



Calling the world's most powerful companies to address their impacts on people and planet.

2021-2022 ANNUAL REPORT

Who We Are

ICCR is a coalition of faith- and values-based investors who view shareholder engagement with corporations as a powerful catalyst for change. Our statement, “inspired by faith, committed to action” sets forth our pledge to be active owners, and to engage meaningfully with the companies in our portfolios through the process of shareholder engagement that we pioneered more than 50 years ago.

Our guiding principle as shareholders is that sustainable corporations must look beyond the next earnings report to account for the full impact of their businesses on society, and must view the well-being of all of their stakeholders – including their workers and the communities where they operate – as integral to their long-term value.

ICCR has always been at the vanguard of the shareholder advocacy movement in both the issues we bring to corporations and the strategies we employ to

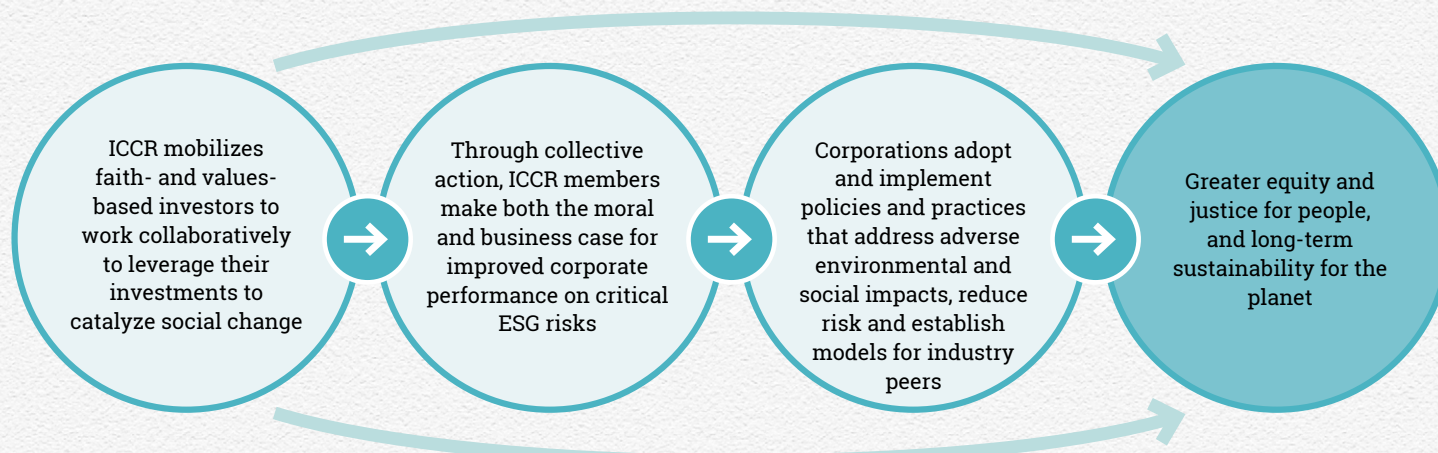
hold them accountable. What motivates us to lead is our connection to communities most impacted by corporate practices and the clear evidence of progress made as a result of our interventions. While our membership comprises a broad range of organizations both religious and secular, our members make common cause through our persistent focus on social and environmental justice and our collective commitment to bring these concerns to companies through direct, collaborative engagement.

Over the years ICCR has developed a growing network of NGOs and civil society groups which serves as an early warning system in identifying and understanding the impacts of corporate practices on the ground and ensures that our corporate engagement strategies are informed by their perspectives. These partnerships are unique among investor coalitions and serve to keep our work grounded and authentic while allowing us to amplify our voice through collective action.

Moreover, because so many of the issues we address are systemic in nature, ICCR members believe that investor engagement in public policy debates is critical in advancing social justice and environmental sustainability. Unique to our coalition is the human rights lens through which we view all our initiatives – whether climate, water, food, worker rights, health, or corporate governance – and our persistent focus on the impact of corporate practices on people and communities. The U.N. Sustainable Development Goals and the U.N. Guiding Principles on Business and Human Rights provide key frameworks for our corporate engagements. ICCR’s long-term goal to broaden the base of investors engaging corporations on their human rights impacts is a natural extension of our mission and origins as a coalition of faith-based institutions, and led to our creation of the Investor Alliance for Human Rights in 2018. The Alliance’s continued growth and expanding impact is critical to helping us achieve our goal.

ICCR works closely with NGOs and civil society groups to ensure that corporate engagement strategies integrate the perspectives of impacted people and communities.

ICCR’S THEORY OF CHANGE



ICCR engages with policy-makers and standard-setting bodies to promote enabling environments for corporate accountability.

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Letter from ICCR Board Chair Rob Fohr



The last few years have been an incredibly trying time in the world in so many ways and the challenges remain but so, of course, do the opportunities. I'm constantly inspired by our community which has remained strong and united through the pandemic, the trials and tribulations of the SEC and other restrictive regulations, and now unprecedented political attacks on our work. It is a tribute to our coalition and the impact of our members that we remain on the leading edge of this movement to change corporate practices on so many systemic issues impacting people and the planet. I am very focused on the opportunities and hope you are as well.

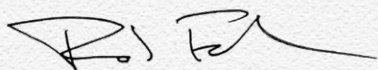
On health equity, worker rights and human rights, the climate crisis and so many other issues, after 50 years ICCR remains the foremost moral voice within the investor community. As we continue to build relationships with stakeholder partners, we are strengthening both the impact of our engagements and the authentic connections that we have as investors with groups representing communities impacted by corporate practices.

A sign of our growing success—both as ICCR and as a movement—is that we have “awoken the sleeping giant”. As a growing body of investors and companies recognize the management of ESG risks as critical to long-term sustainability, political forces threatened by the success of the ESG investing movement are mobilizing to discredit it as what they term “woke capitalism”.

This aggressive campaign by our opponents is well-funded and only in its early stages. ICCR has mobilized a coalition of like-minded allies to ensure progress by investors and companies to curb climate change and advance a just transition to clean energy, protect worker rights and human rights, ensure health equity, bring accountability to corporate political engagement, and other critical work by the ICCR community continues unhindered. We welcome your support in this endeavor, moral and otherwise.

Finally, I want to recognize the extraordinary efforts of our faithful members including those who have passed such as Sr. Patricia Daly, OP. They are the backbone of our community and the true voices for justice building a strong foundation for the ICCR members to come.

May their memory be a blessing for us all.



Rob Fohr
The Presbyterian Church U.S.A.

Letter from ICCR CEO Josh Zinner



Friends,

It is my pleasure to share ICCR's 2021 – 2022 annual report where you can read about the growing success of our coalition in helping to mitigate a range of corporate impacts affecting people and planet.

We see the issues that ICCR members tackle as highly interconnected. Human rights have always been the thread that binds our work across the environmental, social and governance concerns our members are raising with companies and these principles are a central focus for how we evaluate corporate policies and practices affecting workers and communities, and all rights-holders.

Human rights are central to our work to advance worker justice, promote equitable global supply chains and a more equitable healthcare system, and to address climate change and advance a just transition to clean energy. Racial equity is another crucial lens for so much of our work. So many of the concerns raised by our coalition disproportionately impact people and communities of color. These issues serve to reinforce long-standing racial and gender inequities that are at the root of so many systemic social and economic ills. Strategies to address them must remain at the heart of our work.

The destabilizing influence of corporate lobbying and political spending on our policy discourse and on society more broadly is also a theme that binds so many of our corporate engagements. We remain always vigilant to the problem of corporate and regulatory capture and its ability to undermine the realization of human rights and the progress so needed to confront existential challenges such as the climate crisis.

ICCR continues to see authentic engagement with stakeholder partners as integral to our work and critical to our collective success. As we dig deeper into what a successful engagement looks like for investors and other stakeholders, we hope the ICCR coalition can be a model for how we can work collaboratively for change.

The ICCR community continues to grow in our membership, staff, the issues we take on, and the strategies we deploy to address them. While there are certainly challenges ahead, we remain excited by the opportunities and are grateful to count you as an ally and supporter on this journey.



Josh Zinner

Accelerating the Just Transition to a Net-Zero Economy

Given the urgent need to confront the existential threats posed by the climate crisis, ICCR members press their portfolio companies to align their businesses with the 1.5° net zero by 2050 goals of the Paris Climate Agreement.

“The response to climate change is already having immense impacts on workers and their communities. Shareholders and corporate executives must be mindful moving forward not to use these changes as an excuse to bust unions or implement a race to the bottom on wages and working conditions.”

MIKE SMITH, CHAIR, UNITED STEELWORKERS
NATIONAL OIL BARGAINING PROGRAM

Fossil Fuel Finance.

By phasing out financing for high-carbon activities and shifting investments to support the clean energy transition, the financial services sector can meaningfully curb the worst impacts of climate change, helping to protect people and planet, and stabilize the economy. ICCR's members filed proposals this year calling on banks to adopt “climate-forward” lending plans and policies to better align their practices with their expressed commitments to achieving net zero emissions. We are also pressing insurers to phase out the underwriting of new fossil fuel projects, as well as to disclose emissions targets aligned with 1.5°C.

Paris-Aligned Lobbying.

Climate progress has been hindered for decades by aggressive lobbying on the part of corporations and their trade

associations, chiefly companies in the oil and gas sector. Now in its third year, our members' Paris-aligned climate lobbying campaign, which seeks to align corporate lobbying with the Paris Agreement and a 1.5°C trajectory, has expanded to include additional companies and new sectors. We are calling on companies to actively support climate policy that will make their own transitions easier and less costly. We also released a report, [Leading Lobbying Practices to Drive 1.5C Policy Action](#), benchmarking the lobbying practices of over 70 companies to guide companies toward more responsible climate lobbying.

Just Transition.

To avoid the worst impacts of climate change, investors are urging companies not only to adopt business plans and practices designed to stay within the 1.5°C

limit, but to include a “Just Transition” framework that links their support for climate action with commitments to labor standards, human rights, and inclusivity as well. ICCR recently hosted a multi-stakeholder Roundtable on Just Transition with energy utility companies, which showcased the needs of workers and energy justice communities in the transition.

Our Impact.

In 2022 our members negotiated 70 agreements for climate action with corporations, and 10 climate-focused resolutions received majority support in 2022 - including 3 that received greater than 90% support.



Working Together to Advance Dignity and Justice for All Working People

Bringing together shareholder advocates and worker-led organizations, ICCR's Advancing Worker Justice (AWJ) program combines our members' investments with strategic partnerships and movement-building strategies to influence workplace practices, build worker power and achieve meaningful gains for workers' rights in the U.S. and Canada.



“ICCR’s members’ efforts around paid sick leave policies highlighted rail company’s misunderstanding of the value of investing in human capital, one of a firm’s most important assets. We’re pleased that our efforts have resulted in significant changes.”

MARVIN OWENS, IMPACT SHARES

Paid Sick Leave.

Nearly 28 million people working in the private sector in the U.S. have no access to paid sick leave (PSL); meanwhile, 48 percent of Latinx workers and 36 percent of Black workers have no paid time away from work of any kind. ICCR members are pushing for companies to provide paid sick leave as a standard employee benefit.

For the 2023 proxy season, our members filed resolutions challenging nine companies in the railroad, restaurant, retail, and hospitality sectors to either adopt or disclose policies that all full- and part-time employees have permanent PSL.

Freedom of Association and Worker Voice.

Freedom of association (FoA) and collective bargaining are fundamental

rights protected by multiple national and international human rights standards. Yet corporations routinely use intimidation tactics to deter union organizing, including retaliatory firings and threats of reduction or elimination of benefits, workplace closures, and captive audience meetings. This proxy season our members asked 7 companies to issue independent reports assessing their adherence to their stated commitments to FoA and collective bargaining, including management noninterference when employees decide to form a union.

Working people should have a voice in corporate decision-making. When workers aren't given a seat at the table, or respected as valuable corporate stakeholders, racial and economic disparities become more intractable and systemic, which threatens everyone. By

contrast, when worker dignity, safety, and voice are prioritized, everyone prospers.

Worker Health and Safety.

Our members use their leverage as investors to push corporations in strategic sectors such as dollar stores, the warehouse industry, and ride-hail services to pay their workers a living wage, eliminate racial and gender pay gaps, provide a safe and healthy working environment, and strengthen worker protections for contingent/gig workers and independent contractors.

We are asking U.S. dollar stores to evaluate how their business models and factors like understaffing, a lack of in-store security, and low wages put their workers' safety at risk.

A Commitment to Equity and Safeguarding the Human Right to Health

ICCR members advocate for systemic reforms that will improve access and affordability of medicine and health care for all. Pharma companies frequently use business tactics that prioritize profits over people's health and further drive inequities in our healthcare system. We believe corporations must assess how their business practices are either facilitating or hindering equitable access to medicine.



“Patients can’t afford their medications. One reason for this is the patenting practices of drug makers who seek not to innovate, but to monopolize the market to maximize profits.”

LYDIA KUYKENDAL,
MERCY INVESTMENT SERVICES

Patents and Access.

To delay generic competition and preserve their profit margins, branded drug manufacturers often deploy a variety of strategies including “patent thickets” consisting of many secondary and tertiary patents designed to artificially

extend exclusivity periods. As high U.S. drug prices persist amid an extended period of high national inflation, ICCR members filed new resolutions with AbbVie, Amgen, Bristol-Myers Squibb, Eli Lilly, Gilead, Johnson & Johnson, Merck, Pfizer, and Regeneron, seeking to understand whether and how the companies are considering access in their petitions for patent exclusivity extensions.

Access to Covid-19 Products and Vaccine Technology.

To curb the spread of COVID-19, governments used taxpayer dollars to make early, large investments in pharma companies to spur the development of breakthrough vaccines and medicine. Since then, recipient pharma companies have repeatedly been accused of profiteering and global inequities in

vaccine access. ICCR members refiled resolutions with Johnson & Johnson and Merck asking each to disclose whether and how receipt of government support is being considered when engaging in conduct that affects access to COVID-19 products, such as setting prices. Members also asked Moderna and Pfizer to conduct feasibility studies on the sharing of COVID-19 IP, knowledge and technology.

Health Technology and Algorithmic Harm.

Companies that create and market healthcare technologies have a responsibility to ensure such technology is built in ways that ensures data privacy, fosters equity and reduces or eliminates potential harms to patients. Yet the tech industry's impact on the healthcare sector remains largely unregulated, exacerbating inequities among communities of color,

low-income communities, and queer and gender non-conforming communities. ICCR's members press companies to acknowledge where risks of algorithmic harm exist, and disclose their plans for preventing and mitigating harms throughout their product lifecycles.

Nutrition Security.

ICCR's members advocate for food and beverage manufacturers, casual restaurant chains and grocery retailers to examine how their business models and operations may directly or indirectly contribute to health inequities, and work to create a more equitable and resilient system that benefits workers, the company, shareholders, and communities at large.

Furthering a Human Rights-Based Approach to Investing

An initiative of ICCR, the Investor Alliance is a collective action platform for responsible investment grounded in respect for people's fundamental rights. With over 220 institutional members representing over \$12T in assets in 20 countries, it builds investors' capacity to embed human rights into corporate and investor actions through the provision of expertise, tools, and resources.

“Engaging the tech sector on its societal impact through the Investor Alliance for Human Rights creates an opportunity for collective investor action and understanding impact to people through their civil society network.”

DANIELLE ESSINK, SENIOR
ENGAGEMENT SPECIALIST, ROBECO

Exposing Digital and Human Rights Risks in the Tech Sector.

Companies in the ICT sector facilitate greater citizen participation, freedom of expression, and coordination of democratic movements. Yet, without the proper safeguards, these same companies can also cause serious human rights harms due to business models that prioritize profits at the expense of people's fundamental rights. Members of the Investor Alliance filed 15 proposals for the 2023 proxy season with Alphabet, Amazon, and Meta, raising concerns ranging from violations of privacy rights, inadequate content moderation, and the proliferation of hate speech to a lack of transparency and accountability through the use of opaque algorithms, artificial intelligence, and targeted advertising. Together, the proposals highlight how a lack of adequate oversight in the tech ecosystem raises risks for all stakeholders.

Mobilizing an Investor Response to Forced Labor and Abuses in the Uyghur Region.

The ongoing state-imposed forced labor of millions of predominantly Turkic and Muslim-majority peoples, including Uyghurs, in the Uyghur Region and across China requires urgent action from all stakeholders. In collaboration with civil society organizations, the Investor Alliance coordinates investor engagement on Uyghur forced labor in multiple global industries, from automotive and solar panel manufacturing, to agriculture and apparel. Given the severity and extent of the abuses, businesses that do not exit Uyghur Region supply chains, ventures, and/or investments run a high risk of violating international human rights protections and U.S. law. Investor Alliance members are engaging portfolio

companies seeking the adoption of a single global standard to eradicate Uyghur forced labor.

Advocating for Effective Human Rights Risk Management.

Robust human rights due diligence processes as well as assigning board-level oversight of human rights risks are essential to company risk management and the protection of stakeholders' rights. This year Investor Alliance members pressed companies that have repeatedly scored zero on the Corporate Human Rights Benchmark's due diligence indicators to significantly improve their human rights performance. The Investor Alliance also mobilized investor support for robust human rights due diligence and corporate disclosure legislation in the EU and beyond.



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Mary Minette
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Services



Sr. Jean Sliwinski
Felician Sisters of
North America



Courtney Wicks
Investor Advocates
for Social Justice

Financials

STATEMENT OF FINANCIAL POSITION

Year Ended December 31, 2021

ASSETS

Cash and cash equivalents	\$2,058,865
Restricted cash	206,908
Member dues receivable	65,350
Grants receivable	272,500
Contributions receivable	104,000
Prepaid expenses	33,303
Investment	1,794,864
Property and equipment	110,457

TOTAL ASSETS	\$4,646,247
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LIABILITIES

Accounts payable and accrued liabilities	\$276,416
Other payable	106,908
Deferred revenue	665,000
Notes payable	100,000
Liability for HIPR benefits	223,000

TOTAL LIABILITIES	1,371,324
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NET ASSETS

Without donor restrictions	743,307
With donor restrictions	2,531,616
TOTAL NET ASSETS	3,274,923

TOTAL LIABILITIES AND NET ASSETS	\$4,646,247
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STATEMENT OF ACTIVITIES

Year Ended December 31, 2021

REVENUE

Member dues	\$1,209,362
Contributions	128,282
Grants	1,797,966
Special event - net of \$29,995 in direct expenses	n/a*
In-kind contributions	7,175
Investment return	213,386

TOTAL REVENUES	\$3,356,171
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EXPENSES

Program expenses	\$2,141,638
Management and general	398,007
Fundraising/membership	306,924

TOTAL EXPENSES	2,846,569
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CHANGE IN NET ASSETS	509,602
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NET ASSETS - BEGINNING OF YEAR	2,765,321
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NET ASSETS - END OF YEAR	3,274,923
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*2021 special event revenue was deferred because the event was delayed to March 2022 due to COVID restrictions.

Our Contributors

We are indebted to the following donors whose generous support enables ICCR to continue its important work.

FOUNDATIONS

\$500,000 and Above

Ford Foundation
Omidyar Network

\$250,000 - \$499,999

Anonymous
Educational Foundation of America
Humanity United
Open Society Foundations

\$100,000 - \$249,999

Amalgamated Charitable Foundation
Environmental Defense Fund
Nathan Cummings Foundation
Wallace Global Fund

Up to \$99,999

FJC - A Foundation of Philanthropic Funds

DONATIONS

\$50,000 and Above

Bank of America
Southern Company

\$25,000 - \$49,999

Abbott Laboratories
Citigroup
ConocoPhillips
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\$10,000 - \$24,999

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Sisters of the Presentation of the Blessed Virgin Mary, Dubuque
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Includes donations
made between
November 1, 2021
and December 31,
2022.

IN MEMORIAM



Sister Patricia Daly, OP, who took on corporate giants like General Electric, Ford and ExxonMobil, died in December of 2022. Sr. Pat's decades of work to hold companies accountable for their impacts on people and creation is the stuff of legends. Sr. Pat was valued not only for her wisdom and leadership on so many issues of concern for the ICCR community but for the way she actively mentored many in our ranks, helping to cultivate the next generation of ICCR leaders. She will be dearly missed.

ICCR Members

FAITH-BASED MEMBERS

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American Baptist Home Mission Societies

American Friends Service Committee

Azzad Asset Management

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Catholic Health Association of the United States, The

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Evangelical Lutheran Church in America

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Congregation of Holy Cross, Moreau Province

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Daughters Of Wisdom

Diocese of Albany

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Franciscan Sisters of Allegany

Franciscan Sisters of the Poor, Brooklyn, NY

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Maryknoll Sisters

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PeaceHealth

Providence St. Joseph Health

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Sisters of St. Joseph of Peace, Western Province

Sisters of St. Mary of Oregon

Sisters of the Holy Names of Jesus and Mary, US Ontario Province

Tacoma Dominicans

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Presbyterian Church (USA)

Providence St. Joseph Health

Reform Pension Board

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Congregation / Holy Spirit

Congregation of Divine Providence, KY

Congregation of St. Joseph, OH

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Franciscan Friars, St. John the Baptist Province

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Sisters of the Humility of Mary, PA

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** indicates CRI organization; some CRI members are also direct ICCR members.

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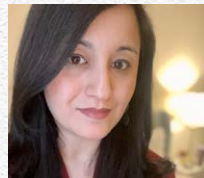
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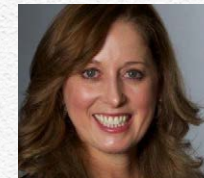
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