

**SISS Stewardship Priorities
Focus Area Template**

STEWARDSHIP PRIORITY
FOCUS AREA OVERVIEW Describe each Focus Area (s) for the stewardship priority and why they are important to our beneficiaries/portfolio.
VISION OF SUCCESS <ul style="list-style-type: none">• What is the change we are looking for?• Describe what will be different if the Focus Area is successful
PROBLEM AND OPPORTUNITY <ul style="list-style-type: none">• <i>Problem Statement</i><ul style="list-style-type: none">○ State the problem we are trying to solve.○ Provide a summary of the underlying drivers creating and contributing to the problem.• <i>Opportunity Statement</i><ul style="list-style-type: none">○ Why now? Describe why this is the right time to embark on the proposed Focus Area. What are the windows of opportunity that suggest transformative outcomes are likely?○ Describe our unique value proposition and what we bring that is distinct. What is our comparative advantage relative to other players in tackling the particular root causes of the problem noted above?
STRATEGY DESCRIPTION <ul style="list-style-type: none">• Briefly describe the major strategies within the Focus Area.• Describe the universe (i.e. specific companies, sectors, geographies, or regulators)• If a collaborative effort, describe the other participants and their roles and responsibilities

<p>STRATEGY IMPLEMENTATION</p> <p>Describe which tools will be used to achieve the desired outcomes: Proxy Voting, Direct Company Engagement, Collaborative Engagement, Policy Advocacy, Leveraging SISS Managers. Detail how these tools will be used.</p>
<p>DESIRED OUTCOMES – Focus Area</p> <ul style="list-style-type: none"> • List the desired asks/outcomes that, if collectively achieved, would reflect successful completion of the Stewardship Priority and/or the Focus Areas. • Describe how progress toward the outcomes will be monitored and measured.
<p>RISKS – Focus Area</p> <p>Identify in bulleted form any significant external risks and other barriers to success (e.g., opposing viewpoints) that may challenge our ability to achieve the objective of the Stewardship Priority and state how we intend to overcome them.</p>
<p>MILESTONES/TIMELINE – Strategy</p> <p>List the activities and milestones for each Focus Area. Detail the timeframe, the action taken, and the result.</p> <p>Activity</p> <ul style="list-style-type: none"> • Milestone: XXXX (Target date: XXX) • Milestone: XXXX (Target date: XXX) • Milestone: XXXX (Target date: XXX)
<p>COMMUNICATION UPDATES</p> <ul style="list-style-type: none"> • Describe what communication tools will be used (i.e. website, Engagements in Action, press releases, board items) • Timing of the communication updates
<p>FOCUS AREA LEAD(S):</p>

