

How does Zevin initiate shareholder advocacy campaigns?

As long-term investors, we must have vision. Our shareholder advocacy approach provides us with the opportunity to proactively improve companies, creating stronger portfolios over time.

We blend our own research with information from the Sustainability Accounting Standards Board (SASB) to determine issues that are most material to the sectors in which we invest. In the tech industry, for example, we found that human capital, human rights and freedom of expression, and data privacy and security were the areas that most prominently impact corporate risk.

We convene our advocacy and investment teams to discuss our best course of action. In some cases, we may decide that management is on the right track and no action is needed. When we see elevated risk, however, we create a plan to encourage change.

We issue letters to open direct lines of communication with companies. We amplify our voices by mobilizing the press, collectively drawing attention to a well-researched challenge that demands change. If our outreach goes unanswered, we develop shareholder proposals that lead to a vote by other investors at shareholder meetings, determining a “yes” or “no” verdict on the issue. Proposals that do not pass still produce impact by highlighting the issue and setting the stage for continued dialogue.



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