

# Investing in a just and sustainable world

Our Strategic Plan  
2023-2025



Rakotzbrücke bridge,  
Gablenz, Germany

Front page: Whirlpools of the maelstrom of Saltstraumen,  
Nordland, Norway

Back page: Sabanci Central Mosque, Adana, Turkey

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'Major faith groups run half of the world's schools, a quarter of its colleges and universities, and a third of its hospitals. They feed people a half billion meals per day, own a tenth of the world's forests and billions of dollars invested in global markets — in sum, trillions of dollars' worth of assets and investments. What they do with their wealth matters.'

– Martin Palmer, FaithInvest CEO

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Why bridges?

We use bridges as our motif because FaithInvest acts as a bridge:

- Between faiths
- Within faiths, linking religious and investment leaders
- From faiths to the finance community

# Contents

Our Vision	4
Our Mission	4
FaithInvest: A network for the faiths and a bridge to Faith-Consistent Investing	5
Our History	6
Our Values	7
Theory of Change	8
Our Context	9-10
Our Strategic Aims and Objectives	11-19
Aim 1: Play a central role in building the FCI Movement	12
Aim 2: Serve faith asset owners	14
Aim 3: Strengthen partnerships	16
Aim 4: Strengthen our governance and capacity	18
How will we know we have succeeded?	20-21

## Our vision

Our vision is of a world in which faith groups and people of faith, motivated by their passionate conviction that investing in line with their values will achieve a just and sustainable world, actively use their investments for the benefit of people and planet.

## Our mission

We exist to grow the scale and impact of faith-consistent investing worldwide by supporting faith groups to invest in line with their values ~ for the benefit of people and planet.



# FAITHINVEST: A NETWORK FOR THE FAITHS AND A BRIDGE TO FAITH-CONSISTENT INVESTING

FaithInvest is an international, not-for-profit organisation for religious groups and faith-based institutional investors. We were founded to support the rapidly growing movement of values-driven investing among faith groups and, through this, achieve a just and sustainable world.

We support the faiths in becoming, or continuing to be, creative engines of profound change, based on their deep beliefs, values and teachings.

Our aim is to grow the scale of faith-consistent investing (FCI) worldwide to mobilise assets for the benefit of people and planet. Most faiths interpret this to mean initiatives that address the climate crisis, support the environment, promote social justice, tackle global poverty and, broadly speaking, further the aims of the Sustainable Development Goals.

This strategy sets out how we will work to build an even stronger voice for faith-consistent investing from 2023-25.

## What we do

We support faith groups, whatever their size, geography or sophistication of investment portfolios, to invest in line with their beliefs and values by:

- Promoting faith-consistent investing globally
- Supporting faiths to align their values and investment policies
- Providing research, resources and training on faith-consistent investing
- Convening spaces for investment ideas, opportunities and collaboration
- Working with the richness and diversity of faiths
- Providing a voice for faith-consistent investing and faith-based investors
- Working with partners to grow the faith-consistent investing movement

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

## Our history

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'Given the size of their assets and influence, faiths alone, through their actions, could make the crucial difference to the world's efforts to halt irreversible climate change and reverse environmental destruction.'

– Martin Palmer, FaithInvest CEO

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FaithInvest was founded following a landmark meeting of religious investors, philanthropies, the United Nations, national governments and investment firms in Zug, Switzerland, in 2017. Our founder organisation, the Alliance of Religions and Conservation (ARC), incubated FaithInvest until we were formally launched as an independent charity in 2019.

The world's major faiths should be a natural powerhouse for ethical, faith-based and impact investing. They represent a significant pool of investment assets as well as vast ownership of property and land, and they are deeply and strongly motivated.

With more than 80% of people on the planet belonging to a faith, the potential for activating such vast values-based networks for positive action is enormous. Yet for many faiths, this is currently more of a potential than a reality.

Faith institutions manage 8% of the habitable land mass of the planet and a further 15% is deemed 'sacred', making it less vulnerable to destruction. Faiths are already engaged in environmental and climate action – the UN has described the faiths' environment programmes as "the largest civil society movement on climate change in the world".

Yet our research shows that when it comes to aligning investments with beliefs and values, there is still much work to be done, particularly when it comes to moving beyond exclusionary policies to positive investment for people and planet.

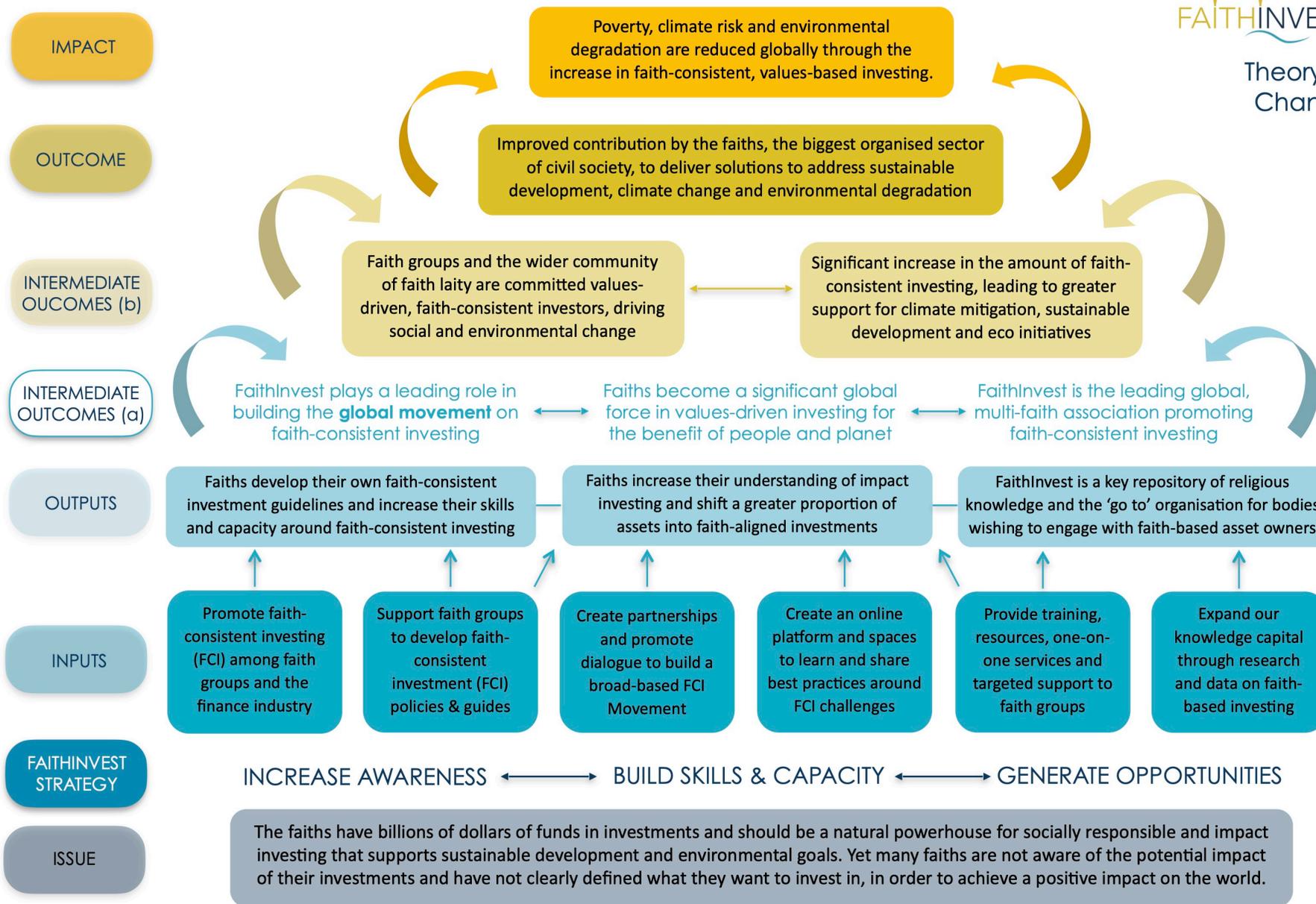
We work with faith-based asset owners to help faiths recognise their role as stakeholders in a sustainable future and shift their assets accordingly. As investors, the faiths are good at knowing what they *don't* want to invest in. FaithInvest helps faiths to identify and articulate what they *do* want to invest in, for a better future for people and planet.



## Our values

Our values will guide our decisions and principles in our work, through the strategy and in all we do.

<p>Respect</p>	<p>We work with all the major faiths, respecting and valuing the diversity of perspectives and understanding that this brings.</p>
<p>Catalysts of change</p>	<p>We seek to grow faith-consistent investing by inspiring faith leaders to take action, working innovatively and ambitiously together to achieve impact.</p>
<p>Open and listening</p>	<p>We are people focussed and relationship based, seeking to involve and engage stakeholders and partners in all our work.</p>
<p>Social justice</p>	<p>We believe in justice, dignity and fair access to global resources for all.</p>
<p>Valuing our planet</p>	<p>We believe that the faiths have a key role in leading the conservation and sustainability of our planet. We strive to act by example, consciously reducing our own ecological footprint to minimise our impact on the planet.</p>
<p>Creativity</p>	<p>We seek to harness the creativity and commitment of our team members and their diverse knowledge, expertise, and skills to further common goals.</p>



For a fuller version, including narrative, visit <https://bit.ly/FITheoryChange>

## Our context

FaithInvest's parent organisation, ARC, began looking at faiths and finance in the early 2000s. It was clear that this was an issue few faiths were considering. For example, hardly any faiths even had negative screening.

However, the picture had changed by 2015, when ARC and the UN co-hosted the UN's only formal meeting with the faiths in Bristol, UK, on the Sustainable Development Goals. Around a third of the 24 faiths who made commitments on the SDGs at the Bristol meeting included aspirations around investing in line with their values.

It was this background that led to the establishment of FaithInvest in 2019, with the goal of increasing the size and impact of faith-consistent investing worldwide.

We were founded initially with a membership structure and a focus on bringing faith-based asset owners

(FBAOs) together to discuss FCI-related issues.

The ambition was to form a peer community where FBAOs could share learnings in a contained environment, fostering greater trust and eventually leading to new solutions (such as new funds, new methodologies for assessment, shared due diligence and manager intelligence).

However, a few months after we were founded, the global Covid pandemic hit, leading to multiple national lockdowns and an inability to travel or meet in person for two years.

In addition, as we engaged more with FBAOs, we learned that the layers of complexity and challenges facing faith groups required more diverse and individually tailored approaches than simply a peer community strategy. For that reason, the key focus of our future strategy is on building one-on-one direct engagement and assisting

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FaithInvest is a trail angel, as hikers and pilgrims know them – here to help, guide, encourage, inform and engage faith-based investors on their faith-consistent investing path.

– Mathew Jensen, FaithInvest  
Director of Investment Solutions

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asset owners with more personalised and tailored services and support.

For groups that are at the beginning of their exploration into how they might make better use of their investments, we have also identified a strong demand for FCI training provision.

One of our key unique selling points is our significant legacy of faith

leadership and contacts inherited from ARC as well as new high-level relationships with the Catholic world.

We have learned that where relationships already exist, and where trust has been established (such as with the Vatican and Catholic Religious Orders and with key Buddhist organisations in Asia and Europe), we have been able to build and deepen these relationships.

We have established FaithInvest as a key repository of religious knowledge and capital and one of the ‘go to’ organisations for organisations wishing to engage with faith-based asset owners particularly. This ‘religious capital’ – an in-depth knowledge of the faiths themselves and understanding

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**The faiths are as diverse in their investment capabilities as they are in their beliefs.**

– Mike Even, FaithInvest Director of Strategy and Investment Research

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of the cultural sensitivities, structures and nuances of individual faiths, makes us very well placed to drive forward this agenda in a bespoke, respectful and responsive way.

Our review has also enabled us to focus our strategy more specifically in key areas of the world where we have existing connections. The field of play in terms of FCI is potentially limitless – every faith, every country, every type of investment.

As we currently have staff in three key countries (the UK, Ireland and USA), we have acknowledged the strategic value in developing a critical mass of relationships amongst FBAOs and asset managers in these countries.

We will therefore be looking to work with a smaller numbers of partner organisations in each of the major faith groups within these countries, to build strategic relationships and bilateral projects.

Internally, as a new team, established during Covid and working remotely, we

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**Faiths need to align their investments and their substantial assets to resolve the problems the world is facing – and shout from the rooftops about what they are doing!**

– Lorna Gold, FaithInvest Director of Movement Building

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are moving from an entrepreneurial ‘start-up’ mode to a more formalised structure with regard to the structures, systems and staff resource needed to enable us to achieve our objectives.

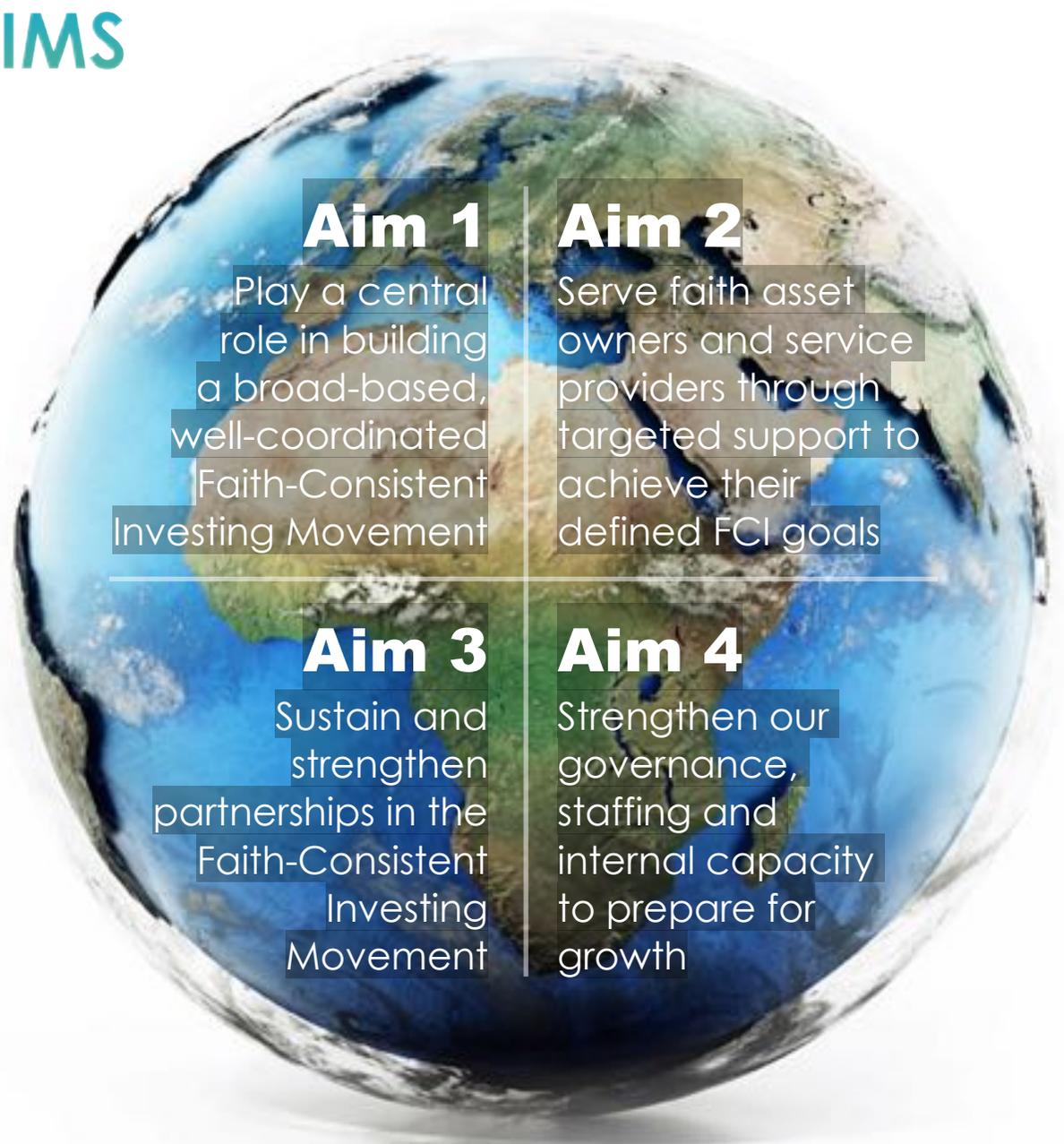
Over the coming strategic period, we will embed the necessary systems, practices and policies to ensure that we are able to operate effectively but flexibly as a small team working on a global scale.

# OUR STRATEGIC AIMS AND OBJECTIVES FOR 2023-25

These strategic aims will direct our work for the next three years.

The aims are linked and interdependent.

Between 2023-25, we will:



## **Aim 1**

Play a central role in building a broad-based, well-coordinated Faith-Consistent Investing Movement

## **Aim 2**

Serve faith asset owners and service providers through targeted support to achieve their defined FCI goals

## **Aim 3**

Sustain and strengthen partnerships in the Faith-Consistent Investing Movement

## **Aim 4**

Strengthen our governance, staffing and internal capacity to prepare for growth

# Aim 1

# PLAY A CENTRAL ROLE IN BUILDING A BROAD-BASED, WELL-COORDINATED FAITH-CONSISTENT INVESTING MOVEMENT



Delegates at  
our Bold Plans  
event,  
London,  
October 2022

## *Rationale*

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When FaithInvest was launched in 2019, there was very little discussion of faith-consistent investing (FCI) or faith-based investing in the public domain. In the three years since then, however, the position has changed considerably and there is much more information, debate – and action – around aligning faith values and investments.

FaithInvest has already become a significant voice in the FCI Movement and is uniquely placed to play a central role in developing it further. That's due to the legacy and goodwill we inherited from our founding organisation, ARC, of key faith relationships and decades of experience of working with all major religious traditions.

We believe that by supporting the development of a vibrant global movement of faith communities actively using their investments for people and planet, we will achieve a just and sustainable world.

### *Aim 1 Objectives*

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- 1.1** Increase the visibility and understanding of faith-consistent investing by actively promoting it within faith communities and in the wider finance world.

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- 1.2** Convene highly valued spaces where the FCI Movement can come together for meaningful conversation and dialogue around relevant topics, and to build bridges between the faith leadership and the investment leadership.

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- 1.3** Leverage our connections across the FCI Movement to share knowledge of, and potential for, co-creating pipelines of investable projects and joint funds such as the Multi-faith Just Transition Fund.

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- 1.4** Build one-on-one relationships with high-level faith leaders to enable and support them in thought and action leadership.

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- 1.5** Develop a new FaithInvest Brand Strategy, including showcasing what difference we make; research-based content development; case studies of how we add value.

**Aim  
2**

# SERVE FAITH ASSET OWNERS AND SERVICE PROVIDERS THROUGH TARGETED SUPPORT TO ACHIEVE THEIR DEFINED FAITH-CONSISTENT INVESTING GOALS

## *Rationale*

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FaithInvest was founded to support faiths actively using their investments to create a better world – for people and planet.

The faiths have billions of dollars invested on the global markets. They should be a natural powerhouse for ethical, faith-based and impact investing.

Yet for many faith groups, this is currently more of a potential than a reality, and the full impact of faith-consistent investing has not yet been realised.

The challenges facing faith-based asset owners are many and varied. They include lack of knowledge about FCI, concerns about making

a bad decision, insufficient in-house capacity to explore FCI or carry out due diligence, or lack of understanding or support from faith leadership.

By providing targeted support, we can help faiths to align their investment policies and their values and so achieve their FCI goals.



Some of FaithInvest's White Papers and research

## *Aim 2 Objectives*

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- 2.1** Build a one-on-one direct engagement service model and support follow up with faith-based asset owners (FBAOs).
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- 2.2** Develop and roll out a range of training modules and resources for FBAOs and financial intermediaries around faith-consistent investing, ranging from 'the ABCs of FCI' to advanced topics.
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- 2.3** Develop a one-on-one service for "Providers" to build their religious literacy, thus developing their FCI fund and service capabilities.
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- 2.4** Build our internal organisational 'faith knowledge capital' by developing a tailored research strategy to support roll out and development of faith-consistent investing.

# Aim 3

## SUSTAIN AND STRENGTHEN PARTNERSHIPS IN THE FAITH- CONSISTENT INVESTING MOVEMENT

### *Rationale*

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The challenges facing our planet are both substantial and urgent, from global poverty to the destruction of the natural environment. Climate change, in particular, is an existential threat to us all.

As UN Secretary General Antonio Guterres told us at COP27: 'We are in the fight of our lives and we are losing ... Our planet is fast approaching tipping points that will make climate chaos irreversible. The global climate fight will be won or lost in this crucial decade – on our watch.'

In the face of such challenges, it is imperative that we come together to maximise our efforts. FaithInvest does not exist in isolation but is part of a collaborative effort by many organisations taking action for people and planet.

We believe that by strengthening partnerships in the FCI Movement, we will create **more** momentum, accelerate **more** action, have **more** impact and be **more** successful in addressing global crises and in creating a **better future** for us all.





### *Aim 3 Objectives*

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- 3.1** Develop a partnership approach model to enable us to sustain relationships, grow our network of partners and develop relevant topical research.
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- 3.2** Deepen our existing high-level relationship with Catholic entities/ FBAOs and leverage this for FCI Movement-wide impact.
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- 3.3** Build a comparable partnership to the Vatican programme with at least one other faith group, for example, working with Indonesia's Muslim Union to develop a platform for Al-Mizan.
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- 3.4** Ensure the wide partnerships established through the FaithPlans framework is translated into more focused FCI work.



# Aim 4

## STRENGTHEN OUR GOVERNANCE, STAFFING AND INTERNAL CAPACITY TO PREPARE FOR GROWTH

### *Rationale*

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As a charity with a small team, we need to ensure we have the appropriate staffing, strategies and processes in place to enable us to work as effectively as we can, support faith groups and faith-based asset owners. We also need to put resources in place in enable us to grow to meet the huge and accelerating demand on our time and services.



Tree planting project organised by the Evangelical Lutheran Church in Tanzania. Photo: ARC



Above: Tree planting in Ethiopia. Photo: Eyoel Kahssay

Right: Tree planting in India. Photo: EcoSikh



## *Aim 4 Objectives*

- 4.1** Deepen and broaden the capacity of our Board to support us as we grow, including the addition of new trustees.
- 4.2** Develop and deliver critical implementation plans to underpin the strategy including mission-aligned decision-making processes and effective tracking and evaluation systems.
- 4.3** Grow our funding base, particularly in other faith philanthropies beyond the Catholic world, while retaining our current donors.
- 4.4** Build an income strategy aligned with our charitable objectives that is focused on FCI service delivery, consultancy offerings and training opportunities, including exploring the potential for complementary revenue streams such as licensed products and services.
- 4.5** As a dispersed, remote-working international organisation, nurture our sense of our team and build a positive, supportive working culture.



## How we will know we have succeeded?

We will demonstrate the extent to which we have succeeded in our mission and strategy through the measurement and tracking of the performance indicators opposite, which will form the basis of our future impact reporting to our beneficiaries, partners, funders and regulators.

1. Play a central role in building a broad-based FCI movement	2. Serve faith asset owners and service providers with targeted support	3. Sustain and strengthen partnerships in the FCI movement	4. Strengthen our governance, staffing and internal capacity
<p>We will grow the number of key organisations attending our events, their participation and positive feedback.</p> <p>We also aim to increase the number of high level external events that we are invited to speak and participate in.</p> <p>We will increase the number of new organisations that engage with our Investment Solutions Team's 'services'.</p> <p>We will increase the number of media mentions of FaithInvest and/or 'faith-consistent investing' or 'faith-based investing' in key sector publications.</p>	<p>We will expand the number of referrals to, and engagement with, our one-one services for faith asset owners</p> <p>Our aim is always to move capital and we will actively seek to increase the amount of faith assets moved into FCI as a result of our support</p> <p>We will assess the success of our our FCI training provision by the number of referrals, level of engagement and feedback from participants</p> <p>We will publish more research-based content and case studies, and track how well they are read and received.</p>	<p>We will expand the number of partnerships we engage in, with a key focus on FCI.</p> <p>We will grow the number of Catholic entities engaged in FCI as a result of our engagement with them, and measure our success by the nature of their feedback to us.</p> <p>We will develop a high-level agreement with at least one other major faith tradition, accompanied by funding arrangements.</p> <p>We will expand the number of organisations participating in our Faith Plans framework that go on to adopt FCI.</p>	<p>We will recruit additional trustees and embed key governance structures into our operations.</p> <p>We will achieve financial sustainability and growth through a diversified funding model, demonstrating a broader range of funders and a growth in charitable trading, including consultancy support and training delivery.</p> <p>We will embed mission- and strategy-aligned decision-making, tracking and evaluation processes within the organisation.</p> <p>We will improve recruitment and retention of high quality staff and achieve positive team feedback through nurturing our sense of team and fostering a positive working culture.</p>



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