



Join the

# Climate Safe Lending Fellowship

A six-month leadership programme for banking professionals advancing the climate agenda within their institutions



# An Overview

- Why** Banks and lending institutions urgently require deep transformation from the inside to finance a just and equitable transition to a low carbon future. Banking professionals are faced with the monumental task of setting and operationalising climate commitments amidst rapid change and uncertainty. The Climate Safe Lending (CSL) Fellowship provides a platform for navigating the net zero landscape to accelerate climate action across the banking sector.
- What** The CSL Fellowship is a six-month leadership programme designed to develop the internal talent in banking to embed and advance climate action within their institutions. Fellows will access sector insights and emerging new practice in climate finance. They will leave the programme with new tools, skills and multi-stakeholder networks gained in a pre-competitive, collaborative environment.
- Who** Committed climate advocates who are currently employed by a bank, and are working to accelerate climate action in their institutions.
- When** October 2021 – March 2022, with an average time commitment of up to one day per month.
- Where** Fully virtual.

**Applications close  
5 July 2021  
9am BST**

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**Or find out more and  
join an information  
session:**

[www.climatesafelending.org/  
fellowship](http://www.climatesafelending.org/fellowship)

# We are committed to bringing about a just and equitable transition to a climate safe world

And banking has a crucial role to play.

We are at the crossroads of a set of converging crises. With the planet already approaching 1.2 degrees of warming and on track to breach Paris Agreement limits a decade ahead of schedule, drastic action is required to avert catastrophic climate breakdown. Meanwhile the Covid-19 pandemic has exposed the cracks of inequality and injustices which were widening long before the world locked down - these have now grown into gaping chasms.

With the immense scale of capital they deploy and the direct impact of their decisions on the real economy and biosphere, banking institutions have a choice: continue to finance a status quo in decline or lead the radical transformation to a regenerative and sustainable future.

While banks are declaring a wave of net zero commitments across the globe, these will remain only symbols of progress without the deep transformation of business as usual to close the gap between bank climate targets and real world outcomes.

**How does a net zero pathway become operationalised through organisational strategies, structures, leadership and culture?**

***“It’s been really powerful to say, ‘I don’t know’, because it’s called to attention that I need help solving climate challenges by working with others.”***

Learning Lab participant

# Climate intrapreneurs will drive this transition

## Climate intrapreneur

### *Noun*

A finance professional seeking to embed climate action within the core strategy, operations and culture of their institution.

These committed change agents play a crucial role in enabling their institutions to set, plan and operationalise climate commitments. Regardless of their functional area or seniority, and regardless of whether they are focused on climate within their day job or side-of-desk, many climate intrapreneurs fit within (or across) these three archetypes.

**The Pioneer:** Directly develops or implements climate-related strategies, frameworks, methodologies and innovations. Often in sustainability, risk, reporting and strategy roles.

**The Patron:** Creates institutional space (resources, relationships, mandates, protection) for colleagues to integrate climate into their work. Often P&L owners, senior leaders or individuals with high levels of informal influence.

**The Guide:** Builds organisational capacity around climate, supports allies to navigate internal channels and helps colleagues to embed climate into their day jobs. Often in support functions such as HR and transformation, or informally supporting others side-of-desk.

**All three archetypes are important.** Patrons may have more formal authority to provide access to resources and make decisions within an institution, Pioneers are necessary for experimenting with and implementing new strategies, and Guides are essential for breaking down silos and building capacity across all parts of the bank.

# Why the Fellowship programme

The Climate Safe Lending (CSL) Fellowship provides structured support over six months for climate intrapreneurs to build their knowledge, confidence and skills for transforming their organisations from within, in service of people and planet.

Many other forums focus on the technical aspects of how banks can finance a just and equitable transition to a climate safe world.

The Climate Safe Lending Fellowship looks beneath the analytical work required and asks:

*What are the underlying systemic dynamics (the structures, relationships, mindsets and values) within banks that inhibit and accelerate progress toward climate goals?*

The Fellowship cultivates the leadership practices of climate intrapreneurs to help them bring about these deeper shifts that will align their institutions with a just transition to a climate safe world.

## About the Climate Safe Learning Lab

*The Climate Safe Learning Lab is an initiative of the [Climate Safe Lending Network](#) – a multi-stakeholder collaborative working to align bank lending with climate safe scenarios. The network is managed by Green America's [Center for Sustainability Solutions](#).*

*The Climate Safe Learning Lab initiative supports banking professionals who are advancing the climate agenda within their institutions. The Learning Lab is delivered by Climate Safe Lending Network member [Finance Innovation Lab](#), a UK-based charity working for a financial system that is democratic, sustainable, just and resilient.*

# How your organisation will benefit

We invite banking institutions to support and develop your internal talent who are ready to operationalise and advance your organisation's climate action.

By supporting your employees to participate in the CSL Fellowship, your institution will:

- **Develop the leadership capacities of key talent**, equipping them with the knowledge and skills to enable the strategies, structures and culture change that will support your bank's progress on climate action.
- **Access insights and emerging new practice**, including tools and approaches that can help banks navigate the next steps towards setting and meeting climate targets, regardless of which stage they are at in this journey.
- **Learn in a pre-competitive environment**, where participants bring back new ideas to their organisation by learning from the experiences of peers and practitioners at the leading edge of sustainable finance.
- **Build relationships with external stakeholders and allies** who are crucial to enabling sustainability strategies, by accessing and engaging with the Climate Safe Lending Network and its influential multi-stakeholder community.

## Groups welcome:

*We encourage up to three employees from different areas of the same banking institution to join our cohort of up to 25 Fellows. We recommend a mix of colleagues from the sustainability function and from core business units to enable integration of programme insights into business as usual. Colleagues can benefit from working together and applying new insights and skills within the same institution.*

# What past participants say

Despite spending my entire career in sustainability, I was holding back from providing my input in strategic conversations around our climate work. **After the programme, I changed my approach and proactively added my voice into the conversation.** Within months I became a key advisor on climate to a C-suite executive and **now I'm part of the inner circle focused on this work at the highest level of the firm.**

**Celine Suarez**

Head of Corporate Sustainability and Reporting, Morgan Stanley

Many of us are so focused on the day-to-day within our institutions. The CSL Fellowship has provided a dedicated space where I can **zoom out and look at the underlying challenges, and explore possible frameworks and solutions that others are trying.** This provides inspiration I can take back to my institution.

**Tjeerd Krumpelman**

Global Head of Advisory, Reporting and Engagement, ABN AMRO

Being part of the discussions expertly facilitated by the CSL Fellowship team made the difference. **I was empowered to speak and to hear from others, and truly felt like I was meaningfully contributing.** I've since been **better able to identify the assumptions, mindsets and structures that sit beneath the surface of this work and now have more confidence and a broader toolkit with which to contribute** on sustainability issues.

**Amara Gossin**

VP Legal, Barclays

## Past participants have come from:

ABN AMRO

Allied Irish Bank

Amalgamated Bank

Assinboine Credit

Union

Bank of America

Barclays

Beneficial State Bank

CIMB Bank

Citi Bank

Credit Suisse

European Bank for

Reconstruction &

Development

Fifth Third Bank

Firststrand

FYN SA

Goldman Sachs

Iberiabank

ING

KCB

Land & Agricultural  
Development Bank  
of South Africa

Landsbankinn

Lloyds Bank

Macquarie Bank

Morgan Stanley

Natixis

NatWest Bank

Rabobank

Siemens Bank

Standard Bank

Standard Chartered

SunTrust

US Bank

Vancity Credit Union

Wells Fargo

# About the Fellowship

***“It has had such an impact on me, and it changed my perspective as I think about how I move my work forward on this issue. These kinds of opportunities to pause, consider one’s personal connection to this issue, and explore new ways to advance our work internally are so few and far between – if not totally absent. I can’t tell you how meaningful and useful it was to me.”***

Learning Lab participant

# The Climate Safe Lending Fellowship

The Fellowship programme is designed to engage, inspire and propel climate intrapreneurs forward in their efforts to advance the climate agenda within their institution.

By joining the Fellowship, here's what you can expect:

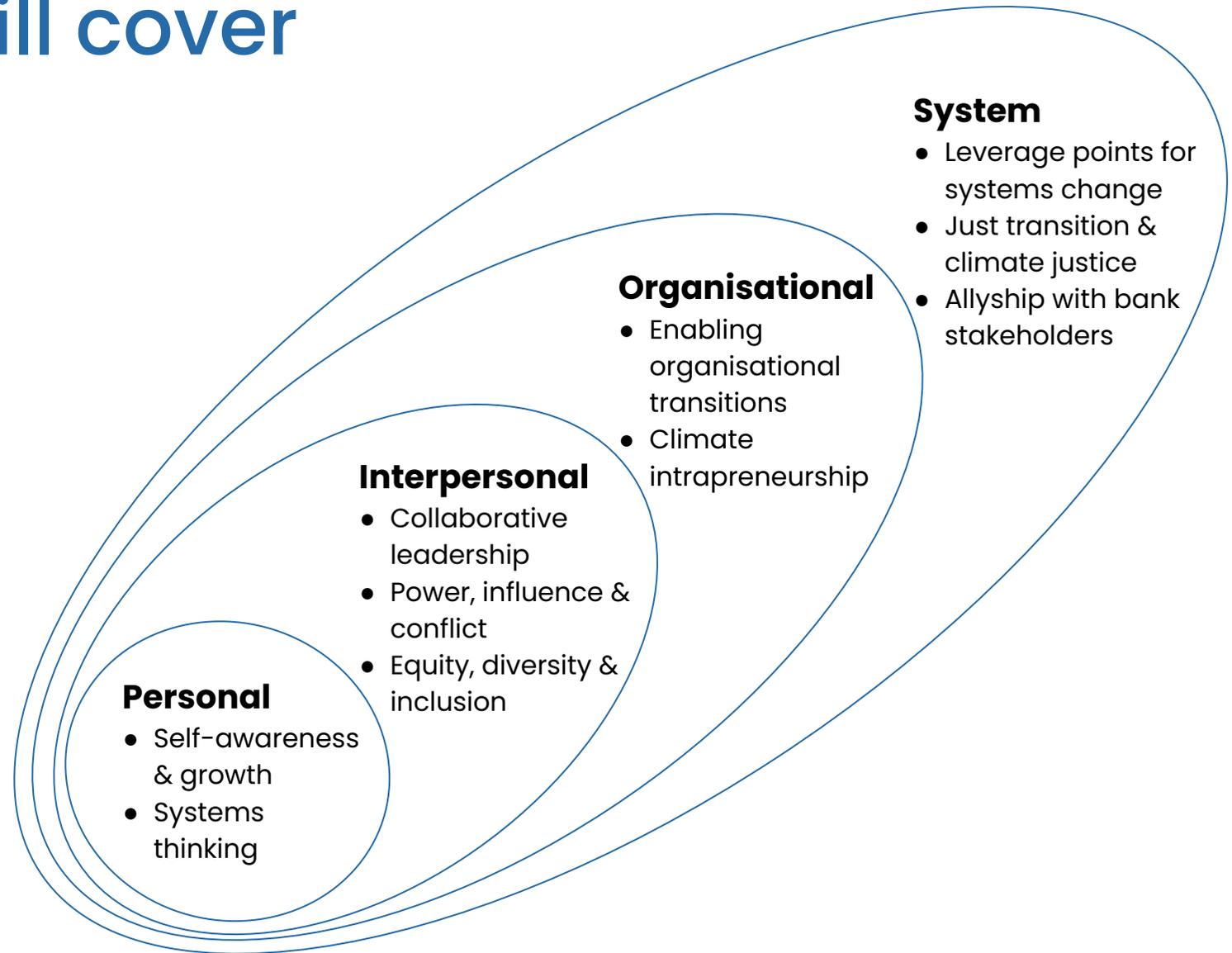
- **Leadership development:** You will be more confident and grounded in your leadership as you create systemic change within your bank towards climate goals.
- **Insights and skills:** You will gain practical tools and skills to influence change and take transformational action to align your organisation with a just transition to net zero. You will be invited to bring a current challenge into the programme to apply your learning, and receive bespoke support throughout the programme to move forward on this challenge.
- **Peer-coaching and support:** You will be part of regular peer coaching sessions with like-minded colleagues from across the banking sector, benefitting from the collective wisdom of peers whilst learning coaching skills you can deploy in your work. You will also have access to coaches and mentors, dedicated facilitators and leading practitioners in the field of sustainable finance.
- **Network building:** You will be part of a thriving peer community with whom you can learn and collaborate. You will also have the opportunity to strengthen your cross-sector network through engagement with values-aligned bank stakeholders across finance, academia, sustainability and civil society.

Upon successful completion of the programme, you will be granted the title of **Climate Safe Lending Fellow** for inclusion on your resume and public profiles. As a Fellow you will gain direct access to the Climate Safe Lending Network to collaborate with a multi-stakeholder community of changemakers all working to accelerate bank climate action.

# What we will cover

The Fellowship programme model focuses on individual change as the birthplace of organisational and systems change.

The programme will provide a safe, but challenging, space for you to reflect on who you are as a leader, and learn ways to cultivate the mindsets, relationships and organisational structures that can bring about greater systemic change. You will be guided through four interconnected levels of change crucial to the work of any systemic changemaker.



# Who it is for

We will bring together a cohort of 20–25 banking professionals who are committed to advancing climate action, and who demonstrate the potential to catalyse systemic change in their institutions.

The Fellowship is open to applicants who:

- **Currently work in a bank.** Applicants are welcome from all banks regardless of size or the stage of its journey towards net zero. Applicants from non-bank lending institutions and development finance institutions are welcome too.
- **Are actively working to progress the climate agenda in their institutions, irrespective of function.** It doesn't matter whether applicants have a sustainability-related job, work in other other parts of the bank (e.g. risk, legal, business units, etc); or are focused on climate action in their day job or side-of-desk.
- **Have a minimum three years' experience in banking.** Climate action can be taken by anyone and everyone, regardless of their seniority. Applicants with less than 3 years of experience can apply if they are able to demonstrate their potential for impact.

We aim for this cohort to reflect the communities that the banking sector serves and impacts. We actively encourage applications from those underrepresented in mainstream banking, including (but not limited to) BIPOC, LGBTQ+ and disabled people.

## Geographic focus:

*Due to the outsized contribution of the Global North in causing the climate crisis and the corresponding responsibility to act, this programme is tailored to those working in North American and European banking institutions.*

*Sessions will take place to accommodate Transatlantic time zones. However, we have also welcomed participants from Africa, Latin America, the Middle East and Asia Pacific in previous programmes. View session timings on our website:*

[www.climatesafelending.org/key-dates](http://www.climatesafelending.org/key-dates)

# Bring a current challenge

You are invited to bring a current challenge into the programme relevant to your work on climate action. This will allow you to focus your learning and apply it within your institution to make meaningful progress during the programme.

We encourage Fellows to define your challenge in terms of a critical shift in your institution that you are (or would like to be) part of creating or enabling. This should be a shift that:

- (i) could be achieved in the next 12 months;
- (ii) is something you can directly or indirectly influence; and,
- (iii) would make a significant difference in aligning your bank's actions with a just transition to a net zero carbon economy.

**You do not need to know the “how”.** This is what you will explore alongside your peers during the programme. You will also receive bespoke support from the Fellowship team to help you transform your challenge into opportunity.

## Examples of challenges include:

1. *A shift from your bank's climate strategy only focusing on environmental impacts → to integrating a justice and equity lens.*
2. *A shift from short-term financial KPIs only → to introducing employee incentives for contribution to climate goals.*
3. *A shift from a lack of colleague capability around sustainability → to compulsory sustainability training for all bank staff.*

View more examples of challenges in the FAQs on our website.

[www.climatesafelending.org/fellowship](http://www.climatesafelending.org/fellowship)

# What to expect over the 6 months

	October 2021	November 2021	December 2021	January 2022	February 2022	March 2022
<i>Content</i>	<i>Opening</i>	<i>Personal change</i>	<i>Interpersonal change</i>	<i>Organisational change</i>	<i>System-level change</i>	<i>Integration and closing</i>
<b>Learn &amp; Apply</b>	2-day virtual retreat  (total of 2 x half day on-screen time)	Monthly 2.5hr workshop				1-day virtual retreat  (total of 1 x half day on-screen time)
<b>Peer Support</b>		Monthly 1.5hr peer coaching session				
<b>Deep-dive &amp; Networking</b>		Monthly 1hr clinic, webinar or networking event (optional)				
<b>Tailored Support</b>	One-to-one sessions with programme team to identify any additional bespoke support, e.g. network introductions, resources, coaching or mentoring, etc (2 x 1hr sessions over 6 months)					

**Fully virtual:** All programme sessions will take place virtually between 2 and 6pm GMT (UK time). Please check the detailed programme schedule available on our website to ensure you are able to attend all sessions: [www.climatesafelending.org/key-dates](http://www.climatesafelending.org/key-dates)

**Time commitment:** To make the most of the Fellowship, we encourage you to set aside a minimum of 0.5 days each month for core Fellowship workshops and peer coaching, and ideally an additional 0.5 days for other optional activities (networking, clinics) and individual reflection.

# How to apply

***“Fast trust, honesty, BS free conversation. Genuine connection and listening happening throughout.”***

Learning Lab participant

# Fellowship cost

We encourage all applicants to seek support from their organisation to sponsor their participation in the programme where possible. The true cost of the programme per participant is USD 10,500. We are able to offer subsidised fees on a sliding scale due to the generous support of our philanthropic donors. For organisations interested in being recognised as a Fellowship programme sponsor and featuring in the Climate Safe Lending Network, please get in touch.

## Organisation-sponsored

USD 5,500	Large banks and lending institutions (more than \$100bn total assets)
USD 4,500	Medium-sized banks and lending institutions (between \$5bn and \$100bn total assets)
USD 3,500	Small banks and lending institutions (less than \$5bn total assets)

## Individual self-funded

USD 1,900	For individuals unable to obtain support from their organisations
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**Group discounts available:** For multiple places from the same organisation: we offer 20% discount for two places and 25% discount for three places. We will not be able to accommodate more than three places from the same organisation to ensure a diverse cohort of up to 25 Fellows. Each applicant will be assessed individually before being granted a place on the programme.

**Limited bursary places available:** We understand that some applicants may not be able to secure sponsorship from their organisation or self-fund their participation. Bursary places will be offered based on need, although we ask participants on a bursary to make a small financial contribution if they are able to. You can apply for a Bursary place as part of your application.

# Our selection process

## Stage 1: Online Written Application

Eligible applicants will be shortlisted based on:

- **Drive and commitment:** We are looking for individuals who are committed to influencing a just transition to a safer climate from within banking institutions over the medium-term. We are also interested in you as a person, and what motivates you in this work.
- **Demonstrated action:** We would like to see evidence of recent or current work in your institution that is aimed at advancing climate action, within your day job or side-of-desk. We welcome applicants committed to learning through failure.
- **Potential for systemic impact:** Systemic impact means transforming the heart of business as usual. We want to support individuals who show the potential to influence meaningful shifts in core business strategy, operational structures, relationships and culture.
- **Appetite to learn and grow:** The work of creating systemic change involves an ongoing journey of adaptation and growth. We seek individuals who are eager to adapt and change, stretch into new areas of growth, and actively support the development of others in a peer learning community.

## Stage 2: Experience Session and Interview

The two-hour virtual Experience Session will allow shortlisted candidates to experience the peer learning culture of the CSL Fellowship and will be an opportunity to mutually gauge interest and fit. The session will also support applicants to clarify and refine the challenge they would like to bring to the programme.

Our final selection will be guided by ensuring a diverse mix of individuals in the cohort (including personal identities, size of institution and the role, function and location of participants) to maximise the learning potential of the group.

To confirm their place on the programme, final candidates will be invited to a 30-minute interview.

# Application information

**Applications open:** 27 May 2021

**Applications close:** 5 July 2021, 9am BST

## **2hr Fellowship Experience workshop**

14 July 2021 (4–6pm BST) or

16 July 2021 (2–4pm BST)

*[Note: final date based on candidate availability]*

## **30-minute final interview**

Week beginning 26 July 2021

**Fellowship places confirmed:** 6 August 2021

[Apply Now](#)

The Climate Safe Learning Lab is committed to equity, diversity and inclusion.

*As part of processing all initial applications to the Fellowship, we are using a blind recruitment software platform for fair and inclusive selection – this includes anonymising applications and building more transparency into the process to ensure we reduce any biases whilst assessing and selecting candidates.*

*Applications are administered by the Finance Innovation Lab who are a member of the Climate Safe Lending Network, and delivery partner for the Climate Safe Learning Lab.*

# For more information

**Join one of our upcoming events to find out more and meet the programme team.**

## **CSL Fellowship Introduction Session**

9 June 2021: 4-5pm BST  
23 June 2021: 4-5pm BST

**Register**

## **CSL Fellowship Taster Workshop**

16 June 2021: 2-4pm BST

**Register**

**Visit the Climate Safe Lending Network website** to view programme FAQs and the detailed programme schedule.

[www.climatesafelending.org/fellowship](http://www.climatesafelending.org/fellowship)

**Get in touch with the team** if you would like to discuss any questions and are unable to attend one of our events.

[learninglab@climatesafelending.org](mailto:learninglab@climatesafelending.org)

# Who's involved in the Fellowship?

## Programme & Facilitation Team



**Lydia Hascott**  
Head of  
Intrapreneurship,  
Finance Innovation Lab



**Becca Bartholomew**  
Lead Facilitator, Climate  
Safe Learning Lab



**Jacqueline Lim**  
Fellowship Manager,  
Climate Safe Learning  
Lab

And others from the Climate Safe  
Lending Network team

## Advisors and Contributors

**James Vaccaro**  
Executive Director,  
Climate Safe Lending  
Network

**Celine Suarez**  
Head of Corporate  
Sustainability and Reporting,  
Morgan Stanley

**Tjeerd Krumpelman**  
Global Head of Advisory,  
Reporting & Engagement,  
ABN AMRO

More contributors to be  
confirmed

**Amara Gossin**  
Vice President -  
Legal, Barclays

**Ivan Frishberg**  
First Vice President,  
Sustainability Banking,  
Amalgamated Bank

**Alisa Gravitz**  
President & CEO,  
Green America

**Jesse Griffiths**  
CEO, Finance  
Innovation Lab

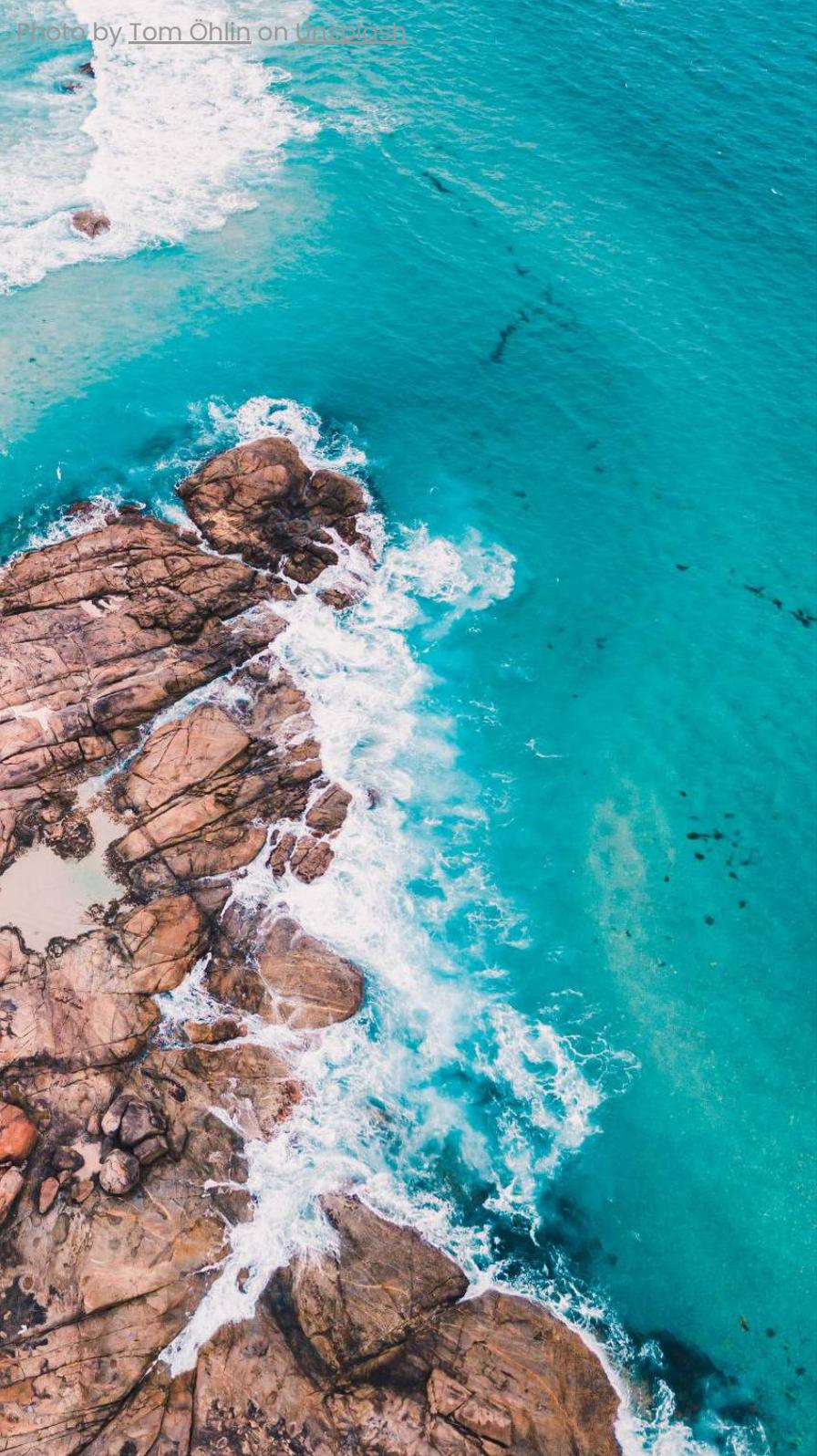


Photo by Tom Öhlin on Unsplash

# Join the Climate Safe Lending Fellowship

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