

## **CAPSTONE WORKSHOP: Bank of America - Corporate Social Responsibility in Latin America**

### **General Course Information:**

SIPA U9000.040 CAPSTONE WORKSHOP: Bank of America - CSR in LatAm

M 06:10P-08:00P

INTERNATIONA 501

### **Instructor Information:**

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Office Hours: By mutual agreement

Bank of America - CSR in Latin America

CAPSTONE WORKSHOP

### **1. Client Background:**

Bank of America Corporation (Bank of America) is a leading global financial institution, serving individual consumers, small and middle market businesses, corporations and governments with a range of banking, investing, asset management and other financial and risk management products and services. Across Latin America Bank of America is a leading financial advisor to governments, companies, institutional and individual investors with more than 50 years of in-region experience, offices in seven countries and membership of four regional exchanges. Local corporate and investment banking, capital markets and sales and trading professionals address a wide range of client needs offering proprietary research covering more than 150 Latin American companies.

### **2. Project Background:**

Bank of America seeks to better understand the CSR practices of other major financial services firms, both locally based and international, active in LAC. This will involve the collection of information about CSR practices involving desk research and interviews. Starting by setting CSR practices by these firms into a regional context the bulk of the project will focus on identifying and comparing specific financial services firm policies with a view to identifying best practices in the space in terms of investment effectiveness and visible impact. Based on this benchmarking the project will assess what approaches to CSR might be appropriate for Bank of America in the region given its geographic foot print, lines of business and broader corporate philosophy and objectives as regards CSR.

### **3. Objective and client deliverables:**

The project will deliver an in-depth research report on CSR in LAC which specifically analyses, compares and contrasts the CSR programs of the largest financial services companies operating in the region's major markets. The project will provide specific recommendations as to which CSR initiatives make sense for Bank of America in the region consistent with its presence and commercial objectives.

### **4. Project Key Tasks**

Background research on CSR in LAC

Collection of information about CSR practices by major financial services companies in LAC using desk research and interviews

Compare and contrast CSR activities of the major financial companies

Development of report structure

Organization of key findings in report

Presentation of report

### **5. Timetable:**

Meeting with Project team and client - December 2012

Detailed work plan: Jan, 2012

Draft report outline: Jan, 2012

Draft report: Week of April 14, 2012

Final report : Week of April 27, 2012

Presentation of key findings: before April 30, 2012

### **6. Requirements:**

Students should have strong research, analytical and oral and written communications skills. Ideal candidates will have experience of, or familiarity with, Corporate Social Responsibility theory and also an interest in Latin America. Experience in finance is a plus.

## **7. Logistics:**

Bank of America will provide other information as requested for the execution of the project to the extent that it is available. The client project director and her colleagues are based in Manhattan can be reached via email and will be available for a regular call with the Faculty Advisor and/or SIPA project team as required.

Travel outside of NYC is not required.

## **8. Student selection:**

All eligible students may apply for up to five workshops through a special online application process over October 15th-31st. Assignment of students will be coordinated by the Office of Faculty and Curriculum, and relevant faculty will be consulted about team membership for their workshop(s).

## **9. Grading (students receive an individual grade):**

Grades for the workshop will be based on the following criteria:

- Quality of individual written work (10%)
- Quality of participation in class, Peer review (20%)
- Feedback from the client (20%)
- Overall professionalism, including timeliness, ability to work with team, etc. (20%)
- Quality of team's final report and briefing (30%)

## **\*Academic Integrity Statement\*:**

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Please familiarize yourself with the proper methods of citation and attribution. The School provides some useful resources online; we strongly encourage you to familiarize yourself with these various styles before conducting your research:

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