



# Faith Plans

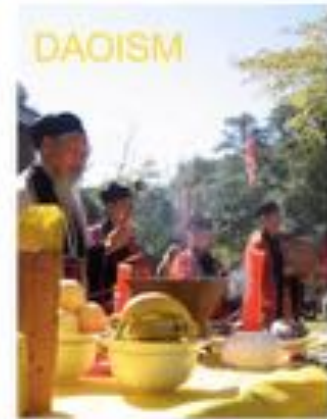
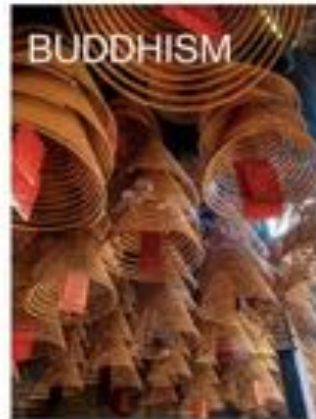
For people and planet

A Holistic Approach to a Sustainable Future

# Origins of Faith Plans

## 2009 Commitments by faith tradition

Click on the images below to find out what Commitments were developed as part of the original programme.





Now is the time to harness the role of faiths as major stakeholders in the future of the planet.

"It's not just about our role as advocates; it's about our role as the asset holders. ... It's about putting the assets of faith at the service of climate action and environmental action."

Dr. Lorna Gold, Director of Movement Building,  
Faith Invest

# What is different about Faith Plans?

- An **integral process** that starts with the faith and builds from there
- **Holistic** – takes into account the full spectrum of faith assets and activities
- **Solution focused** – drawing on opportunities
- **Adaptable** – not a rigid framework, can be modified so long as it is holistic



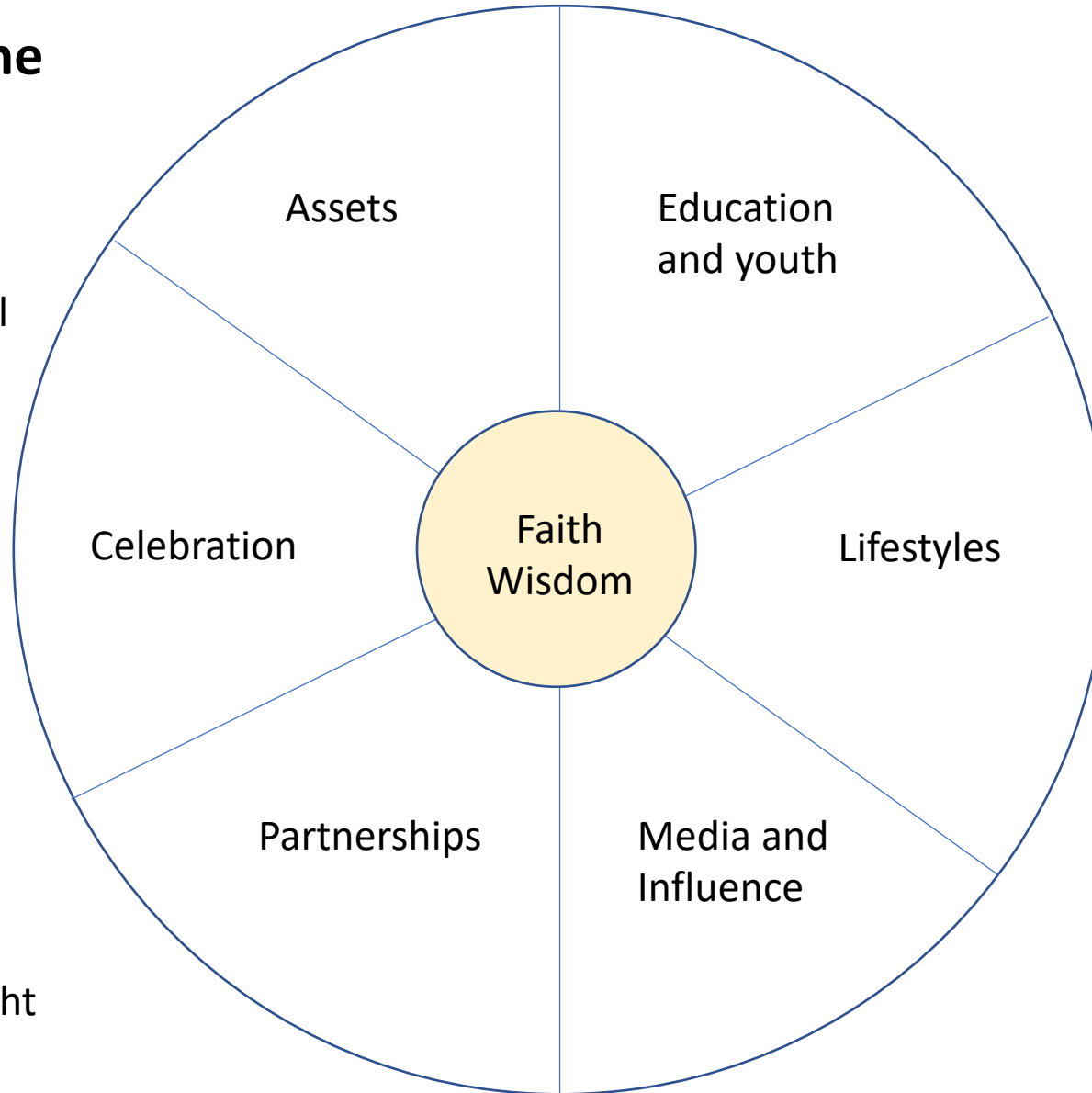
## Putting faith at the centre

What does our faith tell us about how we need to care for the earth?

Where can we find sources of inspiration?

Are there examples we can readily turn to to inspire?

What aspects of our theology/story do we need to revisit in light of the ecological crisis?



Have we applied our core beliefs & values to how we live faith community life?

Which of these areas are applicable to our faith organization?

Who from our faith organization needs to be involved in preparing the plan?

Can we have sub-processes that feed into the overall plan?

Which areas could be our major focus?

# Start with a Holistic Audit

Wisdom	Assets	Education and Youth	Lifestyles	Media and Influence	Partnerships	Celebration
Theology/ Philosophy of nature	Buildings – usage, energy, water	Curricula	Green audits	Subject matter	Dedicated staff and funding	Traditional festivals
Liturgies and rituals	Land and forests	Informal education and youth	Traditions of simple living	Influence	Lay people	New Festivals
Sacred places	Waste management	Vocational Training	Pilgrimage and tourism	Advocacy and campaigning	Eco-twinning	New traditions
Stories, quotes and practices	Procurement and Purchasing	School buildings	Purchasing power	Guides and handbooks	Other technical partnerships	New beautiful places
Spirituality, prayer and meditation	Financial Investments					
Theological training	Enterprises eg. Healthcare					

Aligned processes:

Standard Sustainability Audit

Alignment of financial investments



**Faith Plans**  
For people and planet

## Faith Plans Planning Guide

**Faith Plans Planning Guide will help your faith community get started on developing a long-term Faith Plan.**

It is up to each faith group to decide what they will focus on in their plan, depending on their core beliefs and values, priorities, resources, time, and capacity. The purpose of this step-by-step guide is to provide some simple pointers, some of which may or may not be relevant to your faith-group. Visit [www.faithplans.org/seven-key-areas](http://www.faithplans.org/seven-key-areas) for more specific guidelines on planning for the seven areas of the Faith Plans programme.

The Faiths Plans programme has **four guiding principles**, building on the foundations of the first programme of establishing Faith Long-term Plans. These are relevant to both individual organisations and the co-ordination of multi-faith working groups which will enable groups to work together and deliver change at a greater scale.

Each faith community commits to a 7-10 year plan to care for creation based on their tradition.

Faith Plans platform can support through sharing and learning as we journey together.

FaithInvest invites communities to log their plans on the faithplans.org website

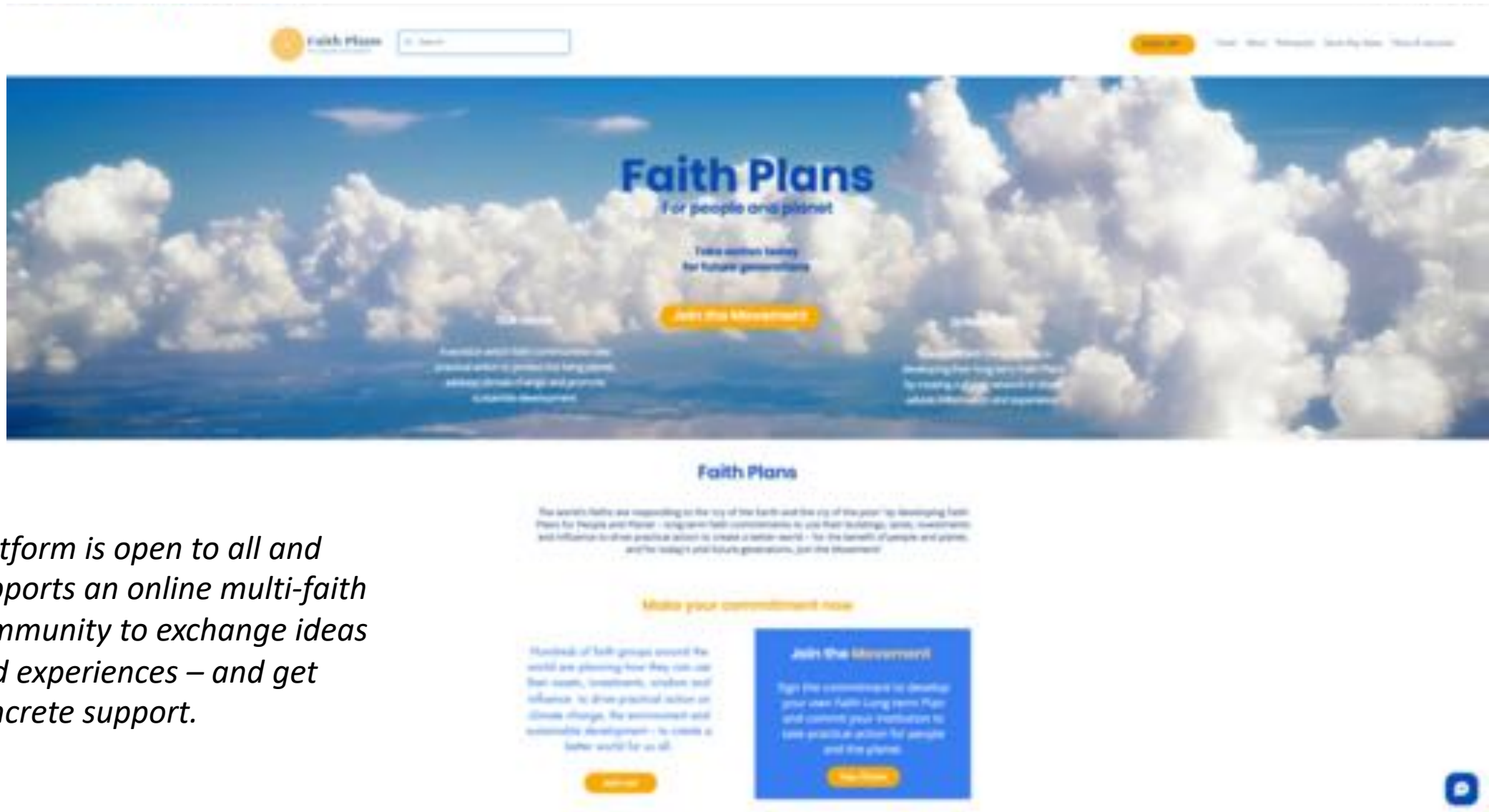
Together, we assess progress at the Stockholm +50 Summit in June and deliver our eco-plans to the UN at COP27 in November

*As we develop the plans, FaithInvest helps to source faith-based investment opportunities to implement them!*



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[www.faithplans.org](http://www.faithplans.org)



*Platform is open to all and supports an online multi-faith community to exchange ideas and experiences – and get concrete support.*



# Next steps!

## Join the Movement

### Join the movement

Hundreds of faith groups around the world are developing Faith Plans, using their faith's assets and investments, wisdom and influence to drive practical action on climate change, the environment and sustainable development. Wherever you are on your journey, we are here for you. Simply register your interest below to receive more information, or sign up to join the movement!

#### Register your **interest**

New to the concept of Faith Plans and not sure how to begin? Register your interest to receive information and resources to help you get started.

Register

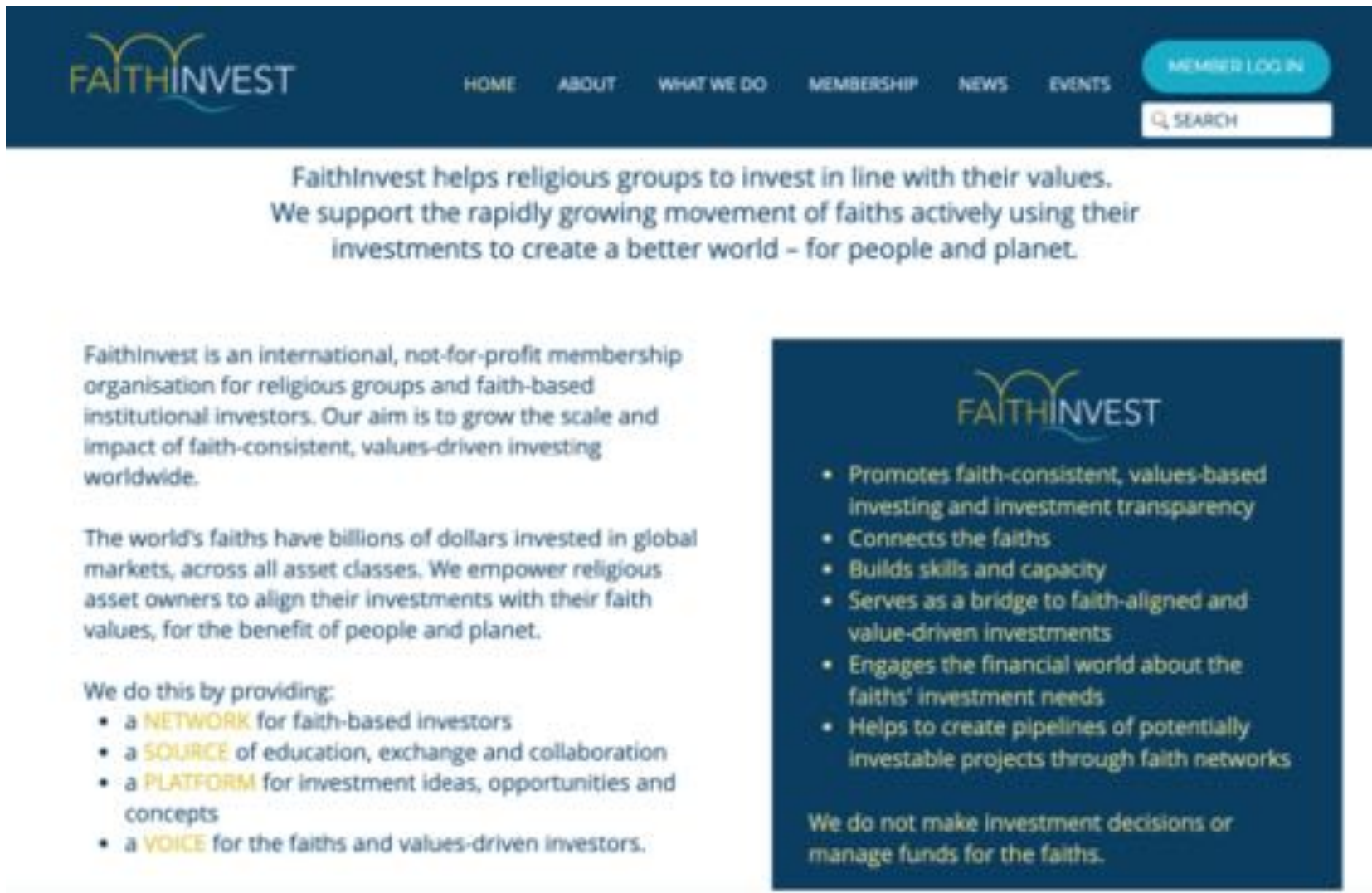
#### Make your **commitment**

Ready to develop your Faith Plan? Join the Faith Plans programme and show how your institution will take action for people and the planet.

Sign up

# Next steps!

## Consider become a Member of FaithInvest



The image shows a screenshot of the FaithInvest website. At the top, there is a dark blue navigation bar with the FaithInvest logo on the left and a menu of links: HOME, ABOUT, WHAT WE DO, MEMBERSHIP, NEWS, and EVENTS. On the right side of the navigation bar, there is a 'MEMBER LOGIN' button and a search bar with a magnifying glass icon and the text 'SEARCH'. Below the navigation bar, the main content area has a white background. It features a central text block with the mission statement: 'FaithInvest helps religious groups to invest in line with their values. We support the rapidly growing movement of faiths actively using their investments to create a better world – for people and planet.' Below this, there are three columns of text. The first column describes FaithInvest as an international, not-for-profit membership organization. The second column states that the world's faiths have billions of dollars invested in global markets and that FaithInvest empowers them to align investments with their values. The third column lists the services provided: a network, a source of education, a platform for investment ideas, and a voice for faiths. To the right of these columns is a dark blue box with the FaithInvest logo at the top, followed by a bulleted list of six key benefits. At the bottom of this box, it states that FaithInvest does not make investment decisions or manage funds for the faiths.

**FAITHINVEST**

HOME ABOUT WHAT WE DO MEMBERSHIP NEWS EVENTS

MEMBER LOGIN

SEARCH

FaithInvest helps religious groups to invest in line with their values. We support the rapidly growing movement of faiths actively using their investments to create a better world – for people and planet.

FaithInvest is an international, not-for-profit membership organisation for religious groups and faith-based institutional investors. Our aim is to grow the scale and impact of faith-consistent, values-driven investing worldwide.

The world's faiths have billions of dollars invested in global markets, across all asset classes. We empower religious asset owners to align their investments with their faith values, for the benefit of people and planet.

We do this by providing:

- a **NETWORK** for faith-based investors
- a **SOURCE** of education, exchange and collaboration
- a **PLATFORM** for investment ideas, opportunities and concepts
- a **VOICE** for the faiths and values-driven investors.

**FAITHINVEST**

- Promotes faith-consistent, values-based investing and investment transparency
- Connects the faiths
- Builds skills and capacity
- Serves as a bridge to faith-aligned and value-driven investments
- Engages the financial world about the faiths' investment needs
- Helps to create pipelines of potentially investable projects through faith networks

We do not make investment decisions or manage funds for the faiths.

# Explore the Faith Plans Hub

## CASE STUDY



How a group of Catholic sisters decided to put their money to work for maximum impact

### Catholic Sisters

The Catholic Sisters are active across the world, running schools, hospitals, social services, charities and more. And now in 27 countries across the Americas, Europe, Africa and Australia.

Two years ago, the Sisters - who normally invest in the Mortgage Lenders of the Society House of Jesus - decided to create an impact investing portfolio. This means investing in assets that generate positive social risk. They expect a financial return, but they also expect to help - and the best of impact of their investment is always the first thing to be considered.

The focus is on those who are focused on helping the poorest, creating change, not at work, or administration. Beneficiaries include migrants, the elderly, and those who are poor. They will get a social return, perhaps even more than the rest, and support to help them who use their funds to set up a business.

A social investment: Women in the Holy Land benefit from the Sisters' investment fund which makes loans for small businesses and is part-headed by the Catholic Sisters

[Read the full story](#)

## FCI GUIDELINES

Developing faith-consistent investment guidelines is an important step for faith groups seeking to align their investments with their values and are a requirement for membership of Faithinvest. Download our guide to developing faith-consistent investment guidelines as well as other resources such as The Zug Guidelines and the Faith in Finance paper.



### FCI GUIDE

Thinking about developing or further refining your own faith-consistent guidelines? You may find [this Guide](#) helpful as you articulate your vision for your investment aspirations.

[Find out more](#)

### ZUG GUIDELINES

The [Zug Guidelines](#), which were published in 2017, describe the investment priorities of dozens of traditions from eight major faiths, plus the ethical rationale behind their decisions.

[Find out more](#)

### FAITH & FINANCE

The 84-page [Faith in Finance](#) paper, published in 2016 by the Alliance of Religions and Conservation, was commissioned by OECD and UNDP to explore the role of faiths as investors.

[Find out more](#)

## RESOURCE

Read Faithinvest's guide to developing your own faith-consistent policies

[Read more](#)

## CASE STUDY

UK Quakers debate values before making money from fossil fuels

[Read more](#)

## WATCH

Our webinar on managing financial assets & investments

[Watch here](#)

## CASE STUDY

How Wespeth applies its faith values to its investment portfolio

[Read more](#)

## CASE STUDY

The Church of England develops an impact investment framework

[Read more](#)

## CASE STUDY

UK Methodists make the most of the value of their faith buildings

[Click here](#)



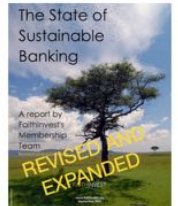
Impact Investing Roadmap

The [Impact Investing Roadmap](#) is a report by the Investment Solutions team that introduces three topics of relevance and importance to faith-based investors: understanding alignment versus impact, private markets for impact investing, and tradeoffs between impact and investment outcomes.



Faith-consistent investing

All faith organisations document what they value in terms of social principles and environmental beliefs, but not all have integrated those values into their investing. [From Faith Values to Investment](#) provides a guide for ensuring that an organisation's faith values are reflected in their investments.



Sustainable banking

For socially responsible investors, your choice of banking partner matters. So how can you find a bank that shares your values? And what are the trade-offs, if any, in working with such a bank? Faithinvest investigates the issue in its [State of Sustainable Banking Report - EXPANDED AND REVISED!](#)

# Start the mobilising your assets planning process

- Download our **simple planning guide** for helpful pointers and suggestions for taking the first steps!
- Explore the **Seven Key Area framework** for pointers & suggestions
- Complete the **baseline survey** as a reflection & action tool



## FINANCIAL INVESTMENTS and MICRO-FINANCE

*First steps: Examine your financial assets (pensions, investments, endowments and other funds) and the policies which govern these investments.*

1. Is there a clear and link between the core beliefs, values and teachings of your faith tradition and the way that you invest? If you have a formal investment plan, is this reflected in your investment policies and guidelines (your sector, asset and geographical allocation, risk exposure, return objectives, liquidity requirement, impact and time horizon). In short, do you practice faith-consistent investing?
2. Have you clearly identified the positive ethical, social and environmental issues you want to support with your investments, and have you considered the long and short term consequences of your investment decisions?
3. Similarly, have you considered the consequences of your decisions to screen out certain investments? How might you counteract unintended negative (often societal) effects of avoiding certain types of investments (by sector, industry or asset class)?

*Next steps: How have you documented your faith-consistent investing policy and the lessons learned?*

1. Taking the three previous questions together, have you documented your faith-consistent investing commitments in your investment policy and guidelines, or any similar documents agreed by your governing bodies? Faithinvest has produced some useful guides which can support this process.
2. Have you tracked the impact of your investments on the financial performance of your investment decisions?
3. What successes can you celebrate - whether financial or broader social, ethical or environmental successes?
4. What challenges have you learnt from?
5. What general principles you can share about the types of approaches and investments that worked well or poorly?
6. Have you considered directly investing in, or working to create, the kind of financial institutions that enable investment in positive social, economic and environmental change? For example, development finance institutions, or microfinance initiatives.

## Dealing with consultants and professional advisers

*Examine the approach of the consultants, managers, custodians and other professional service providers who support you with your investments.*

1. Have you considered the ethics and values of groups you employ to support you with your investments?
2. Are these advisors aware of, and familiar with, what faith-consistent investing means for your organisation? The Faithinvest member network is set up to facilitate sharing of this knowledge, through working group discussions and sharing of case studies. These groups also address the areas where there are gaps - and work together to help professional service providers to understand of and commit to providing different investment options which are consistent with the values and beliefs of different faiths.
3. Have you documented specific criteria that you apply to selecting advisers, and the reporting you require from these advisors to monitor the alignment of your investments?



## Grant giving, day-to-day financial management

*Examine your approach to grant giving, or giving which does not expect a market level of return.*

1. Is there anything that you can learn from your approach to grant giving which can be translated into your approach to investments, eg links to faith beliefs, values and teachings?
2. Could you convert any grant-supported projects into more sustainable, and therefore investable, businesses?
3. Where there are challenges that can only be supported through giving grants, with no expectation of a financial return, have you examined how to make this giving as effective as possible (e.g. first loss capital, common good research and development)?

*Examine your own day-to-day financial management.*

1. Can you incorporate faith-consistent principles into the way you spend, identify suppliers, and use, manage, restore, reuse or recycle resources?

# Save the dates!

## 3rd March 2022

Working Group: If you are responsible for your organisation's assets and investments and want to engage more deeply in the process, sign up for FaithInvest Membership and join our FCI Working Group on March 3rd

**10:00 New York | 15:00 London | 16:00 Paris | 18:00 Nairobi**

## 30th March 2022

Webinar: Faith Plans and Faith-Based Tree Planting  
Join us on 30th March for a co-hosted workshop with WWF Beliefs and Values, looking at how to develop tree planting as part of your faith plan.

**10:00 London | 11:00 Paris | 12:00 Nairobi | 14:30 Delhi**