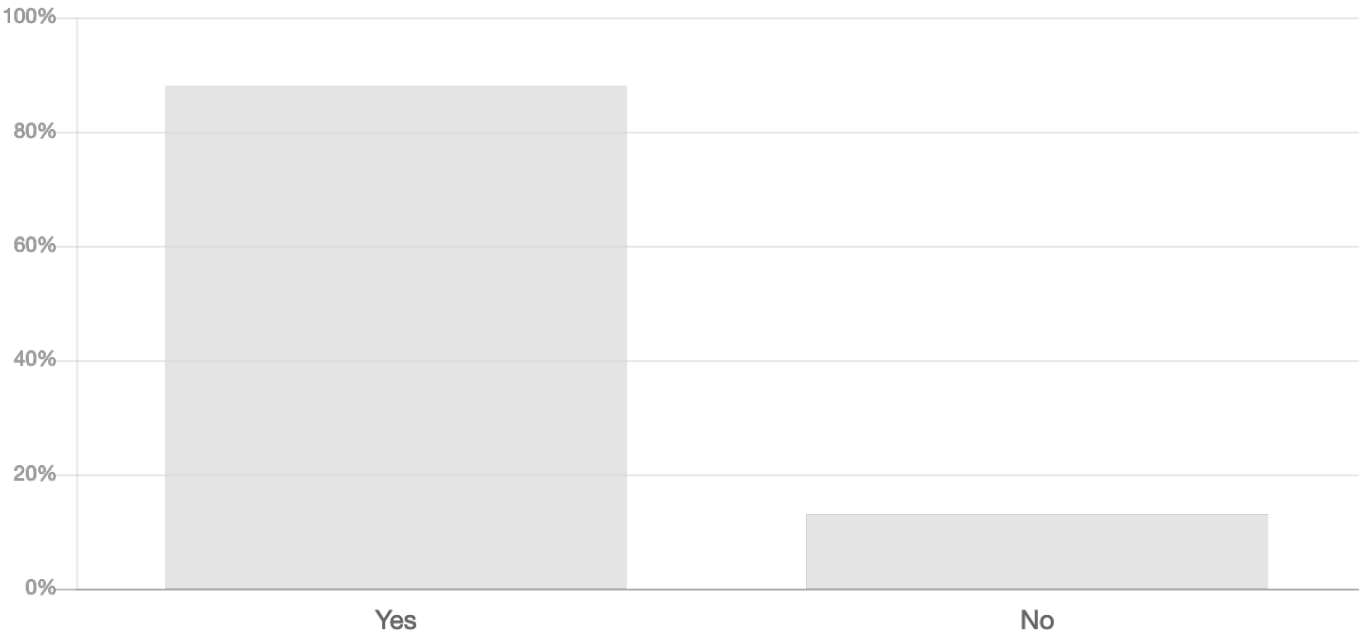
| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 6<br>40% | 9<br>60%  |

15 Answered

2 Skipped

Question 3    ≡ MULTIPLE CHOICE

I received the programme/materials in advance



| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 88%       | 14 |
| No      |  | 13%       | 2  |

16 Answered

1 Skipped

Question 4    ≡ MULTIPLE CHOICE

The objectives of the workshop were  
clearly defined



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100%16    |

16 Answered

1 Skipped

Question 5  MULTIPLE CHOICE

Materials are available on the website  
after the workshop



| ANSWERS     | RESPONSES |           |
|-------------|-----------|-----------|
| Yes         | 86%       | 12        |
| No          | 14%       | 2         |
| 14 Answered |           | 3 Skipped |

Question 6    ... LIKERT SCALE

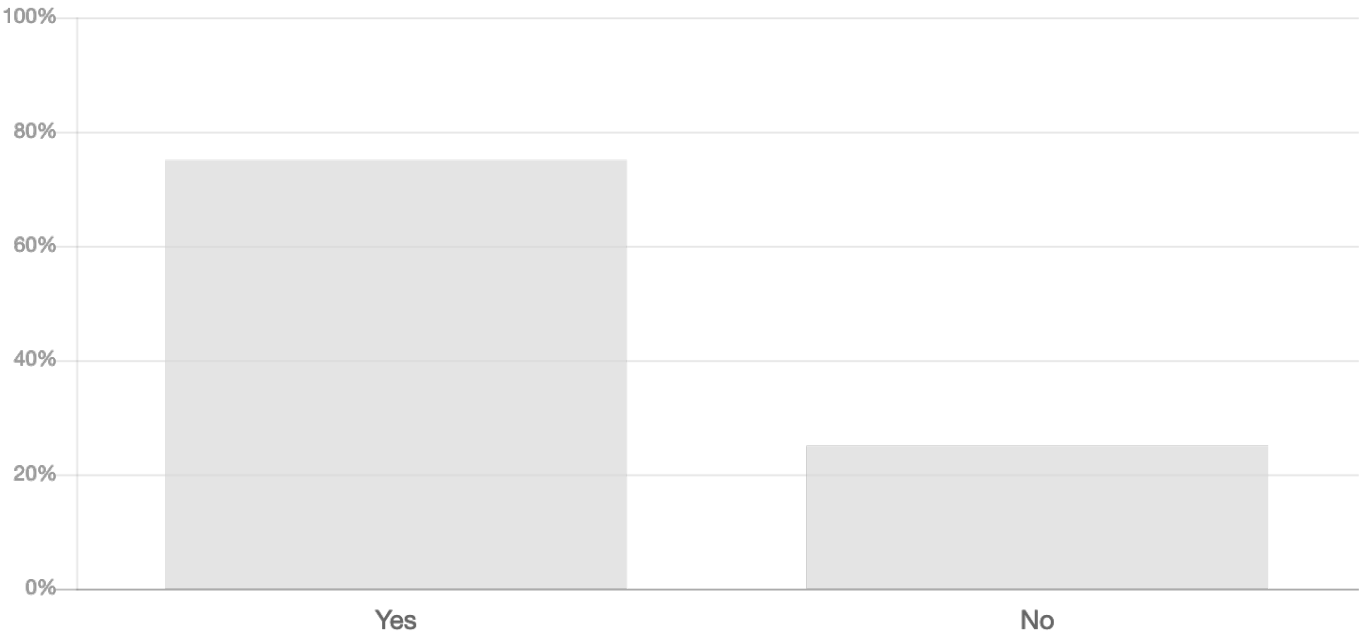
I would rate the delivery of the workshop content as

| Unsatisfying | Fair     | Good      | Very good |
|--------------|----------|-----------|-----------|
|              | 3<br>20% | 5<br>33%  | 7<br>47%  |
| 15 Answered  |          | 2 Skipped |           |

Question 7    ≡ MULTIPLE CHOICE

The duration of the workshop was adequate





| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 75%       | 12 |
| No      |  | 25%       | 4  |

16 Answered

1 Skipped

Question 8    ≡ MULTIPLE CHOICE

The workshop allowed interaction  
between the participants



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100%16    |

16 Answered

1 Skipped

Question 10    ≡ MULTIPLE CHOICE

The experts established dialogue with the participants



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 100%      | 16 |

16 Answered

1 Skipped

Question 12    ... LIKERT SCALE

I would rate the content of the workshop as

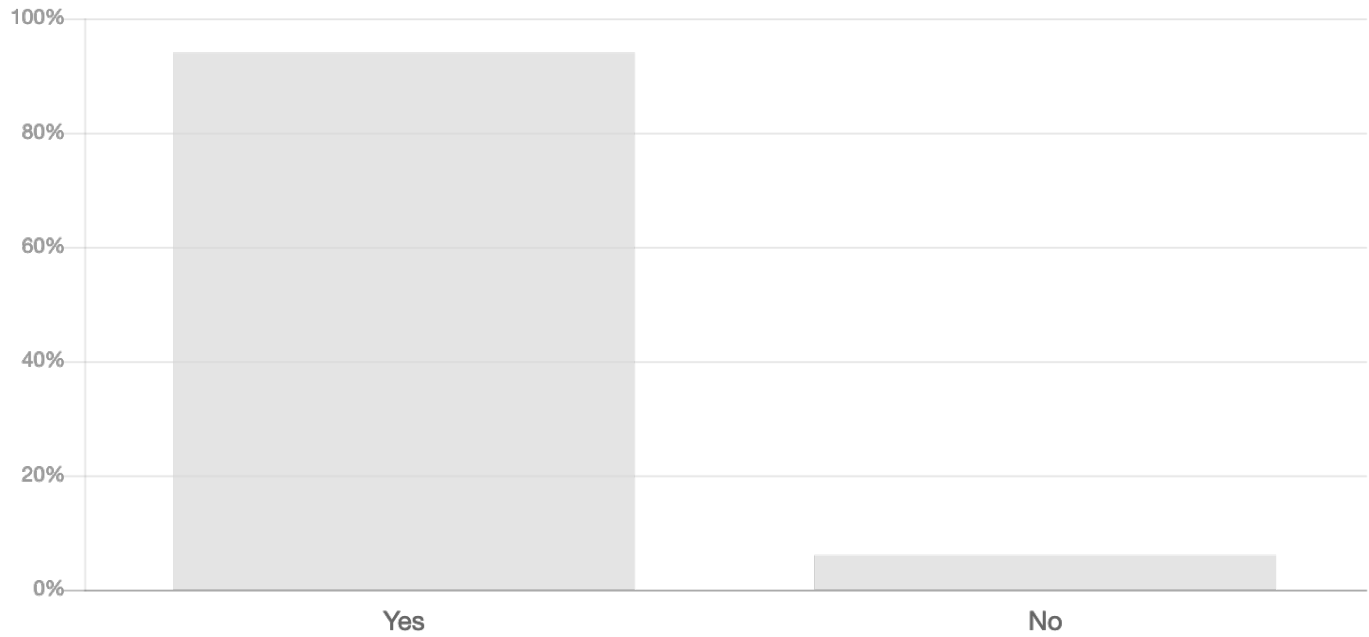
| Unsatisfying | Fair     | Good     | Very good |
|--------------|----------|----------|-----------|
|              | 2<br>13% | 4<br>27% | 9<br>60%  |

15 Answered

2 Skipped

Question 13    ≡ MULTIPLE CHOICE

The workshop improved my understanding of the theory around case study writing and simulation

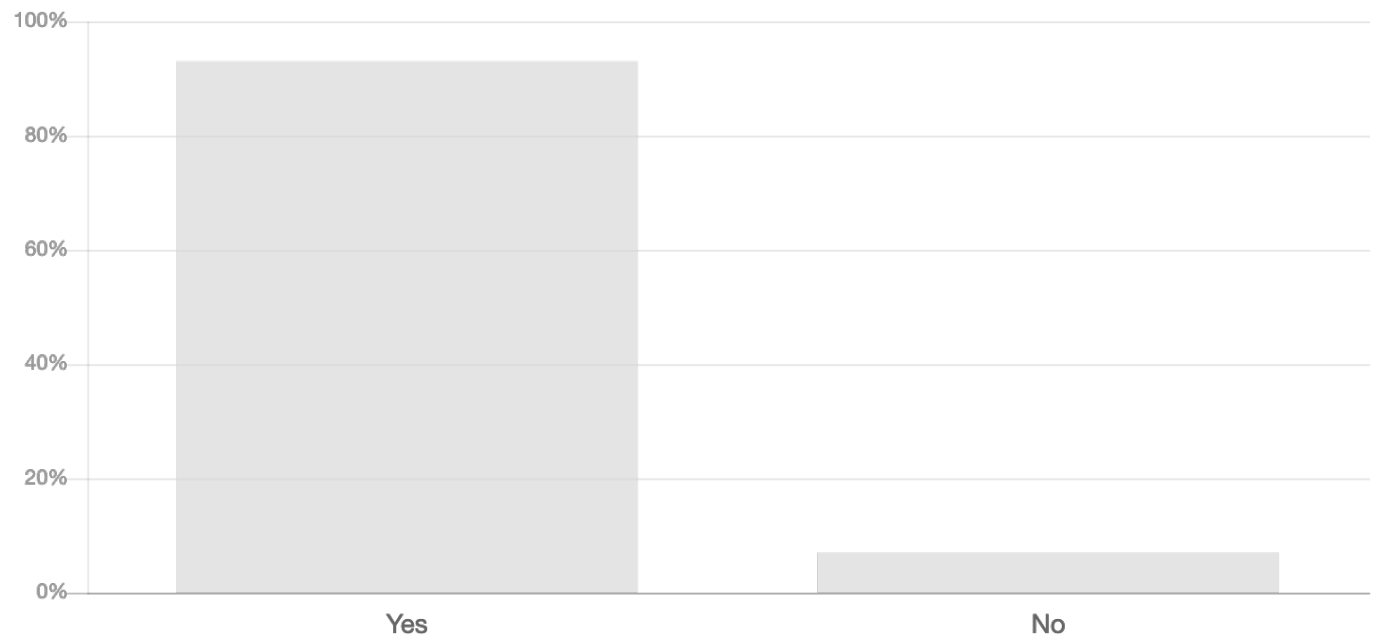


| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 94%       | 15 |
| No      | 6%        | 1  |

16 Answered 1 Skipped

Question 14    ≡ MULTIPLE CHOICE

The workshop improved my knowledge regarding practical tools for case study writing and simulation



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 93%       | 14 |
| No      | 7%        | 1  |

15 Answered 2 Skipped

Question 15    ≡ MULTIPLE CHOICE

The workshop presented me new or original perspectives on the topic case studies writing and simulation



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 93%14     |
| No      | 7%1       |

15 Answered

2 Skipped

Question 16    ≡    MULTIPLE CHOICE

The experts presented best practices on the topic case studies writing and simulation



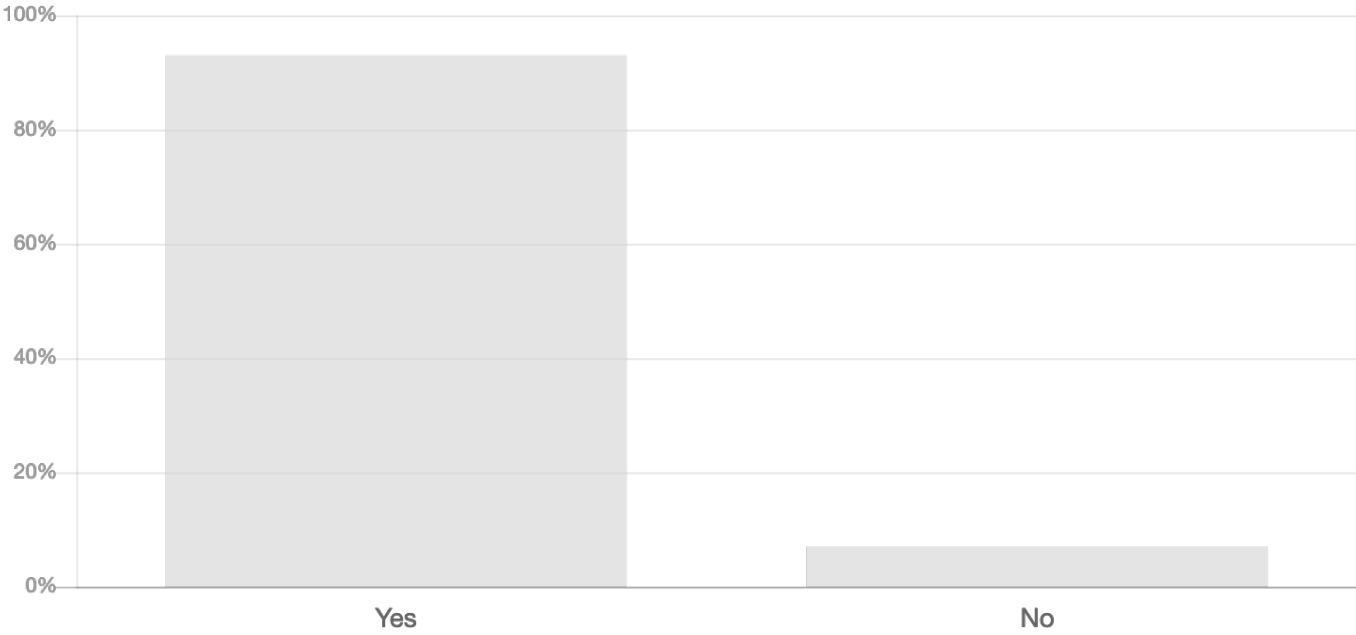
| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100%16    |

16 Answered

1 Skipped

Question 17    ≡    MULTIPLE CHOICE

The content was relevant for the situation in Israel



| ANSWERS     | RESPONSES |           |
|-------------|-----------|-----------|
| Yes         | 93%       | 13        |
| No          | 7%        | 1         |
| 14 Answered |           | 3 Skipped |

Question 18    ... LIKERT SCALE

I would rate the quality of the workshop as

| Unsatisfying | Fair    | Good      | Very good |
|--------------|---------|-----------|-----------|
|              | 1<br>7% | 4<br>27%  | 10<br>67% |
| 15 Answered  |         | 2 Skipped |           |

Question 19    ≡ MULTIPLE CHOICE


The workshop improved my general knowledge/understanding of the project



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 100%      | 16 |

16 Answered

1 Skipped

Question 20  MULTIPLE CHOICE

I will be able to apply some of the key learning points to my tasks as professional



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 100%      | 16 |

16 Answered

1 Skipped

Question 21  MULTIPLE CHOICE

The workshop met my expectations





| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 88%       | 14 |
| No      | 13%       | 2  |




16 Answered

1 Skipped

Question 22 ¶ PARAGRAPH TEXT





I particularly liked or disliked some aspects in the workshop:

| ANSWERS   | DATE                 |                   |
|---|----------------------|-------------------|
| On the first day, it was worthwhile to shorten the lectures, zoom platform is not meant for long use. There was also a lack of interaction during this day. The second day which was more of a workshop experience was excellent! | April 28, 2021 23:08 | <a href="#">🔗</a> |
| SOMETIMES IT LOOKS LIKE A PRIVATE CONVERSATION I DID NOT FEEL COMFORTABLE TO JOIN   | April 28, 2021 17:43 | <a href="#">🔗</a> |
| The high speed talk of Prof. Gal Raz was very difficult to follow in such a digital format which limited its productivity. Fortunately it was followed by more interactive exchange.  | April 28, 2021 12:17 | <a href="#">🔗</a> |
| Long days on ZOOM are not sustainable   | April 25, 2021 07:17 | <a href="#">🔗</a> |

| ANSWERS  | DATE                 |   |
|--|----------------------|---|
| Some lectures were too long. In general, a 6-hour workshop is already long and should not go overtime. | April 24, 2021 15:56 |  |
| The presentations of case studies and the workshop on methodological aspects                           | April 23, 2021 12:54 |  |
| + case studies form practitioners  | April 23, 2021 11:12 |  |
| 7 Answered   |                      | 10 Skipped  |

Question 23 ¶ PARAGRAPH TEXT

For the next activities, I would recommend improving the following aspects:

| ANSWERS   | DATE                 |   |
|---|----------------------|---|
| Not more than 30 min of lecture, it's better to "break" it with interaction, rooms, etc | April 28, 2021 23:08 |  |
| WILL BE VERY HELPFUL TO HAVE MATERIALS AHEAD OF TIME                                    | April 28, 2021 17:43 |  |
| Shorter days for ZOOM workshops/meetings  | April 25, 2021 07:17 |  |
| I would limit the presentations of the "story" type to 15, rather than 30, minutes.     | April 24, 2021 15:56 |  |
| 4 Answered  |                      | 13 Skipped  |

In your opinion,

- were the topics below covered by the presentations, workshops, speeches, lectures or other during the WP6 Summer school at the University of Deusto?
- If yes, by which particular presentations, workshops, speeches, lectures or other?
- Do you have any recommendations for the upcoming activities in order to ensure that all these topics are covered?

*Please, limit your answer to 5 lines maximum.*

- Theory and models of SF

While models of SF were well presented, I thought we were missing a definition we can work with during this project. To my understanding, though related subjects, SF and ESG are not the same. I think that stating what is SF means to us in the aspect of this project (meaning, not necessarily narrow and limiting definition) would be helpful.

*Impact investment in DBS programmes / Cristina San Salvador del Valle*

- Practice and connection with the industry

It was fascinating to learn about the ESG/SF finance ecosystem in Deusto! It was inspiring to see how well the University of Deusto is connected to local industry leaders. I was curious to know if there something in those relations unique to Spain/ EU Vs. other places worldwide.

*Including the perspective of Ethical banks in University programmes / Peru Sasia  
Fundación BBK / The role of banking foundations / Eider Inunciaga  
Hydrogen valley – Petronor / Elías Unzueta*

- Appropriate pedagogical approaches for such short-term programs

All contents related to the ESG Finance Program was important and well said. The only thing I would be happy to have in addition to that was a concrete syllabus to learn from. Especially when it comes to teaching students with no financial background (an aspect which was partially covered by meeting some of the participants themselves)

*The challenge of commercialization / Judit Cano*

*Pedagogic model of Deusto (MUFD/MAUD): implementation on ESG Finance programmes / María G<sup>a</sup> Feijoo*

In your opinion,

- were the topics below covered by the presentations, workshops, speeches, lectures or other during the WP6 Summer school at the University of Deusto?
- If yes, by which particular presentations, workshops, speeches, lectures or other?
- Do you have any recommendations for the upcoming activities in order to ensure that all these topics are covered?

*Please, limit your answer to 5 lines maximum.*

- Theory and models of SF

These topics were mentioned as subjects being taught in courses at Deusto University as well in the summer school.

1. Jon Recacoechea, Director of ESG Finance Summer programme, reviewed the subjects covered in the summer school such as ESG ecosystem, women in finance, asset management, and extra.
2. Guillermo Badia, lecturer and, researcher in sustainable finance, reviewed the ESG finance courses and the research held in Deusto.
3. Cristina San Salvador del Valle, acumen fellow lecturer at DBS, discussed impact investment in DBS programmes.

There was no discussion about specific theory or models of SF. My recommendation is that in the future the guest university will dedicate few lectures on those subjects.

- Practice and connection with the industry

Yes. This topic was covered in depth, there were several lectures of practitioners who also described the way of cooperation with DBS as follow:

1. Ignacio Real de Asua, director of capital markets and financial risk at Iberdola, discussed the involvement of Iberdola in summer programme and other DBS programmes.
2. Peru Sasia, chairman of European Federation of Ethical Banks, discussed the perspective of ethical banks.
3. Iker Larrera, Head of Markets Division, Factor Co2, described the involvement of factor Co2 in summer programme.
4. BBK, discussed the role of banking foundations.
5. Elias Unzueta, Chief innovation officer at Petronor Innovation, discussed the hydrogen valley-Petronor.
6. Jordi Albareda, founder at Fair Saturday, described the Fair Saturday role in ExEd.

- Appropriate pedagogical approaches for such short-term programs

Yes. There were few lectures discussing that topic:

1. Maria G Feijoo, responsible for teaching innovation at DBS, and Matxalen Bealteuigoitia, teaching quality and pedagogy, discussed pedagogic model of Deusto and the implementation on ESG Finance.
2. Luana Ferreira, researcher at Deusto, discussed team work with summer programme students.

In addition, they discussed the way to market the programme:

1. Judit Cano, global engagement office DBS, and Pilar Puyana, international commercialization DBS, discussed the challenge of commercialization.

General comment: They created a link with all lectures, it was a great idea.

# IFI - WP6 Meeting #1: Study visit to summer school in University of Deusto

Question 1    ... LIKERT SCALE

Overall, I would rate the study visit as

| Unsatisfying | Fair    | Good     | Very good |
|--------------|---------|----------|-----------|
|              | 1<br>8% | 3<br>25% | 8<br>67%  |

12 Answered      0 Skipped

Question 2    ... LIKERT SCALE

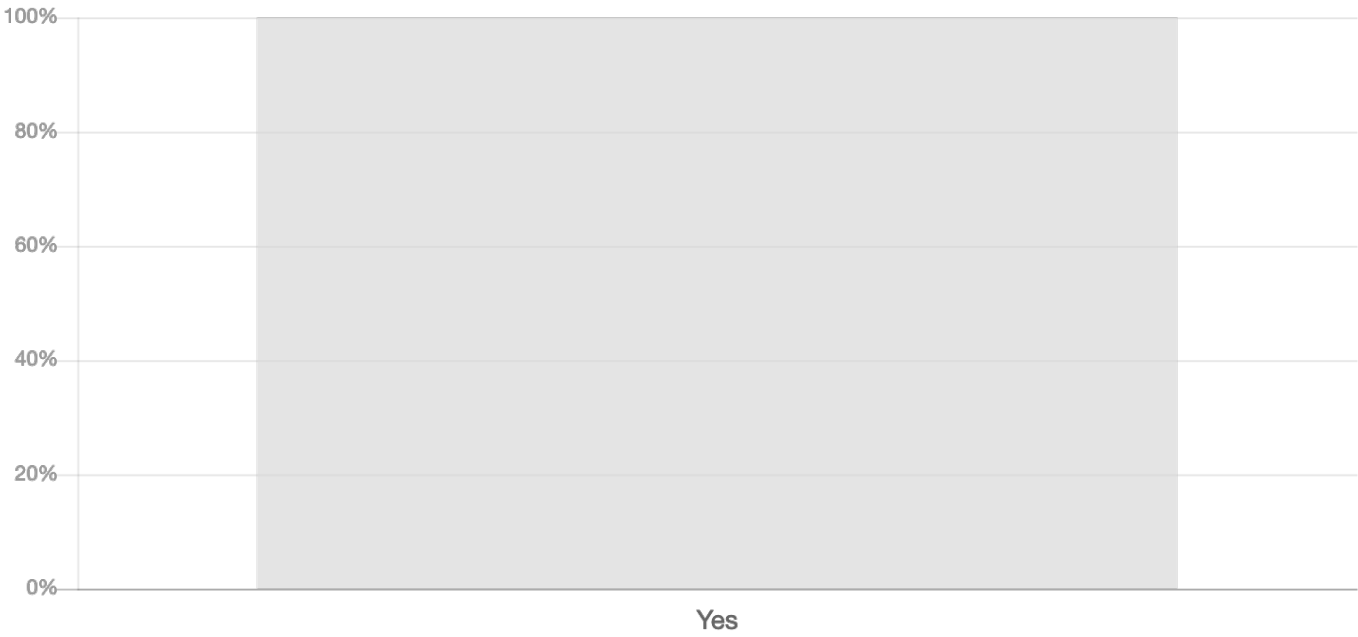
I would rate the organisation of the study visit as

| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 1<br>11% | 8<br>89%  |

9 Answered      3 Skipped

Question 3    ≡ MULTIPLE CHOICE

I received the programme/materials in advance



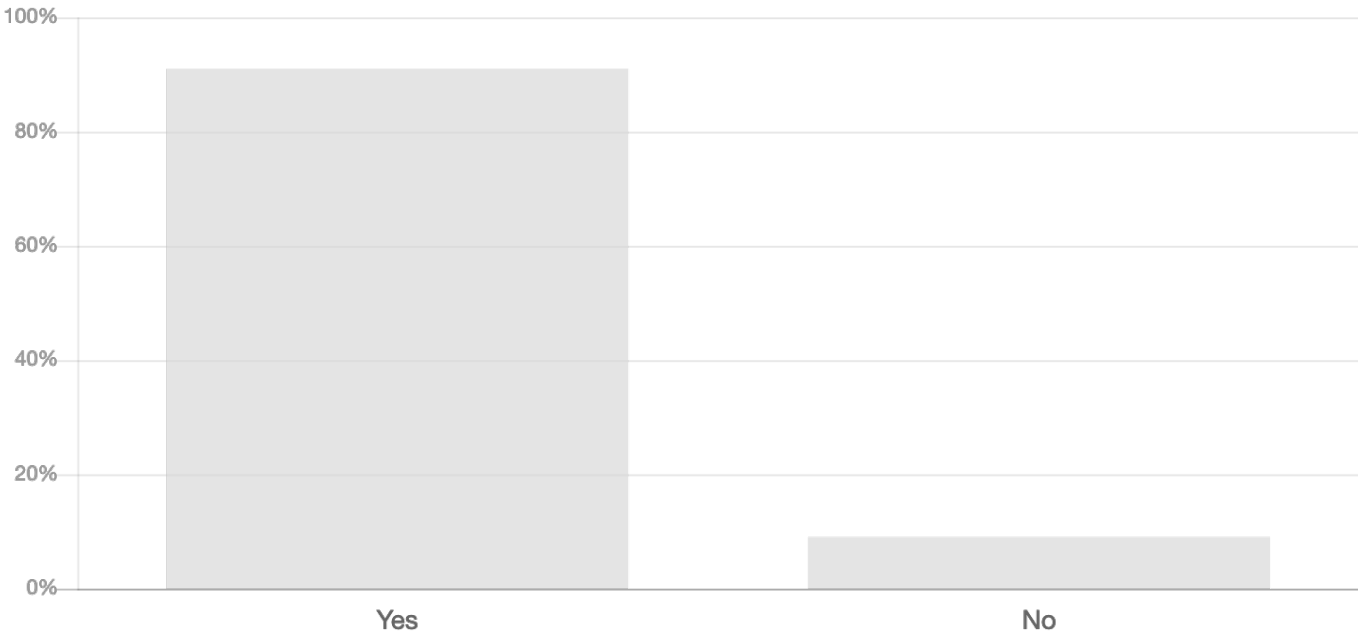
| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100%12    |

12 Answered

0 Skipped

Question 4 ☰ MULTIPLE CHOICE

The objectives of the study visit were clearly defined

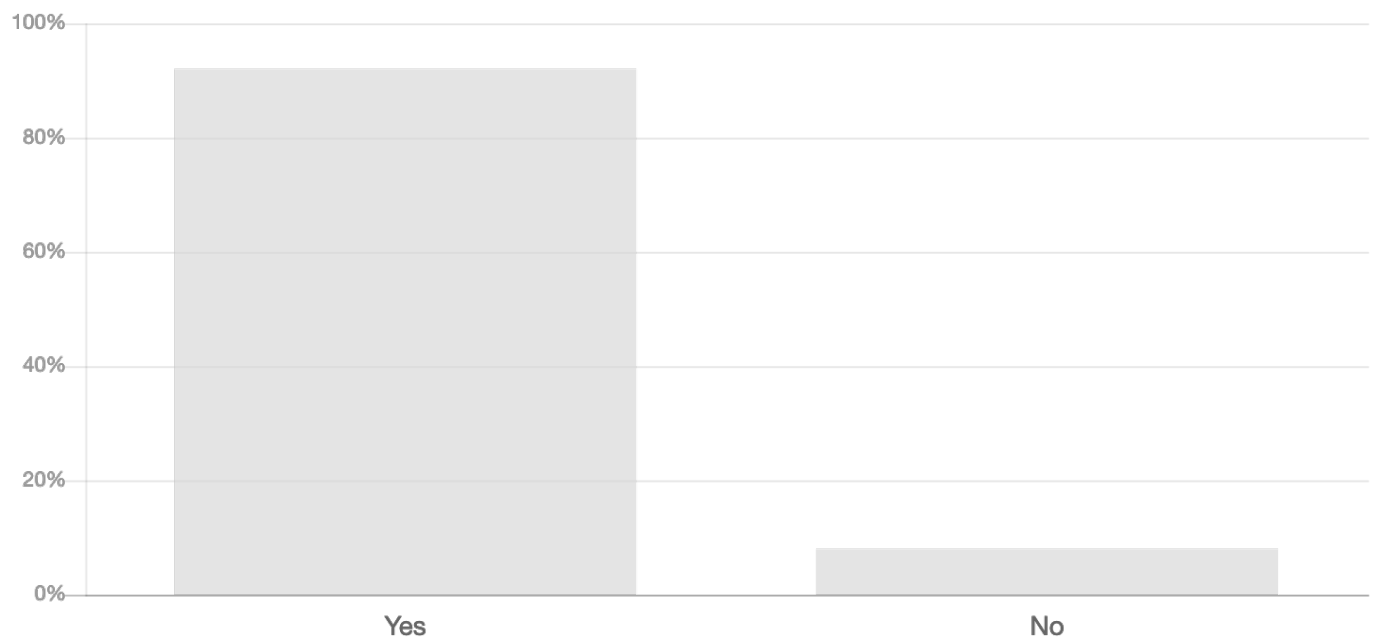




| ANSWERS     | RESPONSES |           |
|-------------|-----------|-----------|
| Yes         | 91%       | 10        |
| No          | 9%        | 1         |
| 11 Answered |           | 1 Skipped |

Question 5    ≡ MULTIPLE CHOICE

Materials are available on the website after the study visit



| ANSWERS     | RESPONSES |           |
|-------------|-----------|-----------|
| Yes         | 92%       | 11        |
| No          | 8%        | 1         |
| 12 Answered |           | 0 Skipped |

Question 6    ... LIKERT SCALE

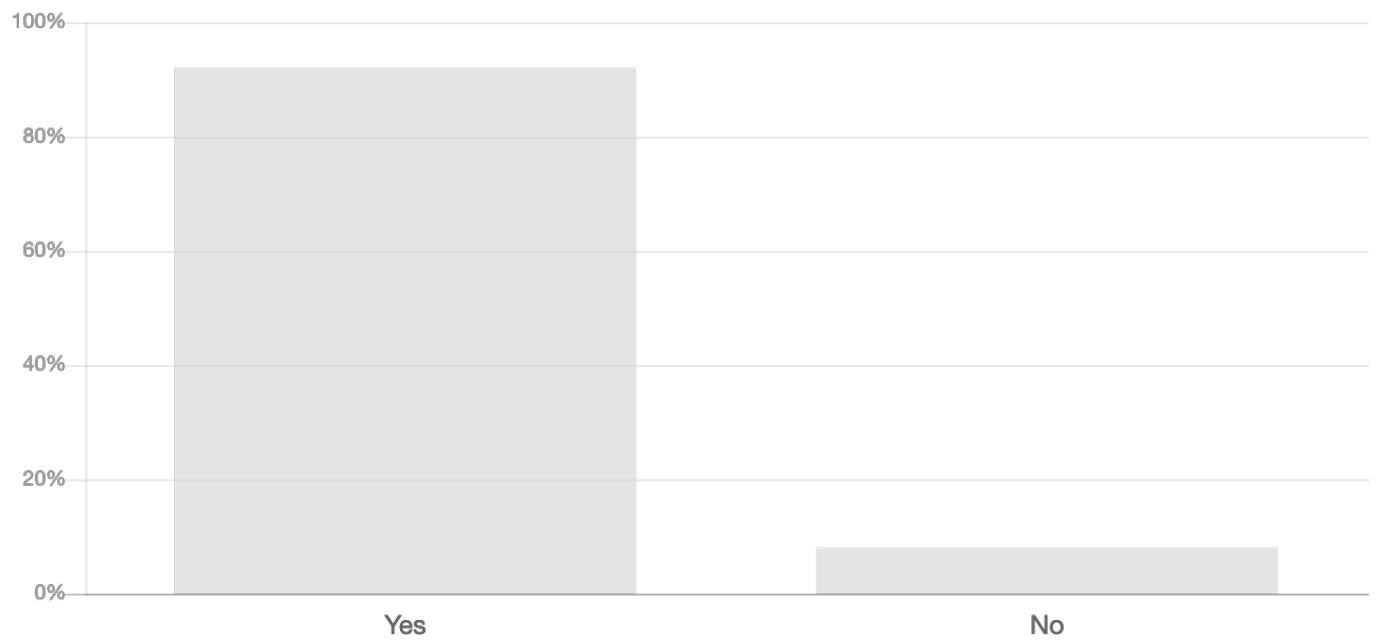
I would rate the delivery of the study visit

as

| Unsatisfying | Fair | Good      | Very good |
|--------------|------|-----------|-----------|
|              |      | 4<br>40%  | 6<br>60%  |
| 10 Answered  |      | 2 Skipped |           |

Question 7 ☰ MULTIPLE CHOICE

The duration of the study visit was adequate

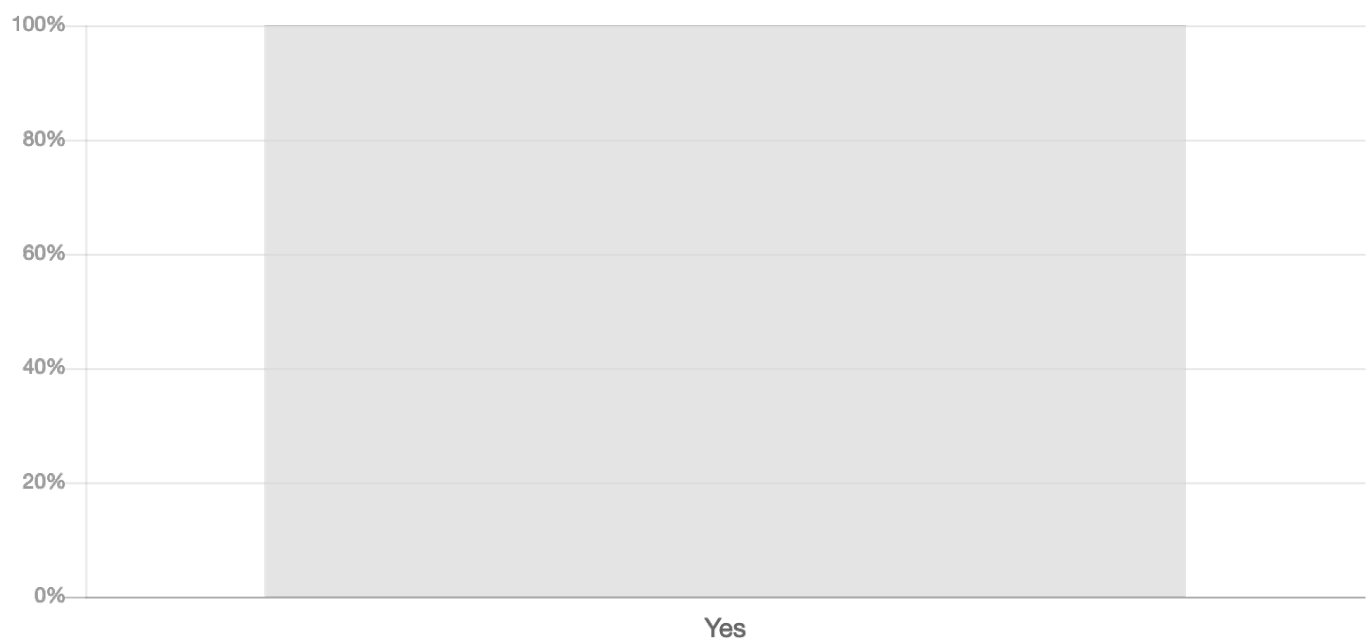


| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 92%       | 11 |
| No      | 8%        | 1  |

12 Answered 0 Skipped

Question 8 ☰ MULTIPLE CHOICE

The study visit allowed interaction between the participants



| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 100%      | 12 |

12 Answered

0 Skipped

Question 9    ≡ MULTIPLE CHOICE

There was a good mix of theory, practice and discussion



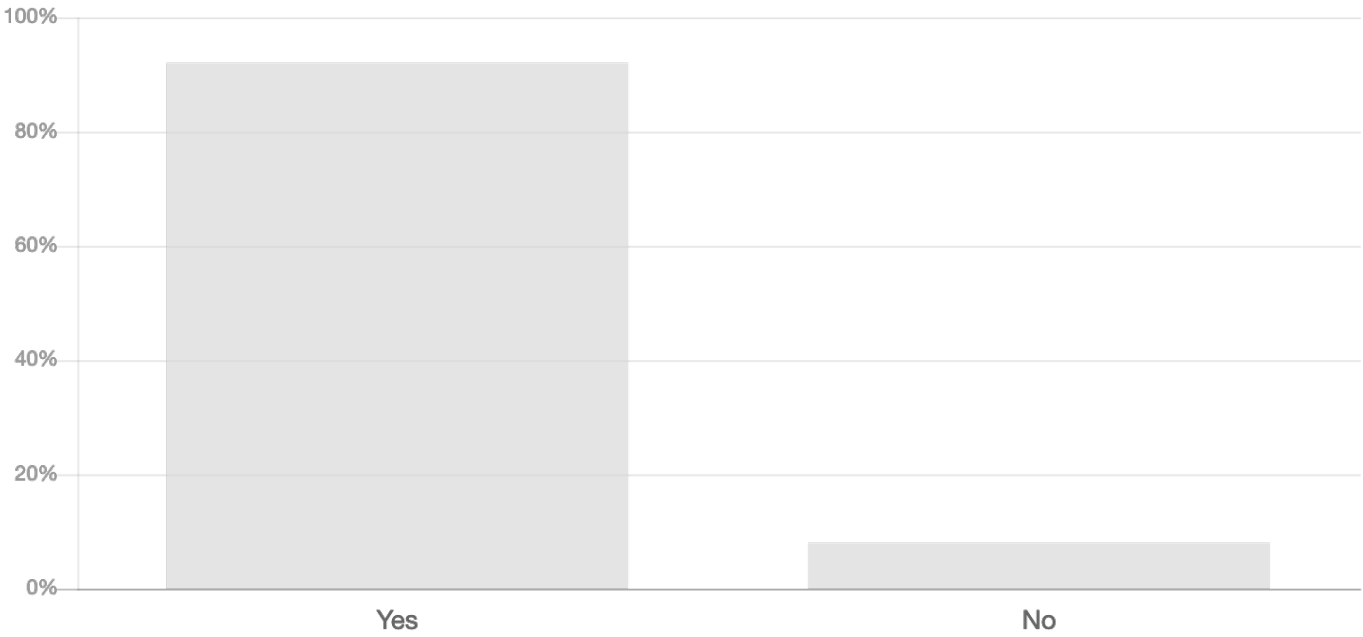
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 83%       | 10 |
| No      |  | 17%       | 2  |

12 Answered

0 Skipped

Question 10    ≡ MULTIPLE CHOICE

The experts established dialogue with the participants



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 92%       | 11 |
| No      | 8%        | 1  |

12 Answered

0 Skipped

Question 11    ... LIKERT SCALE

I would rate the content of the study visit as

| Unsatisfying | Fair     | Good     | Very good |
|--------------|----------|----------|-----------|
| 1<br>11%     | 2<br>22% | 1<br>11% | 5<br>56%  |

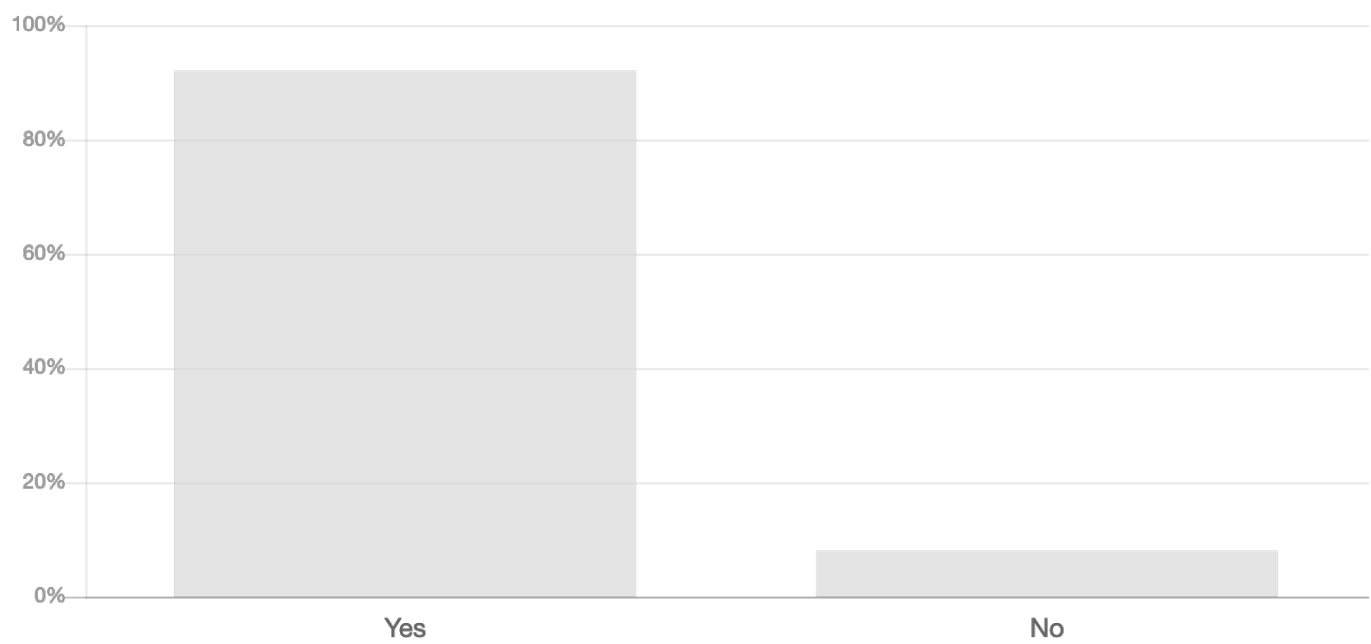
9 Answered

3 Skipped

Question 12    ≡ MULTIPLE CHOICE

The study visit improved my understanding of the content needed for

organising a summer school on impact and sustainable finance



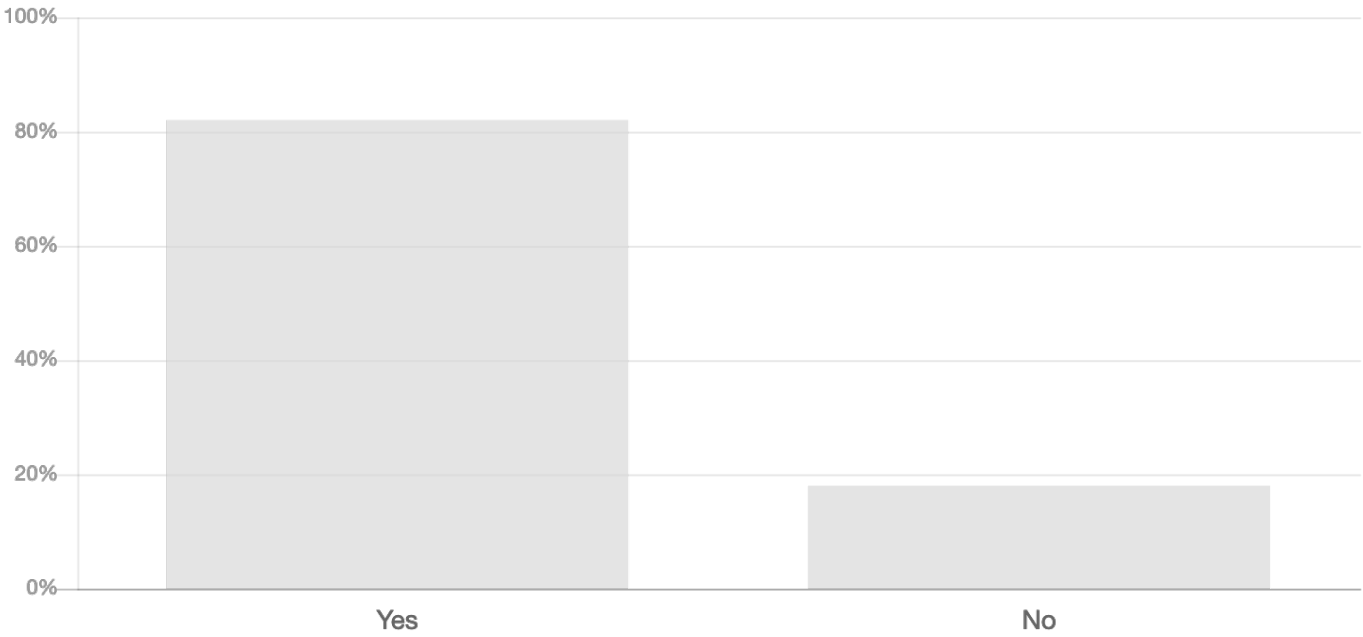
| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 92%       | 11 |
| No      | 8%        | 1  |

12 Answered

0 Skipped

Question 13    ≡ MULTIPLE CHOICE

The study visit improved my understanding of the administration needed for organising a summer school on impact and sustainable finance



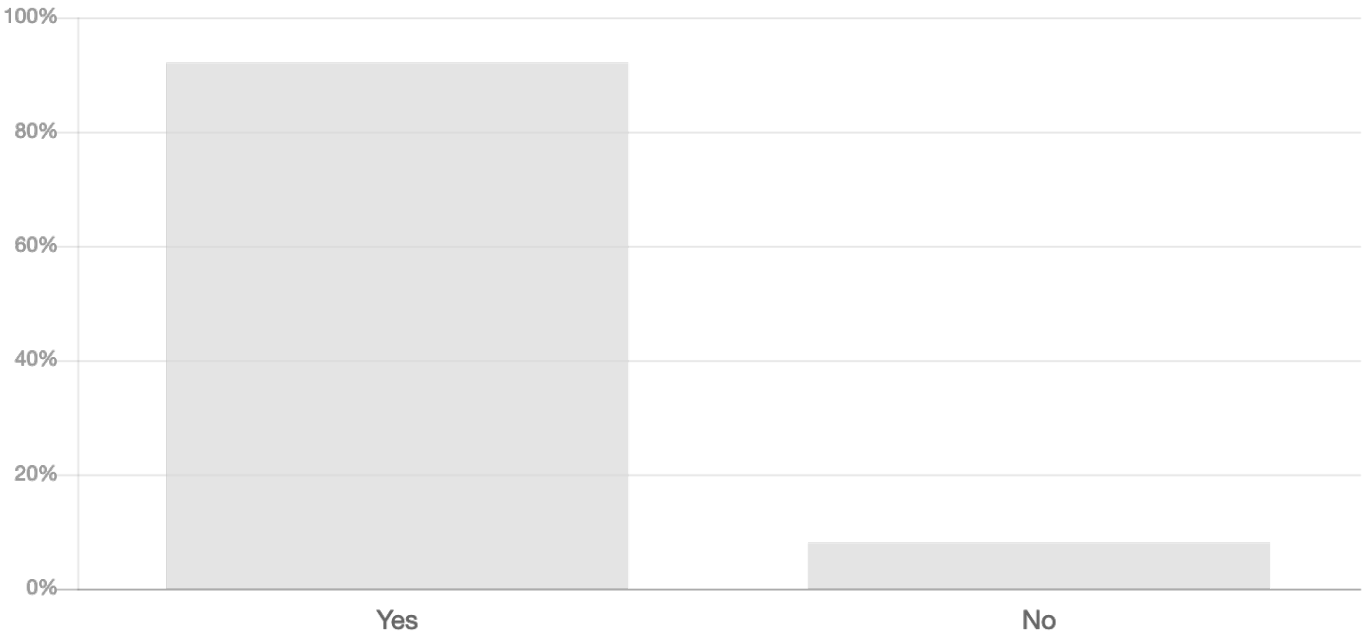
| ANSWERS |  | RESPONSES |   |
|---------|--|-----------|---|
| Yes     |  | 82%       | 9 |
| No      |  | 18%       | 2 |

11 Answered

1 Skipped

Question 14    ≡    MULTIPLE CHOICE

The study visit presented new perspectives in the filed of impact and sustainable finance



| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 92%       | 11 |
| No      |  | 8%        | 1  |

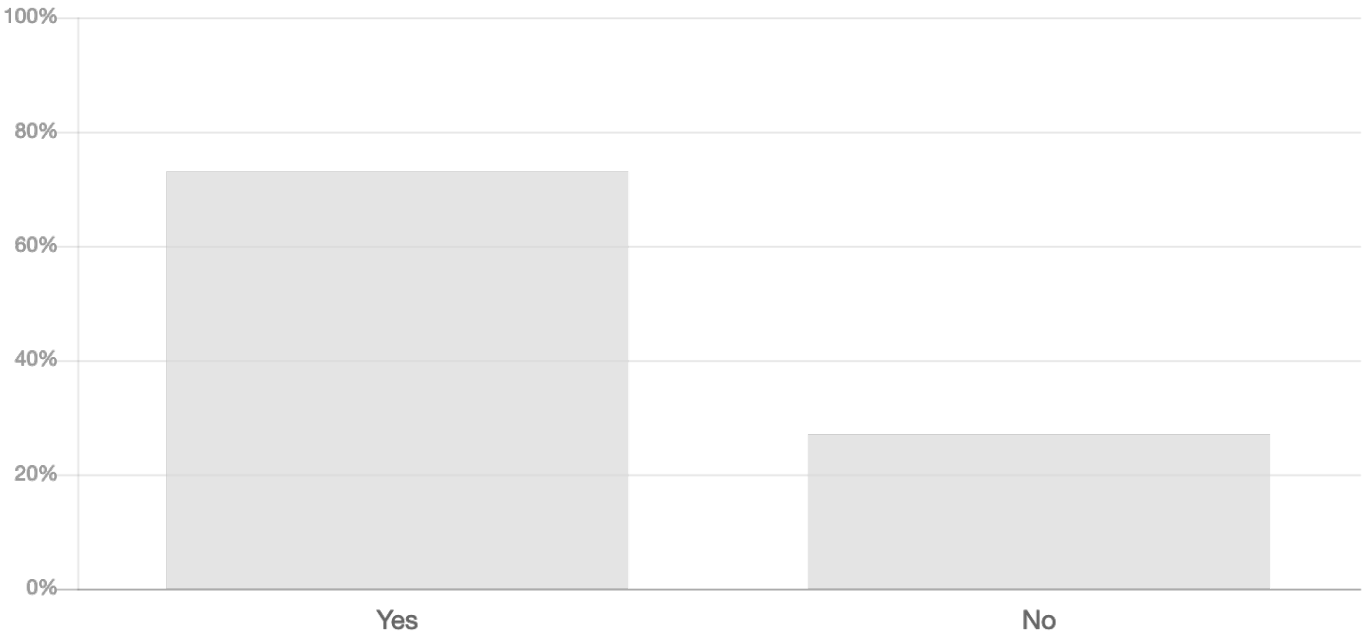
12 Answered

0 Skipped

Question 15    ≡ MULTIPLE CHOICE

The study visit presented best practices in the filed of impact and sustainable finance





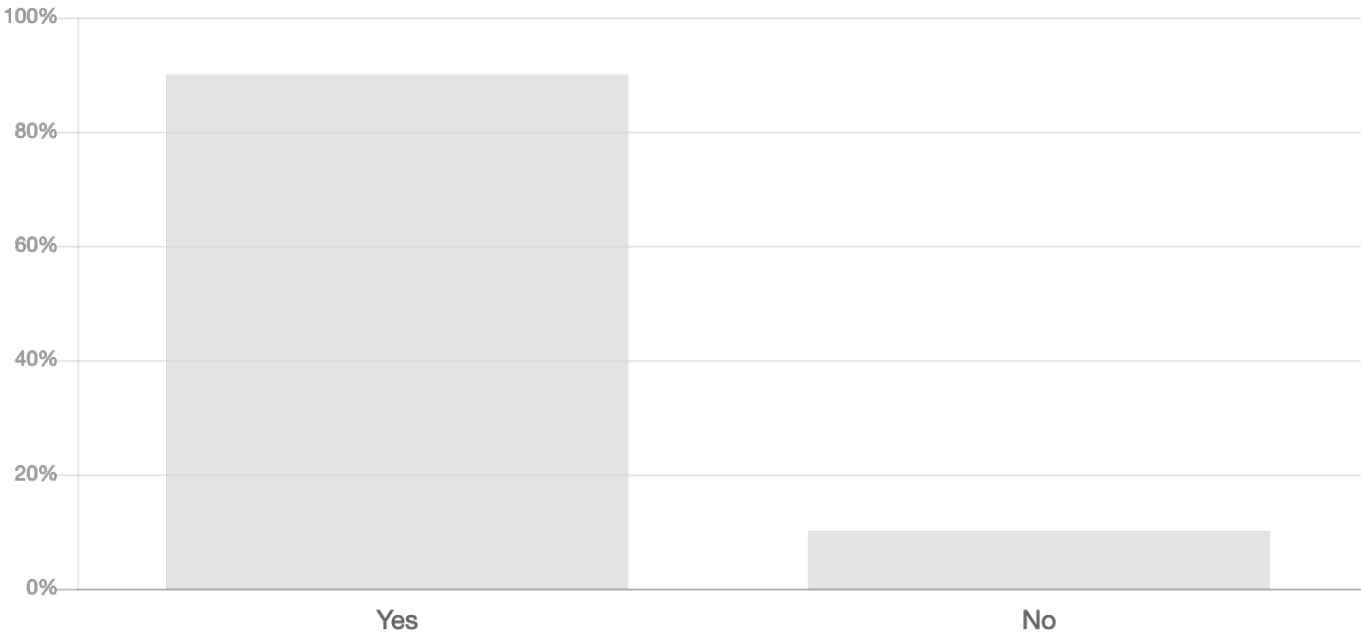
| ANSWERS |  | RESPONSES |   |
|---------|--|-----------|---|
| Yes     |  | 73%       | 8 |
| No      |  | 27%       | 3 |

11 Answered

1 Skipped

Question 16    ≡ MULTIPLE CHOICE

The content was relevant for the situation in Israel



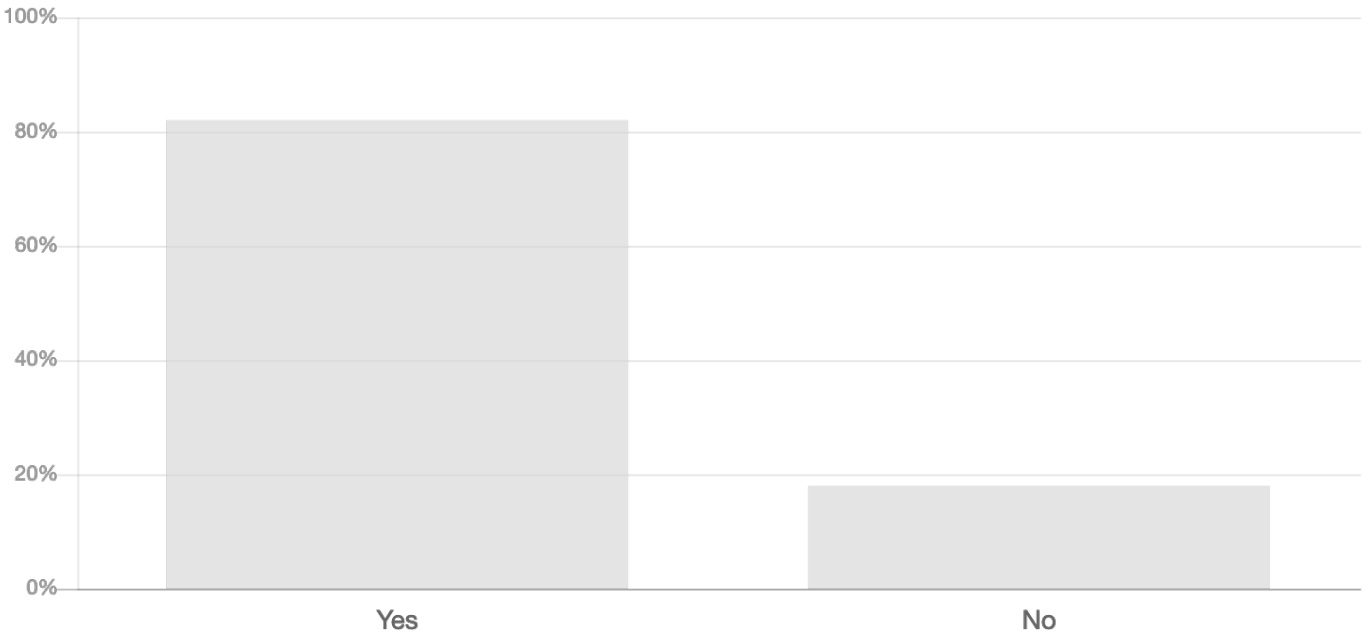
| ANSWERS |  | RESPONSES |   |
|---------|--|-----------|---|
| Yes     |  | 90%       | 9 |
| No      |  | 10%       | 1 |

10 Answered

2 Skipped

Question 17    ≡    MULTIPLE CHOICE

The study visit offered balanced theoretical and practical content in the field of impact and sustainable finance



| ANSWERS |  | RESPONSES |   |
|---------|--|-----------|---|
| Yes     |  | 82%       | 9 |
| No      |  | 18%       | 2 |

11 Answered

1 Skipped

Question 18    ... LIKERT SCALE

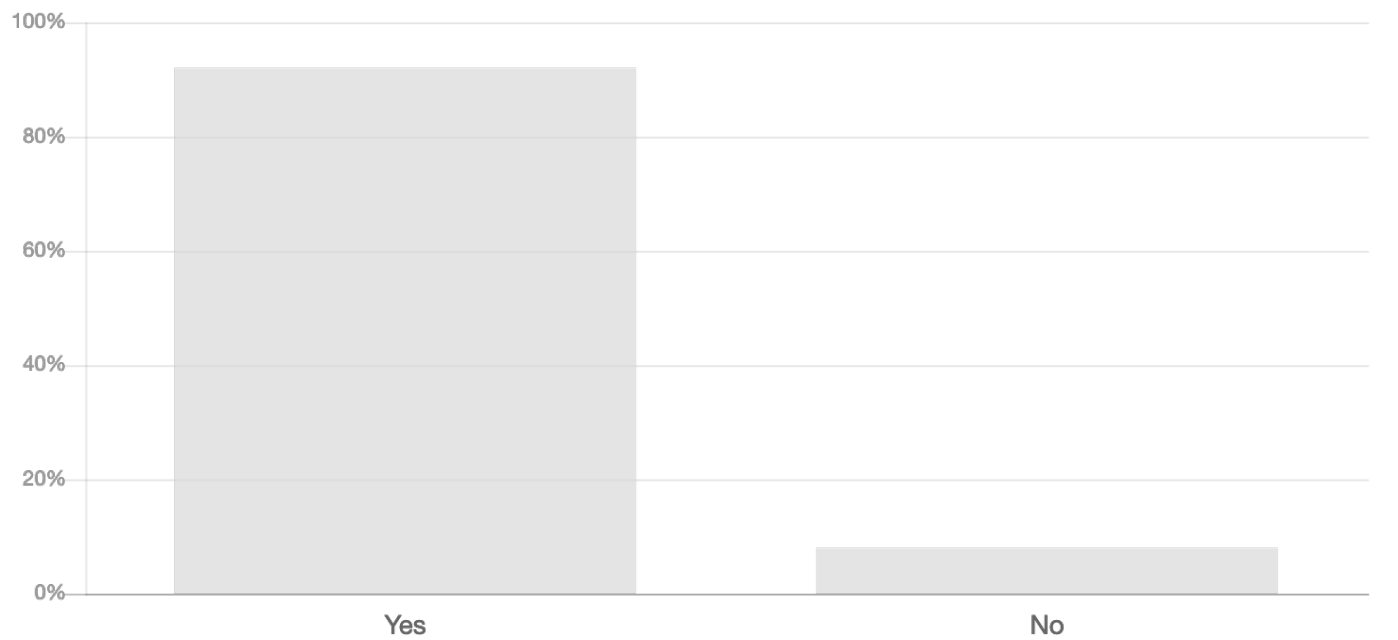
I would rate the quality of the study visit as

| Unsatisfying | Fair    | Good     | Very good |
|--------------|---------|----------|-----------|
|              | 1<br>9% | 2<br>18% | 8<br>73%  |

11 Answered

1 Skipped

The study visit mproved my general knowledge/understanding of the project

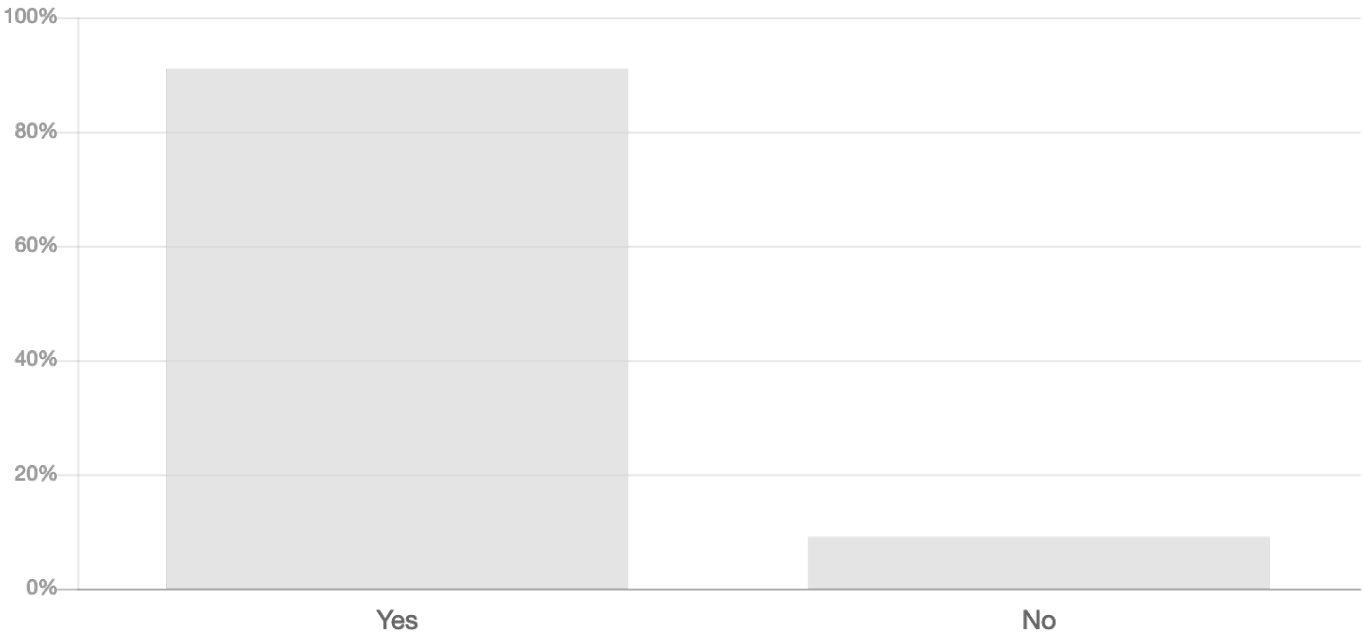


| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 92%       | 11 |
| No      | 8%        | 1  |

12 Answered

0 Skipped

I will be able to apply some of the key learning points to my tasks as professional



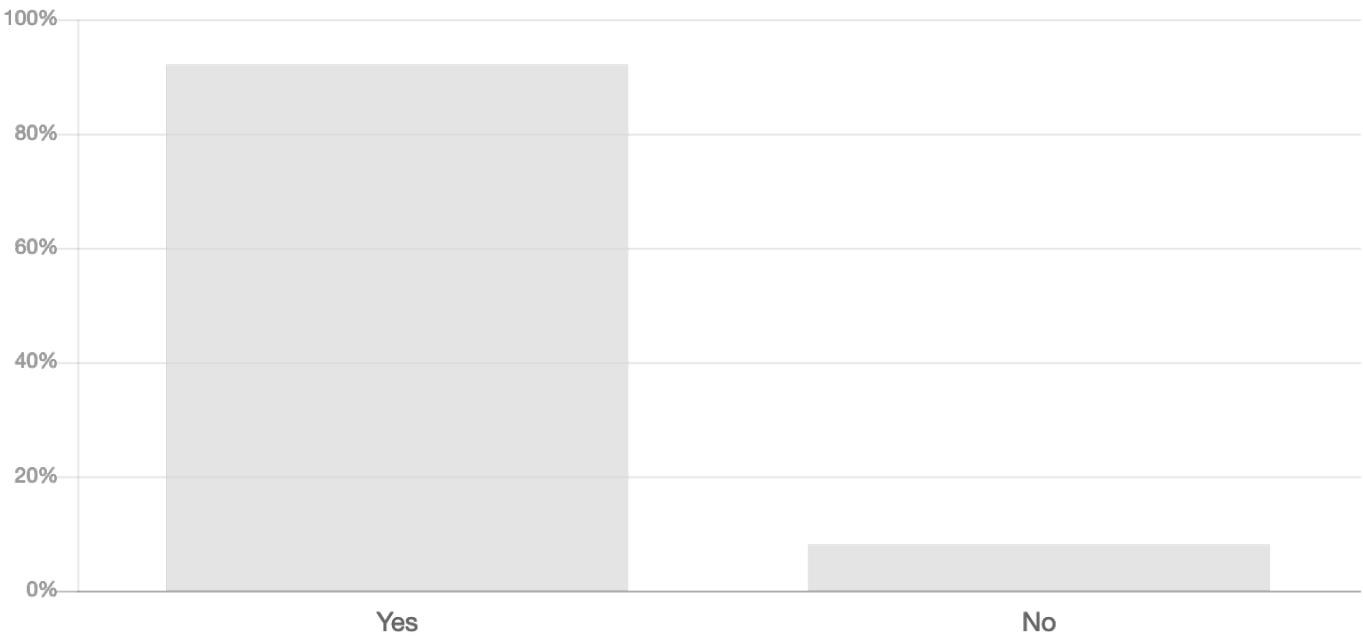
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 91%       | 10 |
| No      |  | 9%        | 1  |

11 Answered

1 Skipped

Question 21    ≡ MULTIPLE CHOICE






The study visit met my expectations



| ANSWERS     | RESPONSES |           |
|-------------|-----------|-----------|
| Yes         | 92%       | 11        |
| No          | 8%        | 1         |
| 12 Answered |           | 0 Skipped |

Question 22   ¶ PARAGRAPH TEXT






I particularly liked or disliked some aspects in the study visit:

| ANSWERS   | DATE                |   |
|---|---------------------|---|
| The holistic approach, the pleasant hospitality   | July 14, 2021 09:58 |    |
| I liked the combination of knowledge, examples of companies implementing the ESG concept, and a details on how the summer school is run. The hospitality was wonderful. There was great interaction and dynamics between the members and the group. | July 13, 2021 23:01 |  |
| I liked also the possibility to visit the Guggenheim museum   | July 13, 2021 18:28 |  |
| Very well-organized and delivered workshop. A lot of new and interesting materials. It was an excellent opportunity to meet the partners and learn together.  | July 13, 2021 16:10 |  |
| I particularly liked the content and speakers, as well as teamwork with students, good idea to illustrate the process.  | July 13, 2021 14:42 |  |
| 5 Answered  |                     | 7 Skipped   |

Question 23   ¶ PARAGRAPH TEXT

For the next activities, I would recommend improving the following aspects:


| ANSWERS | DATE |
|---------|------|
|---------|------|

| ANSWERS  | DATE                |   |
|--|---------------------|---|
| i would enhance interaction between participants, in more conversational form as oppose to frontal lectures with Q&A's.                  | July 20, 2021 16:04 |  |
| Leading theoretical approaches with an emphasis on measurement   | July 14, 2021 09:58 |  |
| I would be happy to hear more information about methodology and what are the principles by which they teach students in the field of ESG | July 13, 2021 23:01 |  |
| I wish we could have all materials for the project in one e-environment, so I could find them a.s.a.p. whenever it is needed.            | July 13, 2021 18:28 |  |
| more group activities  | July 13, 2021 14:42 |  |

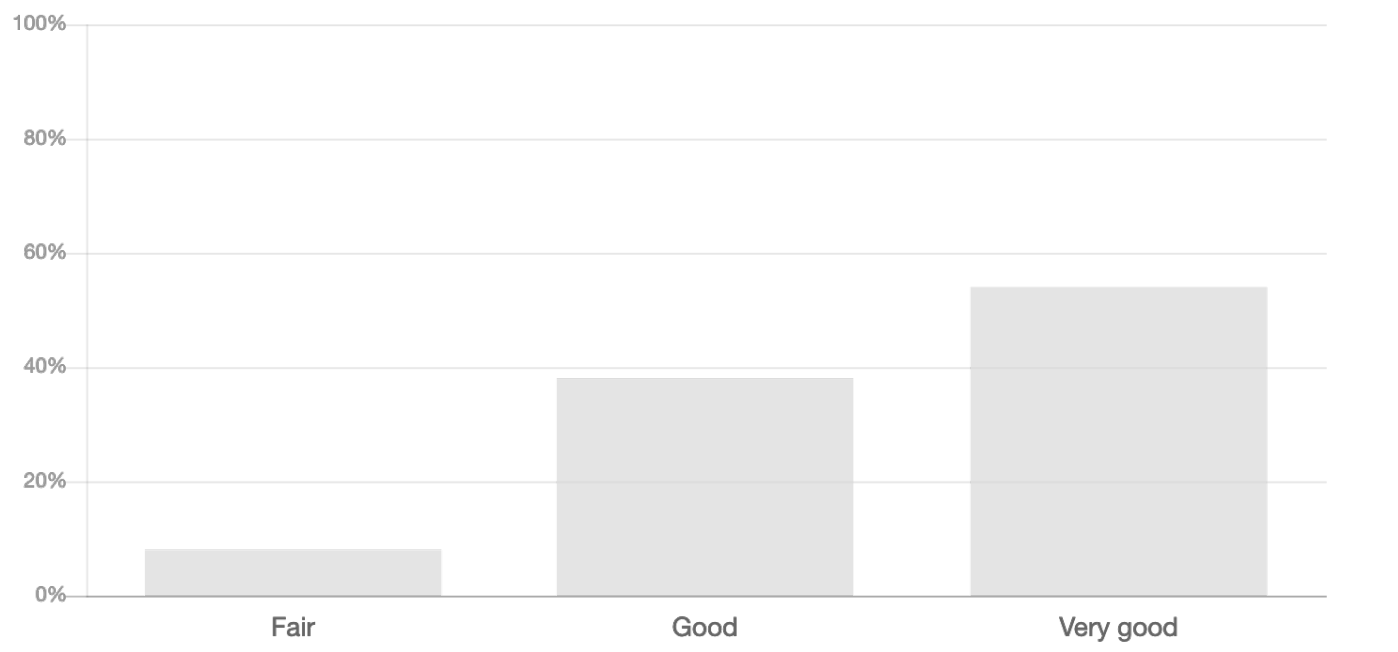
5 Answered

7 Skipped

# IFI - Consortium meeting #2, 15-17 June 2021

Question 1    MULTIPLE CHOICE

I would rate the organisation of the meeting as



| ANSWERS   | RESPONSES |   |
|-----------|-----------|---|
| Very good | 54%       | 7 |
| Good      | 38%       | 5 |
| Fair      | 8%        | 1 |

13 Answered

0 Skipped

Question 2    PARAGRAPH TEXT

Could you please elaborate on why you are not satisfied?





*There are no answers to this question yet.*

Question 3    ... LIKERT SCALE

I received the agenda in advance

| Yes        | No |
|------------|----|
| 13<br>100% |    |

13 Answered      0 Skipped

Question 4    ... LIKERT SCALE

The objectives of the meeting were clearly defined

| Yes       | No      |
|-----------|---------|
| 12<br>92% | 1<br>8% |

13 Answered      0 Skipped

Question 5    ... LIKERT SCALE

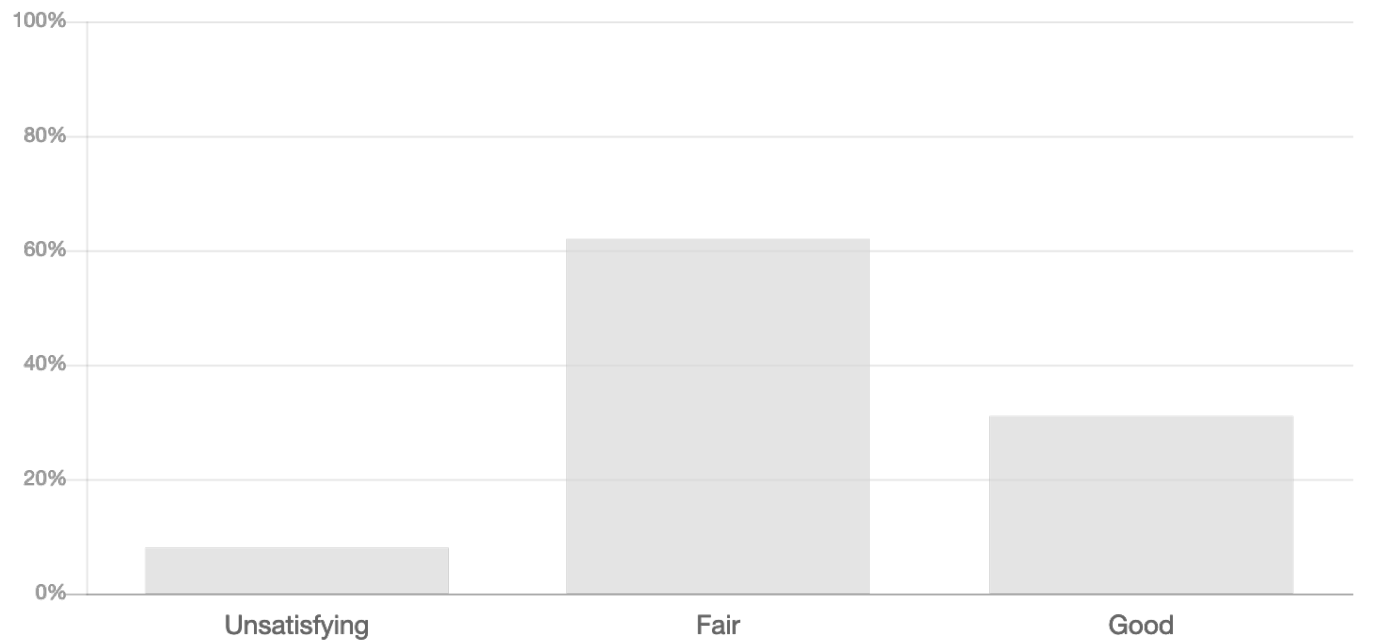
The materials (minutes, presentations and reports) and the agenda are available on the website

| Yes      | No       |
|----------|----------|
| 9<br>75% | 3<br>25% |

12 Answered                      1 Skipped

Question 6    ≡ MULTIPLE CHOICE


I would rate the hybrid form of the meeting as



| ANSWERS      | RESPONSES |   |
|--------------|-----------|---|
| Fair         | 62%       | 8 |
| Good         | 31%       | 4 |
| Unsatisfying | 8%        | 1 |

Question 7 ¶ PARAGRAPH TEXT

Could you please elaborate on why you are not satisfied?

| ANSWERS  | DATE                |   |
|--|---------------------|---|
| those of us that were present could not be jeard by those on zoom, it was hard to discuss and interact | June 23, 2021 17:32 |  |

I would rate the content of the meeting as



| ANSWERS   |  | RESPONSES |   |
|-----------|--|-----------|---|
| Good      |  | 69%       | 9 |
| Very good |  | 31%       | 4 |

13 Answered

0 Skipped

Could you please elaborate on why you are not satisfied?



*There are no answers to this question yet.*

I understand what is expected from me in the next steps of the project

| Yes         | No        |
|-------------|-----------|
| 12<br>92%   | 1<br>8%   |
| 13 Answered | 0 Skipped |

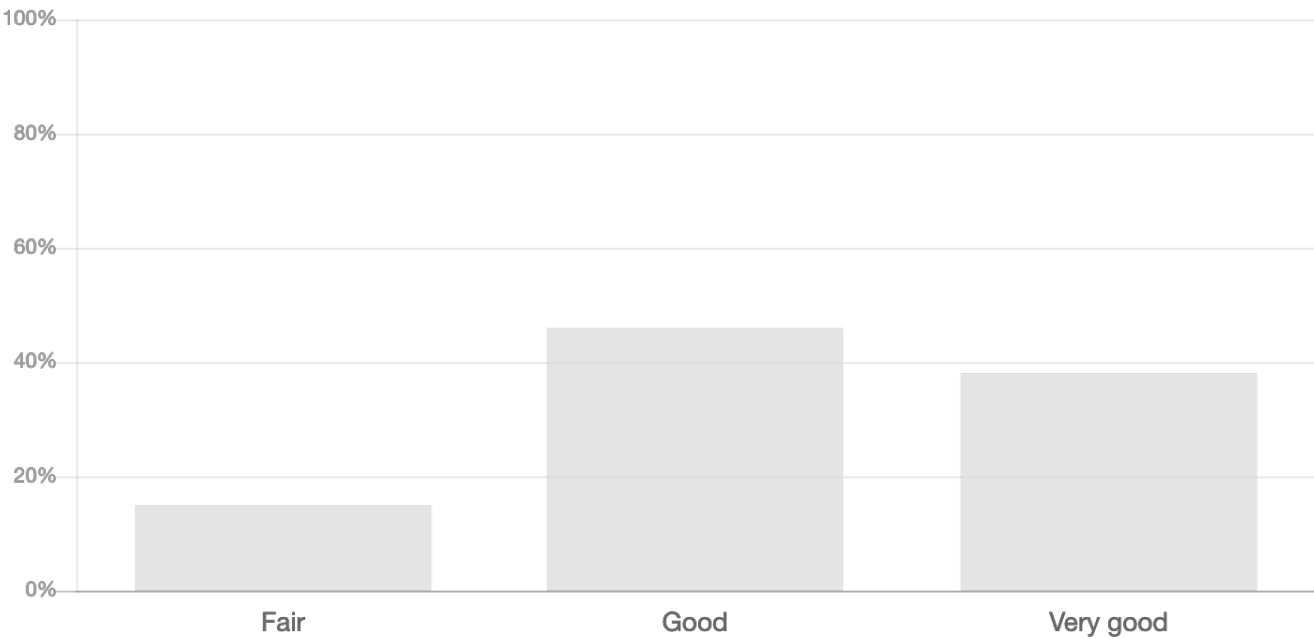
Question 11 ... LIKERT SCALE

The duration of the meeting was adequate to cover all points and answer to the questions I had

| Yes         | No        |
|-------------|-----------|
| 13<br>100%  |           |
| 13 Answered | 0 Skipped |

Question 12 ≡ MULTIPLE CHOICE

I would rate the way we work as a consortium as



| ANSWERS   |  | RESPONSES |   |
|-----------|--|-----------|---|
| Good      |  | 46%       | 6 |
| Very good |  | 38%       | 5 |
| Fair      |  | 15%       | 2 |

13 Answered

0 Skipped

Question 13   ¶ PARAGRAPH TEXT

Could you please elaborate on why you are not satisfied?



*There are no answers to this question yet.*

Question 14   ... LIKERT SCALE

I feel fully integrated in the consortium

| Yes       | No      |
|-----------|---------|
| 12<br>92% | 1<br>8% |

13 Answered

0 Skipped

Question 15    ... LIKERT SCALE

I feel considered by the project leader

| Yes       | No      |
|-----------|---------|
| 12<br>92% | 1<br>8% |

13 Answered

0 Skipped

Question 16    ... LIKERT SCALE

There is a clear sense of common involvement in the project

| Yes       | No      |
|-----------|---------|
| 12<br>92% | 1<br>8% |

13 Answered

0 Skipped

Question 17    ≡ MULTIPLE CHOICE

I would rate the implementation of the project so far, as



| ANSWERS   | RESPONSES |   |
|-----------|-----------|---|
| Very good | 46%       | 6 |
| Good      | 46%       | 6 |
| Fair      | 8%        | 1 |

13 Answered

0 Skipped

Question 18   ¶ PARAGRAPH TEXT

Could you please elaborate on why you are not satisfied?



*There are no answers to this question yet.*

Question 19   ... LIKERT SCALE

I feel that the project is progressing well



| Yes              | No             |
|------------------|----------------|
| <b>12</b><br>92% | <b>1</b><br>8% |

13
 Answered

0
 Skipped

Question 20    ... LIKERT SCALE

I receive the suppot I need from the partners to execute my tasks

| Yes               | No |
|-------------------|----|
| <b>12</b><br>100% |    |

12
 Answered

1
 Skipped

Question 21    ... LIKERT SCALE

I realise the benefits that my institution will get from its participation in the project

| Yes              | No             |
|------------------|----------------|
| <b>12</b><br>92% | <b>1</b><br>8% |

13
 Answered

0
 Skipped

Question 22    ... LIKERT SCALE

I am committed to implement the project

| Yes | No |
|-----|----|
|     |    |

| Yes               | No |
|-------------------|----|
| <b>13</b><br>100% |    |

13 Answered

0 Skipped

Question 23    ... LIKERT SCALE

The financial resources of the project are adequate to execute the tasks assigned

| Yes              | No              |
|------------------|-----------------|
| <b>10</b><br>83% | <b>2</b><br>17% |

12 Answered

1 Skipped

Question 24    ... LIKERT SCALE

The participants from my institution are satisfied with the activities organised by the project

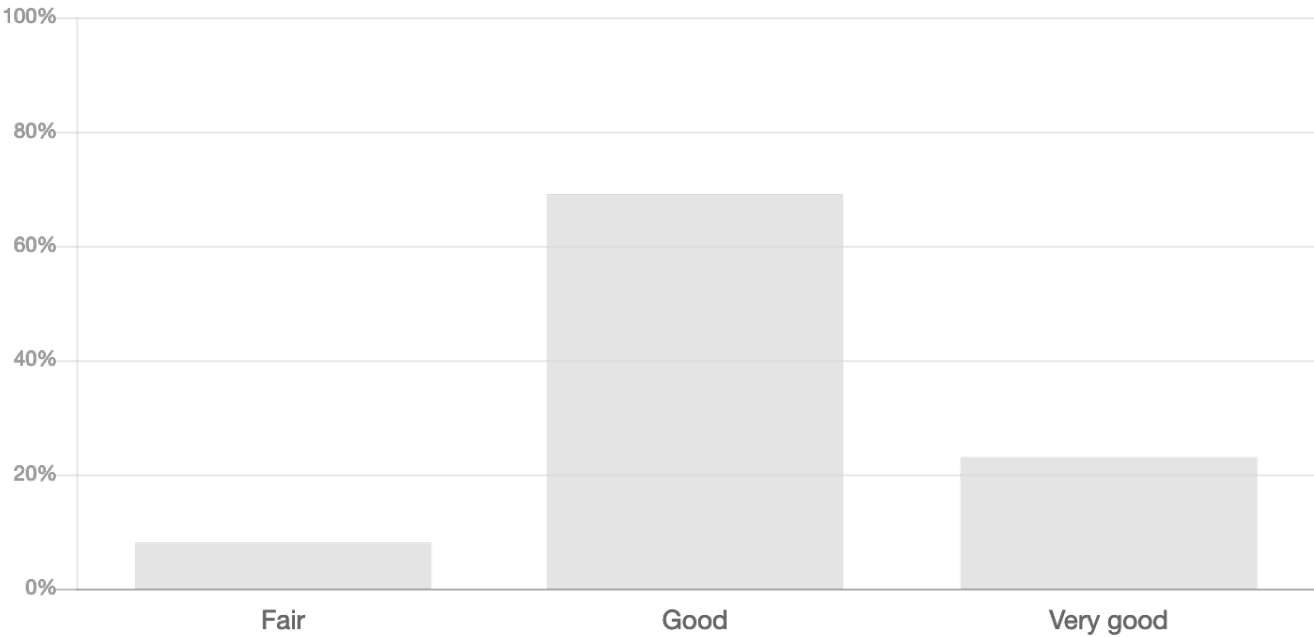
| Yes               | No |
|-------------------|----|
| <b>13</b><br>100% |    |

13 Answered

0 Skipped

Question 25    ≡ MULTIPLE CHOICE

Overall, I would rate the meeting as



| ANSWERS   |  | RESPONSES |   |
|-----------|--|-----------|---|
| Good      |  | 69%       | 9 |
| Very good |  | 23%       | 3 |
| Fair      |  | 8%        | 1 |

13 Answered

0 Skipped

Question 26   PARAGRAPH TEXT






Could you please elaborate on why you are not satisfied?



*There are no answers to this question yet.*

Question 27   PARAGRAPH TEXT

I particularly liked or disliked some aspects in the meeting:




| ANSWERS   | DATE                |   |
|---|---------------------|---|
| I particularly liked the activity after the first day of the meeting (Old man and the sea)  | June 30, 2021 13:10 |  |
| Finally, see (almost) everyone face to face was great. It was also very helpful to the overview Vered gave us all. Now I have a better understanding of each WP work and responsibility | June 28, 2021 08:37 |  |
| liked the guest lecture - we should integrate more content sessions of learning together and not only informative   | June 23, 2021 17:32 |  |
| The hybrid form provided for some challenges, but given the current circumstances it was the best option.   | June 23, 2021 12:37 |  |
| Hybrid meetings have technical disadvantages  | June 23, 2021 12:22 |  |

5 Answered

8 Skipped

Question 28 ¶ PARAGRAPH TEXT

For the next meetings, I would recommend improving the following aspects:

| ANSWERS   | DATE                |   |
|---|---------------------|---|
| Making sure we know where we can find the relevant information online. Not sure yet what in the program website and what can be found in the google drive | June 28, 2021 08:37 |  |
| 85% content at least and up to 15% no more for bureaucratic issues  | June 23, 2021 17:32 |  |
| if online, the meeting should be shorter  | June 23, 2021 10:54 |  |

3 Answered

10 Skipped

| ID | % Complete | WBS   | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|-------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |       |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 0  | 15%        | 0     | <b>IFI - Innovative Finance Inclusion</b>                                   | 850 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 1  | 39%        | 1     | <b>Building a Community of Practice (CoP) and Body of Knowledge (BoK)</b>   | 769 days | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 2  | 22%        | 1.1   | <b>Introduction &amp; Establish CoP for SF</b>                              | 769 days | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 3  | 100%       | 1.1.1 | Introductory seminar (part of kick-off                                      | 3 days   | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 4  | 100%       | 1.1.2 | Establishment of CoP  | 0 days   | 01/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 5  | 21%        | 1.1.3 | Maintain CoP and develop BoK  | 705 days | 01/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 6  | 98%        | 1.2   | <b>Sustainable Finance Framework</b>  | 214 days | 04/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 7  | 100%       | 1.2.1 | SF survey scheme  | 2 days   | 04/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 8  | 100%       | 1.2.2 | Surveys & Interviews  | 65 days  | 15/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 9  | 100%       | 1.2.3 | First draft of reports  | 15 days  | 15/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 10 | 95%        | 1.2.4 | Complete surveys & write  | 45 days  | 05/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 11 | 0%         | 1.2.5 | Final reports   | 0 days   | 30/09/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 12 | 100%       | 1.3   | <b>Work plans for task force teams</b>                                      | 75 days  | 04/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 13 | 100%       | 1.3.1 | Online communication to define task force                                   | 70 days  | 04/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 14 | 100%       | 1.3.2 | Workshop - task force teams (UHEI)  | 5 days   | 12/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 15 | 6%         | 2     | <b>Building tools - Establish a pool of cases for study and simulations</b> | 669 days | 19/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 16 | 1%         | 2.1   | <b>Establish framework and guidelines</b>                                   | 483 days | 19/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 17 | 100%       | 2.1.1 | Workshop to establish framework and guidelines (UniPD)                      | 5 days   | 19/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID | % Complete | WBS     | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|---------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |         |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 18 | 0%         | 2.1.2   | <b>Develop case studies collection</b>  | 478 days | 26/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 19 | 0%         | 2.1.2.1 | 15 case studies   | 114 days | 26/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 20 | 0%         | 2.1.2.2 | 30 case studies   | 365 days | 30/09/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 21 | 13%        | 2.2     | <b>Create open source case studies portal</b>                                   | 669 days | 19/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 22 | 90%        | 2.2.1   | Specification report  | 90 days  | 19/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 23 | 10%        | 2.2.2   | Design & develop case studies portal  | 90 days  | 23/08/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 24 | 0%         | 2.2.3   | Launch database   | 0 days   | 24/12/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 25 | 0%         | 2.2.4   | Update the portal   | 490 days | 24/12/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 26 | 0%         | 2.3     | <b>Face the Case: visits to field partners</b>                                  | 305 days | 18/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 27 | 0%         | 2.3.1   | Study visit: eco-system in Europe (EUR)   | 5 days   | 18/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 28 | 0%         | 2.3.2   | Study visit: benchmarking and   | 5 days   | 15/03/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 29 | 0%         | 2.3.3   | Multiple study visits in Israel for students &                                  | 300 days | 25/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 30 | 0%         | 3       | <b>Building body of Practice – Training programs for different stakeholders</b> | 395 days | 10/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 31 | 0%         | 3.1     | <b>Traineeship programs for Israeli regulators</b>                              | 359 days | 01/03/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 32 | 0%         | 3.1.1   | Roundtable groundwork (EFMD)  | 5 days   | 16/05/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 33 | 0%         | 3.1.2   | Seminar on strategy - Regulation (SAP)  | 4 days   | 14/11/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 34 | 0%         | 3.1.3   | Interdisciplinary meetings in Israeli HEIs                                      | 44 days  | 01/03/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 35 | 0%         | 3.1.4   | Develop policy documents and recommendations for                                | 300 days | 23/05/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID | % Complete | WBS   | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|-------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |       |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 36 | 0%         | 3.2   | <b>Traineeship programs for Israeli investors</b>                                   | 123 days | 10/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 37 | 0%         | 3.2.1 | Seminar for academic and investors  | 3 days   | 10/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 38 | 0%         | 3.2.2 | Interdisciplinary meetings in Israeli HEIs  | 120 days | 12/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 39 | 0%         | 3.2.3 | Develop guidelines and recommendations for investors                                | 120 days | 13/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 40 | 0%         | 3.3   | <b>Traineeship programs for Israeli technology pioneers, designers and</b>          | 150 days | 04/07/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 41 | 0%         | 3.3.1 | Seminar on design thinking (HUJI)   | 3 days   | 04/07/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 42 | 0%         | 3.3.2 | Design thinking simulation seminar  | 5 days   | 03/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 43 | 0%         | 3.3.3 | Interdisciplinary meetings in Israeli HEIs  | 80 days  | 10/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 44 | 0%         | 3.3.4 | Develop guidelines and recommendations for SF entrepreneurs                         | 80 days  | 10/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 45 | 15%        | 4     | <b>Building Innovation - Sustainable &amp; Inclusive Finance R&amp;D and design</b> | 594 days | 01/06/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 46 | 77%        | 4.1   | Establishment of SF Innovation Track  | 100 days | 01/06/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 47 | 0%         | 4.2   | Applying design thinking to SF to create competitive advantage                      | 150 days | 16/11/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 48 | 0%         | 4.3   | <b>Presenting students' ideas for ventures in a competition format</b>              | 245 days | 03/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 49 | 0%         | 4.3.1 | Run mentorship program for SF   | 190 days | 03/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID | % Complete | WBS   | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|-------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |       |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 50 | 0%         | 4.3.2 | SF Accelerator Competit   | 50 days  | 26/06/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 51 | 0%         | 4.3.3 | A field conference to present results (HUJI)                            | 5 days   | 04/09/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 52 | 3%         | 5     | <b>Walk the talk - Israeli Students-led ESG Investing Fund</b>          | 700 days | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 53 | 15%        | 5.1   | <b>Learning from others</b>   | 295 days | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 54 | 15%        | 5.1.1 | Benchmarking on students-led funds                                      | 130 days | 01/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 55 | 0%         | 5.1.2 | Summary meeting to present results (NUIS)                               | 1 day    | 17/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 56 | 0%         | 5.2   | <b>Building the fund business plan</b>                                  | 105 days | 18/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 57 | 0%         | 5.2.1 | Develop students-fund business plan                                     | 90 days  | 18/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 58 | 0%         | 5.2.2 | Present the business plan to all partners (in mid-project meeting)      | 1 day    | 13/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 59 | 0%         | 5.3   | <b>Getting to Know ESG</b>  | 300 days | 14/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 60 | 0%         | 5.3.1 | Develop training sessions on ESG for faculty and students               | 60 days  | 14/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 61 | 0%         | 5.3.2 | Run training sessions on ESG in partner HEIs                            | 150 days | 06/09/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 62 | 0%         | 5.3.3 | Establish ESG Investment Club   | 150 days | 10/01/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 63 | 1%         | 6     | <b>Talk the walk - Training the trainers and teach the practitioner</b> | 503 days | 05/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 64 | 2%         | 6.1   | <b>"Train the trainers" strategy and framework</b>                      | 208 days | 05/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 65 | 100%       | 6.1.1 | Meeting on strategy and framework for train the trainers (UD) -         | 5 days   | 05/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |






















| ID | % Complete | WBS   | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|-------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |       |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 66 | 0%         | 6.1.2 | Development of strategy, framework, and programs to train   | 200 days | 12/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 67 | 0%         | 6.1.3 | Summary meeting on developed strategy and programs to train the trainers (KCE )                             | 3 days   | 18/04/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 68 | 2%         | 6.2   | <b>Study visits to summer school in UD</b>  | 264 days | 05/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 69 | 100%       | 6.2.1 | Introduction meeting on summer school (UD) - with 6.1.1   | 5 days   | 05/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 70 | 0%         | 6.2.2 | Discussions on relevant materials and methods that can be adopted from UD to the Israeli model of SF summer | 250 days | 12/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 71 | 0%         | 6.2.3 | 2nd study visit on summer school (UD)   | 5 days   | 01/07/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 72 | 0%         | 6.3   | <b>Training sessions for academics and mentoring on development of SF programmes</b>                        | 248 days | 27/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 73 | 0%         | 6.3.1 | Develop training materials  | 230 days | 27/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 74 | 0%         | 6.3.2 | Develop summer school program   | 150 days | 27/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 75 | 0%         | 6.3.3 | Internal training sessions in Israeli   | 150 days | 31/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 76 | 0%         | 6.3.4 | Summary training session (KCE)  | 3 days   | 05/06/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 77 | 12%        | 7     | <b>Quality Assurance &amp; Quality</b>  | 780 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 78 | 100%       | 7.1   | <b>Quality policy document and a quality work plan</b>  | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID | % Complete | WBS   | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|----|------------|-------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|    |            |       |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 79 | 100%       | 7.1.1 | Develop quality policy document and a quality work plan   | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 80 | 100%       | 7.1.2 | Approved Quality documents  | 0 days   | 19/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 81 | 0%         | 7.2   | Assessments of project deliverables   | 700 days | 01/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 82 | 15%        | 7.3   | <b>Monitor and control project processes</b>  | 705 days | 01/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 83 | 15%        | 7.3.1 | Assessments of project tasks  | 700 days | 01/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 84 | 15%        | 7.3.2 | Assessments of Pproject WPs   | 140 days | 01/05/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 85 | 0%         | 7.4   | <b>Monitor and control project processes</b>  | 551 days | 01/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 86 | 0%         | 7.4.1 | Year 1 assessment   | 30 days  | 01/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 87 | 0%         | 7.4.2 | Year 2 assessment   | 30 days  | 03/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 88 | 0%         | 7.4.3 | Year 3 assessment   | 30 days  | 02/10/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 89 | 22%        | 8     | <b>Dissemination &amp; Exploitation</b>   | 850 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 90 | 100%       | 8.1   | <b>Define dissemination, exploitation and sustainability strategy, guidelines and work plan</b> | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 91 | 100%       | 8.1.1 | Develop strategy, guidelines and work plan for dissemination                                    | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 92 | 100%       | 8.1.2 | Approved dissemination and sustainability   | 0 days   | 19/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 93 | 29%        | 8.2   | <b>Design, develop and maintain IFI website</b>   | 785 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 94 | 100%       | 8.2.1 | Design IFI website  | 25 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 95 | 100%       | 8.2.2 | Launch IFI website  | 0 days   | 18/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 96 | 26%        | 8.2.3 | Maintaine IFI website   | 760 days | 21/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID  | % Complete | WBS     | Task Name   | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|-----|------------|---------|---|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|     |            |         |   |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 97  | 20%        | 8.3     | Design and publish digital & non-digital materials              | 780 days | 22/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 98  | 10%        | 8.4     | Carry out dissemination, exploitation and sustainability events | 780 days | 22/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 99  | 22%        | 9       | <b>Project Management</b>                                       | 840 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 100 | 85%        | 9.1     | <b>Coordination and communications management</b>               | 732 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 101 | 100%       | 9.1.1   | Develop Communication plan                                      | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 102 | 33%        | 9.1.2   | <b>Consortium Meetings</b>                                      | 726 days | 24/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 103 | 100%       | 9.1.2.1 | Kick-off meeting  | 3 days   | 24/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 104 | 100%       | 9.1.2.2 | 2nd consortium meet   | 3 days   | 15/06/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 105 | 0%         | 9.1.2.3 | 3rd consortium meeti  | 3 days   | 24/01/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 106 | 0%         | 9.1.2.4 | 4th consortium meeti  | 3 days   | 01/06/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 107 | 0%         | 9.1.2.5 | 5th consortium meeti  | 3 days   | 01/12/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 108 | 0%         | 9.1.2.6 | Summary meeting   | 3 days   | 01/09/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 109 | 75%        | 9.1.3   | <b>project newsletter</b>                                       | 243 days | 24/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 110 | 100%       | 9.1.3.1 | project newsletter 1  | 1 day    | 24/12/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 111 | 100%       | 9.1.3.2 | project newsletter 2  | 1 day    | 25/01/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 112 | 100%       | 9.1.3.3 | project newsletter 3  | 1 day    | 29/03/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 113 | 100%       | 9.1.3.4 | project newsletter 4  | 1 day    | 26/04/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 114 | 100%       | 9.1.3.5 | project newsletter 5  | 1 day    | 24/06/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 115 | 100%       | 9.1.3.6 | project newsletter 6  | 1 day    | 26/07/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 116 | 0%         | 9.1.3.7 | project newsletter 7  | 1 day    | 29/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 117 | 0%         | 9.1.3.8 | project newsletter 8  | 1 day    | 29/11/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 118 | 24%        | 9.2     | <b>Administrative management and</b>                            | 840 days | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 119 | 100%       | 9.2.1   | Develop Risk plan   | 70 days  | 16/11/20 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 120 | 22%        | 9.2.2   | Administrative reports  | 710 days | 22/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 121 | 0%         | 9.2.3   | Intermediate report   | 75 days  | 01/02/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 122 | 0%         | 9.2.4   | Final report  | 90 days  | 02/10/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

| ID  | % Complete | WBS     | Task Name                                      | Duration | Start    | 2, 2020 |   | Half 1, 2021 |   |   | Half 2, 2021 |   |   | Half 1, 2022 |   |   | Half 2, 2022 |   |   | Half 1, 2023 |   |   | Half 2, 2023 |   |   | Half 1, 2024 |   |
|-----|------------|---------|--|----------|----------|---------|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|---|--------------|---|
|     |            |         |  |          |          | S       | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M | M | J            | S | N | J            | M |
| 123 | 0%         | 9.3     | <b>Financial management and budget control</b> | 718 days | 15/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 124 | 14%        | 9.3.1   | <b>Partners financial reports review</b>       | 718 days | 15/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 125 | 100%       | 9.3.1.1 | Partners financial reports review 1            | 1 day    | 15/02/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 126 | 30%        | 9.3.1.2 | Partners financial reports review 2            | 1 day    | 15/11/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 127 | 0%         | 9.3.1.3 | Partners financial reports review 3            | 1 day    | 15/02/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 128 | 0%         | 9.3.1.4 | Partners financial reports review 4            | 1 day    | 15/08/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 129 | 0%         | 9.3.1.5 | Partners financial reports review 5            | 1 day    | 15/11/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 130 | 0%         | 9.3.1.6 | Partners financial reports review 6            | 1 day    | 15/02/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 131 | 0%         | 9.3.1.7 | Partners financial reports review 7            | 1 day    | 15/05/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 132 | 0%         | 9.3.1.8 | Partners financial reports review 8            | 1 day    | 15/08/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 133 | 0%         | 9.3.1.9 | Partners financial reports review 9            | 1 day    | 15/11/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 134 | 0%         | 9.3.2   | <b>External Auditor review</b>                 | 441 days | 01/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 135 | 0%         | 9.3.2.1 | Assessmnt of project outcomes                  | 180 days | 01/10/21 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 136 | 0%         | 9.3.2.2 | Assessment of project sustainability           | 180 days | 03/10/22 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |
| 137 | 0%         | 10      | End of project                                 | 0 days   | 14/11/23 |         |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |   |              |   |

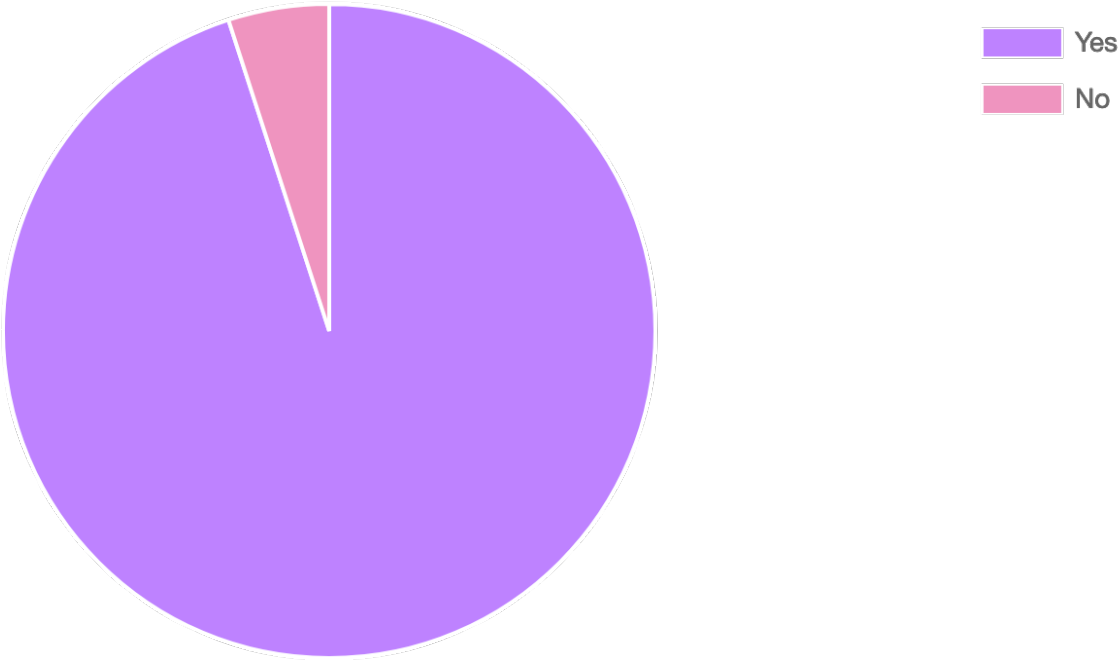
◆ 14/11

|   |                    |   |                       |   |                 |   |
|---|--------------------|---|-----------------------|---|-----------------|---|
| Project: IFI - Innovative Finance Inclusion<br>Date: 24/09/21 | Task               |  | Inactive Task         |  | Start-only      |  |
|   | Split              |  | Inactive Milestone    |  | Finish-only     |  |
|   | Milestone          |  | Inactive Summary      |  | Deadline        |  |
|   | Summary            |  | Manual Task           |  | Progress        |  |
|   | Project Summary    |  | Duration-only         |  | Manual Progress |  |
|   | External Tasks     |  | Manual Summary Rollup |  |                 |   |
|   | External Milestone |  | Manual Summary        |  |                 |   |

# IFI - Project Management

Question 1 MULTIPLE CHOICE

Up until now, I think the project management team is providing good guidance and support for the project



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 95%       | 19 |
| No      | 5%        | 1  |

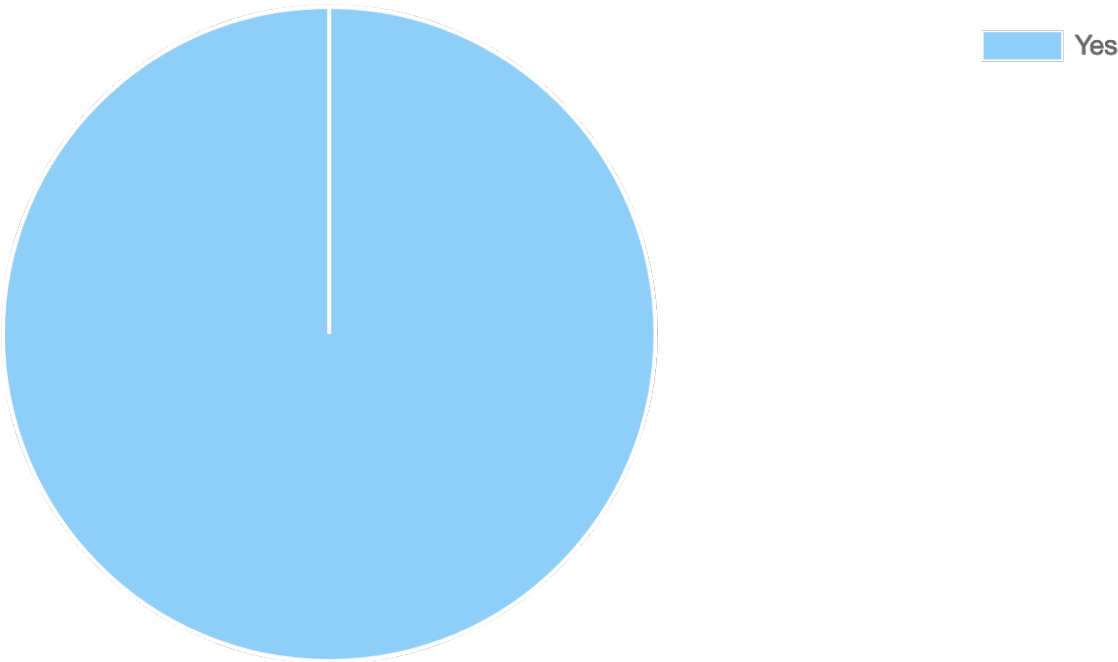
20 Answered

0 Skipped

Question 2 MULTIPLE CHOICE

Overall, I think that project problems or

issues (if they happened) have been solved in an adequate manner



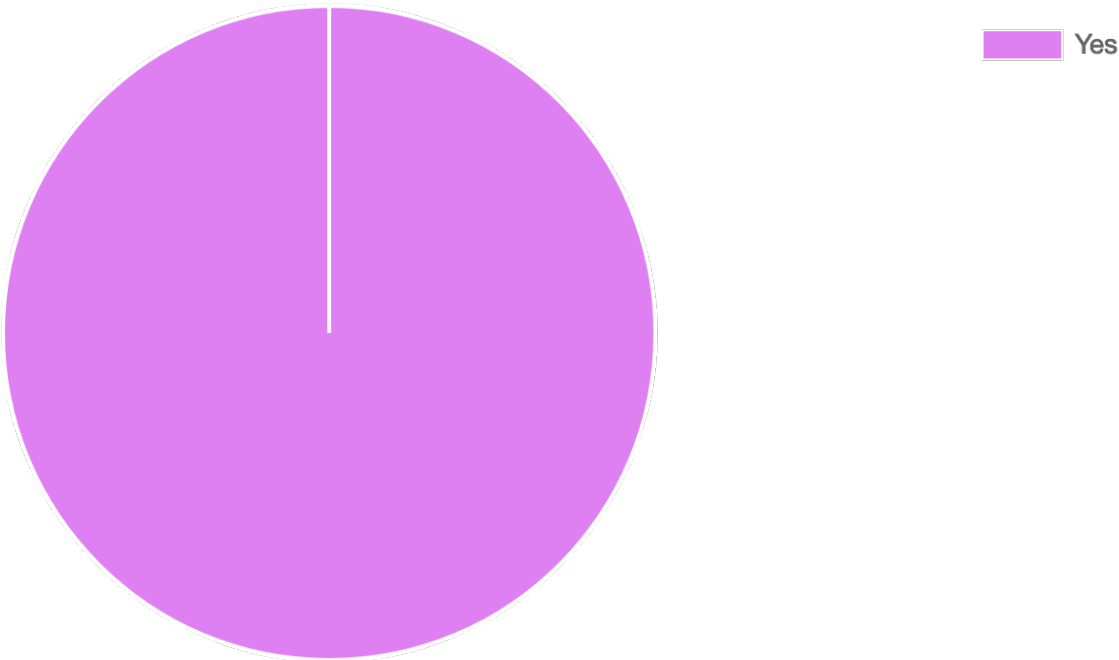
| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 20   |

20 Answered

0 Skipped

Question 3 MULTIPLE CHOICE

Overall, I feel that all necessary adjustments and measures have been taken to adapt to the sanitary situation and minimize the project disruption



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 20   |

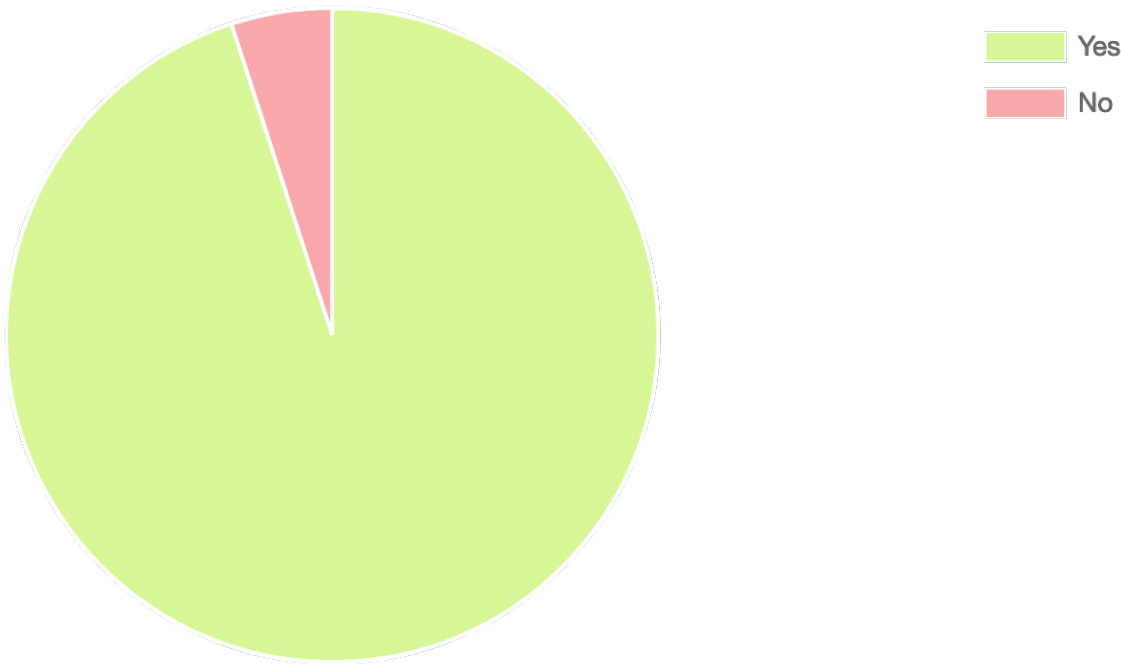
20 Answered

0 Skipped

Question 4  MULTIPLE CHOICE

So far, I think that the tools and the processes developed for the project managing are useful





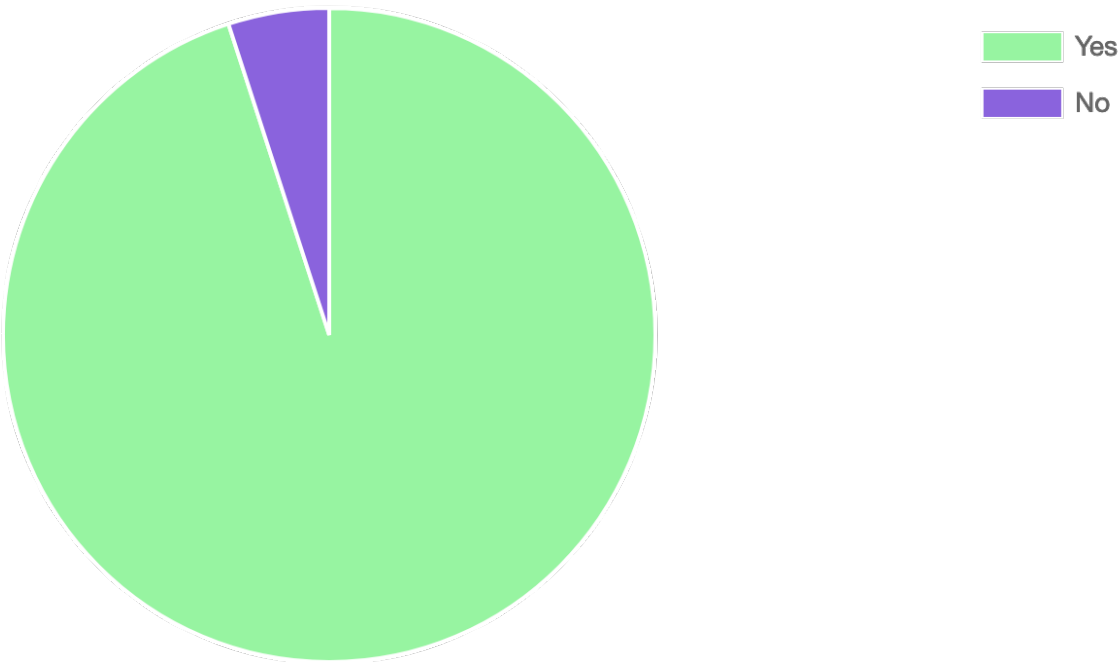
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 95%       | 18 |
| No      |  | 5%        | 1  |

19 Answered

1 Skipped

Question 5  MULTIPLE CHOICE

I think that the project information is communicated timely and adequately



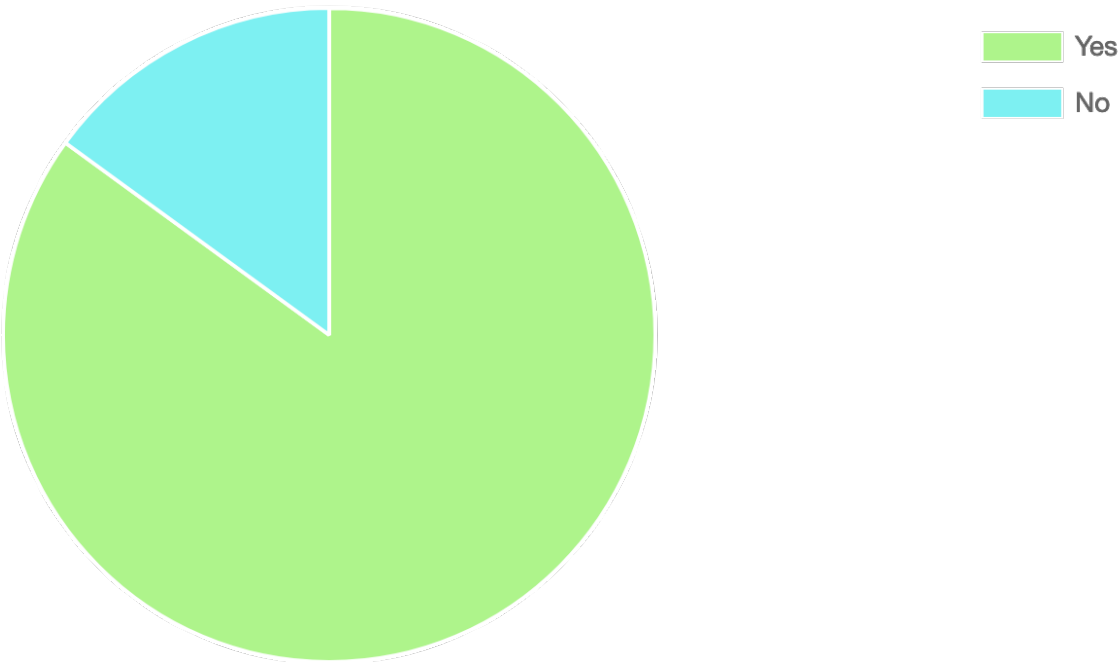
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 95%       | 19 |
| No      |  | 5%        | 1  |

20 Answered

0 Skipped

Question 6  MULTIPLE CHOICE

I think that the project objectives are clear to me



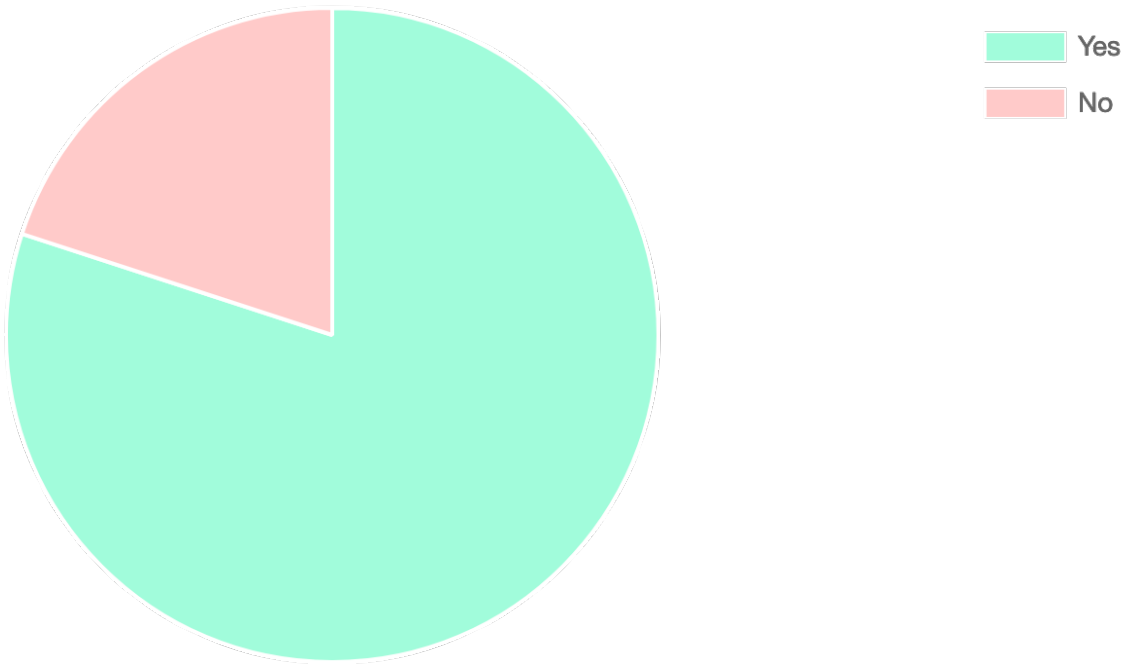
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 85%       | 17 |
| No      |  | 15%       | 3  |

20 Answered

0 Skipped

Question 7  MULTIPLE CHOICE

I feel that I am recognized as a valuable partner



| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 80%       | 16 |
| No      |  | 20%       | 4  |

20 Answered

0 Skipped

# IFI - WP2 Meeting #2: Sustainability at UNIPD and within its community

Question 1 ... LIKERT SCALE

Overall, I would rate the workshop as



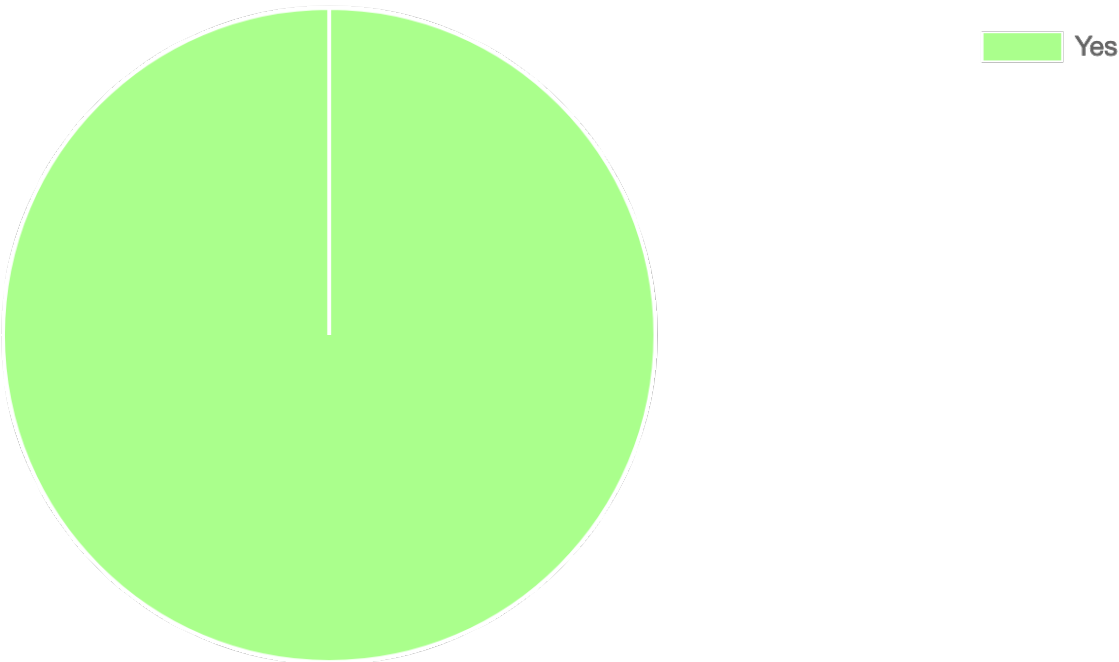
Question 2 ... LIKERT SCALE

I would rate the organisation of the workshop as



Question 3 ≡ MULTIPLE CHOICE

I received the programme/materials in advance



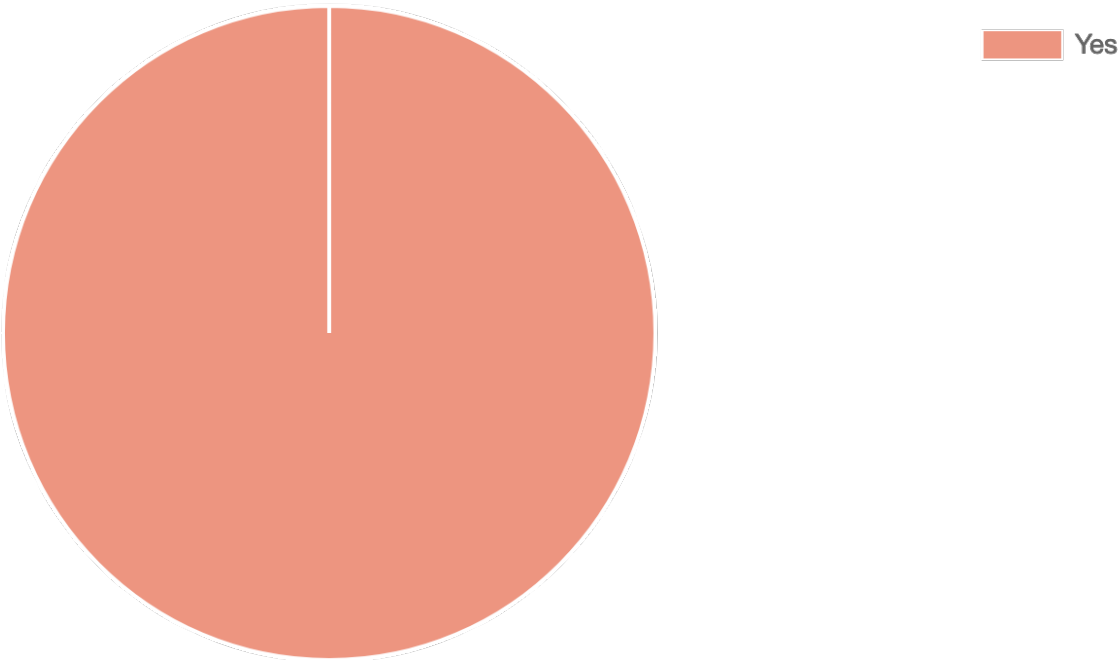
| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 100%      | 11 |

11 Answered

0 Skipped

Question 4  MULTIPLE CHOICE

The objectives of the workshop were clearly defined

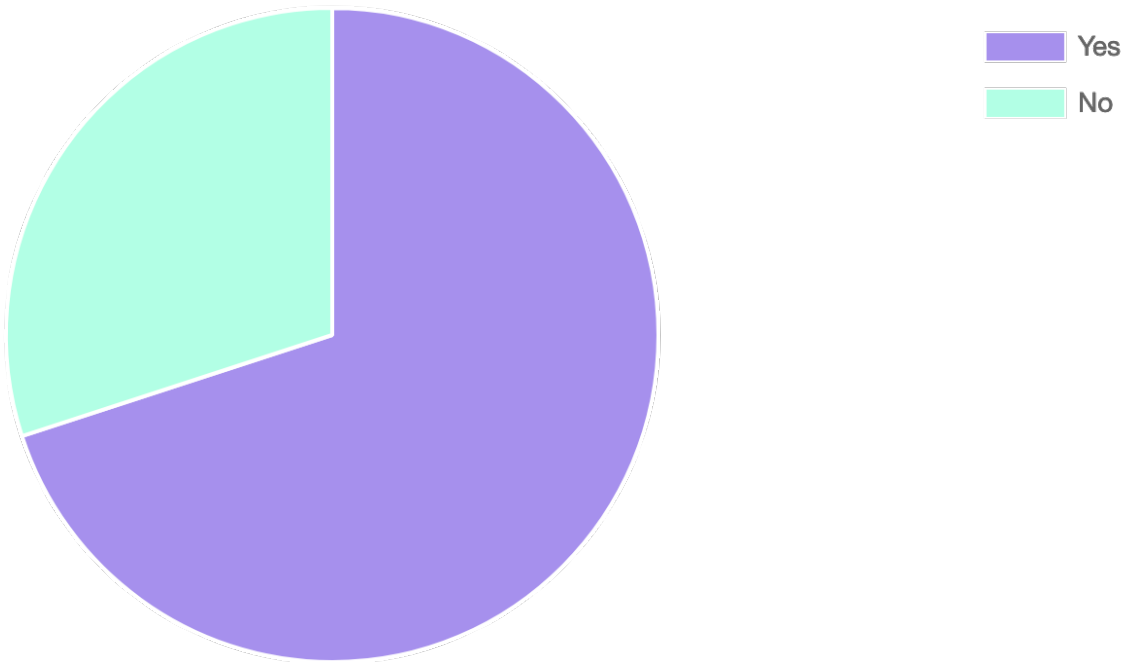


| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 11   |

11 Answered 0 Skipped

Question 5  MULTIPLE CHOICE

Materials are available on the website after the workshop



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 70% 7     |
| No      | 30% 3     |

10 Answered

1 Skipped

Question 6    LIKERT SCALE

I would rate the delivery of the workshop content as

| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 4<br>40% | 6<br>60%  |

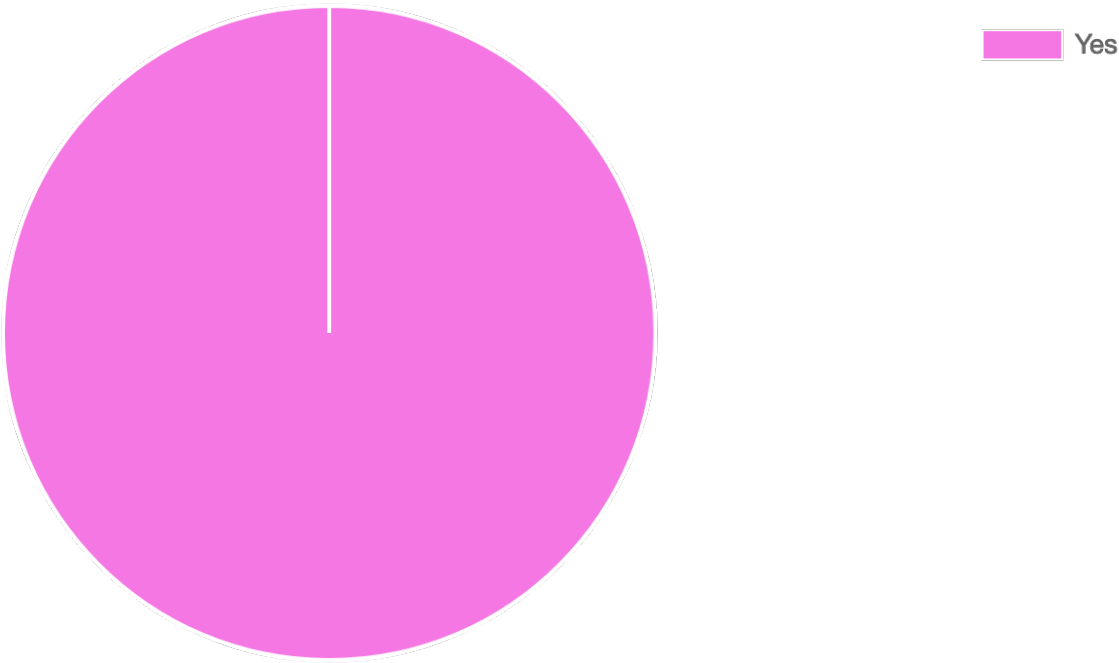
10 Answered

1 Skipped



Question 7 ☰ MULTIPLE CHOICE

The duration of the workshop was adequate



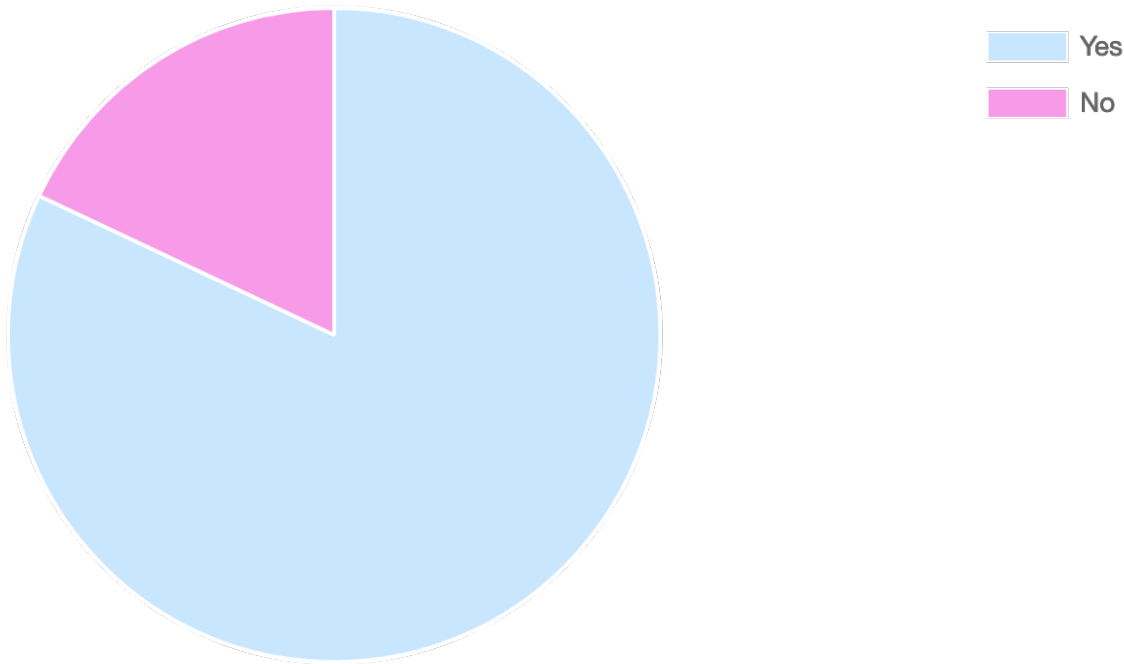
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 100%      | 11 |

11 Answered

0 Skipped

Question 8 ☰ MULTIPLE CHOICE

The workshop allowed interaction between the participants



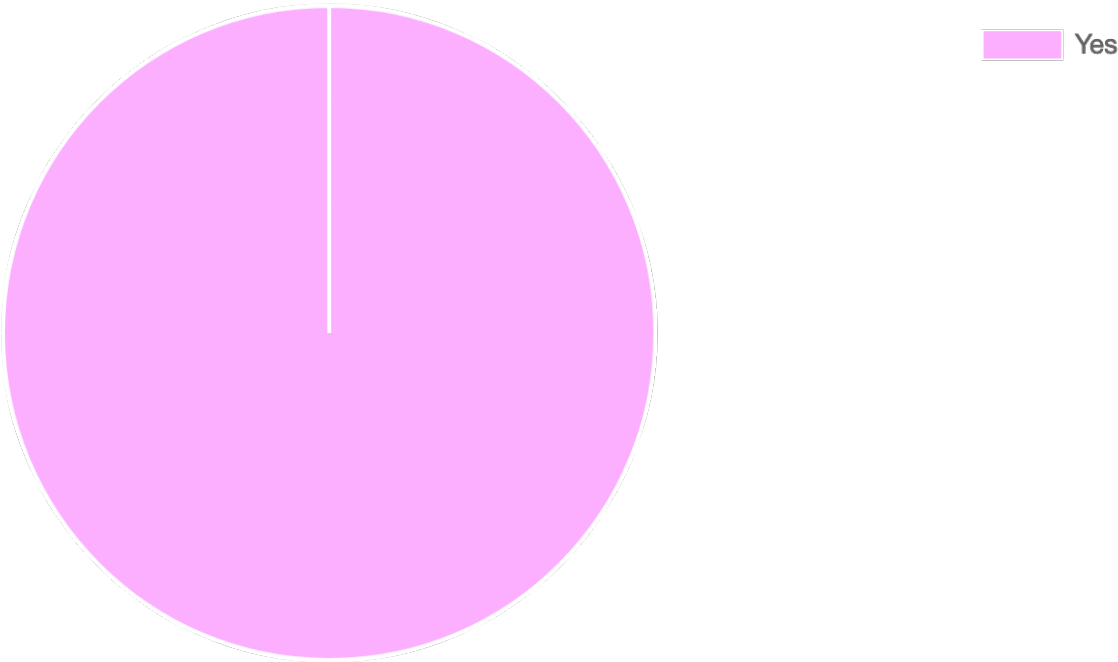
| ANSWERS |  | RESPONSES |   |
|---------|--|-----------|---|
| Yes     |  | 82%       | 9 |
| No      |  | 18%       | 2 |

11 Answered

0 Skipped

Question 9  MULTIPLE CHOICE

The experts established dialogue with the participants



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 11   |

11 Answered

0 Skipped

Question 10    ... LIKERT SCALE

I would rate the content of the workshop as

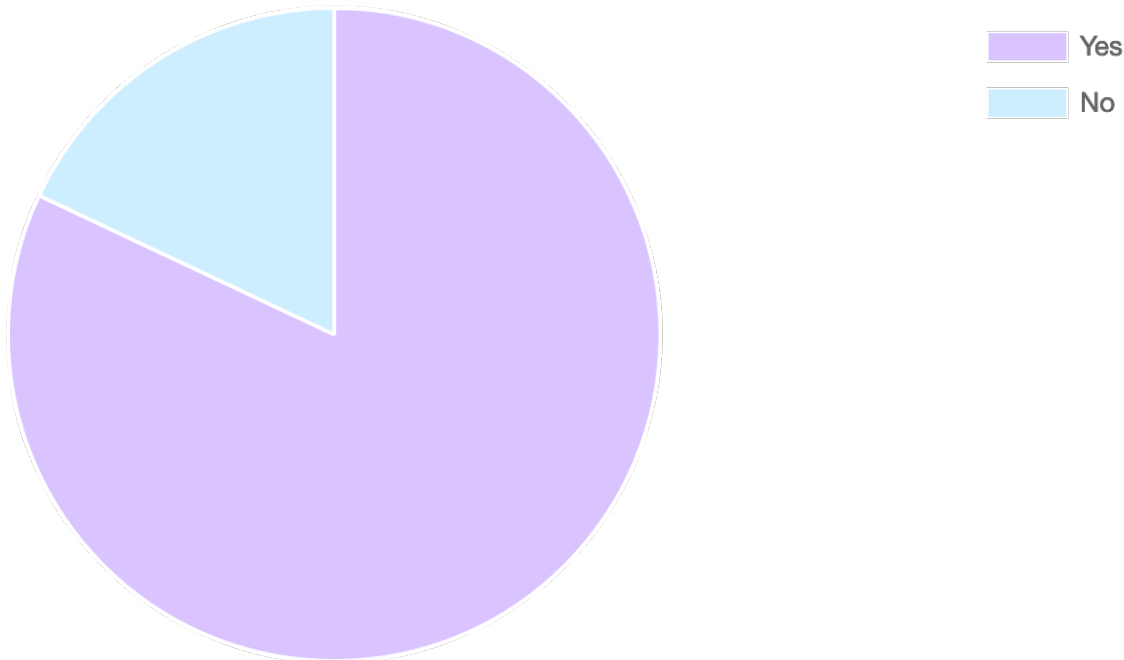
| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 4<br>50% | 4<br>50%  |

8 Answered

3 Skipped

Question 11 ☰ MULTIPLE CHOICE

The workshop helped to develop theoretical and practical knowledge on how to establish case studies on sustainable finance



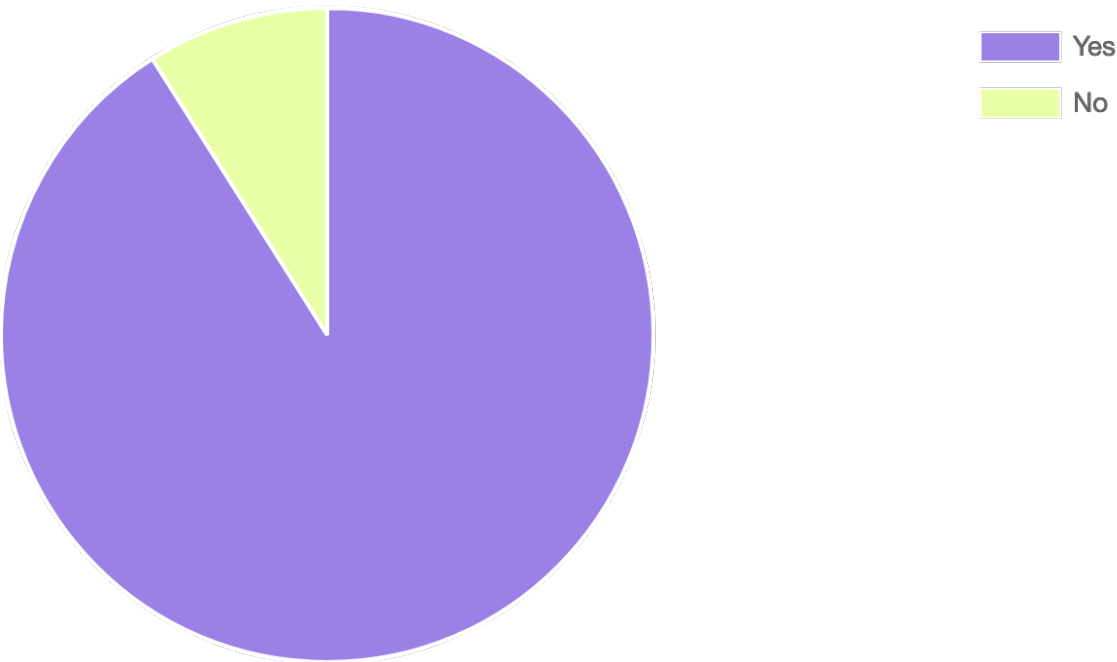
| ANSWERS | RESPONSES |   |
|---------|-----------|---|
| Yes     | 82%       | 9 |
| No      | 18%       | 2 |

11 Answered

0 Skipped

Question 12 ☰ MULTIPLE CHOICE

The workshop improved my knowledge regarding practical tools for around teaching and researching sustainability



| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 91%10     |
| No      | 9%1       |

11

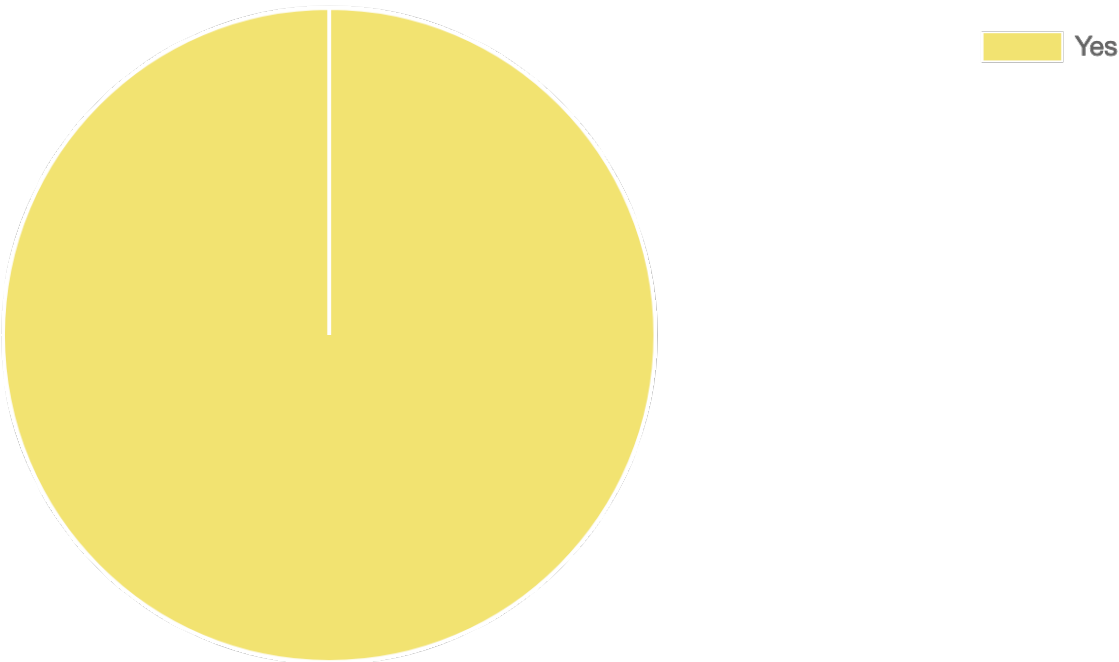
 Answered

0

 Skipped

Question 13  MULTIPLE CHOICE

The workshop presented me new or original perspectives on the topic of sustainability



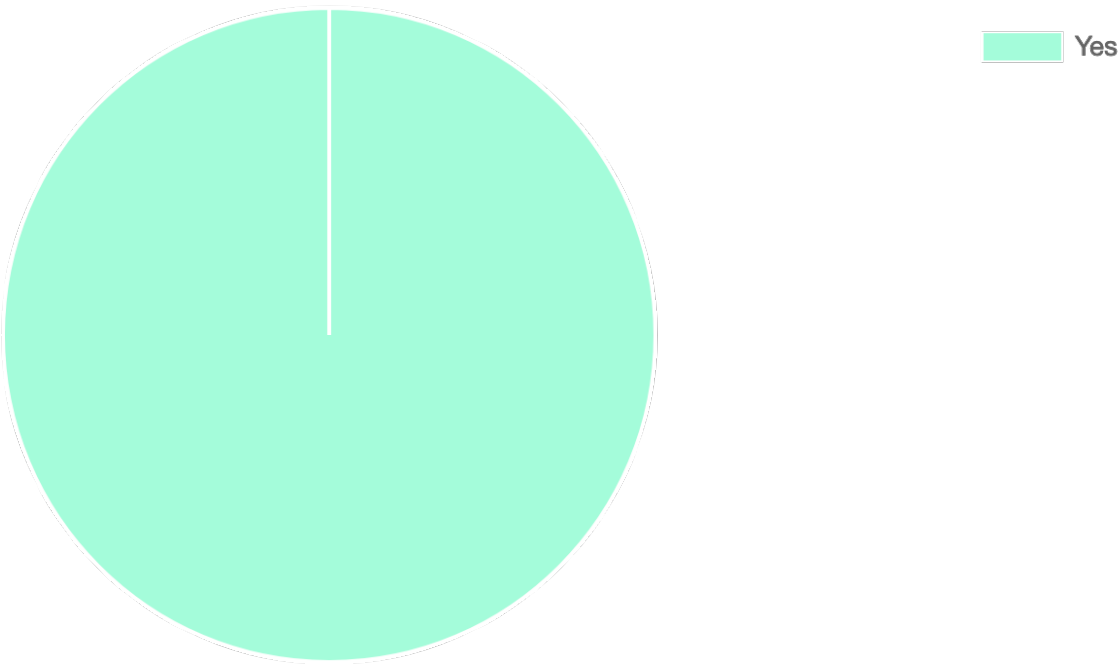
| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 100%      | 11 |

11 Answered

0 Skipped

Question 14    ≡ MULTIPLE CHOICE

The content was relevant for the situation in Israel



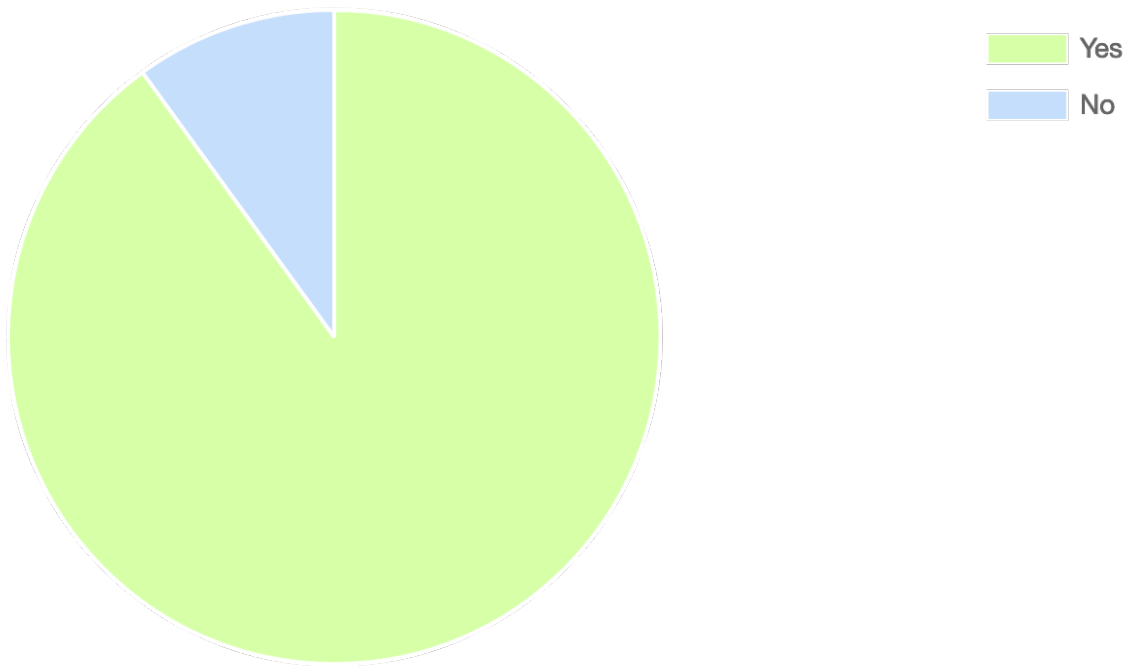
| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 9    |

9 Answered

2 Skipped

Question 15 ☰ MULTIPLE CHOICE

The workshop and the group activities were sufficiently interactive and gave me new ideas/Knowledges



| ANSWERS | RESPONSES |   |
|---------|-----------|---|
| Yes     | 90%       | 9 |
| No      | 10%       | 1 |

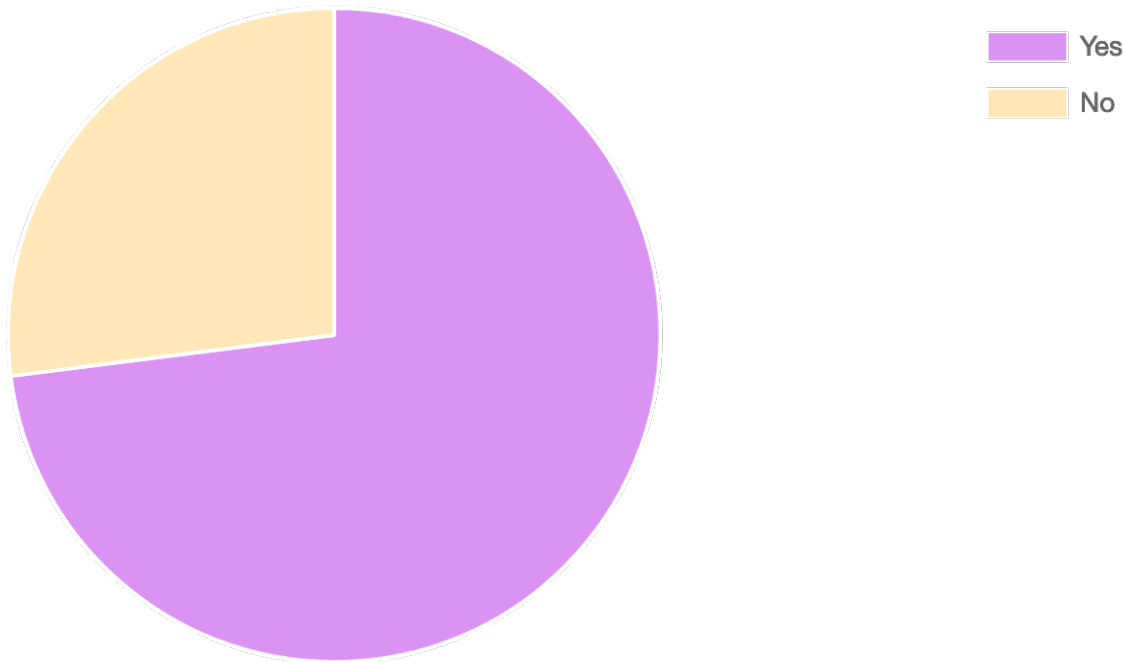
10 Answered

1 Skipped

Question 16    ≡ MULTIPLE CHOICE

The presentation of the case studies gave me a clear understanding on how the case studies are going to be used as tools in the project





| ANSWERS | RESPONSES |   |
|---------|-----------|---|
| Yes     | 73%       | 8 |
| No      | 27%       | 3 |

11 Answered

0 Skipped

Question 17    ... LIKERT SCALE

I would rate the quality of the workshop as

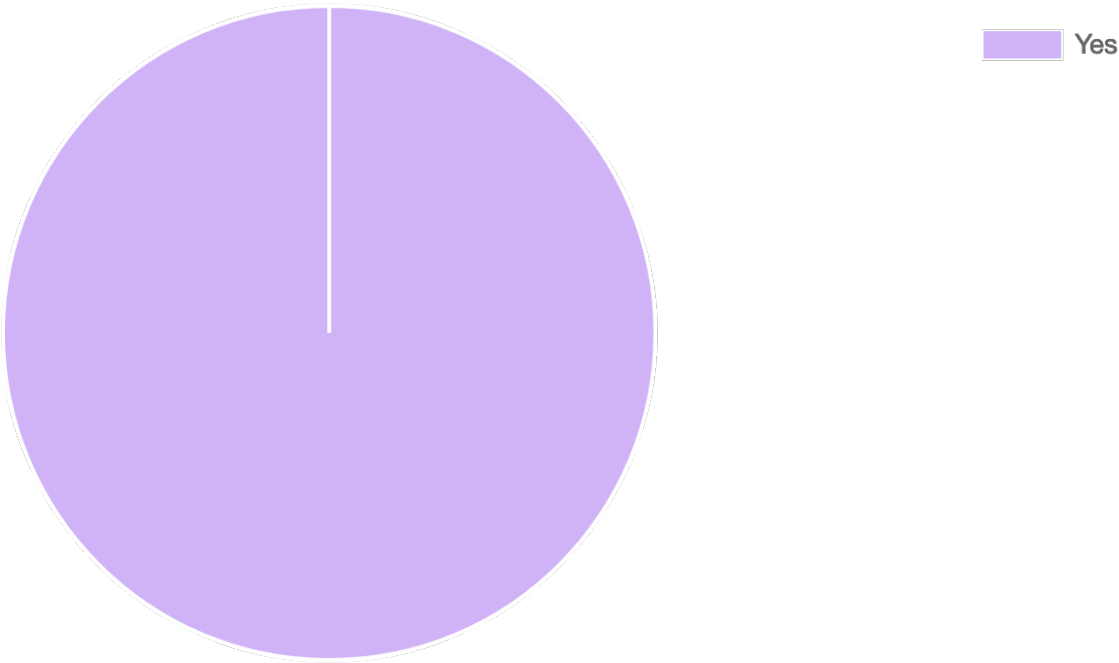
| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 3<br>30% | 7<br>70%  |

10 Answered

1 Skipped

Question 18 ☰ MULTIPLE CHOICE

The workshop improved my general knowledge/understanding of the project

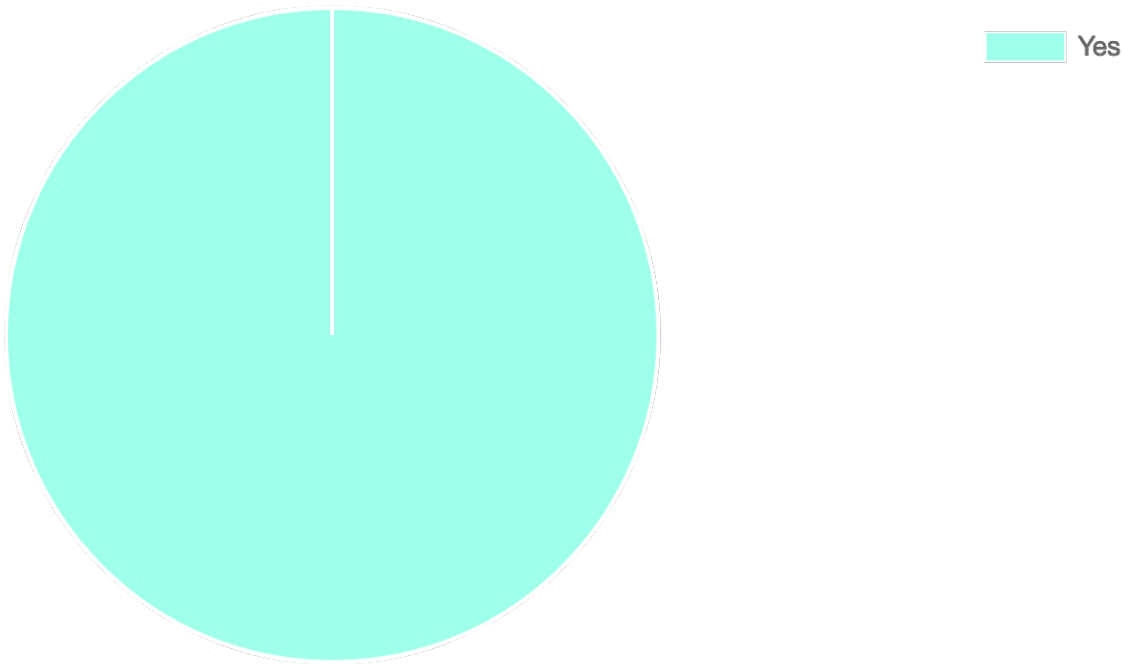


| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 100%      | 11 |

11 Answered      0 Skipped

Question 19 ☰ MULTIPLE CHOICE

I will be able to apply some of the key learning points to my tasks as professional



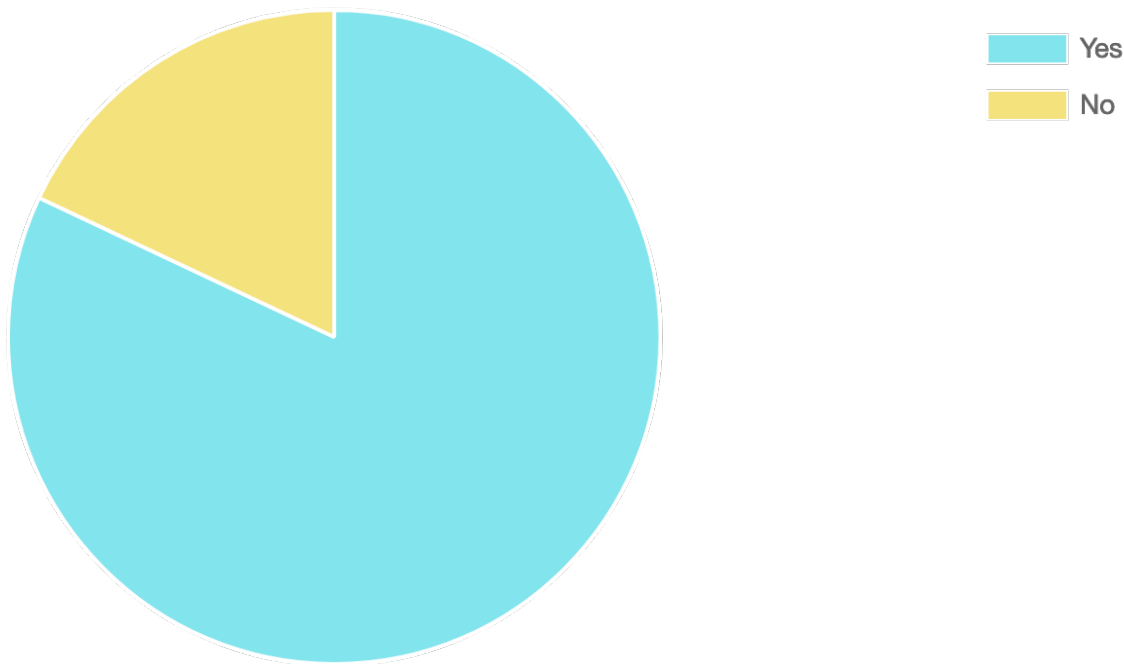
| ANSWERS | RESPONSES |
|---------|-----------|
| Yes     | 100% 11   |

11 Answered

0 Skipped

Question 20  MULTIPLE CHOICE

The workshop met my expectations



| ANSWERS | RESPONSES |   |
|---------|-----------|---|
| Yes     | 82%       | 9 |
| No      | 18%       | 2 |


11 Answered

0 Skipped

Question 21 ¶ PARAGRAPH TEXT

I particularly liked or disliked some aspects in the workshop




| ANSWERS  | DATE                   |  |
|--|------------------------|--|
| Great lectures, providing interesting perspectives on the issues   | November 8, 2021 11:43 |  |
| I liked the diversity of sessions. All of them were very interesting, and the organization was excellent. Thanks to the team of Padova.  | October 29, 2021 02:51 |  |
| I liked the interaction with the students- in class and presentation of students and former students. I liked the meetings with local industries . I think we could have analyzed more the strengths and weaknesses of the presented | October 28, 2021 22:37 |  |

| ANSWERS  | DATE   |
|--|--|
| case studies and talk more about the format and methodology of case studies. |  |
| very well organized  | October 28, 2021 14:49  |

4 Answered 7 Skipped

Question 22 ¶ PARAGRAPH TEXT

For the next activities, I would recommend improving the following aspects

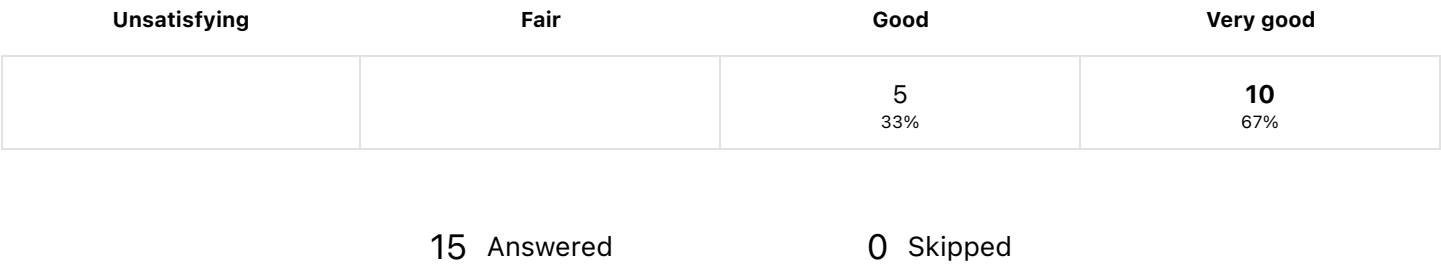
| ANSWERS  | DATE   |
|--|--|
| More interactive workshops   | November 8, 2021 11:43    |
| Discussion regarding the purpose and goals of our multidisciplinary group. | November 5, 2021 13:47  |
| more testing case studies with real students                               | October 28, 2021 14:49  |

3 Answered 8 Skipped

# IFI - WP3 Meeting #1: Training for sustainability at Rotterdam School of Management, Erasmus University Rotterdam

Question 1 ... LIKERT SCALE

Overall, I would rate the training as



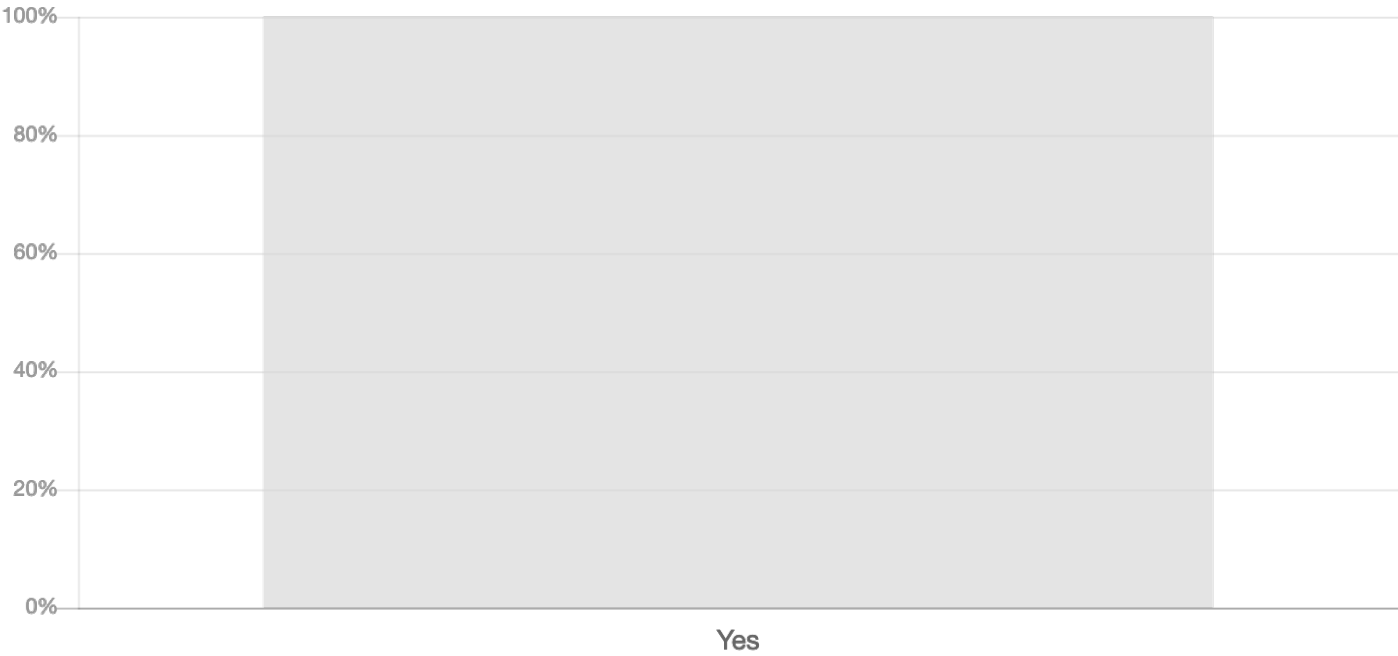
Question 2 ... LIKERT SCALE

I would rate the organisation of the training as



Question 3 ≡ MULTIPLE CHOICE

I received the programme/materials in advance



**ANSWERS**

**RESPONSES**

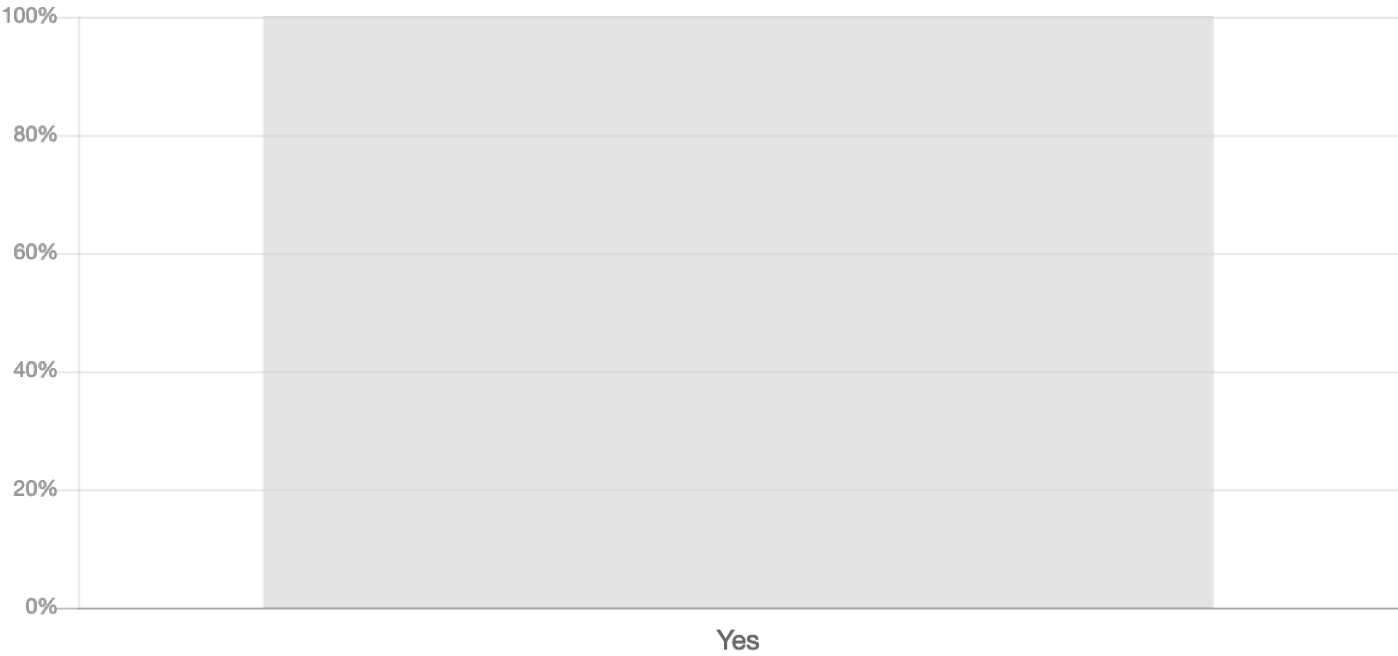
|     |      |    |
|-----|------|----|
| Yes | 100% | 14 |
|-----|------|----|

14 Answered

1 Skipped

Question 4  MULTIPLE CHOICE

The objectives of the training were clearly defined



**ANSWERS**

**RESPONSES**

|     |      |    |
|-----|------|----|
| Yes | 100% | 14 |
|-----|------|----|

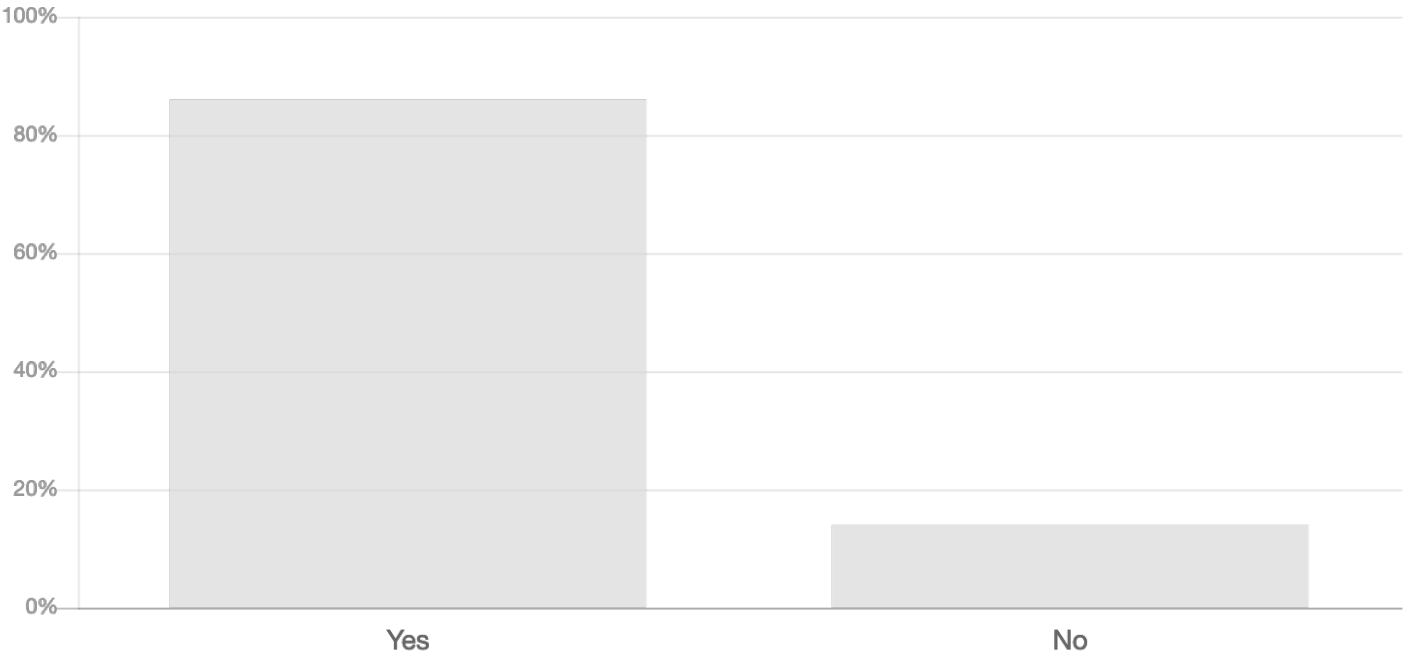
14 Answered

1 Skipped

Question 5  MULTIPLE CHOICE

Materials are available on the website after the training





| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 86%       | 12 |
| No      | 14%       | 2  |

14 Answered

1 Skipped

Question 6    **LIKERT SCALE**

I would rate the delivery of the training content as

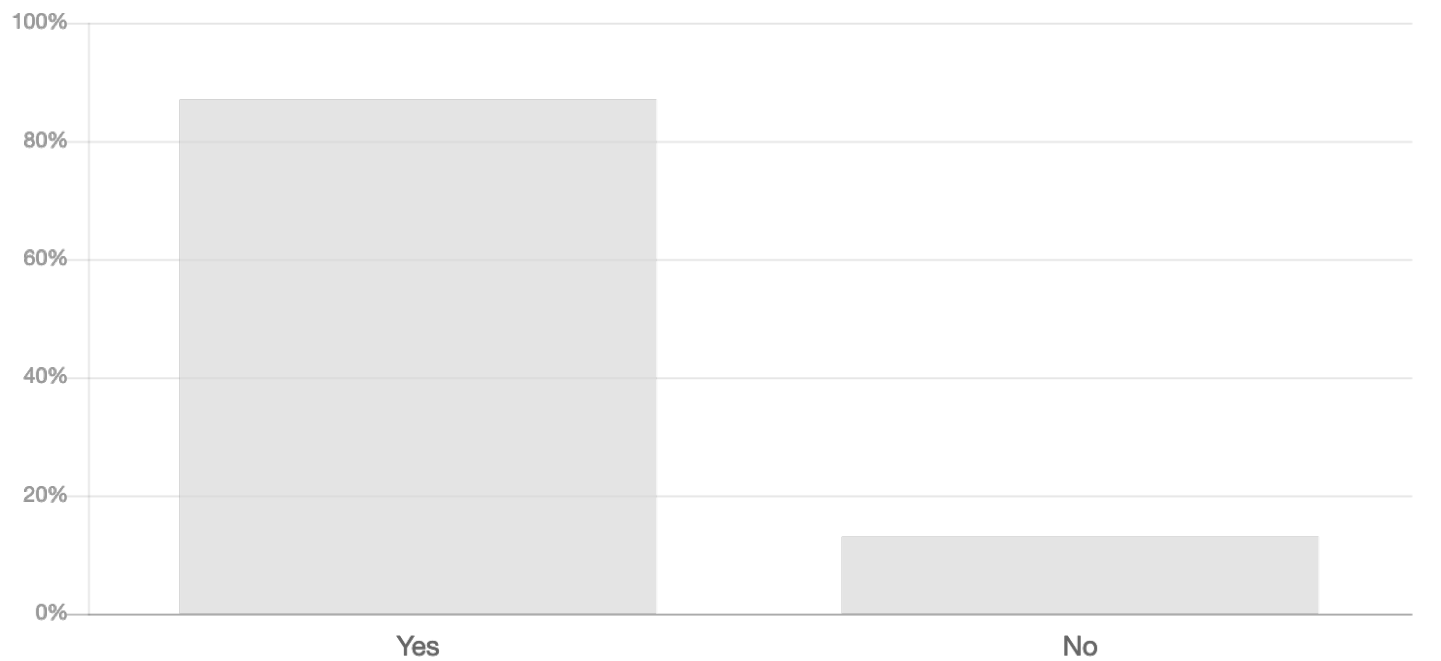
| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 5<br>42% | 7<br>58%  |

12 Answered

3 Skipped

Question 7 ☰ MULTIPLE CHOICE

The duration of the training was adequate

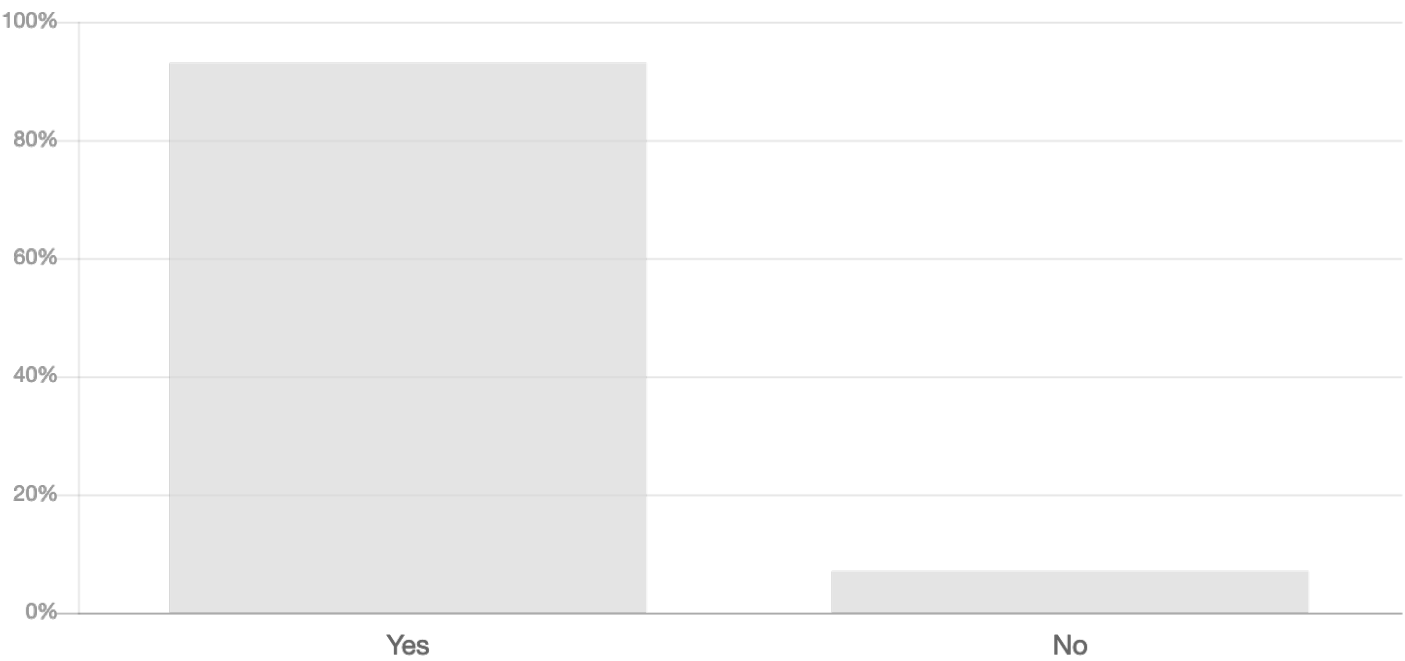


| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 87%       | 13 |
| No      |  | 13%       | 2  |

15 Answered      0 Skipped

Question 8 ☰ MULTIPLE CHOICE

The training allowed interaction between the participants



ANSWERS

RESPONSES

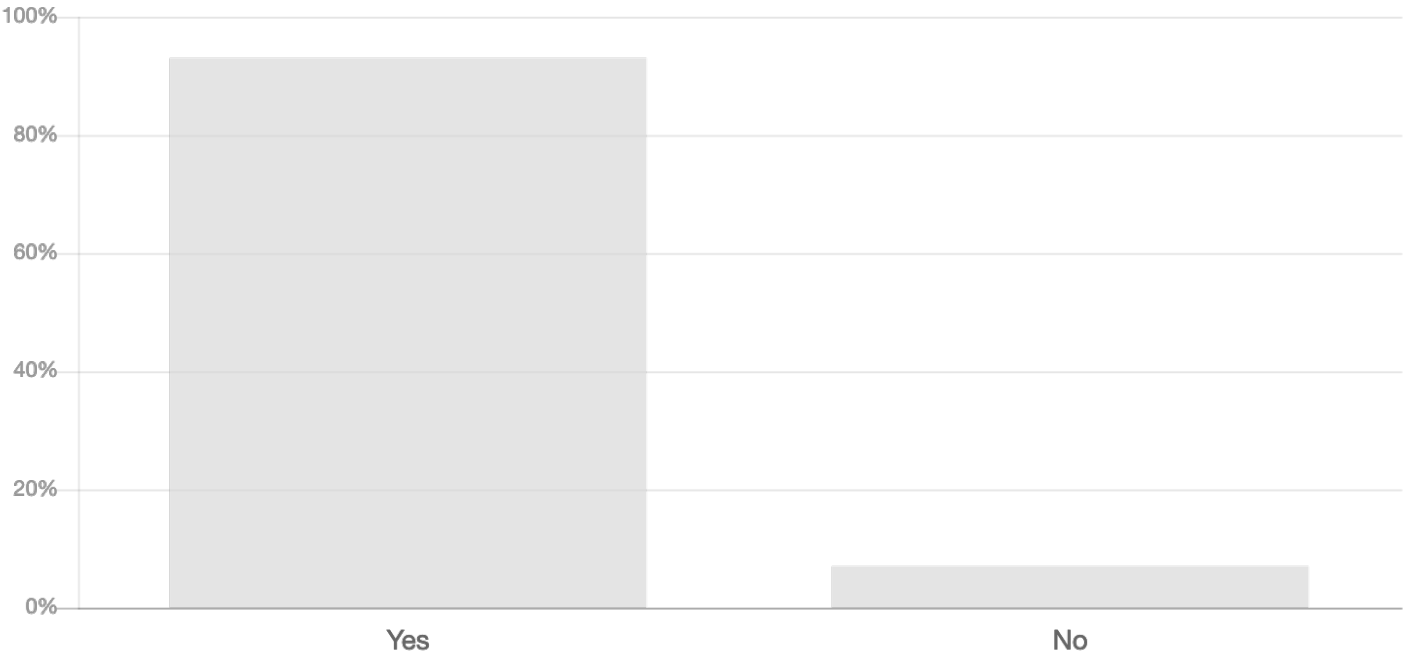
|     |     |    |
|-----|-----|----|
| Yes | 93% | 14 |
| No  | 7%  | 1  |

15 Answered

0 Skipped

Question 9  MULTIPLE CHOICE

The experts established dialogue with the participants



| ANSWERS | RESPONSES |    |
|---------|-----------|----|
| Yes     | 93%       | 14 |
| No      | 7%        | 1  |

15 Answered

0 Skipped

Question 10    ... LIKERT SCALE

I would rate the content of the training as

| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 5<br>45% | 6<br>55%  |

11 Answered

4 Skipped

Question 11 ☰ MULTIPLE CHOICE

The training helped to develop theoretical and practical knowledge on how to design training programmes on sustainable finance



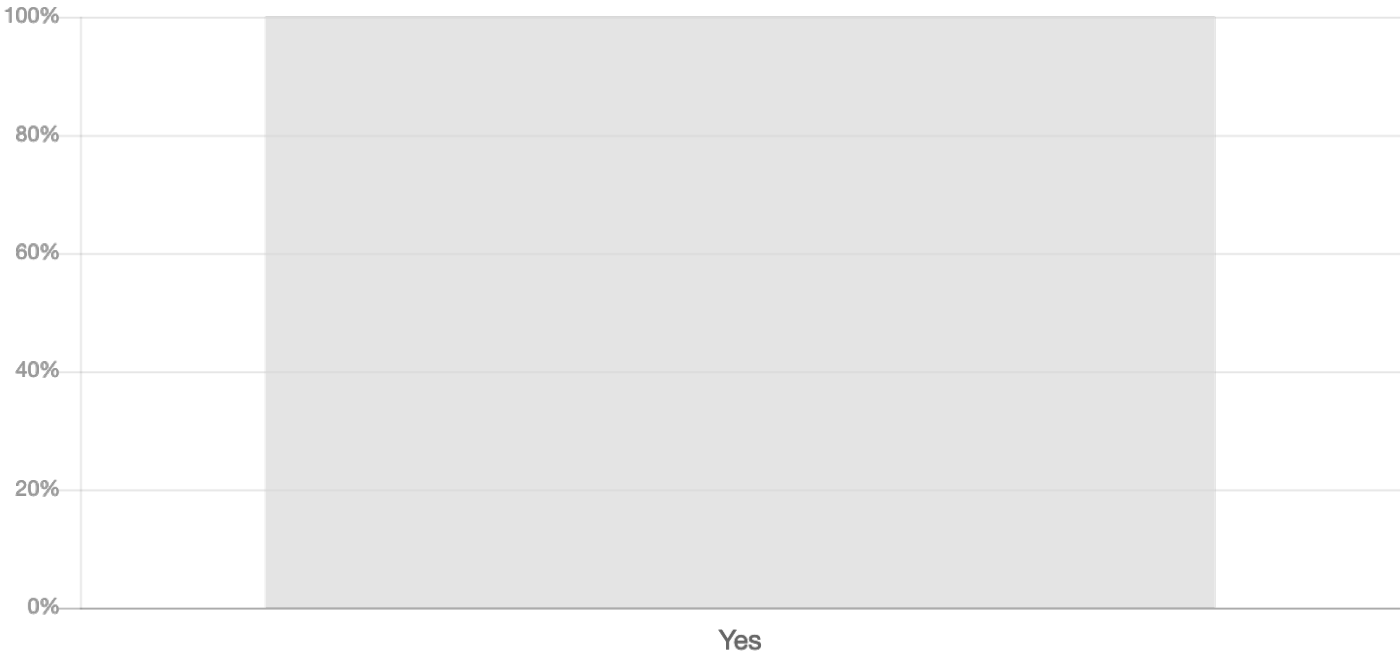
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 100%      | 15 |

15 Answered

0 Skipped

Question 12 ☰ MULTIPLE CHOICE

The training improved my knowledge regarding practical tools for developing training programmes for different professional groups on sustainable finance



ANSWERS

RESPONSES

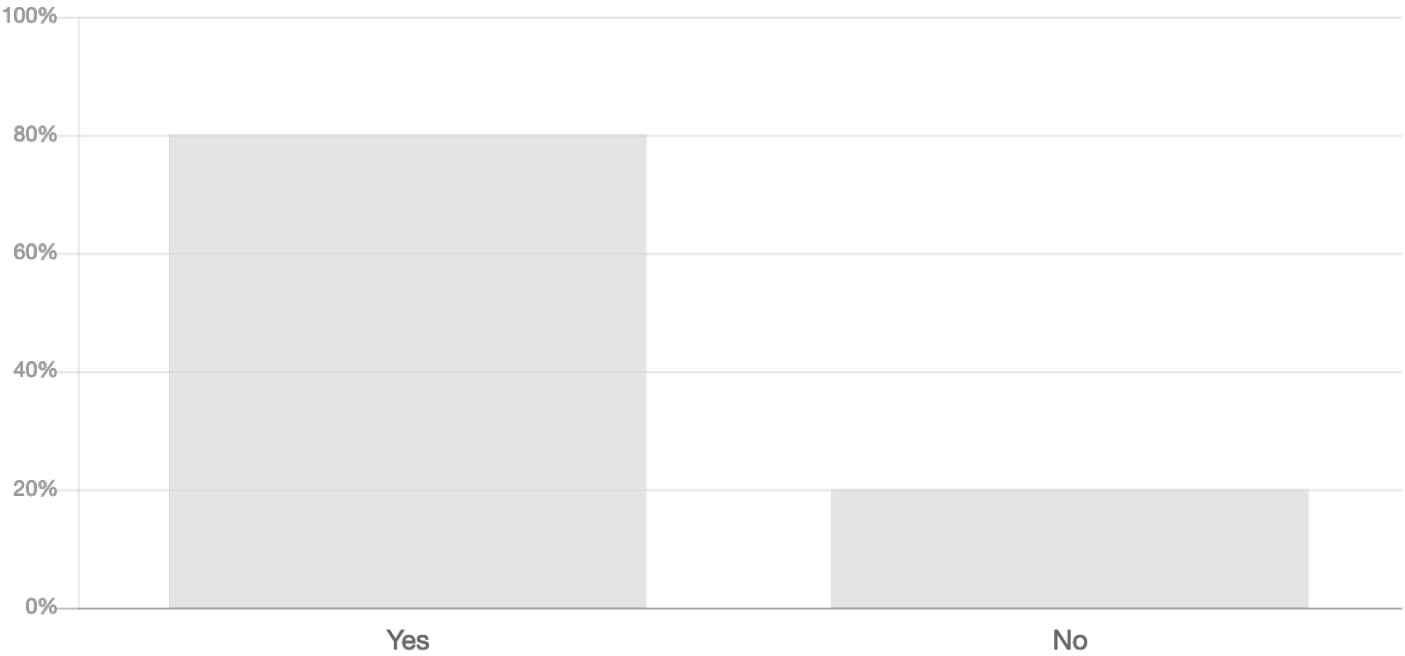
|     |      |    |
|-----|------|----|
| Yes | 100% | 15 |
|-----|------|----|

15 Answered

0 Skipped

Question 13    ≡ MULTIPLE CHOICE

The training presented me new or original perspectives on the topic of sustainability



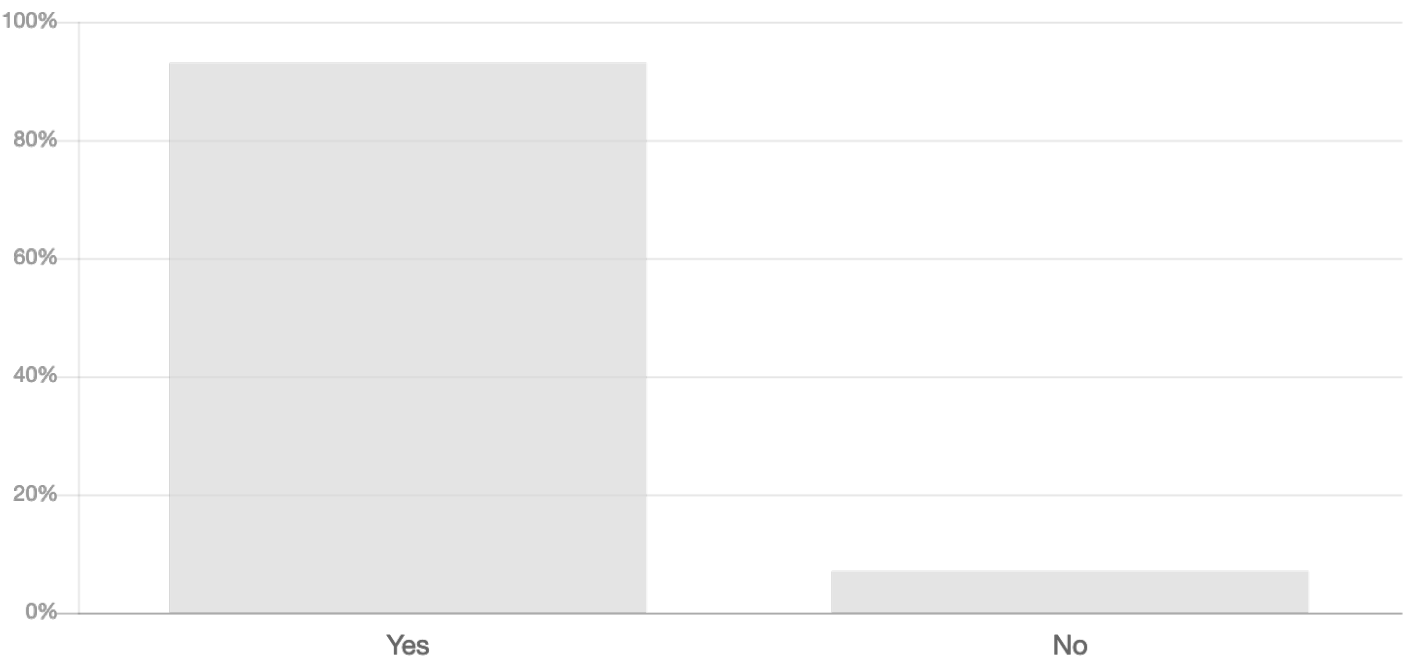
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 80%       | 12 |
| No      |  | 20%       | 3  |

15 Answered

0 Skipped

Question 14    ≡ MULTIPLE CHOICE

The content was relevant for the situation in Israel



| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 93%       | 13 |
| No      |  | 7%        | 1  |

14

Answered

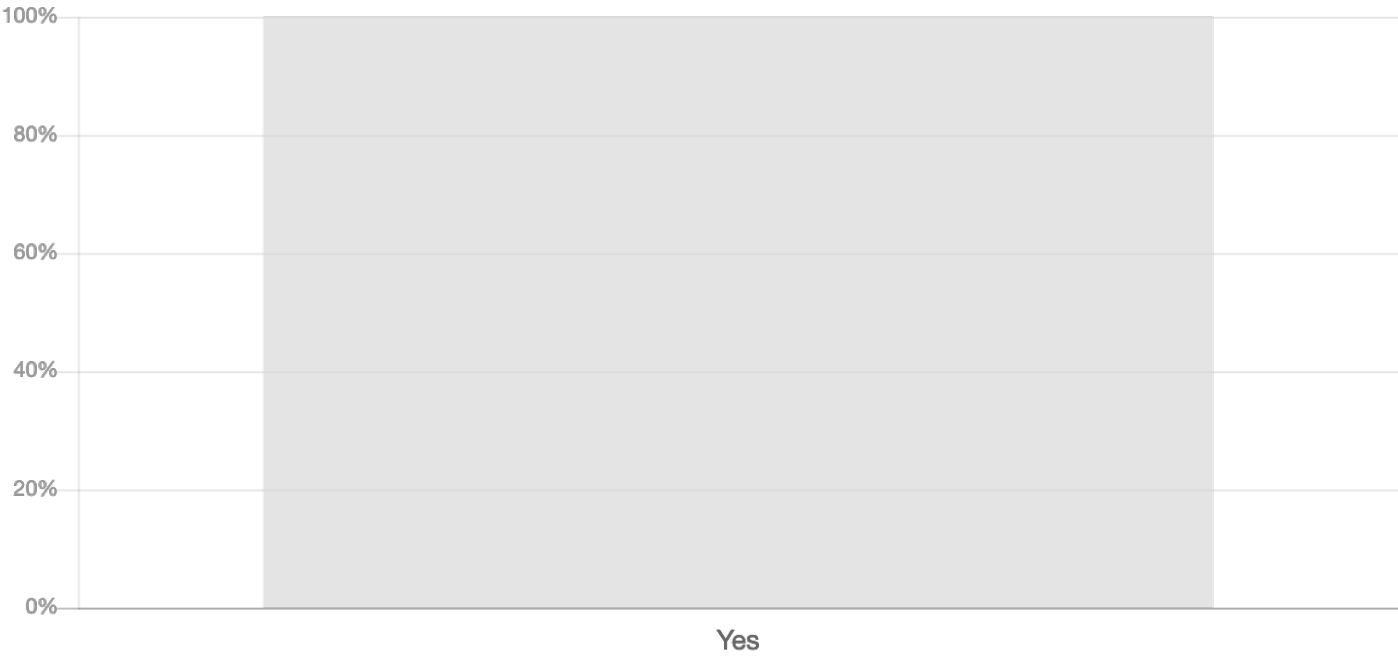
1

Skipped

Question 15    ≡ MULTIPLE CHOICE

The training was sufficiently interactive  
and gave me new ideas/knowledge





ANSWERS

RESPONSES

|     |      |    |
|-----|------|----|
| Yes | 100% | 15 |
|-----|------|----|

15 Answered

0 Skipped

Question 16 ... LIKERT SCALE

I would rate the quality of the training as

| Unsatisfying | Fair | Good     | Very good |
|--------------|------|----------|-----------|
|              |      | 4<br>40% | 6<br>60%  |

10 Answered

5 Skipped

Question 17 ≡ MULTIPLE CHOICE

The training improved my general knowledge/understanding of the project



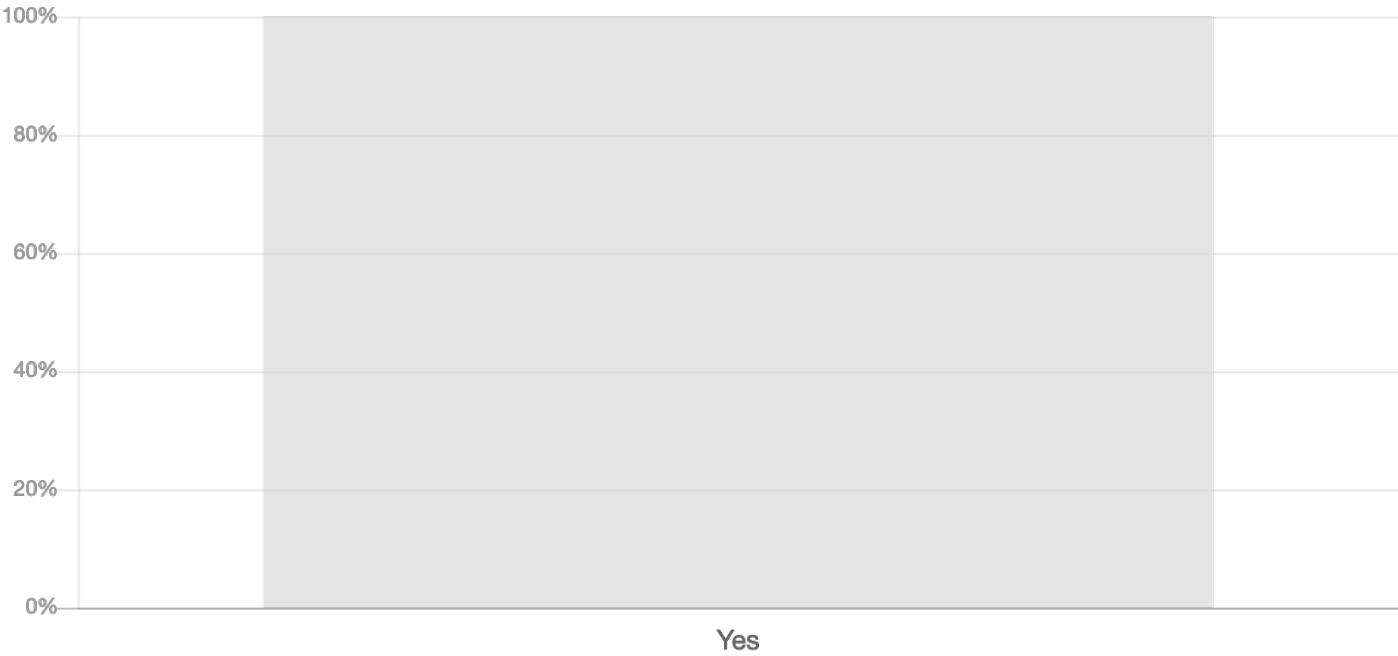
| ANSWERS |  | RESPONSES |    |
|---------|--|-----------|----|
| Yes     |  | 100%      | 15 |

15 Answered

0 Skipped

Question 18    ≡ MULTIPLE CHOICE

I will be able to apply some of the key learning points to my tasks as professional



**ANSWERS**

**RESPONSES**

|     |      |    |
|-----|------|----|
| Yes | 100% | 15 |
|-----|------|----|

15 Answered

0 Skipped

Question 19    ≡ MULTIPLE CHOICE

The training met my expectations



ANSWERS

RESPONSES

|     |      |    |
|-----|------|----|
| Yes | 100% | 15 |
|-----|------|----|

15 Answered      0 Skipped


Question 20   ¶ PARAGRAPH TEXT

I particularly liked or disliked some aspects in the training

ANSWERS

DATE

|  |                         |  |
|--|-------------------------|--|
| Very practical   | November 21, 2021 11:58 |  |
| The team at RSM are very knowledgeable and brilliantly shared their experience in an interesting manner.   | November 20, 2021 17:23 |  |
| Mathijs van Dijk ethics presentation was inspiring   | November 20, 2021 08:13 |  |
| I liked the detailed plans of the executive program and the group assignment on case study, which gave us a demonstration of the use of this tool. | November 19, 2021 14:30 |  |




| ANSWERS   | DATE                    |   |
|---|-------------------------|---|
| I especially liked the content of this meeting, extremely useful and insightful.<br>Also I liked timing and schedule. | November 19, 2021 11:32 |  |

5 Answered

10 Skipped

Question 21 ¶ PARAGRAPH TEXT

For the next activities, I would recommend improving the following aspects





| ANSWERS   | DATE                    |   |
|---|-------------------------|---|
| Keeping focus on the main goal - sustainability, while making sure that the technical tools and examples express the striving for this goal (and do not detach / move away from it) | November 21, 2021 11:58 |   |
| To combine workshop in small groups on specific issues  | November 20, 2021 08:13 |  |
| for offline meetings please keep timing and schedule.   | November 19, 2021 11:32 |  |

3 Answered

12 Skipped

Question 22 ¶ PARAGRAPH TEXT

As suggested during the training, please, give us a list of topics you would like to explore in the next meetings in Heidelberg (March) and Brussels (May). Where possible, add also a wish-list of institutions, regulators or companies you would like to meet / learn more about during this two meetings

| ANSWERS  | DATE                    |   |
|--|-------------------------|---|
| Heidelberg: IMM - from theory to practice Brussels: Regulation - overview of the upcoming/foreseen ESG regulation in the OECD. Ways of dealing with what is expected, in the sense of impact investments   | November 21, 2021 11:58 |  |
| The case study writing workshop was interesting and helpful, more content on the subject would be great  | November 20, 2021 08:13 |  |
| To hear more on policies used in the EU to promote ESG goals. Moreover, to meet examples of more traditional financial institutes who adopt ed new thinking and new tool. To hear about more new impact financial models and to hear on more training academic programs and methodologies used by the host universities to teach impact investments.Thanks | November 19, 2021 14:30 |  |
| Ask youth representatives from Climate strikes to present their ideas to find points of correlation and understand their values and demand and how to built it into our agenda.  | November 19, 2021 11:32 |  |

4 Answered

11 Skipped