

Alameda County Fossil Fuel Equity Tool

Data Request Tips

To use the tool, you'll need to obtain a complete list of individual equity portfolio holdings as well as a list of Carbon Underground 200™ companies for the years you are investigating.

1) Pension Fund Requests

Whom to Contact

- You'll likely wish to contact your pension fund's investment team for information on its individual equity holdings. If you reach out to the pension fund's general email or phone number, a staff member should be able to direct you to the right place.

Items to Keep in Mind

- If you are a member of the pension fund, you may choose to indicate that in your request.
- For those in California, if you state your request as a California Public Records Act (CPRA) request, you should receive notification within 10 calendar days as to when the data will be provided. As CPRA requestor, you do not have to identify who you are or your reason for requesting the data. (Other states may have similar guidelines for public records requests.)
- Be sure to request the data as an Excel spreadsheet or compatible format so you can use it in the tool. A pdf or print-out will not be usable with the tool.

Sample Written Request

I am writing to request the complete list (***as Excel spreadsheets***) of the individual equity positions, including the names of companies, the number of shares, the ending price per share, and the ending total market value of the investments as of the following dates:

- December 31, [insert year]
- December 31, [insert year]
- December 31, [insert year]

Pursuant to the [California Public Records Act], I look forward to hearing back from you within [10] calendar days. Thank you.

2) Fossil Free Indexes Request

Whom to Contact

- Fossil Free Indexes compiles and maintains the Carbon Underground 200™, a list of the top 100 coal and the top 100 oil and gas publicly-traded reserve holders globally. Annual rankings are available at no charge to asset owners, non-profit organizations, and the media for non-commercial use. (Rankings are updated quarterly for subscribers.)
- You can submit your request for annual rankings using the company's online form found [here](#) or email contactus@fossilfreeindexes.com.

Items to Keep in Mind

- The tool provides the most accurate analysis if the dates for the Carbon Underground 200 annual rankings match those for equity data.
- The Carbon Underground 200 annual rankings have specific terms of use, which will be provided to you. We understand that these are compatible with using them in the tool, but you are responsible to review and abide by the terms.

Sample Written Request

I am undertaking some local investment analyses and am requesting the complementary annual updates of The Carbon Underground 200 for the following years, ending December 31: **[insert years compatible with your equity data years]**.

Thank you very much for helping in our efforts to review the fossil fuel impacts of investments.

Please email any feedback on these tips to [acsustain \[at\] acgov.org](mailto:acsustain@acgov.org).