ORC: ESG Advisory Solutions

ORC

An Overview of ORC

We are a Specialist Consultancy

ORC is a specialist due diligence and advisory consultancy supporting sovereign entities, pension funds, DFIs, government-related funds, institutional investors and asset managers.

We help clients define, implement and oversee practical ESG frameworks that reflect their objectives, investment strategy and governance requirements. Our approach is senior-led, tailored and grounded in the practical application of ESG across asset classes.

Our ESG Expert

Our ESG solutions are led by Maria Long, Partner and senior ESG and due diligence specialist. Maria brings practical experience advising asset owners and asset managers on ESG framework design, implementation, due diligence and oversight across investment strategies.



Maria Long | Partner

- Senior ESG and due diligence specialist with experience advising asset owners and asset managers.
- Practical expertise in developing bespoke ESG frameworks aligned with institutional objectives and governance requirements.
- Former Chair of the SBAI Responsible Investment Working Group.
- Adviser to the UK All-Party Parliamentary Group for ESG.
- Former member of the UN PRI

Supported by additional Partners; with our team's total combined industry experience exceeding 205 years.

More than ESG Specialist

We offer a range of solutions supporting clients across the investment and asset servicing lifecycle.

- Operational Due Diligence
- Custody & Fund Administration
- Advisory
- Investment Governance & Due Diligence

Our Offering: *Practical Advice and Implementation Support*



Maria Long
Partner

"ESG objectives are rarely one-size-fits-all. The challenge is translating ambition into a framework that is clear, measurable and practical, and then testing whether managers are delivering against it. ORC helps clients design that framework, embed it across the organisation and maintain effective oversight over time."

Our Complete Solution

We provide an integrated ESG solution that supporting clients from ESG objective definition through to implementation and ongoing monitoring.

ESG Framework Development
Define practical ESG objectives and build the governance, policies, processes and reporting needed to apply them consistently.

ESG Due Diligence
Assess whether external managers are implementing their stated ESG approach and can evidence how it operates in practice.

ESG Ongoing Monitoring
Track changes, commitments and evidence across managers and portfolios through structured oversight and technology-enabled reporting.

Designed Around the Client's Objectives

ESG priorities differ by institution, mandate and investment strategy.

ORC works with clients to define an approach that is specific, measurable and achievable. The framework can be aligned to investment objectives, risk appetite, responsible ownership expectations, regulatory requirements and internal governance.

We Are Thought Leaders

Read our thought pieces and insights into what we observe in the asset management ecosystem.

Thought Pieces | Follow Our Linkedin

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ORC: ESG Advisory Solutions

Our Approach: *From* *ESG Objective Setting to Evidence-Based Oversight*

Value of a Robust ESG Oversight Framework

A well-designed ESG framework helps institutions translate broad objectives into clear governance, consistent decision-making and measurable oversight. It creates a practical basis for applying ESG expectations across investment, risk and compliance processes, rather than leaving them as high-level commitments.

ORC helps clients achieve this by defining clear ESG objectives, designing the supporting governance and processes, and establishing the reporting needed to monitor implementation. We also help firms assess whether external managers are delivering against their stated approach, giving clients a more consistent and evidence-based basis for oversight.

ESG Framework Development

ORC helps clients move from broad ESG ambition to a defined and implementable framework, addressing:

ESG Objectives	Governance and Accountability	Policies and Processes	Data and Reporting
Clarify the institution's priorities, desired outcomes and level of ambition	Define decision rights, responsibilities, oversight and escalation routes	Formalise how ESG is applied across investment, risk, compliance and reporting	Determine what information is required, how it should be collected and how progress should be assessed.

ESG Due Diligence

Reviewing an ESG policy alone does not demonstrate that a manager's approach is operating effectively. ORC assesses whether external managers can evidence how ESG is governed, implemented and monitored in practice. Our review can

Business Management	Human Capital	Third Party Management	Compliance Frameworks	Risk Management & Audit	Compliance Frameworks
ESG governance, accountability and integration across the organisation	ESG culture, resourcing, incentives and workforce practices	ESG expectations for service providers, data vendors and other critical third parties	ESG policies, regulatory alignment and control oversight	Identification, monitoring and independent challenge of ESG-related risks.	ESG integration within research, approval, ownership and monitoring.

ESG Ongoing Monitoring

Effective ESG oversight should continue after the initial review. ORC helps clients maintain visibility across managers and portfolios through structured questionnaires, evidence collection, data analysis and qualitative review. Our approach can support:

Manager Monitoring	**Track changes in governance, resources, policies, commitments and implementation.**
Evidence Tracking	**Monitor whether stated objectives and remediation commitments are being delivered.**
Governance Reporting	**Provide clear outputs for committees, risk functions and other oversight bodies.**

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