



Finance Institute

Socially Responsible, Financially Smart



Singapore

Kuala Lumpur

Amsterdam

London

New York

TRAINING CALENDAR 2013

www.csrfi.com

+61 8 9647 2156

enquiries@csrfi.com

Socially Responsible, Sustainable Investments

L3 London 4-5 February, S3 Singapore 4-5 April, N3 New York 1-2 May

Investors are a demanding, sometimes contradictory universe of people. Not only do they want good, preferably outstanding, financial returns, but increasingly they want to invest only in companies that meet their ethical criteria. This course looks at the rapidly moving world of socially responsible investment: what it means, how it is defined and measured, who does it and how successfully. Issues such as differences in cultural perspectives, how screening works, the boundaries between SRI, other forms of ethical investment and the regulatory system are covered thoroughly through local case studies and group exercises.

- Understand what SRI means, how it evolved, and what its current extent is
- Appreciate the role of values and value systems in determining SRI and its interface with competing ethical investment systems, e.g. Sharia
- Debate and take a position on the relationship between leading ethical issues and SRI
- Learn the role of SRI in a range of different investment classes, including fixed income, real estate, private equity and institutional investment
- Analyse the process of ESG screening and its relationship with SRI investing, including the distinctions between ESG and Impact Investment
- Study the evidence on SRI investment and financial returns
- Examine the construction of SRI indices and their function
- Evaluate the future of SRI investment

Private Finance for Social and Community Infrastructure

L8 London 6-7 February, S8 Singapore 6-7 May

The infrastructure deficit worldwide is the largest regional investment story of our time. Power, water, transport, health, education and many other facilities require substantial investment - yet Government does not have the means to make all the investment required. The private sector must be involved – yet Public Private Partnerships have experienced numerous problems throughout Europe, and especially in the UK, yet similar structures have thrived elsewhere in the world. This course confronts head-on the issues of how the private sector can be involved in infrastructure finance – what the methods of private finance are, their advantages and disadvantages, the structures, roles of the parties involved and how government and the private sector can best work together to achieve economic development.

- The role of the private sector
- Conventional infrastructure procurement
- Bond financing
- Government investment programmes
- Public-private partnerships
- Risks and ratings
- The future of infrastructure finance

S9 Singapore 2-3 September, L9 London 13-14 November

Real estate is a dominant form of investment and consumes more resources than any other industry on the planet. If buildings are not green, the impact on the environment is colossal, and worsening every year. The industry has not been slow to step forward with programmes of certification (such as LEED), technical advances and exciting new developments – but what is the cost, and will real estate investors reap the benefits? This course stands apart from the marketing of the industry itself, and the claims of competing consultancies in presenting an up-to-date global perspective, combining a professional real estate and finance perspective with corporate responsibility expertise on this vital part of the global environmental and corporate responsibility agenda, taught with a range of relevant worked examples and case studies both best practice and failures .

- Drivers of Green Buildings
- Energy efficiency concepts and application
- Real estate valuation
- Architecture, construction and occupancy
- Green Building Initiatives
- Urban Planning and Legislation
- Economic Analysis of Green Buildings

Sustainable Banking and Impact Investment

A9 Amsterdam 18-19 March, S9 Singapore 25-26 March

Socially Responsible Investment (SRI), Corporate Social Responsibility (CSR), and Clean Technologies (CleanTech) have become buzzwords in recent years. As information technology has increased the speed and volume of publicly available information about corporations and financial practices, the roles and responsibilities of government, corporations, and non-governmental organizations have become less segmented and more interdependent. The focal point of social and environmental activism has moved from street protests to corporate boardrooms and shareholder resolutions. Furthermore, businesses are discovering that waste reduction and energy-savings in their manufacturing processes, as well as the adoption of more sustainable and clean technologies, provide more than public relations benefits. Such measures increase profitability and enhance long-term competitive advantage.

- Differences between ESG (SRI) and Impact Investing
- SRI screening
- The role of private equity and alternative investment products in SRI
- Clean Technology valuations
- SRI investment performance and risk analysis
- Successes and failures of companies embracing the Triple Bottom Line

CSR, Sustainability and International Development

L1 London 9-10 April, S1 Singapore 16-17 April, N1 New York 7-8 May

The course will focus upon CSR in international development and its practical implications. Starting from a discussion on what is CSR and Sustainability all about, we shall start with a clear and useful definition to help you understand the maze of terms that are being used as well as how they link to other concepts such as those defined by ISO26000, the EU, the UN Global Compact etc. The course draws upon both the course leader's book on CSR and International Development and copies will be given to registered delegates, as well as the trainer's vast experience in working with companies, Governments and the United Nations in over 120 countries around the world. The course will cover CSR strategy and how it links to practical conditions in emerging market economies with examples taken from large companies as well as small. Delegates will leave the course with a clear idea of how to implement CSR and Sustainable Development in projects and programmes from community development, to employment creating programmes to their own chosen projects.

- Conceptual basis of CSR
- CSR and emerging markets
- Strategic approach to CSR
- Business case and operational considerations in CSR
- CSR and Philanthropy
- The future of CSR

L2 London 11-12 April, S2 Singapore 13-14 May

Delegates will gain a better understanding of business ethics concepts and managerial tools that can help them in rethinking their organisation's business models, better understanding the joint interests of their stakeholders and envisioning ways to build responsible businesses that can drive value and create competitive advantages. Moreover, delegates will develop their personal ethical leadership skills by examining real case-studies where ethical considerations can become a valuable asset for strategic management. They will also acquire the critical know-how to introduce, develop and implement business ethics tools such as codes of ethics; ethical training; CSR standards, and sustainability reporting,

- Why does Ethics matter in Business?
- Corporate Codes of Ethics
- Building Values or enforcing rules?
- Concepts, methodologies and standards for social and Ethical Accounting, Auditing and Reporting
- How can ethics be integrated in strategic decision-making?
- Practical applications of business ethics

Defining and Enhancing ROI for CSR

N20 New York 22-23 April, L20 London 20-21 June

How do you calculate the Return on Investment (ROI) for Corporate Social Responsibility activities? This is the practical question that every organization faces when it considers spending resources on things that may in fact provide certain social and environmental benefits but that are hard to quantify and translate into business value. This course provides a basic framework for calculating the ROI on CSR investments and for enhancing a company's ability to identify and implement CSR strategies that do result in a good return on overall business value. The seminar will cover five areas:

- Background and framework for CSR and the challenge of defining ROI
- Expense vs Investment and Income Statement vs Balance Sheet
- Stakeholder analysis and externalizing costs
- Calculating Brand Value and Business Value
- Strategies to identify high-value CSR investments

L5 London 13-14 May, S5 Singapore 22-23 April

Strategic investment in CSR is increasingly being recognised as an opportunity for companies to differentiate themselves in terms of societal acceptance and thereby help gain a competitive advantage. However, despite the existence of various internationally accepted norms and standards such as AA1000, GRI, ISO 26000, and the UN Global Compact, there is no 'one size fits all' model for a strategic CSR programme that is necessarily congruent with corporate goals and objectives and societal expectations. How does one embark on developing and embedding a strategic CSR programme that a) responds to the expectations of internal and external stakeholders and b) is reflected in a corporate strategy for sustainability that is seen as credible rather than simply a PR exercise? This course is designed to address this question in a practical 'hands-on' sense, the learning outputs from which can be tailored by delegates to suit their own particular situation and circumstances.

- Strategic CSR Principles
- CSR and Management
- Corporate CSR Governance and Auditing
- Codes, Best Practice, Communication and Reporting
- The CSR Value Curve

CSR Impact Measurement

L4 London 14-15 May, S4 Singapore 20-21 May

Following Rio+20, CSR is becoming an increasing concern for companies. For CSR to be effective, the impacts of a company on society, the environment and the economy need to be assessed and, where possible, measured. This course will look at the challenges and techniques available to measure CSR impact. It will cover environmental, social and economic impacts. Techniques discussed include those based on financial measures, such as environmental investments, social return on investment, the value of market research for CSR as well as approaches to handling far more subjective matters.

- What is CSR Impact?
- Boundaries and Indicators
- Environmental Impact
- Social Impact
- Economic, Financial and Valuation Impacts
- Challenges and Issues

Stakeholder Engagement in Practice

L7 London 16-17 May, S7 Singapore 22-23 May

Stakeholder engagement is at the heart of corporate responsibility. However it is hard to do well and as a result it is often poorly carried out. This course will work through the difficulties and practical approaches to stakeholder engagement. The practical experience of the trainer in stakeholder engagement will be brought to bear in discussing numerous techniques and examples of stakeholder engagement.

- Definitions & boundaries of stakeholders
- Stakeholder engagement & Techniques & Standards
- Multi-stakeholder engagement
- Transparency, Communication and Reporting
- Power engagement & reporting

International Best Practices in Corporate Greening

L13 London 3-4 September, S13 Kuala Lumpur 9-10 September

Considerable attention has been focused in recent years on “corporate greening” (often called business sustainability) and its benefits to a company’s reputation, market position, and long-term growth. This executive-level seminar is designed to give senior executives a strategic overview of the current state of green strategies and examine how greening initiatives have been applied in different industries and in different countries.

- Competitive & Economic strategies
- Ways to implement options including green options, waste management
- Economic, financial and regulatory considerations
- Ensuring “buy-in” and commitment within the company
- Tax policies and implications
- Ensuring Internal Company Buy-In

Valuing Green Companies and Brands

S10 Singapore 4-5 September, L10 London 11-12 November

Green companies and how to value them are at the centre of contemporary finance. The reality of climate change as well as the most challenging financing environment in decades has combined to place the need for shrewd investments in green companies at the forefront of fund management. This unique course places green companies – both primary green firms such as energy generators as well as secondary green firms such as real estate funds and engineering – through the lens of well-established valuation theory to examine their key value drivers, economic performance, and valuation metrics.

- Energy Use – concepts, applications, pricing & government and market policies
- Climate change, company performance & investment analysis
- Dividend Valuation
- Valuation through Comparables
- Asset Valuations
- What makes Green Companies different?

From Personal to Corporate Responsibility in Tourism and SMEs

L18 London 23-24 September, S18 Singapore 11-12 November

This course will introduce you to the concept of I, Stakeholder and the theory and practice of Personal Responsibility as both a precursor for, and a result of, Corporate Responsibility.

The concepts of Individual and Corporate Responsibility will be used to explore the implications, as well as their vitality and relevance, in three of the world's key business sectors: Financial institutions; Small and Medium Sized Enterprises (SMEs), and Travel and Tourism. Best international practice will be used as the benchmark against which we shall review selected local examples, and we shall drill down deeply into the themes and key issues. Your learning will take place in a very fast paced, multi media forum, which will cover key learning styles in an interactive manner. The emphasis will be on "How To" so that you, at the end of the course, will be able to take action as an individual change agent on your first Monday afternoon back at your desk or in your organisation.

- Can Financial Institutions be allowed to police their own activities?
- Where does the impulse for CSR in an SME come from?
- Why should CSR be part of an SME's strategy?
- Is there any difference between CSR for an SME and for a multi-national?
- Greening or greenwash?
- What are the key trends of CSR in travel and tourism?
- Travel and tourism are human rights – is the surge of BRICS' travellers a threat or an opportunity?

Linking Sustainable Finance and Voluntary Market-based Tools

S15 Singapore 30 September - 1 October, L15 London 14-15 October

A growing feature of global markets for many products and services is voluntary sustainability standards and certification. This is making the sustainability standards sector a rapidly expanding and complex space. The sheer number of standard systems, stakeholders and organisations appears to increase by the day. With these changes in global markets come increasing needs and expectations as well as responsibilities. Effective sustainability standards need to deliver on their economic, environmental and social objectives and sustainable finance in its many guises is fundamentally tied in to their success. This course provides a detailed examination of voluntary sustainability standards and their intricately linked relationship to sustainable finance.

- Voluntary and regulatory market-based tools
- Linking Voluntary Standards and Sustainable Finance: Investment safeguards
- Measuring the Economic, Environmental and Social Impacts of Multi-Stakeholder
- Sustainability Standards Initiative
- Current State of Knowledge of Impacts of Multi-stakeholder Sustainability Initiatives
- Successful Approaches: Integrating public and private sustainability tools

Renewable and Alternative Energy Finance

S11 Kuala Lumpur 30 September - 1 October, L11 London 4-5 November, N11 New York 29-30 April

As the real prices of non-renewable energy sources continues to rise, the attractiveness of renewable energy steadily increases. But financing remains complex, with regulatory and legal hurdles, and a wide range of potential funding sources, combined with a number of government incentives providing anything but a level playing field. This course is designed to provide a good grounding for bankers of the renewable and alternative energy market, and the why and how of its debt and equity financing, concentrating throughout on the due diligence and skills required by bankers aiming to finance this technically complex but still growing area. The course focuses on the market and how it is financed, focusing on project finance concepts and their applicability to renewable and energy finance.

- The state of the renewable energy industry
- Who funds renewables and how
- Incentives and funding structures
- Project and legal issues
- Renewable energy funds and portfolios
- Documentation reviews and analysis

S12 Kuala Lumpur 2-3 October, L12 London 6 -7 November

Modern renewable energy finance transactions requires a high level of expertise in building financial models which are reliable and flexible to accommodate the changing requirements occurring during the life of a project. The course covers such renewable-specific issues as how to model the role of renewable energy technology, energy payments, and differential tariffs as well as the usual project finance issues of limited recourse debt, debt covenants, cash waterfalls, inter-creditor relations, restructuring and rescheduling of debt, how to model risk, and the role of equity and its rewards. In the course of the two days delegates will evaluate a range of renewable energy models, across the range of different technologies. Delegates will then overcome the most complex aspects of building a reliable model, including uncertainty, currency and timescale mismatches, debt amortisation, depreciation, control account waterfall, cost structures, and the ability to easily shift time scales, as well as the ability to identify and control key sensitivities through spreadsheet simulation.

- Modelling and simulation of renewable energy generators
- The Economics of renewable energy systems
- Renewable energy dynamics
- Using Excel for modelling
- Project Finance, Valuation & Cash Flow Models
- Building a renewable energy model

S16 Singapore 3-4 October, L16 London 7-8 October

The rise of the 'human rights agenda' internationally has demonstrable business implications and this course sets out to categorise, track, and analyse them. The course works progressively from a consideration of what human rights are through to internationally recognised labour standards and the perspectives of investors. The emphasis throughout is on how companies working internationally, including in some of the most challenging national and local environments can adopt best practice to adhere to international law and regulatory constraints whilst marketing their operations to investors in a value-enhancing way.

- International Labor Standards and rights at work
- Operating in areas of conflict or weak governance
- Human rights measurement and sustainability reporting
- Investors and human rights
- Responsible Investment: a three-pronged approach
- Key human rights issues for investors

ISO 26,000 Applied

A17 Amsterdam 17-18 October, S17 Singapore 21-22 October

In November 2010, the ISO 26000 standard on social responsibility was launched. It provides an excellent CSR framework for all sorts of organisations, whether you work for an small company, a government agency or a multinational. It is also an ideal tool for raising awareness of social responsibility within your organisation and for reporting on your progress externally.

In this two-day course, we will explain the context and significance of the ISO 26000 framework, how it fits with other standards and guidelines, such as GRI, the UN Global Compact and SA8000, and provide practical examples of how other companies have implemented the standard.

- ISO26000 & CSR
- Seven clauses, seven principles, seven core subjects
- Certifiable standards & Management systems based on ISO 26000 e.g. IQNet SR10
- ISO 26000 in detail and in practice: integrating social responsibility throughout an organisation
- ISO 26000 and the value chain
- Stakeholder identification and engagement
- Implementation at small and medium-sized companies

W19 Online Course

The objective of this wholly online e-course is to introduce the participant to the concept of Corporate Social Responsibility today, operationalising the term and ensuring a cohesive definition of CSR and its applications to corporate sustainability. The learning materials and tools available through the courses allow participants to acquire the relevant introductory knowledge that will help them and their organizations to better address social responsibility concerns.

By the end of this course, participants will be able to meet the following learning objectives:

- To define and summarise the concept of Corporate Social Responsibility and Sustainability;
- To review alternative definitions of CSR and their strengths and limitations;
- To assess comparative needs for CSR; and
- To distinguish between the applications of CSR in various practical situations.

Course Registration

Course Title (Code)	Location & Date	Cost
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Delegate Details

Mr / Ms / Mrs

First Name: Last Name:

Position: Department:

Mr / Ms / Mrs

First Name: Last Name:

Position: Department:

Mr / Ms / Mrs

First Name: Last Name:

Position: Department:

Company Details

Company:

Address:

Postcode: Country:

Telephone: Facsimile:

Booking Contact

Booking Contact:

Department: Mobile: Email:

YES, I would like to receive information about future events & services via email:

Credit card payment	Cancellation
<p><input type="checkbox"/> If you would like to pay by credit card, please tick here and a member of our team will contact you to take the details.</p> <p>A confirmation letter and invoice will be sent upon receipt of your registration. Please note that full payment must be received prior to the event. Only those delegates whose fees have been paid in full will be admitted to the event. You can pay by US\$ company cheques or bankers draft.</p>	<p>Changes of delegate are accepted at any time. Registrations cancelled more than 7 days before the Event are subject to a \$250 administration charge.</p> <p>Registration fees for registrations cancelled 7 days or less before the Event must be paid in full</p>

Registration is subject to CSRFI terms and conditions which are available at www.csrfi.com/registration. By submitting your registration you agree to be bound by the terms and conditions in full.