



## **Role Profile: Shareholder Advocacy Manager**

**Reports to:** Senior Director of Shareholder Advocacy  
**Department:** Social Responsibility  
**Location:** Remote, Flexible within Eastern or Central time zone  
**Employment:** Full-Time  
**FLSA Status:** Exempt

### **Organization:**

Launched in February 2010, Mercy Investment Services provides for the collective investment and professional management of the endowment and other investment funds of the Sisters of Mercy of the Americas and their sponsored ministries, while working for a just and sustainable world and embraces socially responsible investing as a means of promoting systemic change, with emphasis in the areas of nonviolence, racism, environment, concern for women, and immigration. Our multifaceted socially responsible investing program includes shareholder advocacy engagement with companies, proxy voting, portfolio screening and impact investing (both community and market rate investments). More information is available at [www.mercyinvestmentservices.org](http://www.mercyinvestmentservices.org).

Mercy Investment Services is actively seeking a Shareholder Advocacy Manager to join our social responsibility department as a key member of our shareholder advocacy team. This position is responsible initially for implementing Mercy Investment Services' approved shareholder advocacy plan addressing the issue areas broadly related to protection of human rights, healthy communities and appropriate governance practices. This position's location is negotiable.

### **Position Summary :**

The Shareholder Advocacy Manager is responsible for implementing the annual shareholder advocacy plan of Mercy Investment Services, Inc. and/or shareholder advocacy partner organizations.

### **Position Responsibilities:**

- » Implements the annual shareholder advocacy plan through the filing of shareholder resolutions, including as primary and/or co-filer where appropriate, leading and/or participating in dialogues, and other forms of corporate engagement, in collaboration with the Interfaith Center on Corporate Responsibility and other corporate responsibility advocacy groups and interested social investors aligned with Mercy.
- » Researches corporate impacts on environmental or social issues, in collaboration with other investors. Provides knowledge leadership when engaging corporations.
- » Recommends additions/deletions to the Mercy advocacy portfolio on a quarterly basis in

support of the annual advocacy plan and ongoing advocacy priorities.

- » Recommends additions/deletions to the proxy voting guidelines, which address appropriate governance, social and environmental criteria with a focus on issues of importance to Mercy Investment Services and the Sisters of Mercy and/or partner organizations, as applicable.
- » Enters updates on engagements into the tracker, and provides quarterly and annual reports on assigned areas of the shareholder advocacy program, company engagements and the outcomes/impacts of the shareholder advocacy work.
- » Recommends resources to enhance shareholder advocacy, including research needs, research tools, impact/outcome measurement and other capabilities.
- » Recommends an annual budget to carry out the position's responsibilities to Mercy Investment Services management for review and approval.
- » Informs and educates the Social Responsibility Committee, management and partner organizations on issues and practices of corporate social responsibility as appropriate and requested.
- » Prepares materials on achievements of the annual shareholder advocacy plan for Mercy Investment Services' annual report and other publications as requested.
- » Provides ongoing information on corporate social responsibility and other support to Mercy Investment Services' website content development and monthly newsletters for Mercy Investment Services, the Sisters of Mercy and/or partner organizations as appropriate and requested.
- » Carries out responsibilities in accordance with Mercy Investment Services' policies and applicable laws.
- » Performs other duties as required.

### **Position Qualifications:**

#### Required

- » Bachelor's degree in related field; master's degree preferred;
- » Proven accomplishments in advocacy for human rights, environmental sustainability, or justice
- » Knowledge of Socially Responsible Investing and environmental, social and governance (ESG) investing and/or social justice issues in a faith-based setting;
- » At least five years of experience of demonstrated accomplishment in a related field;
- » Effective writing, communication and presentation skills;
- » Ability to synthesize complex information and communicate it in understandable terms to various audiences;
- » Track record of effectively managing and leading projects by connecting with staff and peers on both an individual level and in large groups;
- » Ability to work collaboratively and/or independently on multiple projects simultaneously and to prioritize responsibilities;
- » Ability to work independently, taking initiative to proactively and responsibly identify and address issues;
- » Strong background in management of information, and internet and computer capabilities including Microsoft Office suite; and
- » Demonstrated sensitivity to and knowledge of cultural differences.

Preferred

- » Understanding of shareholder advocacy legal processes and compliance with legal requirements;
- » Familiarity with and/or interest in the traditions and culture associated with the Sisters of Mercy and Catholic Church structures and teaching.

**Application Process:** Mercy Investment Services is an Equal Opportunity Employer. Interested candidates should send a cover letter, résumé, and salary requirements by Friday, May 19, 2023, to [hr@mercyinvestments.org](mailto:hr@mercyinvestments.org).