## **Mandate for FaithInvest**

**A.** Our strengths: beliefs, commitments and the gifts of diversity.

## B. Our aims:

- To secure our shared commitment and plan;
- To achieve tangible co-operation toward creating a fundable and sustainable faith-consistent investment alliance, to be known as FaithInvest;
- To lead transformation and to open up collaboration.
- **C. Our undertaking:** We commit to co-operate and create a fundable and sustainable alliance to assist faiths to collaborate on globally transformative faith-consistent investment.

The following points and key issues form the agreed agenda for both the Development Committee and prospective members.

## **D.** Broad Principles

- 1. FaithInvest is built on a multi-faith vision of Life and Earth.
- 2. At the heart of FaithInvest are faith investors and faith organisations. These will be in partnership with philanthropies and NGOs and an inspiration to investors guided by their own faith.
- 3. FaithInvest guides investment in line with faith-consistent principles, values and responsibilities. This creates demand for faith-consistent investment initiatives.
- 4. The faiths also generate projects which need investment. These also need support services to become investable at scale.
- 5. FaithInvest helps the faiths build bridges and form partnerships with secular agencies and suppliers of secular and religious financial services.
- 6. FaithInvest aims to assist entire portfolios to be faith-consistent in response to global crises/challenges. That includes any proportion directed specifically toward impact investment.
- **E. Key Roles:** FaithInvest exists to engage the faiths and secular partners to:
  - 1. **Develop** a pipeline of investable projects in line with faith-consistent principles;
  - 2. **Catalyse** faith-based investment partnerships;

- 3. **Encourage and develop a variety of faith-based guidelines** through regional faith programmes in Asia, Latin America and Africa as well as in Europe and North America.
- 4. Create and deliver faith-consistent opportunities and business services;
- 5. **Connect** projects with investors at scale;
- 6. Undertake applied research
- 7. **Focus on faith criteria, indicators and measures;** look for common voices & concerns in this plurality.
- 8. Educate and inform through:
  - a. creating formal and informal curriculum resources;
  - b. raising faith grassroots awareness of FCI principles and potential;
  - c. encouraging faith individuals toward FCI, knowledge sharing;
  - d. providing or partnering with leadership training;
  - e. educating asset managers about engaging with the faiths.
- 9. **Engage partners:** provide the faith-consistent voice needed for systemic change, for example in partnership with the SDGs.
- 10. Inspire: build and tell the story of FaithInvest and faith-consistent investment

## F. Designing FaithInvest

- A. Funding model:
  - 1. Startup: three to five years of grant funding and up-front investment.
  - 2. Sustainable. It is a blended model: some membership fees; some fees for relevant and valuable business services (advisory, research, education, other).
- B. Two-tier or hybrid structure with these elements:
  - 1. Light-touch, not-for-profit flexible association.
  - 2. Business: for-profit service delivery arm acting consistent with the above. This model has to serve the core Association purposes, not to drive them