Institutional Solutions

The official catalogue of research, advisory, education and analytics solutions

RESEARCH · GOVERNANCE · ASSESSMENT · ANALYTICS · EDUCATION · CONVENING

CATALOGUE 2026

Contents

The Institute's solutions are organised into four families. Each solution below is described as an autonomous institutional offering, with a common structure so that organisations can compare and combine them.

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HOW EACH SOLUTION IS DESCRIBED

Every entry follows the same structure — overview, why it matters, audience, methodology, data sources, key outputs, institutional benefits, use cases, future developments and suggested visuals — and closes with its connection to the Institute's research.

Introduction

THE CATALOGUE

Solutions for the stewardship of mission

How to read this catalogue — the architecture common to every solution, and the conviction that unites them.

This catalogue sets out the institutional solutions of the Catholic Finance Institute: the research, advisory, assessment, analytics, education and convening offerings through which the Institute serves the institutions of the Catholic world and the professionals who advise them.

The catalogue is deliberately framed in the language of solutions rather than deliverables. Each entry describes not a technical product but a coherent response to a real institutional need — a way for a diocese, a congregation, a foundation, an asset manager or a family office to govern and steward wealth with both excellence and fidelity. The solutions are designed to stand alone and to work together: an observatory that maps the field, reviews that diagnose governance and values alignment, analytics that bring institutional-grade rigour to portfolios, education that builds lasting capability, and convening that connects the community of practice. Together they form an integrated platform.

Three commitments run through every solution and distinguish the Institute from a commercial provider.

- **Independence** — the Institute carries no product to sell and no commercial mandate; its analysis answers to the evidence and to its mission, not to a sponsor or a fund.
- **Research-led method** — every solution draws on the Institute's own research, frameworks and publications, so that guidance is current, rigorous and honest about what is known.
- **Fidelity to mission** — each solution holds together financial excellence and the Church's social teaching, treating them as a single discipline rather than competing aims.

The catalogue is organised into four families. **Research & Market Intelligence** maps the field and equips institutions with data and analysis. **Governance & Portfolio Advisory** diagnoses and strengthens how institutions oversee and align their assets. **Executive Education** builds durable capability within boards, committees and teams. **Partnership & Convening** sustains the research itself and connects the community that depends on it.

Each solution is presented in a common structure — overview, relevance, audience, methodology, data sources, key outputs, institutional benefits, use cases, future developments and suggested visuals — and closes with an explicit account of how it connects to the Institute's research agenda. The structure is intended to let a board read any single solution on its own, and to let an institution assemble several into a coherent programme of work suited to its needs.

The need for such an institution is real and, until recently, unmet. The institutions of the Catholic world — dioceses, religious congregations and orders, foundations, and the universities and entities that share their mission — collectively steward resources of great significance. Those resources are not ordinary capital: they are held in trust, for a mission and for generations not yet born, and they carry obligations that are at once fiduciary and spiritual. Yet the leaders who govern them have had to navigate sophisticated global markets without an independent institution dedicated to their particular situation — one that understands both the discipline of modern finance and the demands of the Church's social teaching, and refuses to treat them as opposed. The Institute exists to be that dedicated point of reference, and this catalogue is the concrete expression of what it offers.

The framing of *solutions* rather than products is deliberate and consequential. A commercial provider begins with a deliverable it wishes to sell and seeks situations in which to sell it. The Institute begins from the other end — with the genuine needs of the institutions it serves — and has built each solution as a considered response to one of those needs. The distinction matters in practice: it means the Institute has no incentive to recommend a solution an institution does not need, and every incentive to ensure that what it provides genuinely serves the institution's mission. The catalogue should therefore be read not

as a menu to be sold from, but as a map of capabilities an institution can draw on, alone or in combination, as its own circumstances require.

A NOTE ON LANGUAGE

These are institutional solutions, described in the register of a research institute. Where figures, dashboards or scores appear in the pages that follow, they are illustrative of method — not claims of past results. The Institute's value lies in the rigour and independence of its approach.

SOLUTION 01 · RESEARCH & MARKET INTELLIGENCE

Catholic Finance Observatory

A permanent observatory on the state, practice and direction of Catholic finance.

TYPE	CADENCE	IN THE SPIRIT OF	USERS
Standing research observatory	Continuous · periodic reporting	Morningstar · CFA Research Foundation · MSCI Research	Institutions, advisors, sponsors

Product Overview

The Catholic Finance Observatory is the Institute's permanent intelligence function: a standing capability that monitors, measures and interprets the state and evolution of Catholic finance worldwide.

Where most fields of finance are served by established data providers and research foundations, Catholic finance has lacked an independent observatory that follows it systematically over time. The Observatory fills that gap. It tracks the institutions at the heart of the field — asset managers serving Catholic clients, foundations, dioceses and religious congregations — together with the practices they adopt, the frameworks they use, and the regulatory environment in which they operate. It does so continuously rather than episodically, building a longitudinal picture that deepens with each cycle. The Observatory is not a one-off study but an enduring instrument: a place the field can turn to for a credible, independent reading of where Catholic finance stands and where it is heading.

Why It Matters

Institutions cannot benchmark what no one measures. Without a shared, independent point of reference, a diocese has no way of knowing whether its governance is ahead of or behind its peers, an asset manager cannot demonstrate how its practice compares, and a sponsor cannot see where the field most needs support. The Observatory supplies that reference. It makes practice visible and comparable, surfaces emerging norms and risks early, and gives the whole field — practitioners, scholars, regulators and the Church — a common evidence base on which to build. In a domain where reputational and mission stakes are high, the ability to see the field clearly is itself a source of better decisions.

Target Audience

The Observatory serves everyone with a stake in the development of Catholic finance:

- **Religious institutions** — dioceses, congregations and orders seeking to benchmark their own practice
- **Foundations and endowments** tracking norms and peers across the field
- **Asset managers and banks** serving Catholic clients, who need to understand the market they operate in
- **Sponsors and benefactors** deciding where support for the field is most needed
- **Scholars, regulators and the Church**, for whom an independent reading of the field is invaluable

Methodology

The Observatory's method is deliberately rigorous and transparent. It begins from a defined taxonomy of the field — categories of institution, practice and instrument — that makes consistent measurement possible over time. Around that taxonomy it combines several streams of evidence: structured collection of publicly available information; periodic surveys of institutions and practitioners; systematic tracking of regulatory and Church guidance; and qualitative analysis of emerging practice. These streams are integrated into a coherent, longitudinal dataset and interpreted by the Institute's researchers. The emphasis throughout is on method that can be examined and challenged — sources stated, assumptions made explicit, limitations acknowledged — so that the Observatory's findings carry the authority that only transparency confers.

A LONGITUDINAL INSTRUMENT

The Observatory's value compounds. Because it measures the same field, in the same way, over successive cycles, it reveals not just where Catholic finance stands today but the direction and pace of its change — the trends that matter most to those planning for the long term.

Data Sources

The Observatory draws on a disciplined blend of sources, always favouring the independent and the verifiable:

- **Public disclosures** — published filings, reports and statements of institutions and managers
- **Regulatory and Church guidance** — official publications and evolving guidance relevant to the field
- **The Institute's own surveys** — periodic, structured readings of practice gathered directly
- **Market and reference data** — established financial data, used under appropriate terms
- **Qualitative intelligence** — interviews, convenings and the Institute's network of practitioners

Key Outputs

The Observatory produces a family of outputs designed to be cited by scholars and used by practitioners: a flagship periodic report on the state of the field; a longitudinal benchmark against which institutions can locate themselves; thematic readings of particular questions; and timely alerts on regulatory and practice developments. Its findings feed directly into the Institute's flagship publication and inform every other solution in this catalogue.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Field coverage	Number and type of institutions and managers tracked over time
Best-practice adoption	Share of institutions adopting key governance and values practices
Regulatory developments	Material changes in regulation and Church guidance logged per period
Practice dispersion	The gap between leading and lagging institutions on core measures
Field momentum	Direction and pace of change across the Observatory's indicators

Institutional Benefits

For an institution, the Observatory turns an invisible field into a navigable one. It provides the independent benchmark a board needs to judge its own standing, the early warning that lets it adapt before norms shift against it, and the comparative evidence that makes its own practice defensible to donors, auditors and the Church. For the field as a whole, it raises the standard of debate by grounding it in shared, credible evidence rather than anecdote.

Use Cases

The Observatory is used in a range of concrete situations — illustrative of how institutions draw on it:

Board benchmarking

A diocesan finance council uses the Observatory's benchmark to see how its governance and policy compare with peers, and to prioritise improvements.

Market understanding

An asset manager uses the Observatory to understand the Catholic market it serves and to position its practice credibly.

Sponsor targeting

A foundation uses the Observatory's reading of the field to direct its support to the areas of greatest need.

Strategic planning

An institution uses the Observatory's trend analysis to anticipate how the field — and its own obligations — may evolve.

Future Developments

The Observatory is designed to deepen over time. Planned developments include broadening its geographic and institutional coverage, establishing permanent thematic observatories on questions of particular importance, and developing richer, interactive ways for institutions to explore the data and locate themselves within it. As its longitudinal record lengthens, the Observatory's capacity to identify durable trends — and to inform the field's strategic decisions — will grow accordingly.

Suggested Visuals

The Observatory's findings lend themselves to a clear, repeatable visual language:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A monitoring-framework schema showing the flow from sources, through the Institute's taxonomy and analysis, to published intelligence — establishing the Observatory's method at a glance.

INFOGRAPHIC

A field-landscape infographic or heat map showing best-practice adoption across institution types, with a longitudinal view of how the field is moving over successive cycles.

CONNECTION TO THE INSTITUTE'S RESEARCH

The Observatory is the empirical engine of the Institute's research agenda. It supplies the evidence base for the flagship *State of Catholic Finance* white paper, grounds the Institute's frameworks in real practice, and surfaces the questions that drive new research — making it the connective tissue between the Institute's inquiry and the field it serves.

SOLUTION 02 · GOVERNANCE & PORTFOLIO ADVISORY

Catholic Investment Governance Review

A proprietary framework for assessing — and strengthening — the governance of institutional investments.

TYPE	OUTPUT	BENCHMARK	USERS
Diagnostic governance review	Scored review & action plan	International best practice	Boards, committees, finance councils

Product Overview

The Catholic Investment Governance Review is a proprietary diagnostic that assesses the quality of an institution's investment governance against a structured, international standard — and sets out a clear path to strengthen it.

Governance is the single most reliable determinant of long-term institutional outcomes, yet it is rarely examined systematically. The Review changes that. Using a framework developed by the Institute, it evaluates the full architecture through which an institution oversees its investments: the mandate and composition of the investment committee, the structure of delegated authority, the decision-making process, the quality of reporting, and the system of controls. It produces a scored assessment across these dimensions, benchmarked against international best practice and fitted to the distinctive realities of Catholic institutions, together with a prioritised set of recommendations. The Review is not an audit of past performance but a forward-looking diagnosis of the institution's capacity to govern well.

Why It Matters

Most institutions do not underperform because of a single poor investment; they underperform because their governance is weak — mandates unclear, committees under-prepared, policies dated, controls patchy. These weaknesses are rarely visible from inside, and rarely surface until something goes wrong. The Review makes them visible while there is still time to act. It gives a board an honest, external reading of its own governance, identifies the specific points at which oversight could fail, and provides the evidence a board needs to invest in improvement. In a context where fiduciary and canonical duties carry exceptional weight, the ability to demonstrate strong, deliberate governance is itself a protection.

Target Audience

The Review is designed for those who govern institutional investments, and those responsible for the soundness of that governance:

- **Investment committees and finance councils** seeking an objective assessment of their own effectiveness
- **Boards and trustees** with ultimate responsibility for oversight
- **Diocesan and congregational leadership** accountable for the stewardship of patrimony
- **Foundations** professionalising their governance as assets grow
- **Secretariats and finance officers** who support and service governing bodies

Methodology

The Review applies a structured framework organised around five dimensions of investment governance — committee, delegations, process, reporting and controls. For each dimension, the framework defines what good practice looks like, drawing on international standards and on the Institute's research, and adapts it to the ecclesiastical setting. The assessment proceeds through documentary analysis, structured interviews and evidence-gathering, producing a maturity score on each dimension and an overall profile. Crucially, scoring is transparent: the institution can see exactly what each level requires and why it was assessed as it was. The Review concludes with a prioritised action plan — the concrete, sequenced steps that would move the institution to the next level on each dimension.

DIMENSION	WHAT THE REVIEW EXAMINES
Investment Committee	Mandate, composition, expertise, cadence and effectiveness of the committee.
Delegations	The structure and limits of delegated authority, and escalation thresholds.
Process	The decision-making cycle, agendas, pre-reading and quality of deliberation.
Reporting	The clarity, comparability and decision-usefulness of information to the board.
Controls	Conflicts management, compliance, documentation and the integrity of the audit trail.

Data Sources

The Review is evidence-based, drawing on the institution's own documentation and on the Institute's comparative knowledge:

- **Governing documents** — terms of reference, delegations, investment policy and committee charters
- **Committee records** — agendas, papers and minutes that reveal how governance works in practice
- **Reporting and dashboards** — the information on which the board actually relies
- **Structured interviews** — with committee members, officers and, where relevant, advisors
- **International benchmarks** — the Institute's reference standards for governance maturity

Key Outputs

The Review delivers a scored governance profile across the five dimensions, a clear narrative of strengths and vulnerabilities, a benchmark against best practice, and a prioritised action plan. Together these give a board both a diagnosis and a roadmap — and a baseline against which future progress can be measured.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Governance maturity score	Assessed level (1–5) on each of the five dimensions
Benchmark gap	Distance from international best-practice on each dimension
Priority actions	Number and sequencing of recommended improvements
Control coverage	Completeness of conflicts, compliance and documentation controls
Re-assessment delta	Improvement in scores between successive reviews

Institutional Benefits

The Review gives a board the rare benefit of seeing its own governance clearly and objectively. It produces better-prepared committees, more defensible decisions, stronger controls and a documented commitment to improvement that reassures donors, auditors and the Church. By providing a baseline and a roadmap, it turns governance from a matter of assumption into a matter of evidence — and gives leadership a credible basis for investing in capability where it is most needed.

Use Cases

The Review is applied in a range of situations — illustrative of how institutions use it:

New leadership

An incoming finance officer commissions a Review to understand the governance they have inherited and to set priorities.

Growth inflection

A foundation whose assets have grown rapidly uses the Review to professionalise its committee and controls.

Board assurance

A board commissions a periodic Review to assure itself, and its stakeholders, that its oversight remains sound.

Post-event response

Following a near-miss or a difficult decision, an institution uses the Review to close the gaps that were exposed.

Future Developments

The Review will evolve with the Institute's research and the field it measures. Planned developments include expanding the benchmark dataset as the Observatory grows, developing sector-specific variants for different types of institution, and offering lighter-touch periodic re-assessments that let an institution track its progress efficiently over time. As the comparative base deepens, the Review's benchmarks will become richer and more precise.

Suggested Visuals

The Review's findings are naturally visual, and a consistent visual language reinforces their authority:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A governance scorecard or radar across the five dimensions, showing the institution's profile against the best-practice benchmark — the single most useful image for a board.

INFOGRAPHIC

A maturity-ladder infographic illustrating the path from one governance level to the next on each dimension, with the institution's current position marked.

CONNECTION TO THE INSTITUTE'S RESEARCH

The Review operationalises the Institute's research on investment governance and fiduciary duty. Its framework is drawn directly from that research; the anonymised, aggregated patterns it observes feed back into the Institute's studies and into the Observatory's benchmarks — so that each Review both applies the Institute's knowledge and helps to extend it.

SOLUTION 03 · GOVERNANCE & PORTFOLIO ADVISORY

Catholic Values Investment Assessment

An independent assessment of how faithfully a portfolio reflects Catholic principles.

TYPE	OUTPUT	IN THE SPIRIT OF	USERS
Portfolio values assessment	Faith-consistency report & score	MSCI · Sustainalytics · Morningstar Sustainalytics	Institutions, advisors, managers

Product Overview

The Catholic Values Investment Assessment is an independent evaluation of how consistently a portfolio reflects the principles of Catholic teaching — across exclusions, positive screening, stewardship and engagement.

Just as responsible-investment data providers assess portfolios against environmental, social and governance criteria, the Assessment evaluates a portfolio against the criteria that matter to a Catholic institution. It looks through funds to underlying holdings, tests them against the institution's exclusion and positive-screening policies, examines how ownership rights are exercised through stewardship and engagement, and produces a structured, evidenced reading of the portfolio's overall faith-consistency. The result is not a single mechanical label but a defensible analysis — one a committee can stand behind, a successor can understand, and an institution can use to demonstrate, on the record, that its investments are aligned with its mission.

Why It Matters

Many institutions assert that their investments reflect their values, but few can prove it. Assertion is not evidence; and in a domain where the gap between intention and reality can be reputationally and spiritually costly, the difference matters. The Assessment closes that gap. It replaces a vague confidence with a documented analysis, surfaces inconsistencies an institution may not know it holds, and gives a board the means to act — and to show that it has acted. As scrutiny of how faith-based institutions invest continues to grow, the ability to demonstrate genuine, analysed alignment becomes not a luxury but a necessity.

Target Audience

The Assessment serves institutions that wish to know — and to show — that their portfolios are faithful:

- **Dioceses, congregations and orders** seeking assurance that their assets reflect their mission
- **Foundations and endowments** accountable to donors for values alignment
- **Investment committees** needing an objective reading of their own portfolio
- **Asset managers and advisors** wishing to evidence the values alignment of mandates they run
- **Family offices** investing on behalf of Catholic families and their philanthropy

Methodology

The Assessment applies a structured, transparent methodology built on the Institute's research into Catholic investing. It begins by establishing the institution's own values policy — its exclusions, its positive criteria and its engagement preferences — so that the portfolio is assessed against the right standard rather than a generic one. It then looks through the portfolio to underlying exposures, tests each against the policy, weighs apparent conflicts proportionately, and examines the stewardship and engagement record. Findings are integrated into an overall faith-consistency profile, with the reasoning behind difficult judgements documented in full. The method is deliberately explainable: every conclusion can be traced to evidence and to principle.

LENS	WHAT THE ASSESSMENT EVALUATES
Exclusions	Exposure, including via funds, to activities incompatible with Catholic teaching.
Positive screening	The extent to which holdings actively advance human dignity and the common good.
Stewardship	How ownership rights — voting and influence — are used on the institution's behalf.
Engagement	The record of dialogue with managers and issuers to encourage better conduct.

Data Sources

The Assessment combines portfolio data with independent evidence and the Institute's frameworks:

- **Portfolio holdings** — full position and fund data, with look-through to underlying exposures
- **Company and issuer information** — public disclosures on activities and conduct
- **Responsible-investment and reference data** — used critically and through a Catholic lens
- **Manager records** — voting, stewardship and engagement evidence
- **The institution's policy** — its own exclusions, positive criteria and engagement preferences

Key Outputs

The Assessment delivers a faith-consistency report and profile, a flag of specific exposures requiring attention, an evaluation of the stewardship and engagement record, and clear, documented reasoning throughout. It gives an institution both a verdict and the evidence behind it — and a baseline against which future alignment can be tracked.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Faith-consistency profile	Overall and by-lens reading of portfolio alignment with the institution's policy
Exclusion breaches	Number and materiality of holdings inconsistent with stated exclusions
Positive exposure	Share of the portfolio actively advancing the common good
Stewardship coverage	Extent to which ownership rights are exercised in line with values
Engagement activity	Volume and outcomes of engagement on the institution's behalf

Institutional Benefits

The Assessment gives an institution the rare ability to demonstrate, credibly and on the record, that its investments are faithful to its mission. It replaces assertion with analysis, surfaces and resolves inconsistencies, strengthens accountability to donors and the Church, and equips a committee to make and defend difficult judgements. It also provides a baseline — so that alignment can be improved deliberately and tracked over time, rather than assumed.

Use Cases

The Assessment is used in a variety of situations — illustrative of its application:

Mission assurance

A congregation commissions an Assessment to assure its leadership that its reserves are invested in keeping with its charism.

Donor accountability

A foundation uses the Assessment to evidence to donors that its endowment reflects its stated values.

Manager oversight

An institution uses the Assessment to test whether a manager is genuinely implementing its values policy.

Policy refinement

A committee uses the Assessment's findings to refine its exclusion and positive-screening criteria.

Future Developments

The Assessment will deepen as the Institute's research and data mature. Planned developments include richer look-through across complex and private holdings, more sophisticated treatment of proportionality in difficult cases, and periodic re-assessment that lets institutions monitor alignment efficiently over time. As the field's data improves, the Assessment's precision and coverage will grow with it.

Suggested Visuals

The Assessment's findings translate readily into clear, defensible visuals:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A four-lens framework diagram (exclusions → positive screening → stewardship → engagement) showing how the Assessment builds from avoidance to active alignment.

INFOGRAPHIC

A portfolio faith-consistency dashboard — a profile across the four lenses with flagged exposures highlighted, and a trend line tracking alignment over successive assessments.

CONNECTION TO THE INSTITUTE'S RESEARCH

The Assessment is the practical application of the Institute's research on Catholic values investing and faith-consistency analysis. Its methodology is drawn from that research; the patterns it reveals across portfolios inform the Institute's studies and feed the Observatory — making each Assessment both an application and an extension of the Institute's knowledge.

SOLUTION 04 · GOVERNANCE & PORTFOLIO ADVISORY

Religious Institutions Portfolio Review

An independent, holistic review of an institution's patrimony — allocation, risk, governance, liquidity and sustainability.

TYPE	OUTPUT	IN THE SPIRIT OF	USERS
Independent portfolio review	Diagnostic report & recommendations	Cambridge Associates · Mercer	Dioceses, orders, foundations

Product Overview

The Religious Institutions Portfolio Review is an independent, comprehensive examination of an institution's patrimony — assessing its asset allocation, risk, governance, liquidity and sustainability as a single, integrated whole.

Religious institutions often hold portfolios that have grown organically over years or decades, assembled by successive advisors and managers without a unifying view. The Review supplies that view. Conducted independently — free of any interest in managing the assets — it steps back and evaluates the entire portfolio against the institution's mission, obligations and horizon. It examines how the assets are allocated and whether that allocation fits the institution's purpose; the risks the portfolio carries, intended and unintended; the governance through which it is overseen; its liquidity against the institution's needs; and its sustainability and values alignment. The Review produces a clear diagnosis and a set of prioritised recommendations — an independent second opinion of the kind that institutions in every other sector take for granted.

Why It Matters

An institution cannot manage what it has never seen whole. A portfolio assembled piecemeal can carry hidden concentrations, mismatched liquidity, uncompensated risk and drift from mission — none of them visible from any single manager's report. Because the Review is independent of those who manage the assets, it can say what incumbent advisors may not: where the portfolio serves the institution well, and where it does not. For a board holding wealth in trust for a mission and for future generations, an honest, independent reading of the whole is among the most valuable things it can obtain.

Target Audience

The Review is designed for institutions that hold significant patrimony and bear responsibility for its stewardship:

- **Dioceses** overseeing diocesan patrimony and reserves
- **Religious orders and congregations** stewarding long-term assets for their communities and mission
- **Catholic foundations and endowments** seeking an independent view of their portfolios
- **Boards and finance councils** wanting a second opinion independent of incumbent managers
- **Leadership in transition** needing to understand an inherited portfolio

Methodology

The Review applies an integrated methodology that examines the portfolio across five interlocking dimensions, always against the institution's specific mission, obligations and time horizon. It begins by establishing that context, then analyses asset allocation, risk, governance, liquidity and sustainability in turn — and, crucially, in relation to one another, since these dimensions interact. The analysis draws on the institution's portfolio and governance information and on the Institute's research and reference standards, and concludes with a prioritised set of recommendations. Throughout, the Review's independence is its defining feature: it has no stake in any particular outcome, manager or product, and answers only to the institution's interests.

DIMENSION	WHAT THE REVIEW EXAMINES
Asset allocation	Whether the strategic mix fits the institution's mission, objectives and horizon.
Risk	The risks carried by the portfolio — market, concentration, drawdown and permanent loss.
Governance	How the portfolio is overseen, and whether that oversight is adequate to its scale.
Liquidity	Whether the portfolio's liquidity matches the institution's spending and obligations.
Sustainability	The portfolio's alignment with the institution's values and care for creation.

Data Sources

The Review draws on the institution's own information and the Institute's comparative standards:

- **Portfolio data** — full holdings, positions and fund information across the patrimony
- **Manager and custodian reporting** — performance, risk and exposure data
- **Governance documentation** — policies, delegations and committee records
- **Liquidity and obligation data** — the institution's spending needs and commitments
- **Reference standards** — the Institute's frameworks and benchmarks for institutional portfolios

Key Outputs

The Review delivers an integrated diagnostic report covering all five dimensions, a clear statement of the portfolio's strengths and vulnerabilities, and a prioritised set of recommendations. It gives a board an independent, whole-portfolio view it can act on — and a baseline against which future change can be measured.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Allocation fit	Alignment of the strategic mix with mission, objectives and horizon
Risk profile	Concentration, drawdown exposure and uncompensated risk identified
Liquidity coverage	Match between portfolio liquidity and the institution's obligations
Governance adequacy	Sufficiency of oversight relative to the portfolio's scale and complexity
Sustainability alignment	Degree of values and sustainability alignment across the portfolio

Institutional Benefits

The Review gives a board the independence and the wholeness of view that no incumbent manager can provide. It surfaces hidden risks and inefficiencies, tests whether the portfolio genuinely serves the institution's mission, and equips leadership to ask sharper questions of its managers and advisors. For institutions in transition, it makes an inherited portfolio intelligible. In every case, it provides the documented, independent assurance — or the documented case for change — that responsible stewardship requires.

Use Cases

The Review is used in a range of situations — illustrative of its application:

Leadership transition

New leadership commissions a Review to understand the portfolio it has inherited and to set direction.

Independent second opinion

A board commissions a Review to test, independently, the advice it receives from its incumbent managers.

Periodic health check

An institution commissions a Review on a regular cycle to keep its whole portfolio under independent scrutiny.

Strategy reset

An institution uses the Review as the basis for a fundamental reset of its allocation and governance.

Future Developments

The Review will deepen as the Institute's data and research mature. Planned developments include richer peer-comparison drawn from the Observatory, more sophisticated treatment of private and illiquid assets, and streamlined periodic re-reviews that let institutions keep their portfolios under continuous independent view. As the comparative base grows, the Review's benchmarks will become more precise and more relevant.

Suggested Visuals

The Review's integrated findings lend themselves to a clear, board-level visual language:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A five-dimension portfolio diagnostic schema (allocation · risk · governance · liquidity · sustainability) showing how the dimensions interact around the institution's mission.

INFOGRAPHIC

A portfolio dashboard — allocation breakdown, risk and liquidity gauges and a sustainability profile — with peer benchmarks where available, presented for board review.

CONNECTION TO THE INSTITUTE'S RESEARCH

The Review brings together several strands of the Institute's research — on asset management, investment governance, stewardship and sustainable investing — into a single, integrated diagnosis. Its frameworks are drawn from that research; the anonymised patterns it observes across patrimonies feed the Observatory and the Institute's studies, so that each Review both applies and advances the Institute's knowledge.

SOLUTION 05 · EXECUTIVE EDUCATION

Investment Committee Academy

An executive path that turns the members of a finance council into a high-performing investment committee.

TYPE	FORMAT	IN THE SPIRIT OF	USERS
Executive education path	Modular · cohort-based	Harvard Executive Education · CFA Institute	Committee members & trustees

Product Overview

The Investment Committee Academy is a focused executive path designed to equip the members of an institution's investment committee or finance council to govern with confidence, discipline and fidelity.

Investment committees in dioceses, foundations and congregations are typically composed of capable, committed people — but rarely of full-time investment professionals. The Academy meets them where they are. It is not a generic finance course but a targeted programme built around the actual work of an investment committee: understanding the mandate, reading and challenging managers, exercising fiduciary duty, and overseeing a portfolio against an investment policy. Delivered to a cohort over a sequence of modules, it builds a shared language and a common standard across the committee, so that the body governs better collectively — not merely as a set of well-meaning individuals. The Academy is designed to leave a committee genuinely more capable, and an institution less dependent on any single member or outside advisor.

Why It Matters

The quality of an institution's long-term outcomes depends more on the effectiveness of its investment committee than on almost anything else — yet committees are rarely trained for the role. Members are appointed for their judgement and commitment, then expected to oversee sophisticated portfolios without ever being equipped to do so. The Academy closes that gap. It gives committee members the specific knowledge and confidence their role requires, raises the quality of the whole committee's deliberation, and builds the continuity that survives the rotation of members. For an institution, a well-prepared committee is the single most reliable protection of its patrimony.

Target Audience

The Academy is designed for those who serve on, or support, institutional investment committees:

- **Members of diocesan investment committees** and finance councils
- **Trustees and committee members** of Catholic foundations and endowments
- **Finance councillors of religious congregations** and orders
- **Incoming committee members** who need to be equipped quickly and well
- **Secretariats and officers** who service and support these committees

Methodology

The Academy's pedagogy is practical and cohort-based, drawing directly on the Institute's research and advisory experience. It combines academic foundations with realistic case studies and applied governance tools, and it teaches the committee as a body rather than as isolated individuals — building the shared language and common standard on which collective effectiveness depends. Sessions move deliberately between principle and practice: members do not merely learn that an investment policy matters; they work with one, critique it, and understand how to use it. The method is designed to leave durable capability behind, embedded in the committee itself.

MODULE FOCUS	WHAT THE COMMITTEE GAINS
The committee's mandate	Clarity on roles, duties and the limits of delegated authority.
Investment policy	The ability to read, use and maintain an investment policy statement.
Reading managers	Confidence to evaluate and challenge managers on the right grounds.
Fiduciary duty	A working understanding of the duties of loyalty, prudence and care.
Oversight in practice	Disciplined habits of agenda, reporting, monitoring and minute-taking.

Data Sources

The Academy's content is grounded in the Institute's research and in real institutional practice:

- **The Institute's research** — its frameworks on governance, fiduciary duty and Catholic finance
- **Illustrative teaching cases** — composite scenarios drawn from real committee challenges
- **Governance reference standards** — international best practice fitted to ecclesiastical contexts
- **Practitioner experience** — the lived realities of committees, brought into the room by faculty
- **Participant context** — the actual policies and questions the cohort's institutions face

Key Outputs

The Academy produces a committee that shares a common language and standard, members equipped to read policy and challenge managers, and a documented uplift in the committee's collective capability. Its outcomes are visible at the level of the committee and the institution — in better-prepared meetings, sharper questions and more defensible decisions.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Committee capability	Assessed uplift in members' understanding of their role and duties
Shared standard	Degree to which the committee adopts a common language and approach
Decision quality	Improvement in the preparation, deliberation and documentation of decisions
Continuity	Reduction in the institution's dependence on any single member or advisor
Engagement	Participation and completion across the committee cohort

Institutional Benefits

The Academy gives an institution a committee that genuinely governs. It raises the quality of oversight, embeds a shared standard that survives the rotation of members, reduces reliance on outside advisors, and provides the board with assurance that its most important governance body is equipped for its role. It is, in effect, an investment in the durable capability of the institution itself.

Use Cases

The Academy is used in a range of situations — illustrative of its application:

New committee

An institution establishing or refreshing its investment committee uses the Academy to equip the whole body at once.

Onboarding

An institution enrols incoming committee members to bring them quickly to a common standard.

Capability uplift

A committee that senses its own limitations commissions the Academy to raise its collective game.

Continuity

An institution uses the Academy to build capability ahead of an anticipated turnover of members.

Future Developments

The Academy will develop alongside the Institute's broader education and research. Planned developments include deeper specialisation for different types of institution, refresher and advanced modules for experienced committees, and integration with the Institute's assessment solutions so that a committee's learning is grounded in a real diagnosis of its own institution. The aim is an Academy that accompanies a committee over time, not merely once.

Suggested Visuals

The Academy's structure and impact translate readily into clear visuals:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A committee learning-journey diagram showing the path from mandate, through policy and manager oversight, to fiduciary duty and disciplined practice — the arc of the cohort's development.

INFOGRAPHIC

A before/after capability infographic illustrating the uplift in a committee's effectiveness across the dimensions the Academy addresses.

CONNECTION TO THE INSTITUTE'S RESEARCH

The Academy is the committee-level expression of the Institute's research and education on investment governance and fiduciary duty. Its curriculum is drawn directly from that research and from the Institute's advisory experience — and the questions committees raise in the Academy feed back into the Institute's inquiry, keeping its teaching grounded in practice.

SOLUTION 06 · EXECUTIVE EDUCATION

Catholic Finance Executive Programme

The Institute's advanced executive programme — the complete vision of Catholic finance, for those who lead.

TYPE	THEMES	IN THE SPIRIT OF	USERS
Advanced executive programme	Finance · Asset Mgmt · Governance · Stewardship	Harvard ExecEd · Oxford Saïd · CFA Institute	Senior leaders & boards

Product Overview

The Catholic Finance Executive Programme is the Institute's flagship advanced programme — a comprehensive, senior-level education that integrates Catholic finance, asset management, investment governance and stewardship into a single, coherent whole.

Where the Institute's other educational solutions are focused, this programme is comprehensive. It is designed for those who carry strategic responsibility for an institution's financial life and need to hold its many dimensions together. Across its themes it carries senior leaders from the doctrinal foundations of Catholic finance, through the disciplines of asset management and the architecture of investment governance, to the long-horizon practice of stewardship — insisting throughout that financial excellence and fidelity to the Church's teaching are a single discipline, not competing aims. The programme is the educational cornerstone of the catalogue: the place where the full vision the Institute exists to advance is taught to those who must lead it within their own institutions.

Why It Matters

The most consequential financial decisions in a Catholic institution are made, or ratified, by leaders who are rarely investment specialists — and who need a coherent framework connecting the purpose of capital to the practice of governing it. Fragments of technical knowledge are not enough; what leadership requires is an integrated understanding it can act on. This programme provides exactly that. It equips senior leaders to lead the union of excellence and fidelity across their institutions, reducing dependence on outside advisors and strengthening the continuity of capability across leadership transitions.

Target Audience

The programme is designed for the senior leaders of Catholic institutions and those who advise them:

- **Diocesan finance officers** and secretaries general
- **Treasurers and bursars** of religious orders and congregations
- **Executives and trustees** of Catholic foundations and endowments
- **Chairs of investment committees** and senior finance councillors
- **Senior advisors and managers** who serve Catholic institutions and wish to understand them deeply

Methodology

The programme's pedagogy is rigorous, interdisciplinary and grounded in the Institute's research. It combines academic foundations, realistic case studies and applied governance tools, taught by a faculty that spans investment practice, governance, law and the Church's social teaching. Its method moves deliberately between the conceptual and the practical, and is engineered to leave participants with capability they can apply immediately — and that their institutions retain. The programme can be delivered in person, online or in tailored institutional formats, allowing it to meet the realities of busy senior leaders.

THEME	WHAT IT DEVELOPS
Catholic Finance	The doctrinal and moral foundations of the right use of capital.
Asset Management	Portfolio construction and performance within Catholic mandates.
Governance	The boards, committees and oversight that make stewardship accountable.
Stewardship	The long-horizon management of wealth held in trust for mission.

Data Sources

The programme's content is drawn from the Institute's research and from real institutional practice:

- **The Institute's research** — its studies and frameworks across all four themes
- **Illustrative teaching cases** — composite scenarios drawn from real institutional challenges
- **International standards** — best practice in governance and asset management, fitted to context
- **Practitioner and scholarly expertise** — brought into the room by an interdisciplinary faculty
- **Participant context** — the actual situations and questions the cohort's institutions face

Key Outputs

The programme produces leaders equipped to govern their institutions' finances with both excellence and fidelity, a shared standard across an institution's leadership, and a documented uplift in strategic financial capability. Its outcomes are visible in stronger policy, sharper oversight and more defensible decision-making across the institution.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Strategic capability	Assessed uplift in leaders' integrated understanding of Catholic finance
Breadth of competence	Coverage across finance, asset management, governance and stewardship
Institutional standard	Adoption of a common language and approach across leadership
Continuity	Reduction in dependence on individuals and on outside advisors
Application	Extent to which learning is translated into institutional practice

Institutional Benefits

For the sponsoring institution, the programme is an investment in durable capability and reduced risk. It strengthens governance, raises transparency, equips leaders to act as competent fiduciaries while remaining faithful to mission, and builds the shared understanding that reduces reliance on any single individual. Above all, it gives the institution the ability to demonstrate that its leadership is genuinely equipped to steward its wealth both well and faithfully.

Use Cases

The programme is used in a range of situations — illustrative of its application:

Leadership development

An institution enrols its senior finance leaders to build an integrated, common capability.

Cohort effect

A diocese or order sends a cohort so that a shared standard takes root across its governance bodies.

Succession

An institution uses the programme to prepare emerging leaders ahead of a transition.

Advisor fluency

An asset manager enrols senior staff to deepen their understanding of Catholic institutions.

Future Developments

The programme will evolve with the Institute's research and the needs of the field. Planned developments include advanced and specialised tracks, tighter integration with the Institute's assessment and advisory solutions so that learning is grounded in a real diagnosis of the participant's institution, and a structured pathway of recognition across the Institute's education. The aim is a programme that grows with its participants and their institutions.

Suggested Visuals

The programme's integrated vision translates readily into clear visuals:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A four-theme integration diagram (Catholic Finance · Asset Management · Governance · Stewardship) converging on the institution — the single image of the programme's coherent vision.

INFOGRAPHIC

A leadership-capability infographic showing the breadth and depth of competence the programme develops across its themes.

CONNECTION TO THE INSTITUTE'S RESEARCH

The programme is the comprehensive educational expression of the Institute's entire research agenda. Its curriculum draws on the Institute's work across all of its fields; the questions senior leaders raise feed back into that research — making the programme both the fullest application of the Institute's knowledge and a source of new inquiry.

SOLUTION 07 · EXECUTIVE EDUCATION & ADVISORY

AI for Religious Institutions

Helping institutions govern and responsibly adopt artificial intelligence — with the human person at the centre.

TYPE	DOMAINS	ANCHORED IN	USERS
Education & advisory solution	Governance · Research · Administration · Assets	Catholic ethics of technology	Administrators, CFOs & leads

Product Overview

AI for Religious Institutions equips the leaders of Catholic organisations to understand, govern and responsibly adopt artificial intelligence — across governance, research, administration and asset management — with judgement rather than hype.

Artificial intelligence is reshaping how institutions operate, and Catholic organisations cannot responsibly ignore it — nor adopt it uncritically. This solution helps them strike the right balance. Part education and part advisory, it brings the Church's deep tradition of reflection on the human person, work and technology to bear on a fast-moving field. It helps institutions put governance and principles in place before they deploy tools; identify where AI can genuinely serve their mission across administration, research and asset management; and recognise where prudence counsels restraint. It treats AI as a question of governance and ethics first, and of tools second — equipping leaders to make decisions that are prudent, accountable and faithful.

Why It Matters

AI offers real efficiencies and real risks, and most institutions face it without a framework for deciding between them. Adopted carelessly, AI can erode accountability, mishandle sensitive information, and remove human judgement from decisions that require it. Approached well, it can lighten administrative burdens and strengthen research and oversight. The difference lies in governance and discernment — precisely what this solution provides. For institutions whose first commitment is to the human person, the ability to adopt technology wisely, and to decline it when prudence requires, is a matter of fidelity as much as of efficiency.

Target Audience

The solution is designed for those who lead and administer Catholic institutions:

- **Administrators and chief financial officers** of Church entities and Catholic organisations
- **Diocesan and congregational leadership** responsible for adoption decisions
- **Research and education leaders** in Catholic universities and institutes
- **IT and operations leads** tasked with implementing new tools responsibly
- **Investment officers** encountering AI in the asset-management process

Methodology

The solution combines structured education with practical advisory, grounded in the Institute's research and in the Church's ethical tradition. It begins with governance — establishing the principles, ownership and human oversight appropriate to a religious institution — before turning to specific domains of application. Throughout, it keeps the human person, not the system, in the position of responsibility, and it equips leaders to evaluate AI not merely by what it can do but by what it does to dignity, work and the common good. The method is deliberately practical: institutions leave with a governance posture and a way of discerning adoption, not merely an awareness of the issues.

DOMAIN	FOCUS
Governance	Principles, ownership, oversight and accountability for AI use.
Research	Responsible use of AI in inquiry, with rigour and intellectual honesty.
Administration	Prudent adoption in operations, drafting and analysis, with human judgement preserved.
Asset management	Informed engagement with AI in analysis, oversight and operations.

Data Sources

The solution draws on the Institute's research and on the Church's engagement with technology ethics:

- **The Institute's research** — its work on the responsible use of technology in finance
- **The Church's ethical tradition** — its reflection on the human person, work and technology
- **Established practice** — emerging standards for responsible and governed AI adoption
- **Practitioner experience** — the realities of adoption in institutional settings
- **Participant context** — the actual decisions and tools the institution is facing

Key Outputs

The solution produces a governance posture for AI, leaders equipped to discern responsible adoption across domains, and a documented, principled basis for the institution's decisions. Its outcomes are visible in adoption that is prudent, governed and accountable — and in the confidence to decline what does not serve.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Governance readiness	Whether principles, ownership and oversight for AI are in place before deployment
Human oversight	Extent to which consequential decisions retain human responsibility
Risk awareness	Leaders' ability to identify and manage AI's ethical and operational risks
Prudent adoption	Quality of the institution's discernment on where to adopt and where to refrain
Mission alignment	Degree to which AI use is ordered to genuinely human, mission-serving ends

Institutional Benefits

The solution gives an institution the ability to engage AI on its own terms — adopting what genuinely serves its mission, declining what does not, and governing the whole with wisdom. It protects accountability and the human person, equips leaders to make principled decisions under fast-moving conditions, and brings the Church's distinctive perspective to bear as a compass for innovation rather than a brake on it.

Use Cases

The solution is used in a range of situations — illustrative of its application:

Governance first

An institution adopts the solution to establish an AI governance framework before deploying any tools.

Administrative adoption

A finance office uses the solution to adopt AI tools responsibly, with human judgement preserved.

Education policy

A Catholic university uses the solution to shape thoughtful policies for AI in teaching and learning.

Committee fluency

An investment committee uses the solution to understand AI's role in the management of its assets.

Future Developments

The solution will evolve as rapidly as the technology it addresses. Planned developments include domain-specific governance toolkits, scenario-based foresight to help institutions prepare for how AI may develop, and integration with the Institute's research as its work on technology and finance deepens. The aim is a solution that keeps institutions prudently ahead, not perpetually catching up.

Suggested Visuals

The solution's structure translates readily into clear visuals:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

An AI-governance framework diagram showing principles and human oversight at the centre, with the four domains of application arranged around it.

INFOGRAPHIC

A responsible-adoption infographic mapping each domain against the key risks and the safeguards that govern it — a decision aid for leadership.

CONNECTION TO THE INSTITUTE'S RESEARCH

The solution applies the Institute's research on the responsible use of technology in finance, set within the Church's broader ethical tradition. Its frameworks are drawn from that research; the questions institutions raise about AI feed back into the Institute's inquiry — keeping its work at the frontier where technology and the Catholic tradition meet.

SOLUTION 08 · RESEARCH & MARKET INTELLIGENCE

Bloomberg-Based Investment Analytics

Institutional-grade portfolio analytics, built on professional market infrastructure and a Catholic lens.

TYPE	BUILT ON	IN THE SPIRIT OF	USERS
High-value analytics service	Bloomberg professional analytics	Bloomberg Professional Services	Committees, CFOs, managers

Product Overview

Bloomberg-Based Investment Analytics brings institutional-grade, professional market analytics to Catholic institutions — combining the analytical power of Bloomberg's professional tools with the Institute's independence and its distinctive Catholic lens.

This is the catalogue's most technically demanding solution. It equips Catholic institutions with the kind of portfolio analytics that large, sophisticated investors take for granted — but which most religious institutions and foundations cannot access or interpret on their own. Drawing on Bloomberg's professional analytics infrastructure — its terminal data, intelligence, ESG data, fixed-income analytics and portfolio analytics — the Institute conducts rigorous, independent analysis of an institution's portfolio and presents it in clear, decision-useful form. Crucially, the Institute adds what a data terminal cannot: independence from any product or manager, interpretation by experienced researchers, and a Catholic-values lens applied throughout. The result is analytics of professional depth, made intelligible and made relevant to a Catholic institution's mission.

Why It Matters

Sophisticated analytics are no longer optional for serious institutional oversight — yet they remain out of reach for most Catholic institutions, whether for cost, complexity or want of expertise to interpret them. This leaves boards overseeing portfolios with far less insight than the managers they supervise, an asymmetry that weakens governance. This solution corrects it. It gives an institution professional-grade analysis it can actually understand and act on, levelling the informational field between a board and its managers. In a domain where the stewardship of mission is at stake, the ability to see a portfolio with professional clarity is a direct strengthening of oversight.

Target Audience

The solution is designed for institutions and advisors that require analytical depth beyond standard reporting:

- **Investment committees** that need to see their portfolios with professional clarity
- **Chief financial officers and treasurers** of larger institutions and foundations
- **Boards** seeking to close the analytical gap with their managers
- **Asset managers and family offices** serving Catholic clients who value an independent analytical overlay
- **Institutions with complex portfolios** spanning multiple asset classes and managers

Methodology

The Institute uses Bloomberg's professional analytics as the infrastructure for a disciplined, independent analytical process. Portfolio holdings are analysed using professional tools for performance and risk attribution, fixed-income analytics, ESG and exposure analysis, and scenario and stress testing. The Institute's researchers interpret the output — translating professional analytics into clear findings — and apply a Catholic-values lens alongside the conventional financial analysis. The process is independent of any manager or product, and transparent in its assumptions. The emphasis is on turning analytical power into institutional insight: not a flood of data, but the few measures that genuinely inform a board's decisions.

ANALYTICAL CAPABILITY	WHAT IT DELIVERS
Performance attribution	A clear account of where returns come from, set against the right benchmarks.
Risk analytics	Exposure, concentration, volatility and drawdown analysis across the portfolio.
Fixed-income analytics	Duration, credit and yield analysis for the fixed-income allocation.
ESG & values exposure	Sustainability and values exposure, read through a Catholic lens.
Scenario & stress testing	How the portfolio behaves under defined market and stress scenarios.

Data Sources

The solution combines professional market data with the institution's own portfolio:

- **Bloomberg Terminal data** — market, security and reference data underpinning the analysis
- **Bloomberg Intelligence** — research and analytical inputs across markets and sectors
- **Bloomberg ESG data** — sustainability data, interpreted through a Catholic lens
- **Bloomberg Fixed Income & Portfolio Analytics** — professional analytics for risk and attribution
- **The institution's portfolio** — full holdings and positions, with look-through to underlying exposures

Key Outputs

The solution delivers professional-grade analytical reporting — performance and risk attribution, fixed-income and ESG analysis, scenario testing and benchmarking — interpreted by the Institute and presented in board-ready form. It gives an institution analytics of a depth it could not otherwise obtain, made intelligible and made relevant to its mission.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Analytical coverage	Breadth of the portfolio subjected to professional-grade analysis
Benchmark clarity	Quality of performance attribution against appropriate benchmarks
Risk visibility	Concentration, drawdown and stress exposures surfaced for the board
Values exposure	Sustainability and Catholic-values exposure quantified across holdings
Decision usefulness	Extent to which analytics are distilled into board-actionable insight

Institutional Benefits

The solution gives an institution professional analytical power without the cost and complexity of building it in-house — and, decisively, with the independence and interpretation a data terminal alone cannot provide. It closes the analytical gap between a board and its managers, strengthens oversight with genuine insight, and applies a Catholic lens to analytics that would otherwise be values-blind. It turns sophisticated analytics from something an institution is subject to into something it can use.

Use Cases

The solution is used in a range of situations — illustrative of its application:

Independent overlay

A committee commissions an independent analytical overlay on the reporting it receives from its managers.

Risk deep-dive

An institution commissions a professional risk and stress analysis of a complex portfolio.

Values quantification

A foundation uses the solution to quantify the values and sustainability exposure of its holdings.

Benchmark scrutiny

A board uses professional attribution to test whether its managers are genuinely adding value.

Future Developments

The solution will deepen as analytical tools and the Institute's methods advance. Planned developments include richer integration of Catholic-values analytics into the professional toolset, more sophisticated scenario and climate analysis, and streamlined periodic reporting that lets institutions keep their portfolios under continuous professional view. The aim is professional analytics made ever more relevant to the Catholic institution.

Suggested Visuals

The solution's analytics are inherently visual, and a clear, board-level presentation is essential:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

An analytics architecture diagram showing professional data and tools flowing through the Institute's independent interpretation and Catholic lens to board-ready insight.

INFOGRAPHIC

A professional analytics dashboard — attribution, risk, fixed-income and values-exposure panels — distilled for board review rather than presented as raw output.

CONNECTION TO THE INSTITUTE'S RESEARCH

This solution gives the Institute's research a professional analytical engine, and gives institutions the benefit of that engine independently interpreted. The methodology reflects the Institute's research on asset management and Catholic-values investing; the analytical patterns it observes inform the Observatory and the Institute's studies — connecting professional analytics to the Institute's wider inquiry.

SOLUTION 09 · PARTNERSHIP & CONVENING

Catholic Finance Research Sponsorship

A structured way for organisations to sustain independent research — and to lead the conversation it creates.

TYPE	SUPPORTS	BENEFITS	USERS
Research partnership programme	White papers · observatories · surveys	Thought leadership · visibility · network	Sponsors, foundations, firms

Product Overview

Catholic Finance Research Sponsorship is the structured programme through which organisations, foundations and benefactors sustain the Institute's independent research — and, in doing so, associate themselves with the leading edge of thinking in the field.

Independent research requires committed support, and this programme provides the means for organisations to give it. Sponsors can underwrite the Institute's flagship white papers, its permanent observatories, its industry surveys and its position papers — directing their support to the areas that matter most to them, while the Institute retains full editorial independence over what it finds and publishes. In return, sponsors gain genuine, substantive association with serious thought leadership: visibility within the community the Institute serves, and access to its network of institutions, scholars and practitioners. The programme is designed so that support for independent research and the benefits of association reinforce one another — without ever compromising the independence on which the research's value, and therefore the sponsor's, depends.

Why It Matters

Credible, independent research does not fund itself — and the field of Catholic finance has lacked the sustained support that a serious research agenda requires. This programme addresses that need, and in doing so serves the sponsor as much as the field. For an organisation that wishes to be seen as a serious, mission-aligned participant in Catholic finance, association with independent, high-quality research is among the most credible forms of standing available — far more so than conventional promotion. The programme lets sponsors build that standing while advancing knowledge the whole field needs.

Target Audience

The programme is designed for organisations and individuals with the means and the motivation to support the field:

- **Asset managers and financial institutions** serving Catholic clients
- **Foundations and benefactors** committed to the development of Catholic finance
- **Banks and family offices** seeking credible, mission-aligned association
- **Corporates and professional firms** wishing to demonstrate serious commitment
- **Individuals** who wish to advance independent thinking in the field

Methodology

The programme is built on a single, non-negotiable principle: editorial independence. Sponsorship may be directed to a chosen area of research, but it never determines findings. Around that principle, the programme offers structured ways to support the Institute's work — from underwriting a specific white paper or survey, to sustaining a permanent observatory, to supporting the events and convenings through which research reaches the field. Each form of support is governed transparently, with the relationship between sponsor and research clearly defined, so that the independence — and therefore the credibility — of the research is protected, and the sponsor's association with it is genuinely valuable.

WHAT CAN BE SUPPORTED	WHAT IT SUSTAINS
White papers	Flagship, in-depth studies that define a question and advance the field.
Observatories	Permanent monitoring of the field or of a particular theme over time.
Industry surveys	Periodic, structured readings of practice across the field.
Position papers	Considered institutional contributions on questions of principle.

Data Sources

Sponsors support research grounded in a rigorous, independent evidence base — the same disciplined sources that underpin all of the Institute's work:

- **The Institute's own surveys and data** — gathered directly and independently
- **Public disclosures and regulatory sources** — verifiable and transparent
- **Market and reference data** — used critically and under appropriate terms
- **The Institute's network** — practitioners and scholars who inform the research
- **The Observatory** — the longitudinal evidence base on the state of the field

Key Outputs

For the field, the programme produces independent research the field needs — white papers, observatories, surveys and position papers it would not otherwise have. For the sponsor, it produces genuine thought-leadership association, visibility within the Institute's community, and access to its network. Its outputs serve both the advancement of knowledge and the standing of those who make it possible.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Research sustained	Volume of white papers, surveys and observatories supported
Field reach	Distribution and uptake of the research across the field
Thought-leadership association	Quality and visibility of the sponsor's association with the work
Network access	Engagement opportunities created through the Institute's community
Citations & influence	Extent to which sponsored research is cited and shapes practice

Institutional Benefits

For the sponsor, the programme offers a form of standing that promotion cannot buy: credible association with independent, mission-aligned research, visibility within a serious community, and access to a network of institutions and scholars. For the field, it secures the sustained support that credible research requires. Because independence is guaranteed, both benefits are real — the research is trusted, and so the association with it is valuable.

Use Cases

The programme is used in a range of situations — illustrative of its application:

Flagship sponsorship

An asset manager underwrites a flagship white paper, associating itself with the field's leading research.

Permanent observatory

A foundation sustains a permanent observatory on a theme central to its mission.

Survey support

A financial institution supports an annual industry survey that the whole field relies on.

Thought leadership

A firm builds credible standing through sustained association with independent research.

Future Developments

The programme will grow with the Institute's research agenda. Planned developments include a broader portfolio of sponsorable research, the establishment of named, permanent observatories, and richer ways for sponsors to engage with the community the research serves — always within the framework of guaranteed editorial independence. The aim is a programme through which support for the field and the standing of its supporters grow together.

Suggested Visuals

The programme's logic translates readily into a clear, compelling visual:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A sponsorship-model diagram — Sponsor → Research → Knowledge → Impact — showing the chain from support, through independent research, to the good it sustains, with independence marked at its centre.

INFOGRAPHIC

An infographic of the research portfolio open to sponsorship (white papers, observatories, surveys, position papers), with the associated forms of recognition and network access.

CONNECTION TO THE INSTITUTE'S RESEARCH

This programme is what makes the Institute's research agenda possible — it is the connective tissue between the field's need for independent knowledge and the organisations willing to sustain it. Every sponsored study feeds the Observatory and the Institute's wider inquiry, so that sponsorship directly advances the research on which every other solution in this catalogue depends.

SOLUTION 10 · PARTNERSHIP & CONVENING

Executive Roundtables & Strategic Dialogues

Curated convenings that bring the field's leaders to the same table — at the heart of the Church.

TYPE	SETTINGS	PARTICIPANTS	USERS
Institutional convening	Castel Gandolfo · Rome · Vatican · universities	Managers · academics · institutions	Senior leaders & partners

Product Overview

Executive Roundtables & Strategic Dialogues are the Institute's curated convenings — high-level gatherings that bring together the leaders of Catholic finance for candid exchange, in settings of singular resonance at the heart of the Church.

Some of the most valuable work in any field happens not in reports but in conversation — when the right people are brought together, in the right setting, to think aloud about shared challenges. This solution creates those occasions. Convened by the Institute and held in settings such as Castel Gandolfo, Rome, the Vatican and leading universities, the roundtables and dialogues bring asset managers, academics, religious institutions and professionals to the same table — communities that share a stake in faithful finance but seldom meet directly. Each convening is carefully curated: a focused question, the right participants, expert framing drawn from the Institute's research, and a format that encourages genuine, candid exchange. The result is insight, relationship and a quality of dialogue that exists almost nowhere else in the field.

Why It Matters

The field of Catholic finance is fragmented across sectors and borders, and its leaders rarely have occasion to think together. Asset managers, scholars, Church institutions and professionals each hold part of the picture, but the picture is seldom assembled. This solution assembles it. By convening these communities deliberately, in settings that confer both seriousness and trust, it creates the shared understanding, the relationships and the candid exchange on which a field's progress depends. In a domain where so much turns on confidence and discretion, the value of being brought together, well, is difficult to overstate.

Target Audience

The convenings bring together the leaders and shapers of the field:

- **Asset managers** — senior practitioners who steward capital for Catholic clients
- **Academics** — scholars of finance, ethics, governance and theology
- **Religious institutions** — leaders of dioceses, congregations, orders and foundations
- **Professionals** — senior advisors, lawyers and finance officers
- **Partners and sponsors** — those who sustain and shape the Institute's work

Methodology

The Institute approaches convening as a discipline, not an event-management exercise. Each roundtable or dialogue begins from a focused, consequential question and a deliberately curated guest list that brings the right perspectives — and the right seniority — into the room. Discussion is framed by expert input drawn from the Institute's research, and conducted under conventions of candour and discretion appropriate to the sensitivity of the subject and the standing of the participants. The setting is itself part of the method: places of contemplation and learning at the heart of the Church lend the conversations a seriousness and a trust that ordinary venues cannot. Where valuable, the Institute distils the insights into a synthesis that extends the convening's value beyond the room.

ELEMENT	HOW IT IS CURATED
The question	A focused, consequential theme that genuinely needs collective thought.
The participants	A deliberately balanced group bringing the right perspectives and seniority.
The framing	Expert input drawn from the Institute's research to ground the discussion.
The setting	Places of resonance — Castel Gandolfo, Rome, the Vatican, universities.

Data Sources

The convenings are informed by the Institute's research and intelligence, and in turn enrich them:

- **The Institute's research** — the studies and frameworks that frame each discussion
- **The Observatory** — the reading of the field that surfaces the questions worth convening on
- **Participant expertise** — the knowledge and experience the participants themselves bring
- **The Institute's network** — the relationships from which the right participants are drawn
- **Prior dialogues** — the accumulating insight of successive convenings over time

Key Outputs

The convenings produce insight on the questions that matter, relationships across communities that rarely meet, and — where appropriate — published syntheses that carry the discussion to the wider field. Their outputs are at once intangible and real: the shared understanding and trust on which a field's progress depends, and the durable relationships that outlast any single gathering.

SUGGESTED INDICATOR	WHAT IT CAPTURES
Convening quality	Seniority, balance and engagement of participants brought together
Insight generated	Value and originality of the thinking the dialogue produces
Relationships formed	New connections created across the field's communities
Field reach	Distribution of any published synthesis beyond the room
Continuity	Development of an ongoing community through successive convenings

Institutional Benefits

For participants and partners, the convenings offer what neither research nor advice alone can: the chance to think alongside peers, to build relationships across the field, and to shape its direction directly — all in settings of singular resonance. For the field, they create the shared understanding and trust on which its development depends. For sponsors and partners, association with these gatherings confers genuine standing within a serious community.

Use Cases

The convenings take a range of forms — illustrative of their application:

Strategic roundtable

The Institute convenes leaders on a pressing question — the future of Catholic investing, say — for candid exchange.

Peer dialogue

Finance officers of religious institutions meet to think together about shared governance challenges.

Cross-sector dialogue

Asset managers and Church institutions meet to build mutual understanding across a persistent divide.

Partner convening

Sponsors and partners are convened to shape the Institute's agenda and to connect with the community.

Future Developments

The convenings will grow into a recognised fixture of the field. Planned developments include a regular calendar of flagship dialogues, the establishment of a signature annual convening, and the systematic publication of syntheses that carry each gathering's insight to the wider field. The aim is a convening programme that becomes, over time, one of the places where the future of Catholic finance is shaped.

Suggested Visuals

The convening function translates readily into a clear, evocative visual:

SUGGESTED VISUALS

SCHEMA / DIAGRAM

A convening diagram — the Institute at the centre, bringing together asset managers, academics, religious institutions and professionals — set against its signature settings.

INFOGRAPHIC

An infographic of the convening calendar and formats (roundtables, dialogues, the annual gathering), with the communities each brings together.

CONNECTION TO THE INSTITUTE'S RESEARCH

The convenings are where the Institute's research meets the field in person. They are framed by that research and by the Observatory's reading of the field; in turn, the insight they generate feeds directly back into the Institute's inquiry — making them both a channel for the Institute's knowledge and a source of new questions for it to pursue.

Closing Framework

HOW THE INSTITUTE DELIVERS

One method beneath every solution

The catalogue describes ten distinct solutions — but a single architecture, method and standard underlies them all. This is how they fit together, and how an institution works with the Institute.

For all their variety, the solutions in this catalogue are not ten separate products from ten separate teams. They are expressions of a single institution, built on a common method, held to a common standard, and designed to work together. Understanding that shared architecture is the key to using the catalogue well.

A single, research-led method

Every solution draws on the same engine: the Institute's research. This is the decisive difference between an institute of this kind and a commercial provider assembling services. Research is not a marketing veneer here; it is the source. The Observatory gathers the evidence; that evidence becomes published studies and frameworks; those frameworks become the methodologies behind the reviews, assessments and analytics; and the same body of knowledge becomes the curriculum of the education and the framing of the convenings. The cycle then closes: each engagement — every review conducted, every portfolio assessed, every committee taught, every dialogue convened — surfaces new questions and new patterns that feed back into the research. The result is a method that is genuinely current, genuinely tested, and genuinely integrated. A board that engages two different solutions is not buying two unrelated services; it is drawing twice on one coherent body of knowledge.

Independence as the foundation

Beneath the method lies a principle without which none of it would have value: independence. The Institute carries no product to sell, manages no assets, and earns nothing from recommending one manager or fund over another. Its analysis therefore answers to the evidence and to the institution's interests alone. This is not incidental to the solutions; it is what makes them worth having. An assessment is trusted because it is disinterested; a portfolio review can say what an incumbent manager cannot precisely because the Institute has no stake in the answer; sponsored research carries weight because sponsorship never determines findings. Across every solution, independence is protected deliberately and treated as the Institute's most valuable asset — because it is the source of every other value the Institute offers.

A consistent standard of quality

Every solution is held to the same standard, expressed in a single test: would this withstand the scrutiny of a serious fiduciary, *and* remain faithful to the Church's teaching? Only what passes both is released. In practice this standard has four components, applied without exception:

- **Methodological rigour** — transparent method, with sources, assumptions and limitations stated plainly enough to be examined and challenged.
- **Fidelity to teaching** — grounding in Catholic social teaching, engaged seriously rather than invoked for effect.
- **Independence** — freedom from any commercial mandate or product interest in the conclusions reached.
- **Discretion** — the confidentiality appropriate to ecclesiastical and fiduciary contexts.

This common standard means an institution can expect the same seriousness from a one-day masterclass as from a multi-month portfolio review — and can trust that the Institute's name carries the same meaning across everything it does.

Solutions that combine

Because the solutions share a method and a standard, they combine naturally into coherent programmes of work. An institution rarely needs only one. A diagnosis of governance often points toward education; an assessment of values alignment often leads to a portfolio review; intelligence about the field informs every decision that follows. The catalogue is designed to be assembled — and the four families map directly onto the needs an institution actually has.

IF THE INSTITUTION NEEDS TO…	RELEVANT SOLUTIONS
Understand the field and its direction	Catholic Finance Observatory · Bloomberg-Based Investment Analytics
Strengthen the governance of its investments	Catholic Investment Governance Review · Investment Committee Academy
Verify that its portfolio is faithful	Catholic Values Investment Assessment
See its whole patrimony, independently	Religious Institutions Portfolio Review · Bloomberg-Based Investment Analytics
Build lasting capability in its people	Investment Committee Academy · Catholic Finance Executive Programme · AI for Religious Institutions
Sustain the research and gain standing	Catholic Finance Research Sponsorship
Connect with, and shape, the field	Executive Roundtables & Strategic Dialogues

An engagement built around the institution

However many solutions an institution draws on, the Institute's way of working is consistent. Engagement begins not with a product but with a conversation — an effort to understand the institution's mission, its governance, its assets and the questions it is wrestling with. From that understanding, the right solution, or combination of solutions, is shaped. Delivery is rigorous, independent and discreet. And every engagement is designed to leave capability behind: documented frameworks, trained people, and a clear method the institution can carry forward on its own. The Institute measures its success not by dependence but by the durable competence and independence its clients retain.

> **CAPABILITY, NOT DEPENDENCE**
>
> The aim of every engagement is to strengthen the institution itself — to leave behind understanding it owns, rather than a reliance it must keep paying for. This is the mark of an institute of learning, as distinct from a provider of services.

Supporting the institution over time

Finally, the solutions are designed to support an institution not once but over time, as its needs evolve. An institution might begin with intelligence and a diagnosis — understanding the field and its own standing — then move to strengthening governance and verifying alignment, then to building the capability of its people, and finally to an ongoing partnership of analytics, education and convening that accompanies it for the long term. The catalogue is, in this sense, not a menu of one-off purchases but the basis of a lasting relationship between an institution and the Institute — a relationship in service of the same end the Institute exists to advance: the stewardship of mission, with both excellence and fidelity.

A shared visual language

One further element runs through every solution in this catalogue: a common visual language. Each solution proposes its own suggested schemas, infographics and key indicators, but they are not designed in isolation. They share a consistent grammar — frameworks rendered as clear schemas, findings presented as board-ready dashboards, maturity and alignment shown as scorecards and profiles, and impact tracked through defined sets of indicators. This shared grammar is deliberate, and it serves the institutions the Institute works with. A board that has read one of the Institute's reviews can read another without relearning how to interpret it; a finance council that has seen one dashboard understands the next at a glance. Consistency of presentation is, in this sense, part of the substance: it lowers the effort required to absorb complex analysis and lets decision-makers spend their attention on judgement rather than on decoding.

The visual language also reflects the Institute's conviction that rigour and clarity are not in tension. Sophisticated analysis is of little use to a board if it cannot be grasped and acted upon; the purpose of the Institute's diagrams, dashboards and indicators is precisely to make depth legible — to distil professional-grade analysis into the few images and measures that genuinely inform a decision, without sacrificing the rigour beneath them. Across the reviews, assessments, analytics, education and intelligence in this catalogue, the same discipline applies: show what matters, show it clearly, and let the evidence speak. The suggested visuals accompanying each solution are concrete starting points for that shared language — a consistent way of seeing that, like the method and the standard beneath it, belongs to the institution as much as to the Institute.

THE ARCHITECTURE IN ONE LINE

Ten solutions, one institution: a single research-led method, a single standard of independence and quality, and a single purpose — to help the institutions of the Catholic world steward their resources excellently and faithfully.

BEGIN THE CONVERSATION

One platform, many solutions

The solutions in this catalogue are designed to stand alone and to work together. An institution may engage the Institute for a single review, a place on a programme or a seat at a roundtable — or assemble several solutions into a coherent programme of work, from intelligence and assessment through advisory and analytics to education and convening.

Whatever the need, the Institute welcomes the conversation. Each solution is offered in the same spirit: independent, research-led and faithful to the mission these institutions exist to serve. The Institute's role is to help them steward their resources with both excellence and fidelity — and the invitation to begin is open.

Beginning is deliberately simple. There is no obligation to adopt a programme of work, and no expectation that an institution should know in advance which solution it needs. An engagement starts with a single conversation — about the institution's mission, its responsibilities and the questions it is facing — from which the right first step, whether a review, a place on a programme or a seat at a roundtable, becomes clear. From there, an institution can go as far as its needs require, confident that each step rests on the same independent, research-led foundation as the last.

What an institution can expect, in every case and from every solution, is constant: rigour without commercial interest, fidelity without naïveté, and a single-minded commitment to leaving the institution itself stronger. That is the standard the Institute holds to across this entire catalogue — and the promise behind every solution within it.

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