

Building a Just
& Equitable
Economy
for All

RESILIENCE



Seventh Generation Interfaith
Coalition for Responsible Investment

2021 Conference

12 October 2021

Welcome to the 2021 SGI Conference

"There is nothing new about poverty. What is new, however, is that we now have the resources to get rid of it. There is no deficit in human resources, the deficit is in human will."



This reality, described by the late Reverend Dr. Martin Luther King, Jr. in his last book, *Where Do We Go From Here?*, is even more evident today than it was in 1967. The pandemic woke us up to the twin crises that have existed since our nation was established: a market-based economy with insufficient social safety nets and a lack of accounting for environmental externalities.

I want to welcome our members and guests to Seventh Generation Interfaith 2021 conference. This year's conference theme, Resilience: Building a Just & Equitable Economy for All, will explore the changes needed to make our economy work better for everyone. I am excited to hear what Milwaukee's own Reverend Dr. Liz Theoharis of the Poor People's Campaign has to say on this topic, along with an excellent line up of panelists. As our nation's political leaders struggle with what President Biden's Build Back Better plan will ultimately be, we must do our part as faith and values-based investors to address these systemic failings of our economy. For nearly 50 years, SGI members have called on the world's most powerful companies to address their impacts on our most vulnerable communities and the planet.

I want to congratulate Donna Meyer for being selected as this year's Mike Crosby Award recipient. Her work with Mike to engage tobacco companies and her leadership in ICCR Health Equity team truly exemplified the passion and commitment of our founder.

I want to thank our sponsors for their generous financial support to enable us to continue our work. And finally, I want to thank our Board of Directors for their guidance and the Conference Committee and staff who worked so hard to organize this event.

Peace and All Good,
Frank Sherman

Welcome from the SGI Board President

Dear SGI members and friends,



Welcome to the Seventh Generation Interfaith Coalition for Responsible Investment 2021 Annual Conference! While we had hoped to convene in-person, we are grateful that we can be together again virtually.

This year's theme is Resilience: Building a Just & Equitable Economy for All.

Resilience is the ability of a system or organization to adapt to or recover readily from a crisis or a disruptive process. I'm grateful to our keynote speaker, Reverend Doctor Liz Theoharis, and a panel of experts who will offer their perspectives on how we can implement positive change from the learnings and challenges of 2020, dismantle systems that perpetuate gender and racial inequities, and build an economy that serves all people and ensures the dignity of all workers.

As we continue to emerge from the lasting effects of COVID-19, and collectively face other challenges like racial and economic disparities, the resilience of our people and planet will be key to prosperity for all. This is the aim of sustainable investing, and the reason we the members of Seventh Generation do the work we do.

Please join me in congratulating Donna Meyer, PhD, as the recipient of the 2021 Fr. Mike Crosby Award, in recognition of her values and passion for our mission to "build a more just and sustainable world, especially those most vulnerable."

We owe our gratitude to Frank, Chris, and Natalie for continuing to foster Fr. Mike Crosby's work, and we thank the SGI Board for volunteering their time and dedication. I want to offer my sincerest appreciation to our sponsors for their support of our work, and finally, to our members and their commitment to create a better life for people and planet.

Kindest regards,
Cindy Bohlen
SGI Board President

Today's Program

Welcome Cindy Bohlen
Board President, SGI

Overview Christopher Cox, SGI

Keynote Address

Keynote Rev. Dr. Liz Theoharis
Co-Chair, [Poor People's Campaign](#)

Panel Discussion

Panelists Caroline Boden
Director of Shareholder Advocacy,
[Mercy Investment Services](#)
(moderator)

Sr. Sue Ernster, FSPA
Vice President and Treasurer,
[Franciscan Sisters of Perpetual Adoration](#)

Edgar Hernandez
Assistant Director, Department of Strategic Initiatives
[Service Employees International Union](#)

Kevin Williams
Director, Global Diversity, Equity and Inclusion
[American Airlines](#)



Keynote:

The **Reverend Dr. Liz Theoharis** is Co-Chair of the [Poor People's Campaign: A National Call for Moral Revival](#) with the Rev. Dr. William J. Barber II. She is the Director of the [Kairos Center for Religions, Rights, and Social Justice](#) at Union Theological Seminary. She is an ordained minister in the Presbyterian Church (USA) and teaches at Union Theological Seminary in New York City.

Rev. Dr. Theoharis is the editor of [We Cry Justice: Reading the Bible with the Poor People's Campaign](#) (Broadleaf Press, 2021). She is the author of [Always with Us?: What Jesus Really Said about the Poor](#) (Eerdmans, 2017) and co-author of [Revive Us Again: Vision and Action in Moral Organizing](#) (Beacon, 2018). She has been published in The New York Times, Time Magazine, Newsweek, The Guardian, The Nation, The Hill, Boston Review, CNN, Religion News Service, Sojourners, Religion Dispatches, the Grio, La Jornada, Salon, Slate, and elsewhere.

In 2021, she received the [Hunger Leadership Award](#) from the Congressional Hunger Center, along with the Rev. Dr. William Barber II. In 2020 she was named one of [15 Faith Leaders to Watch](#) by the Center for American Progress. In 2019, she was a [Selma "Bridge" Award](#) recipient and named one of [11 Women Shaping the Church](#) by Sojourners. In 2018, she gave the "Building a Moral Movement" [TEDTalk](#) at TEDWomen, was named one of the [Politico 50](#) "thinkers, doers and visionaries whose ideas are driving politics", and was also named a [Women of Faith Award](#) recipient by the Presbyterian Church (USA).

Rev. Dr. Theoharis received her BA in Urban Studies from the University of Pennsylvania; her M.Div. from Union Theological Seminary in 2004 where she was the first William Sloane Coffin Scholar; and her PhD from Union in New Testament and Christian Origins.

Panelists:



Caroline Boden is a director of shareholder advocacy with Mercy Investment Services, covering portfolio issues such as nutrition, the reduction of food and plastic waste, human trafficking, and safer chemical management.

Prior to joining Mercy Investment Services in 2016, Caroline was a research associate at the Center for Strategic and International Studies in Washington, D.C. Her responsibilities included researching and producing reports and policy memos on the geopolitics of the Arctic, as well as security and defense issues in Northern Europe. She also served as a political intern with the U.S. Department of State where she worked on U.S.-European Union political and economic relations. Caroline holds a bachelor of arts degree in French and international studies from Illinois Wesleyan University and a master of science in European politics from the University of Glasgow.



Sue Ernster is a member of the Franciscan Sisters of Perpetual Adoration (FSPA), based in La Crosse, WI, currently serving as Vice President and Treasurer of the FSPA. Sue has served on the Seventh Generation board of directors in the past.

Sue has a bachelor of arts degree in Accounting from Loras College in Dubuque, IA as well as a Master of Arts in Pastoral Ministry from St. John's University in Collegeville, MN.

Sue, along with her FSPA congregation, have been involved with Seventh Generation, ICCR, and shareholder advocacy for many years. It has been a privilege to work with Seventh Generation (staff and other members) to work on systemic change for the common good through shareholder advocacy.



Edgar Hernández is the Assistant Director of the Service Employees International Union (SEIU) Department of Strategic Initiatives. Previously, he served as the Assistant Director of the SEIU's Capital Stewardship Program. The focus of his work is to interact with public and private sector pension funds and trustees on investment, corporate governance and retirement security issues in the Midwest. While working on issues of national importance for SEIU.

He is the co-lead on the SEIU's Diversity and Dollars initiative that promotes opportunities for Diverse asset managers. In addition,

he also works on investor engagement with publicly traded companies on the investment risks related to the Immigration policies. Edgar serves as a Deputy Trustee for the SEIU Master Trust pension fund that has \$3 Billion in assets under management. He received his BA in Political Science and Latin American Studies and a Master in Urban Planning and Policy from the University of Illinois at Chicago.



Kevin Williams is the Director, Global Diversity, Equity and Inclusion at American Airlines. He joined American in January of 2019 as the Director, People Business Partners where he supported a variety of operational and corporate functions prior to joining the diversity team in 2021.

He is responsible for developing and executing the company's diversity, equity and inclusion strategy to ultimately support American's business objectives. Prior to American, Kevin held many HR leadership

roles at Toyota North America, Brinker International, parent company of Chili's and Maggiano's restaurants, and gained HR generalist experience with Office Depot. He holds a MBA in Organizational Development from the University of Dallas, BBA in Management from Midwestern State University and his PHR certification. He also serves on the Board of Directors for the Junior Players, a local non-profit providing under-served youth exposure to arts education.



Fr. Mike Crosby Award: Donna Meyer, Ph.D.

Donna Meyer, PhD, was Director of Shareholder Advocacy for Mercy Investments Services, Inc. where she specialized in Public Health and Health Services. She actively participated with the Interfaith Center on Corporate Responsibility (ICCR), serving on its board from 2007 to 2013 and using her expertise in health care and public health to provide leadership for SRI domestic and

global health issues. Most recently, there is a focus on increasing access to COVID vaccines and treatments.

Throughout more than two decades of shareholder advocacy, Donna was a regular collaborator with Fr. Mike. Fr. Mike collaborated with Donna in the design of the SRI program for CHRISTUS Health, and he guided her into an engagement about the sale and advertisement of tobacco products that was her first “win.”

She also served as Co-chair of the IOPA. The Investors for Opioid and Pharmaceutical Accountability (IOPA) is a coalition of 61 investors with \$4.2trn in combined assets under management. Beginning with the 2020 proxy season, the initiative changed its name from the ‘Investors for Opioid Accountability’ to widen its focus to cover pharmaceuticals and healthcare as well as opioids.

She has had a career in healthcare administration has served on the Board of Directors of a number of health-related organizations. She currently serves on the Board of the Texas Health Institute and as a member of the Catholic Health Initiatives (Common Spirit) Mission and Ministry Board Committee. Dr. Meyer is a Fellow of the American College of Health Care Executives; she earned her BS and MS from the University of Minnesota and her Doctorate from the University of Texas School of Public Health.

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this year's conference.



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Seventh Generation Interfaith Coalition for Responsible Investment

The National Catholic Coalition for Responsible Investment (predecessor to Seventh Generation Interfaith) was founded in 1973 by Rev. Michael Crosby of the Midwest Capuchin Franciscans and Sisters Charlita Foxhoven and Alphonsa Puls of the School Sisters of St. Francis. NCCR was the first coalition to join the Interfaith Center for Corporate Responsibility (ICCR) to enhance our shareholder advocacy for systemic change. The membership has grown to 36 faith-based institutions and financial services firms located in the midwestern United States.

The name was changed to Seventh Generation Interfaith in 2015 in reference to the Great Law of the Iroquois whose love of mother earth and all creation led to their credo to consider the impact of their decisions on the current generation as well as for seven generations into the future. We continue to broaden our membership beyond our Catholic roots to include all people of faith and moral values who want to live out our mission in the stewardship of our resources. Through the lens of faith, SGI members work builds a more just and sustainable world for those most vulnerable by integrating social and environmental values into corporate and investor actions. We welcome you to join us!



Currently celebrating its 50th year, the Interfaith Center on Corporate Responsibility (ICCR) pioneered the use of shareholder advocacy to press companies on environmental, social, and governance issues. The coalition of over 300 global institutional investors currently represents more than \$4 trillion in managed assets. Leveraging their equity ownership in some of the world's largest and most powerful companies, ICCR members engage management to identify and mitigate social and environmental risks resulting from corporate operations and policies.

Today, ICCR members seek: to eliminate forced labor risks in global supply chains; to curb GHG emissions to align with the Paris Climate Agreement; to develop sustainable food systems, affordable and accessible health care, and financial services; and to improve corporate water stewardship policies. They engage companies through direct dialogue, filing shareholder resolutions, voting proxies, participating in annual shareholder meetings, convening issue roundtables and public advocacy on priority issues.

Inspired by faith, committed to action



Seventh Generation Interfaith actively seeks faith- and values-based institutional investors to join our ministry. For more information about joining Seventh Generation Interfaith, please call 708-315-0571 or send an email to: SeventhGenerationInt@gmail.com.



Seventh Generation Interfaith Coalition for Responsible Investment

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