Date: 17 September 2020

Client: UNEP FI

Project: Principles for Responsible Banking – Year One Update

Author(s): Adam Garfunkel; Rachael Mpashi-Marx

# Toolkit for Year One Progress Update

Contents

[Toolkit for Year One Progress Update 1](#_Toc51242195)

[Introduction 2](#_Toc51242196)

[Overview of the Year 1 Progress Update 2](#_Toc51242197)

[Campaign objectives 2](#_Toc51242198)

[Year One Progress Update campaign messages 3](#_Toc51242199)

[Key messages 3](#_Toc51242200)

[Secondary messages 3](#_Toc51242201)

[Takeaways for key audiences 3](#_Toc51242202)

[Campaign assets 4](#_Toc51242203)

[Videos 4](#_Toc51242204)

[Infographic 5](#_Toc51242205)

[Social media cards 5](#_Toc51242206)

[Year One Progress Update pages on the UNEP FI website 7](#_Toc51242207)

[Appendices 8](#_Toc51242208)

[About the Principles for Responsible Banking 8](#_Toc51242209)

[Purpose, Vision and Mission of the Principles 8](#_Toc51242210)

[About UNEP FI 8](#_Toc51242211)

# Introduction

September 22nd, 2020 marks one year since the launch of the Principles for Responsible Banking.

Much has happened in that time. It is important that UNEP FI publicly shares insight gained from the first year with signatory banks and civil society stakeholders because transparency, accountability and involvement of stakeholders are all core to the success of the Principles.

The Year One Progress Update is a dynamic, engaging snapshot of the progress made, and points to the work still to be done.

It is not a traditional or comprehensive report. Rather, it presents the activities and stories emerging from putting the Principles into practice. It is also an opportunity to engage civil society voices.

This work is part of the overall communications strategy for this implementation phase of the Principles. The strategy’s core objective is to establish the Principles as a credible brand.

# Overview of the Year 1 Progress Update

The Year One Progress Update is a flagship communications campaign. It is designed to highlight the work being done in the year since the launch of the Principles. It has been created with ease of sharing, and social media in mind. It includes a collection of ‘info-nuggets’ communicated through videos, social media cards and the section on the UNEP FI website. Content includes:

* brief descriptions of innovative activities by individual banks,
* some overview key numbers of growth in the year,
* quotes from banks, UNEP and non-bank advocates.

There is also a template media release available for signatory banks to adapt for their own circulation. Signatories are encouraged to share both their individual story, and that of the collective progress made during year one.

## Campaign objectives

The objectives of publishing and disseminating the Year One Progress Update are to:

* Contribute to sharing what good looks like in relation to implementation of the Principles.
* Model openness and willingness to engage with critical stakeholder voices.
* Raise the profile of the Principles and the work being done by the signatory banks.
* Contribute to fostering a positive narrative about the Principles.

### How your team can support the campaign

Involvement in the campaign is a virtuous cycle: the more signatory banks that share content and reference the Principles, the more credible the Principles become. The more credible the Principles are, the more trusted you are as a signatory bank. Suggestions of ways you can do this include:

* Use the assets internally to build awareness and pride in the Principles; build them into Town Halls or Meet the CEO events about strategy
* Share social media cards with posts highlighting the changes you are making that are positive for people and planet
* Use the assets with clients and customers and other key stakeholders to give them an update on why this matters to you and the progress you are making
* Issue a media release using the template provided

In brief, we want to collectively challenge the perception that ‘little is happening’ by sharing glimpses of what banks are doing, and links to the website and assets that showcase the progress in year one.

# Year One Progress Update campaign messages

## Key messages

The key messages that we want to communicate as part of this campaign are:

* This is the end of year one and signatory banks have four years to align their strategies with what the world needs in the shape of the Sustainable Development Goals and the Paris Climate Agreement.
* Signatory banks are working together to identify emerging leading practice and to create the tools and processes to put the whole banking sector onto a sustainable footing.
* Signatory banks are making positive contributions to society in ways that align with the Principles for Responsible Banking.

## Secondary messages

Alongside this, we also want to share the following messages as and when appropriate:

* Signatory banks are putting in place the internal building blocks that will help them align their strategy with the Principles.
* Signatory banks are working with clients and customers to help them be more sustainable.
* Signatory banks are actively addressing social issues such as poverty and marginalisation in their activities.
* Signatory banks are actively addressing environmental issues such as climate and biodiversity with their lending.
* Signatory banks are playing their part in helping communities affected by Covid-19.
* Signatory banks are working with stakeholders to create positive change they couldn’t deliver on their own.
* Signatory banks are inspired by the potential of the Principles for Responsible Banking to bring about meaningful change.

## Takeaways for key audiences

In line with the campaign’s objectives, the Year One Progress Update has been designed to inspire specific understanding amongst its four key audiences, as follows:

### Media/civil society

“One year on, the Principles for Responsible Banking initiative is showing signs that it is starting to drive banks to be better for people and planet.”

### Signatory banks management and employees

“The Principles for Responsible Banking are making change happen – I’m proud we are part of it."

### Investors in a signatory bank

“Being part of this initiative tells me the bank we invest in is thinking about its long-term success in terms of its contribution to people and planet, as well as profit.”

### Non-signatory bank leaders

“This initiative looks like a good thing to be part of. We might be missing out. Let’s join.”

# Campaign assets

We have created a number of communication assets as part of this campaign. They are designed to be used together across different channels, including the UNEP FI website, banks’ websites, social media, and signatory banks’ internal communications. They are for use by UNEP FI and signatory banks, and include:

* 10 Videos
* An overview infographic showing growth and activities
* Social media cards, for Linkedin and Twitter
* Dedicated section on the UNEP FI website, as part of the [Progress section](https://www.unepfi.org/banking/bankingprinciples/progress/).

## Videos

There are 10 videos of about 3 minutes length. There is one overview video, and nine content-specific videos, which cover a range of key themes emerging from the first year of implementing the Principles.

Each video features a number of representatives from various signatory banks and stakeholder organisations talking about aspects of the Principles that are particularly significant to them. They are intended to bring the Principles to life, and to inspire viewers, as well as to be informative.

### Overview video

This video features short snippets of some of the banks and stakeholders featured in the other films. It is intended to provide an overview of the first year, and to serve as the most widely shared asset on social media.

It is intended to encourage viewers to go to the campaign landing page to find out more. From there, viewers will be able to see the other videos and find more information about what has been happening during the first year of implementation of the Principles.

### Content-specific videos

1. How our bank has been **embedding** the PRB internally (creating structure for more change and positive impact.
2. How banks are working with **clients and customers**.
3. How banks have made a positive difference on **social** issues.
4. How banks have made a positive difference on **environmental** issues.
5. How banks have made a positive difference on **Covid-19**.
6. How banks work with **stakeholders**.
7. Perspectives on the Principles from **Civil Society.**
8. How **Collective Progress** is a vital feature of the Principles
9. Why **becoming a Signatory** has been important to us. (This one will live in a different part of the UNEP FI website to the others – it will be on the *Become a Signatory* page.)

## Infographic

This presents the growth of the Principles in the first year including some key numbers (eg signatories, AUM, customers) and very brief summaries of key activities.

It lives on the Year one update landing page.

It is also available to download as a final file and as design files (for translation) from the communications toolkit area of the UNEP FI website.

## Social media cards

A suite of social media cards have been created for use on Linkedin and Twitter. They can also be shared on other social media platforms in line with banks’ own communication strategies. The suite includes:

* general cards about the qualities of the Principles
* a teaser to find out more about what has happened in year 1
* several with quotes from signatories and UN figures about specific topics addressed in the year. These broadly correspond to the topics featured in the nine content-specific videos.

There is one set of cards badged with the Principles logos and icons and sized for LinkedIn and Twitter. There is another set of cards that have been created as templates for customisation and use by signatory banks.

### Using the social media cards

Please use the social media cards widely from 22 September until Christmas 2020.

Each card is intended to drive traffic to specific elements of the wider communications campaign to encourage those engaging to find out more about the Principles and the progress made in year one. The details are set out below.

Banks may also want to use elements of this campaign to drive traffic to information on their own websites about the Principles.

|  |  |
| --- | --- |
| **Social media card type** | **Link** |
| Cards referencing general qualities of the Principles, including:* Aligning with society’s goals
* Robust accountability
* Coalition for change
 | Principles’ homepage - <https://www.unepfi.org/banking/bankingprinciples/>  |
| Cards referencing overall progress, including:* Growing the community
 | Year One Progress Update landing page - [www.unepfi.org/banking/bankingprinciples/progress/year-one-update](http://www.unepfi.org/banking/bankingprinciples/progress/year-one-update)  |
| Cards referencing progress on one of the content-specific topics – for details see below | The relevant web page |
| How our bank has been **embedding** the PRB internally (creating structure for more change and positive impact. | <https://www.unepfi.org/year-one-update/driving-change-internally/>  |
| How banks are working with **clients and customers**. | <https://www.unepfi.org/year-one-update/clients-and-customers/>  |
| How banks have made a positive difference on **social** issues. | <https://www.unepfi.org/year-one-update/social-issues/>  |
| How banks have made a positive difference on **environmental** issues. | <https://www.unepfi.org/year-one-update/environmental-issues/>  |
| How banks have made a positive difference on **Covid-19**. | <https://www.unepfi.org/year-one-update/covid-19/>  |
| How banks work with **stakeholders**. | <https://www.unepfi.org/year-one-update/stakeholders-and-partnerships/>  |
| Perspectives on the Principles from **Civil Society.** | <https://www.unepfi.org/year-one-update/civil-society/>  |
| How **Collective Progress** is a vital feature of the Principles | <https://www.unepfi.org/year-one-update/collective-progress/>  |
| Why **becoming a Signatory** has been important to us | [www.unepfi.org/banking/bankingprinciples/progress/year-one-update](http://www.unepfi.org/banking/bankingprinciples/progress/year-one-update) |

**Suggested text for post accompanying the social media cards**

With each social media card, we encourage banks to include some text and #responsiblebanking. This might be generic text that highlights the overall campaign, or it may be specific to the bank.

Suggestions of what generic text might be are suggested below. Customised text should highlight the interesting work being done by the bank as a result of being a signatory to the Principles or offer a perspective from someone from the bank who is involved in the implementation.

|  |  |
| --- | --- |
| **Social media card**  | **Generic post text** |
| Aligning with society’s goals | Part of the global movement for change, signatory banks are creating a future of banking that is better for people and for the planet. #responsiblebanking |
| Robust accountability | Signatory banks are creating a better future for banking, but don’t just take our word for it… #responsiblebanking |
| Coalition for change | Together we are going to change the banking sector for the better. #responsiblebanking |
| Growing the community | We are in this together, and our community is growing. #responsiblebanking |
| How our bank has been **embedding** the PRB internally  | If you want to change the world, you must first change yourself. Signatory banks are creating a future for banking that is better for people and planet. #responsiblebanking |
| How banks are working with **clients and customers**. | We can’t change the banking sector for the better without our clients and customers. #responsiblebanking |
| How banks have made a positive difference on **social** issues. | Striving to be a positive part of the communities we serve, signatory banks are creating a better future of banking for people and planet. #responsiblebanking |
| How banks have made a positive difference on **environmental** issues. | Signatory banks are creating a future for banking that is better for our beautiful planet. #responsiblebanking |
| How banks have made a positive difference on **Covid-19**. | Signatories to the Principles for Responsible Banking have been stepping up to support people and communities affected by the global pandemic. #responsiblebanking |
| How banks work with **stakeholders**. | We are not alone in creating the future of banking. Signatories are collaborating with governments, regulators and civil society – together we can do more for people and our planet. #responsiblebanking |
| Perspectives on the Principles from **Civil Society.** | Signatory banks are engaging with civil society because together we can create a future for banking that truly is better for people and planet. #responsiblebanking |
| How **Collective Progress** is a vital feature of the Principles | The contributions we all make add up to the changes that we need for people and planet. Together we are creating the future of banking. #responsiblebanking |
| Why **becoming a Signatory** has been important to us | The community of signatory banks is the largest, global movement for positive change in the sector. Together we are creating the future of banking. #responsiblebanking |

## Year One Progress Update pages on the UNEP FI website

There is a dedicated collection of web pages on the UNEP FI website within the [progress section](https://www.unepfi.org/banking/bankingprinciples/progress/) featuring information and videos. From 22nd September, the pages will be live, and accessible here: [www.unepfi.org/banking/bankingprinciples/progress/year-one-update](http://www.unepfi.org/banking/bankingprinciples/progress/year-one-update)

As with the rest of the campaign, these pages are designed to provide a quick, engaging overview of some of the activities and progress taking place in the year since the launch of the Principles.

There is a landing page, eight pages dedicated to each of the content-specific topics, a page featuring videos made by signatory banks about their experiences of the first year, and a page. looking at what will happen over the next year.

As with the other aspects of this campaign, we encourage signatory banks to share the links to these pages through your various communication activities to engage people with the Principles, and share information about what they are, and what has been happening amongst signatories to realise the ambitions of the Principles in practice.

# Appendices

## About the Principles for Responsible Banking

### One line

The Principles for Responsible Banking provide the first-ever global sustainability framework for the banking industry.

### Strapline

Creating the future of banking

### One paragraph

The Principles for Responsible Banking provide the first-ever global sustainability framework for the banking industry. Signatories commit to aligning their business strategies global goals such as the Sustainable Development Goals and the Paris Climate Agreement. The number of signatories has grown to nearly 200 banks, collectively representing more than 40% of global banking assets.

## Purpose, Vision and Mission of the Principles

### Our purpose or Why these Principles exist:

To transform the banking industry to enable it to play a leading role in achieving society’s goals.

### Our vision - the impact we want the Principles to have in the world:

A responsible banking industry that is an integral part of the society of the 21st century because it serves and contributes to an inclusive society that uses its natural resources sustainably.

### Our mission - what we will do to achieve our vision:

We will take a leadership role and use our products, services and relationships to support and accelerate the fundamental changes in our economies and lifestyles necessary to achieve shared prosperity for both current and future generations.

## About UNEP FI

The United Nations Environment Finance Initiative (UNEP FI) is a partnership between UNEP and the global financial sector to mobilize private sector finance for sustainable development.

UNEP FI works with more than 300 members – banks, insurers, and investors – and over 100 supporting institutions – to help create a financial sector that serves people and planet while delivering positive impacts.