ENVIRONMENTAL CONSULTING CASE STUDY

Improving Sustainability Data Quality and Portfolio-Level Insight for an Energy-Focused PE Firm

CHALLENGE

A private equity firm sought to strengthen its sustainability program rigor across upstream and energy transition portfolios. Diverse business models, varying data maturity, and evolving stakeholder expectations made it difficult to consistently collect, validate, and interpret sustainability performance information at the portfolio level.

SOLUTION

Trinity served as an extension of the firm's internal sustainability staff, providing year-round support for data collection, validation, benchmarking, portfolio company engagement, and investor reporting. The team introduced greater consistency, technical rigor, regulatory expertise, and operational insight across sustainability processes and datasets.

RESULT

The firm improved the quality, consistency, and defensibility of sustainability performance information across its portfolio. Enhanced reporting processes and portfolio-level insights increased confidence in sustainability data used for management decision-making, partner communications, and investor engagement.

A U.S.-based private equity firm with investments spanning upstream oil and gas and energy transition sectors sought to strengthen the consistency, quality, and usefulness of sustainability information across its portfolio. Trinity Consultants partnered with the firm to provide year-round support for data collection, quality assurance, benchmarking, portfolio company engagement, and investor reporting. Working as an extension of the internal sustainability team, Trinity helped transform company-level information into more reliable and credible portfolio-level insights that support decision-making and stakeholder communications.

CHALLENGE

As the firm expanded investments across upstream oil and gas and energy transition assets, it sought to strengthen the rigor, consistency, and usefulness of sustainability information used to support portfolio management and investor communications. Operating companies varied significantly in size, maturity, data availability, and internal resources, resulting in differences in how sustainability metrics were defined, calculated, and reported. At the same time, sustainability priorities differed across the two funds. While certain portfolio companies focused on operational performance indicators such as emissions, safety, and workforce metrics, others emphasized measures related to technology deployment, environmental impact, and growth. Aggregating information across diverse business models while maintaining consistency and comparability presented an ongoing challenge.

The firm sought a trusted advisor that could provide technical expertise, portfolio-level perspective, and year-round program support while serving as an extension of its lean internal sustainability team.

SOLUTION

Trinity Consultants partnered with the firm to support and enhance a year-round sustainability program aligned with its investment and reporting cycle. Working across both funds and their portfolio companies, Trinity provided program management, technical review, data analysis, benchmarking, and reporting support designed to improve consistency and confidence in sustainability information. Drawing on deep experience in upstream energy, energy transition industries, GHG accounting, and sustainability reporting, Trinity helped refine metric definitions, improve quality assurance processes, and strengthen portfolio-wide data management practices.

- Refined sustainability metrics and reporting guidance to improve consistency across portfolio companies
- Enhanced data validation, quality control, and aggregation processes
- Standardized information requests and annual data collection procedures
- Conducted portfolio-level benchmarking and performance analysis
- Supported sustainability report development and investor communications
- Maintained ongoing engagement with portfolio companies to provide context, address data questions, and identify opportunities for program improvement

By combining quantitative analysis with an understanding of portfolio company operations, Trinity helped transform individual company submissions into more meaningful portfolio-level insights.

RESULT

The firm established a more structured and scalable sustainability program capable of supporting a diverse portfolio of upstream and energy transition investments. Enhanced reporting processes, clearer metric definitions, and stronger quality assurance practices improved the consistency and reliability of sustainability information across portfolio companies.

Expanded benchmarking and portfolio-level analysis provided greater visibility into performance trends, highlighted areas requiring additional review, and increased confidence in data used for partner presentations, investor communications, and annual reporting. The improved process also reduced administrative burden on the internal sustainability function by providing dedicated technical support throughout the reporting cycle.

Today, Trinity continues to serve as a long-term sustainability partner, helping the firm strengthen data quality, maintain reporting consistency, and generate actionable insights that support portfolio management, stakeholder engagement, and investor relations.

ABOUT TRINITY CONSULTANTS

Trinity Consultants, a leading global environmental consulting firm, provides services and solutions in the EHS Regulatory Compliance, Built Environment, Life Sciences, and Water & Ecology markets. Founded in 1974, Trinity has the technical expertise, industry depth, and capabilities to help clients achieve their goals across the natural and built environments.

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