

A GUIDE TO MEMBER BENEFITS & SERVICES





Welcome to the ICCR Community!

Congratulations on joining ICCR and on behalf of staff and the board, I want to warmly welcome you to our community. The work to catalyse social change through shareholder advocacy is needed today more than ever, and we are committed to getting you acclimated and participating in ICCR's work as quickly as possible.

ICCR members have been practicing socially responsible investing and corporate engagement for more than four decades and, as a group, they possess a remarkable wealth of experience and skill. Whether you are a relative newcomer to the work of shareholder engagement or a veteran practitioner, at ICCR you will find a group of responsible investor determined to increase their collective influence and impact in an environment that fosters knowledge-sharing, skill-building and collaboration. Our staff will be focused on equipping you with the tools, research and resources you need to build your engagement capacity quickly and we will look for opportunities to bridge connections to others in our community that can help you advance your goals.

One of ICCR's most valuable assets is the rich mosaic of our coalition, the diversity of voices within our membership. This diversity has brought great strength to our coalition and has made our work infinitely more impactful. As a new member we welcome your unique and powerful voice in our growing community of investors seeking greater corporate accountability. ICCR staff will be reaching out to speak to you in greater detail about your organization's goals and expectations, but should a question or need arise that we can address in the interim we hope you won't hesitate to call or email us.

ICCR's Associate for Development & Membership Kyle Chesebrough will be your main point of contact if you have questions such as how to attend an ICCR conference or join one of our priority issue groups. You can reach out to him at (212) 870-2936 and kchesebrough@iccr.org. And if you find yourself in NYC, we hope you'll make time to come see us.

Again, welcome to ICCR!

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke.

Josh Zinner
CEO, ICCR

The Benefits of Membership

Greater Impact for Your Organization's Advocacy Goals

You amplify your shareholder voice and influence significantly by joining ICCR. Through corporate engagements in coalition with other like-minded institutional investors, ICCR members are able to consolidate and focus their shareholder power to positively transform the policies and practices of multiple companies and, entire sectors, each shareholder season. Your membership in ICCR allows you to tap into our network of 700 active SRI practitioners to seek support for your advocacy initiatives and in turn lend your support to initiatives led by other members.

What distinguishes our coalition from other investor groups is our staff and members' extensive experience in engaging with corporations, our commitment to partner with a wide range of stakeholders, and our roots in many faith traditions. For these reasons, ICCR is a respected practitioner of both socially responsible investing and corporate engagement.

Expertise on ESG Issues and Shareholder Strategies

Effective corporate engagement requires analysis, preparation, outreach and coordination. ICCR program staff work with members to develop and coordinate engagement strategy. This includes developing criteria to measure company progress against goals and identifying and resolving barriers to progress on a multitude of corporate social responsibility issues with a range of companies. Program staff also help draft talking points to assist you in your dialogues with corporations, help draft **investor letters** and **best practice guidelines**, and provide research for **white papers**, **corporate benchmarking studies** and other tools used by investors and corporations to advance greater corporate responsibility.

You will be able to share these materials with your organization and investment professionals, to educate your networks and investment clients about emerging trends in socially responsible investing and corporate accountability.

In addition, ICCR staff plan and convene **industry roundtables**, member meetings, calls and help with the crafting, filing, promotion and, when needed, defence of shareholder resolutions challenged by corporations at the SEC.

Further, ICCR segments its advocacy work into program areas that are chosen through a member-wide prioritization process that takes place every 5 years. Each priority program receives dedicated staff time. In addition, ICCR staff supports many member-led initiatives by providing meeting time and space both during our in-person conferences and on our Members' Area website.

ICCR's 14 full-time staff members are based in New York City at The Interchurch Center at 475 Riverside Drive:



"Membership in ICCR provides a multitude of benefits for sustainable and responsible investors -- a network of other concerned investors many of whom are veteran professionals in the field, extremely helpful information on key issues, a fruitful place to coordinate on shareholder engagement, and often inspiration as we do this work together."

-- Tim Smith, Walden Asset Management



Nadira Narine, Senior ICCR Program Director

"The impact of ICCR's work will multiply with the energy and efforts of our membership. The Program Team works hand in hand with members to make sure they feel prepared and confident in their shareholder advocacy engagements."

-- Nadira Narine, ICCR

Our current priority issues are:

- **Climate change**
- **Domestic and global health**
- **Financial practices & risk**
- **Food and sustainable agriculture**
- **Human rights & global supply chains**
- **Water stewardship**

As you get started at ICCR, we encourage you to join one of our priority groups in ICCR's Members Area. When you do so, the program staff person directing the work will know to get in touch with you and begin to bring you on board so you can begin contributing as soon as possible. Staff will advise you about the various ways you can get involved, including **monthly issue-based conference calls**, **educational webinars** and, of course, ongoing engagements with companies.

There are also more **formal mentoring arrangements** available where you can be teamed up with a veteran ICCR member who can help you "learn the ropes" of corporate engagement. If this is something you would like to explore further, please let a program team member know.

Program Staff

David Schilling

Senior Program Director, Human Rights and Resources
212-870-2928 dschilling@iccr.org

David provides program direction for ICCR member initiatives in the areas of human trafficking and slavery in global supply chains. He supervises ICCR's No Fees Initiative, is responsible for leading the Bangladesh Investor Initiative and coordinates ICCR's policy advocacy on corporate human rights themes.

Paloma Munoz Quick

Program Director - Investor Alliance for Human Rights (IAHR)
212-870-2937 pmunozquick@iccr.org

Working with ICCR members and senior staff, Paloma is helping to establish the IAHR - a first of its kind network to coordinate broadbased investor advocacy on both public policy and corporate engagements on a range of human rights and labor rights issues.

Valentina Gurney

Associate Program Director, No Fees Initiative
212-870-3039 vgurney@iccr.org

Valentina provides program coordination, research, analysis and evaluation to support members' work on human trafficking and, specifically, the No Fees Initiative.

Nadira Narine

Senior Program Director, Food and Water
212-870-2275 nnarine@iccr.org

Nadira is responsible for strategic development and planning, tactical coordination and evaluation of a broad range of investor actions in the areas of food and water sustainability.

Christina Herman

Program Director, Climate Change
212-870-2316 cherman@iccr.org

Christina coordinates ICCR member environmental initiatives including our work with companies to reduce GHG emissions and other contributors to climate change and to spur greater investment in renewable energy technologies.

Meg Jones-Monteiro

Program Director, Health Equity
212-870-2984 mjonesmonteiro@iccr.org

Meg is responsible for leadership of ICCR’s shareholder engagement and advocacy on global and domestic health issues.

Mary Vaccari

Program Associate
212-870-2599 mvaccari@iccr.org

Mary supports ICCR’s program team through a wide variety of coordinating and support assignments. Mary also provides program support for ICCR’s Fair Chance Initiative which promotes more equitable hiring practices.



Claire Deroche, Unitarian Universalist Congregation at Shelter Rock

“Because of the encouragement and support of ICCR staff member Nadira Narine, and the ongoing collaboration of ICCR members, I became a dialogue facilitator, a responsibility that has taught me so much about shareholder advocacy.”

Claire Deroche, Shelter Rock Unitarians



Senior ICCR Program Director David Schilling speaks at an ICCR Conference.



Member Donna Meyer leads a talk during an ICCR domestic health meeting.



Member Danielle Fugere and Ed Kom-anjoh lead a panel on driving up the vote on shareholder resolutions.



Members Peter van der Werf and Kevin Thomas.

Member-Support Staff

Josh Zinner

CEO

212-870-2294 jzinner@iccr.org

Josh is responsible for ICCR's strategic leadership and is the lead external representative for the organization.

Naseefa Hamid

Director of Finance & Administration

212-870-2926 nhamid@iccr.org

Naseefa is responsible for all financial and accounting functions.

Susana McDermott

Director of Communications

212-870-2938 smcdermott@iccr.org

Susana is responsible for all aspects of ICCR's internal and external communications.

Julie Wokaty

Publications and Website Specialist

212-870-2318 jwokaty@iccr.org

Julie is responsible for maintenance of the organization's websites and shareholder databases and for supporting the communications director in the development of ICCR publications. She is the principal author of the Proxy Resolutions and Voting Guide.

Kyle Cheseborough

Associate for Development & Membership

212-870-2936 kcheseborough@iccr.org

Kyle coordinates ICCR's fundraising, membership cultivation and retention campaigns. He also provides analysis of the current membership base to the CEO and strategy for member diversity and growth.

Victoria Moilan

Office Coordinator and Network Administrator

212-870-2293 vmoilan@iccr.org

Victoria coordinates administrative office logistics and technology. She also plays a leading role in organizing ICCR's Annual General Meeting.

Jaana Hinkkanen

Director of Development

212-870-2623 jhinkkanen@iccr.org

Jaana is responsible for overseeing all foundation and corporate fundraising at ICCR.



Amy Domini (Domini Social Funds) and Darrick Hamilton (New School), two of the panelists at ICCR's 2016 special event.

Education and Networking: ICCR's Bi-Annual Member Conferences

Two times a year, the full ICCR membership convenes for five days of meetings. These in-person convenings are an invaluable opportunity to become educated and develop strategy with staff and fellow members on program-related themes as well as to hone our corporate engagement strategies. Importantly, our conferences provide numerous opportunities for you to deepen connections with fellow investors and allies in the field of SRI.

Winter and fall conferences are held in New York City and the fall conference culminates in our annual special event, including an educational component, most often a panel discussion among thought leaders from the worlds of faith, business, academia and civil society on a topic relevant to our work—followed by a cocktail reception.

ICCR's Annual General Meeting

Our AGM generally takes place in the beginning of June at the home city of one of our members who helps host the conference. This conference is of particular importance due to the governance themes addressed and key decision-making that takes place, including the voting of board members.

ICCR's Member Area Website

ICCR has a members-only website that serves as an online forum for members and staff. Organized by issue, the site is a collaborative workspace that allows staff and members to initiate projects, share information, participate in investor actions and collectively advance their corporate engagement strategies.

This website is where you can join ICCR's priority issue groups. Joining these groups is a way to ensure that you receive updates about the group's work via e-mail and invitations to participate in group meetings and phone calls.

Please see our Members Area User Guide for additional details. Julie Wokaty (jwokaty@iccr.org), ICCR's Publications and Website Specialist, can answer any questions you have about using the Members Area.

Shareholder Actions Database (For Faith-Based and Associate Members Only)

Housed within the Members Area website, ICCR's Shareholder Actions Database is a unique resource in the field of SRI and a strategic tool for our staff and members. Accessible to Associate and full, Faith-Based members, ICCR's shareholder actions database (SADB) is the most critical component of ICCR's technology ecosystem. The SADB facilitates the coordination and tracking of ICCR's corporate engagement activities which, in any given year can total 500 actions at over 200 companies. Our SADB currently holds well over 10,000 records. Searchable by company, keyword, resolution text, issue group, topic and year, the database is where you sign up to express your interest in actively engaging companies in different sectors. The database includes notes from past corporate dialogues.



Members Mary Ellen Gondeck, Heidi Welsh and Susan Baker.

Please see our Shareholder Actions Database Guide for specific directions on signing on to other members' actions, adding actions of your own, and posting dialogue notes.

Throughout the year, ICCR offers a series of tutorial webinars to help new and existing members get the most out of the Members Area website and Database, and become more closely involved in our work. If you would like to participate, email: jwokaty@iccr.org.

Communications

ICCR Communications staff are responsible for both external and internal communications and for maintaining the public website (www.iccr.org) and Members Area, social media channels (Twitter, Facebook and YouTube), e-newsletters and member bulletins. Press releases and other communications strategies in support of program campaigns are coordinated in conjunction with program staff and member leaders.

Members receive a variety of publications to support their work, including ICCR's annual Proxy Resolutions and Voting Guide, which details member-sponsored shareholder resolutions and previews each year's corporate shareholder season trends, and our e-newsletter The Corporate Examiner which highlights member initiatives and corporate progress on environmental, social and governance fronts.

As a member you will also receive ICCR's bi-weekly Member Bulletin, highlighting noteworthy events, investor actions and meetings that are important to our members. If you would like to share relevant news or a message with ICCR members, please advise Julie Wokaty.

Membership Services

ICCR's Membership Associate is Kyle Cheseborough (212-870-2936 kcheseborough@iccr.org) and he is your primary contact for any questions regarding membership benefits. Kyle manages member Letters of Agreement, member contact data for ICCR's CRM systems, and first invoices for dues payments. He can also connect you with ICCR staff and member leads working on priority issue areas.

ABOUT ICCR:

Currently celebrating its 47th year, ICCR is the pioneer coalition of active shareholders who view the management of their investments as a catalyst for change. Its 300 member organizations with over \$400 billion in assets have an enduring record of corporate engagement that has demonstrated influence on policies promoting justice and sustainability in the world.

www.iccr.org/ www.facebook.com/InterfaithCenteronCorporateResponsibility/
<https://twitter.com/ICCRonline>