BGEN Investment Policy

1. Purpose

The purpose of this investment policy is to outline the principles and guidelines that govern how the Botanical Gardens Education Network (BGEN) manages its investments in a responsible, ethical, and sustainable manner, consistent with our mission to support education, biodiversity, and environmental care.

2. Objectives

- To ensure that BGEN's funds are managed responsibly and used to support our charitable objectives.
- To achieve a reasonable return on investments without compromising ethical, environmental, or social standards.
- To preserve the capital value of funds while maintaining liquidity and minimising risk.

3. Ethical Investment Principles

BGEN is committed to responsible investment. We will **not invest in companies or funds** that:

- Contribute to **deforestation** or the destruction of natural ecosystems.
- Are involved in the production or promotion of **fossil fuels**, including oil, gas, and coal.
- Significantly contribute to **global warming** or have poor environmental records.
- Are associated with **arms manufacturing**, **weapons trading**, or military activity.
- Are known to be involved in or benefit from **child labour**, **modern slavery**, or other **unethical labour practices**.
- Have records of **human rights abuses**, **corruption**, or **lack of corporate transparency**.

BGEN seeks to invest in organisations and funds that demonstrate strong **Environmental, Social, and Governance (ESG)** performance, support **climate-positive activities**, and operate with **transparency and accountability**.

4. Risk Management

BGEN will adopt a **low-risk investment approach** to protect its funds and ensure long-term financial sustainability.

As such, BGEN will **not invest in**:

- **High-risk investments**, including speculative or highly volatile financial instruments.
- **Derivatives**, options, or other complex financial products that carry significant financial risk or are inconsistent with our charitable goals.
- **Unregulated or non-transparent investment vehicles**.

Investment choices will prioritise **capital preservation**, with moderate returns and low exposure to financial volatility.

5. Oversight and Review

- Investment decisions that exceed the Treasury's spending threshold (£1,000) will be overseen by the **Board of Trustees**.
- All investments will be reviewed **at least annually** to ensure they remain in line with this policy.
- The Board reserves the right to divest from any investment that is later found to conflict with this policy or BGEN's values.

6. Implementation

This policy will be shared with the Board of Trustees, the Governance Workstream and the Treasury Workstream, and compliance will be monitored on a quarterly basis.