

Episcopal Diocese of Oregon
Report to the 133rd Annual Meeting of Convention
November 6, 2021

SOCIALLY RESPONSIBLE INVESTING STAKEHOLDER ADVISORY COMMITTEE

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Other Committee Members include Anne Frazier, Madeline Moore, Jaime Sanders+, Diane Pinney, and Keith Walters.

The SRI Stakeholder Advisory Committee (SAC) is a committee supporting the Board of Trustees and its Investment Committee with respect to the Socially Responsible Investment Fund (SRIF). The SAC is responsible for communications regarding the SRIF, research on socially responsible investing, and establishing criteria for investing according to Gospel values.

2021 Activities and Goals Progress:

The Socially Responsible Investment Fund (SRIF):

- Achieved investment returns of 27.9% over the past year (net of fees as of June 30, 2021), outpacing a traditional 60% equity/40% bond portfolio by over 5% and ranking in the top 28% percent of peers.
- Amassed \$7.4 million in assets, reflecting additional investment of Diocesan-controlled assets, existing stakeholders, and new stakeholders. The increased asset base allows for greater diversification amongst investments and lowers fees, on a percentage of asset basis, for all stakeholders.
- Funded an additional \$30,000 community impact investment note offered by Craft3. Craft3 provides micro-lending to underserved businesses, nonprofits and individuals in our local community.
- Was featured in "Investing as Doing Theology," a report to the 80th General Convention from the Task Force on the Theology of Money. Within the report, Diocese of Oregon's SRIF, and the dot-voting procedure created by the SAC to assess Gospel values and investment priorities, was showcased.

2022 Goals:

- Resume the dot-voting exercise at the in-person 2022 Convention, promoting discussion amongst Convention delegates regarding Gospel value priorities within SRIF investments.
- Continue outreach and communication with churches regarding the SRIF and the importance of socially responsible investing.

More information is available under the "+Socially Responsible Investment Fund (SRIF)" drop down at: <https://diocese-oregon.org/administration/finances/investments/>