

# **Guide to the Investment Office, Yale University, Records Concerning Ethical Investments**

RU 296



compiled by Daniel Hartwig

June 2008

Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441

[beinecke.library@yale.edu](mailto:beinecke.library@yale.edu)

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## Collection Overview

**REPOSITORY:** Manuscripts and Archives  
Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441  
beinecke.library@yale.edu  
<http://www.library.yale.edu/mssa/>

**CALL NUMBER:** RU 296

**CREATOR:** Yale University. Investment Office

**TITLE:** Investment Office, Yale University, records concerning ethical investments

**DATES:** 1977-1994

**PHYSICAL DESCRIPTION:** 18 linear feet (18 boxes)

**LANGUAGE:** English

**SUMMARY:** The records consist of reports and subject files of the Yale Investment Office concerning ethical investing, particularly in South Africa and tobacco companies.

**ONLINE FINDING AID:** To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0296>

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## Requesting Instructions

To request items from this collection for use in the Manuscripts and Archives reading room, please use the request links in the HTML version of this finding aid, available at <https://hdl.handle.net/10079/fa/mssa.ru.0296>.

To order reproductions from this collection, please go to [http://www.library.yale.edu/mssa/ifr\\_copy\\_order.html](http://www.library.yale.edu/mssa/ifr_copy_order.html). The information you will need to submit an order includes: the collection call number, collection title, series or accession number, box number, and folder number or name.

Key to the container abbreviations used in the PDF finding aid:

b.      box  
f.      folder

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## Administrative Information

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### Conditions Governing Access

Access to the records is restricted. See Collection Contents for details.

Some records in this finding aid have been redacted, as they include student names, donor names, and other restricted data. These records will not appear in the published finding aid.

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## Conditions Governing Use

Copyright for materials authored or otherwise produced as official business of Yale University is retained by Yale University. Copyright status for other collection materials is unknown. Transmission or reproduction of materials protected by U.S. Copyright Law (Title 17, U.S.C.) beyond that allowed by fair use requires the written permission of the copyright owners. Works not in the public domain cannot be commercially exploited without permission of the copyright owners. Responsibility for any use rests exclusively with the user.

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## Preferred Citation

Investment Office, Yale University, Records Concerning Ethical Investments (RU 296). Manuscripts and Archives, Yale University Library.

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## Processing Information

Yale University records are arranged and described at the accession level by the creating office. The University Archives creates collection level descriptive records, but typically does no further arrangement and description at the accession level.

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## Scope and Contents

The records consist of reports and subject files of the Yale Investment Office concerning ethical investing, particularly in South Africa and tobacco companies.

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## General note

Forms part of Yale Record Group 5-D (YRG 5-D), Investment and insurance records of Yale University.

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## Arrangement

The records are arranged by accession.

## Collection Contents

### Accession 1997-A-043: Records of investment policy for various responsibility issues primarily divestment in South Africa, 1972-1994

Restricted until January 1, 2044

General files		
b. 1, f. 2	"Beyond Divestment: the Moral University": speech to AACHE	1986 Mar 13
b. 1, f. 12	Public statements on South African investments	1986
Committees		
Alumni Committee on Investor Responsibility (ACIR)		
b. 2, f. 4	Agenda memoranda campus correspondence	1983-1984
Correspondence		
General		
b. 2, f. 8	1976	1976
b. 2, f. 9	1977	1977
b. 2, f. 10	1978	1978
b. 2, f. 11	1979	1979
b. 2, f. 11a	1979-1980	1979-1980
b. 2, f. 12	1980	1980
b. 2, f. 13	1981	1981
b. 2, f. 13a	1981-1982	1981-1982
b. 2, f. 14	1985	1985
b. 2, f. 15-16	1988-1989	1988-1989
b. 2, f. 17	1991-1992	1991-1992
b. 2, f. 18	1992	1992
b. 2, f. 34	Fact-finding trip to South Africa	1986
b. 2, f. 35	Harvard report	1984
Letters		
b. 2, f. 39	Drafts	1993
b. 2, f. 39a	Letters, correspondence and memoranda	1991
b. 2, f. 40	Letters to Richard C. Levin re: South Africa	1994

Committees > Alumni Committee on Investor Responsibility (ACIR) (continued)

Meetings		
b. 3, f. 6	Notes and correspondence	1990-1991
b. 3, f. 7	Policy Recommendations	1991
b. 3, f. 7a	Policy guidelines summary	1992
b. 3, f. 8	Presidential letters of invitation	1993-1994
b. 3, f. 24	South Africa Ivy Group proposal	1981
b. 3, f. 26	Summary of votes	1987
b. 4, f. 4	Committee on the use of Hewitt Quadrangle, correspondence-re: Winnie Mandela City	1986

Accession 1998-A-001: Records concerning investment responsibility, 1986-1988

Restricted until Jan 1, 2038.

South Africa Materials		
b. 1	Cornell University Research Report on South Africa	1985
b. 1	Cornell University Research Report on South Africa, second addendum	1985
ADVISORY COMMITTEE FOR INVESTOR RESPONSIBILITIES		
b. 2	Policy - guidelines summary	1992
b. 3	Presidential letters of invitation	1993 -94
b. 4	Levin Letter	1994

Accession 2001-A-097: Corporation  
Committee of the whole meeting information  
packet on investor responsibility regarding  
tobacco.

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**Accession 2001-A-097: Corporation Committee of the whole meeting information  
packet on investor responsibility regarding tobacco, 1992**

Restricted until Jan 1, 2042.



## **Selected Search Terms**

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person or organization, by subject or location, and by occupation and listed alphabetically therein.

### **Subjects**

Investments  
Investments -- Moral and ethical aspects  
Universities and colleges -- Finance

### **Corporate Bodies**

Yale University. Investment Office  
Yale University. Office of Finance and  
Administration  
Yale University -- Finance