

Environmental, Social and Governance (ESG) Courses

Maximise understanding of ESG
to drive your business forward

IBTC Approach

We have partnered with BPP, one of the UK's largest providers of professional education to bring you internationally recognised ESG courses from general awareness right through to specialist certification.

BPP has undergone extensive research with leading bodies including the CFA®, Institute of Chartered Accountants of Scotland (ICAS) and the Institute of Banking and Finance Singapore (IBF) to ensure we deliver the right training for your entire organisation.

They have experience in delivering training to professionals in nine of the top 10 international professional services firms, and nine of the 10 leading global investment banks.

IBTC and BPP

IBTC has an exclusive license agreement with BPP Professional Education for the delivery of its professional qualifications and continuous professional development courses in South Africa and neighbouring countries. This means you get global quality courses that are delivered and supported locally.



There is a sustainable finance skills gap

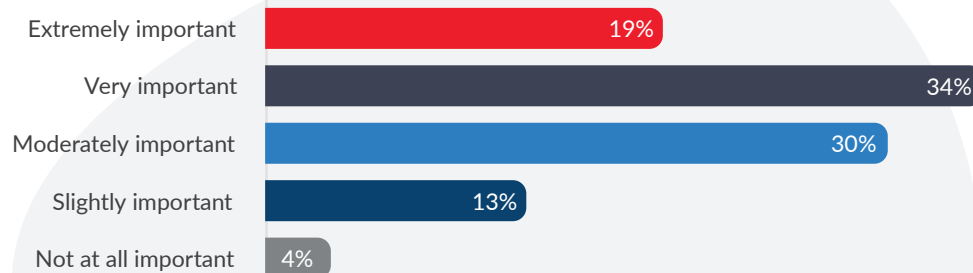
I think that we can largely agree on the following:

- 1 Globally there is a growing awareness of the link between finance and sustainability.
- 2 ESG has been identified as one of the emerging change drivers in the FAS sector.
- 3 It is essential that we build a greater understanding of the environmental, social and governance factors facing the financial sector to protect the South African economy.
- 4 Sustainable finance has largely become a core competency (i.e. a priority issue for executives and boards).
- 5 Organisations need to prepare their current and future workforce to support sustainable finance.
- 6 Developing sustainable finance skills lack urgency within some organisations.
- 7 Many organisations are still trying to understand how best to operationalise sustainable finance and incorporate sustainability within their core mandate.
- 8 The main factors inhibiting the development of sustainable finance skills are competing internal priorities, lack of coordination, and inadequate training budgets.
- 9 Anticipated government regulations could spur demand for sustainable finance skills.
- 10 ESG skills are scarce. Difficulties in recruiting skilled and experienced staff are fueling expectations of upskilling, but more globally-standardised training programmes are needed.

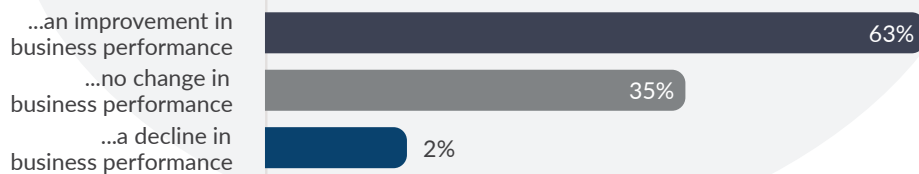
What does our international research say?

ESG is fast becoming a strategic priority for organisations across the world, as investors increasingly use this to measure whether a business is worth investing in. Despite this, there are many within organisations that do not have an understanding of ESG and its impact on business performance.

How important is ESG for your organisation generally?



"I think that businesses that invest in ESG skills and training will see..."



Upskilling beyond ESG reporting

When you embed ESG into your whole business, reporting just becomes easier.

Reporting on sustainability is complex. The key here is to recognise that sustainability and sustainability reporting is an enterprise-wide endeavour, so that every line of business understands how their own actions will impact the company's wider ESG goals and can easily communicate their own progress.

Skills gap

There is a need to address the growing gap between the current skills in sustainable finance and those that will be needed in the future. We recognise that sustainability topics are complex and cross-functional, and see that organisations are staffing their ESG teams with multidisciplinary talent.

We believe it as a top learning need to integrate sustainability across the whole business, ranging from awareness to working knowledge to expertise.

Our ESG Courses

Expertise	Awareness		Working Knowledge		Working Knowledge	Technical Expertise in ESG	
Pathway	Awareness for entire organisation	ESG and company strategy	Commercial bank lending	ESG reporting	Investment Management	Investment Management	Investment Management
Programme	Environmental, Social and Governance (ESG) - An Awareness	ESG – Decision-Making and Management Reporting	ESG – Commercial Lending	ESG – Sustainability Reporting	ESG – Fundamentals for Investment Management	CFA® Certificate in ESG Investing	CFA® Certificate in Climate and Investing
Purpose	An introductory course to develop an understanding of the way ESG issues impact an organisation's strategy, finance considerations and future reporting, and how to incorporate ESG into business processes.	Understand how consideration of ESG issues can lead to business improvements and how to incorporate ESG into performance reporting.	Focuses on key ESG issues in Commercial Lending, considering how these issues impact perceived risks at an industry and organisational level.	Develops a broad understanding of the latest sustainability disclosure requirements and any future reporting developments for sustainability information in their annual reports.	Develops an understanding of the key ESG factors that impact company performance, as well as the methodologies for integration of ESG into the investment analysis process.	A professional qualification that develops the advanced knowledge required to manage investments with a focus on integrating ESG issues into the portfolio construction process.	Provides the knowledge and skills required to understand climate, as it links to investing, and how to integrate this knowledge into the investment management process.
Duration	Half day (online live)	One day (online live)	Half day (online live)	One Hour (online live)	Half day (online live)	Four x 3 hour sessions, online live. Recommended study time for the qualification is 130 hours. (NQF 6)	Four x 3 hour sessions, online live. Recommended study time for the qualification is 150 hours. (NQ6)
Cost	R6,500	R12,500	R6,500	R2,150	R6,500	R19,500 plus exam fees of +- R19 000	R19,500 plus exam fees of +- R19 000

Environmental, Social and Governance (ESG) – An Awareness.



How does it benefit your business?

ESG can evaluate how your business is performing in relation to factors that are valuable to society and the long term viability of your organisation. This programme looks at the main elements of ESG that the wider business community should be aware of.

It offers your employees an understanding of key ESG issues for business professionals. The course is also useful for those in your organisation looking to understand how a business'

ESG strategy and the data produced is used by investment management firms and banks to make decisions on investment and financing of businesses.



What will your employees learn?

Following this course, your employees will be able to:

- Explain what ESG is and how it links to concepts such as Corporate Social Responsibility (CSR), Sustainability and Green Finance
- Explain the key ESG megatrends such as climate change and understand their potential impact on your firm in terms of both risk and opportunity
- Consider business improvements, such as improved business efficiency and stakeholder perception through adaptation of ESG principles
- Understand the future developments in corporate reporting, both voluntary and mandatory
- Advise on how ESG data is used by banks and investment management firms to make financing/investment decisions



Who is this course designed for?

This course is suitable for all business professionals looking for an introduction to key ESG issues. In addition, those who require an understanding of how relevant issues such as climate change impact businesses, and how they should be incorporated into relevant strategies, will benefit from this course. It will also benefit those who want to understand how investment management firms and banks will use ESG data to make decisions on investment and financing of businesses.

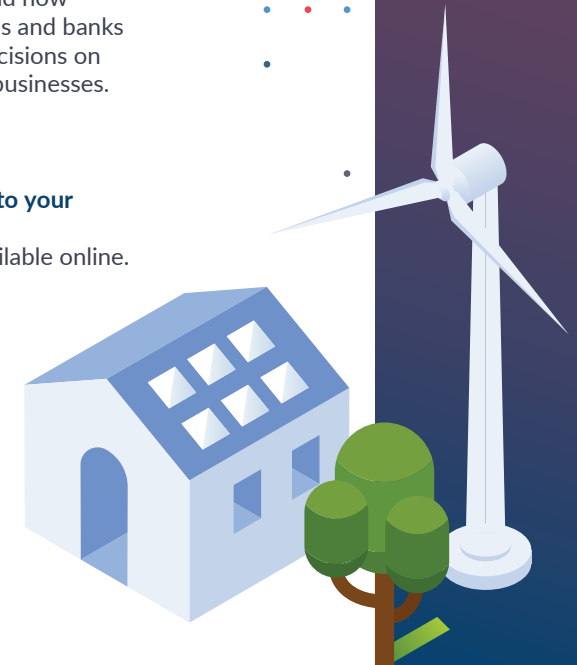


How is the course delivered to your employees?

All IBTC programmes are available online.



Duration
Half-Day Course



ESG - Decision-Making and Management Reporting



How does it benefit your business?

ESG initiatives will have a major part in defining your business strategies for the future. This course reviews how these considerations might be built into the fabric of your organisation using the 17 United Nations Sustainable Development Goals (SDG) as a structure. It will review the latest thinking of the impact of ESG on corporate thinking and will consider existing decision making, reporting and strategic models and tools in the light of ESG. Your business can benefit from knowledge on current best practice approaches within organisations where it currently exists, while considering the costs of not building ESG into your business culture. The course is highly beneficial for managers interested in bringing the principles of ESG to life and building them into the culture of your organisation. It would also benefit anyone involved in the strategic development, decision making or management reporting processes within your organisation and the associated financial considerations.



What will your employees learn?

Following this course, your employees will be able to:

- Explain the UN's Sustainable Development Goals (SDG) and how they can focus ESG improvements within the business
- Apply ESG principles to your organisation with a particular focus on strategy development, investment appraisal and management reporting
- Explain the impact of ESG initiatives on revenue and costs
- Explain how ESG can drive business efficiency and improved stakeholder perceptions.
- Apply ESG to existing tools such as Balanced and Strategic Scorecards to integrate ESG into strategy and performance evaluation
- Refer to case studies that show the impact of ESG thinking in business



Who is this course designed for?

This course is for managers interested in bringing the principles of ESG to life and building them into the culture of your organisation. It would also suit anyone involved in the strategic development, decision-making or management reporting processes within an organisation and the associated financial considerations.



How is the course delivered to your employees?

All IBTC programmes are available online.



Duration

One-day online course



ESG - Commercial Lending



How does it benefit your business?

This course looks at best practice for banks in incorporating ESG into lending considerations. In-depth understanding of these issues is key for banks relationship managers, credit analysts and risk professionals. It looks at key ESG issues, considering how these impact perceived risks at industry and firm level.

Regulators, investors and customers are increasingly looking at how banks are addressing issues such as climate change and governance, including how their loans books treat ESG considerations. Sustainable finance looks to reward borrowers who perform well on ESG factors, as it signals a resilient business able to service debt finance. Approaches to initially screen investments are analysed and the ways to incorporate ESG factors into a formal credit analysis processed are also covered.

The latest developments in ESG reporting and the role of credit rating agencies in producing data useful for commercial banks are considered. In addition, the course uses case study examples to discuss the different types of sustainable lending facilities such as Green loans and Sustainability-linked loans.



What will your employees learn?

Following this course, your employees will be able to:

- Explore the role of banks in relation to ESG and their importance in transitioning to a net zero carbon position
- Explain approaches to incorporate ESG into the fundamental credit analysis process using models like the UN's SDG
- Understand the latest company reporting requirements in relation to ESG and the use of credit rating organisations in supplying ESG data
- Explain the role of bank loan managers in actively engaging firms in their progress on ESG-related issues
- Understand different types of ESG lending including Green loans and Sustainability-linked loans



Who is this course designed for?

This course will benefit credit analysts and credit risk professionals through reviewing best practice in incorporating ESG into lending considerations.

Relationship managers and related support teams will also benefit in supporting the appraisal and execution of sustainability related loans.



How is the course delivered to your employees?

All IBTC programmes are available online.



Duration

Half-Day online



ESG - Sustainability Reporting



How does it benefit your business?

This course considers developing the requirements for your organisation to report sustainability information in annual reports. It will examine current requirements, impending developments and the likely direction of travel.

It will enable your employees to assess the sustainability information that entities are required to present, the basis and content of that information, and the steps required to enable the preparation of that information. It will also enable anyone reading corporate annual reports to better understand and appraise the information disclosed.

It is highly beneficial to employees in, or considering, a role in corporate reporting as well as those interested in the development of the wider ESG agenda in your business. It will also be useful to those who use or review/audit company annual reports.



What will your employees learn?

Following this course, your employees will be able to:

- Understand the drivers of the development of sustainability reporting requirements
- Discuss the current mandatory reporting requirements (including strategic report requirements and Streamlined Energy and Carbon Reporting)
- Understand the implementation of the Task Force on Climate related Financial Disclosures (TCFD) framework
- Discuss the latest position of disclosure reporting through the IFR



Who is this course designed for?

This course will be useful to your current professionals or those considering a role in corporate reporting. It will also benefit employees who are interested in the development of the wider ESG agenda in your organisation and those who use or review/audit company annual reports.



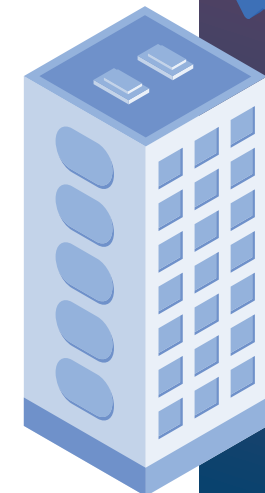
How is the course delivered to your employees?

All IBTC programmes are available online.



Duration

One hour online



Fundamentals for Investment Management



How does it benefit your business?

This introductory course aims to develop an understanding of the key ESG factors that impact your business performance, as well as the methodologies for integration of ESG into the investment analysis process.

ESG factors are becoming increasingly important in investment management.

This is driven by a combination of client demand, new regulations and the materiality of ESG considerations on risk and investment returns.

In addition, the course will consider practical issues such as engagement strategies with investee firms and incorporating ESG into client mandates.



What will your employees learn?

Following this course, your employees will be able to:

- Understand the ESG market and the key ESG issues, such as climate change, impacting long-term investee firm valuations
- Discuss the key drivers to integrate ESG into the investment management process
- Understand ESG reporting and the role of ESG rating agencies in company analysis and valuation
- Overview the different approaches to integrating ESG into analysis and valuation
- Overview client mandates, reporting and engagement strategies with investee firms



Who is this course designed for?

This course is useful for all roles in financial services organisations that require an understanding of ESG investing. This includes roles in sales and distribution, risk, product development, wealth management and advisory roles.



How is the course delivered to your employees?

All IBTC programmes are available online.



Duration

Half day course online



CFA® Certificate in ESG Investing



How does it benefit your business?

This CFA® Certificate in ESG Investing focuses on ESG in the financial services industry, specifically for investment management roles in your organisation.

This CFA® qualification delivers knowledge in your business to manage investments with a focus on integrating ESG issues.

This qualification has been developed with leading firms and is supported by the UN's Principles for Responsible Investment (PRI).

Having employees holding the Certificate gives a clear indication of the importance of ESG within the Investment management firm. Employees will be able to confidently integrate ESG factors into stock analysis and valuation and also able to communicate effectively with both investee firms and clients.

We offer a fully exam-focused approach, delivered by BPP's CFA® qualified tutors, to help your employees stay ahead in this field and develop as dedicated experts in this growth area. In addition, our qualified tutors also have real-world ESG experience, with support available from the moment your employees register on the programme.



What will your employees learn?

Following this course, your employees will be able to:

- Understand the ESG market and how it's incorporated into different asset classes
- Able to discuss megatrends within ESG and the risks and opportunities these create for business
- Consider different approaches and frameworks to incorporate ESG into the investment analysis and valuation process
- Consider effective solutions for stewardship and investee firm engagement on ESG issues
- Carry out client mandates incorporating ESG and understand analytics and reporting on portfolio performance



CFA Institute



Who is this course designed for?

This course is designed for investment professionals who want to know how to integrate ESG into the investment management process. This includes asset managers and research analysts, those working in sales and distribution, product development, wealth management, financial advice, risk, or consulting roles.



How is the course delivered to your employees?

Choice of online study options. All IBTC programmes are available online live, providing ultimate flexibility and efficiency for your business.



Duration

The online tuition for this programme is made up of four sessions of three hours.

The Certificate in ESG Investing has a recommended 130-hour study time.

Your employee will have access to over 15 hours of recorded lectures, question banks and mock exams plus tutor support until the exam day.



CFA® Climate and Investing



How does it benefit your business?

Climate change is a critical risk facing businesses. This qualification supports understanding of the latest developments in climate science and how climate can create risks and opportunities for investee firms. In the transition to net zero, the skills and knowledge developed will be key as funds are increasingly managed with a strong climate action mandate.

The Certificate in Climate and Investing helps your business understand how climate dynamics link to investing and how to integrate this knowledge into the investment management process. The qualification builds in-depth understanding of this field, which is critical as capital markets are expected to play an increasing role in the transition to a low carbon economy.

We offer a fully exam-focused approach, delivered by CFA® qualified tutors, to help your employees stay ahead in this field and develop as dedicated experts in this growth area. In addition, our qualified tutors also have real-world ESG experience, with support available from the moment your employees register on the programme.



What will your employees learn?

Following this course, your employees will be able to:

- Understand the latest knowledge in relation to climate science
- Discuss the implications of climate change and the corresponding risks to financial markets
- Understand the role capital markets are expected to play in allocating capital for the transition to a low carbon economy
- Discuss policy, regulation and corporate reporting developments in relation to
- Understand approaches to incorporate climate into valuation of assets and investment instruments



CFA Institute



Who is this course designed for?

This course is designed for investment professionals who want to know how to integrate climate analysis into the investment management process. As well as asset managers and research analysts, those working in sales and distribution, product development, wealth management, financial advice, corporate reporting, risk or consulting roles will also benefit.



How is the course delivered to your employees?

Choice of online study options. All IBTC programmes are available online live, providing ultimate flexibility and efficiency for your business.



Duration

The online tuition for this programme is made up of four sessions of three hours. The CFA® Certificate in Climate and Investing has a recommended 150-hour study time. Your employee will have access to over 20 hours of recorded lectures, question banks and mock exams plus tutor support until the exam day



Conclusion

- With increasing stakeholder pressure and a greater regulatory burden we need strategy-led action to turn business-as-usual into future-ready business.
-
- According to the Treasury's report, building a greater understanding of the environmental, social and governance risk exposure facing the financial sector is absolutely essential to attaining the financial stability needed to protect the South African economy and its citizens from major external shocks to the financial system. It is also key to building resilience through solvency and effective risk management, as well as balanced and inclusive growth. (From *Financial services industry has key role to play in ESG sustainability*, Marily de Villiers for Min Group and ITWeb, 18 May 2022).

I would like to invite you to engage with us on a potential strategic alliance to put ESG training into action.

IBTC is a BB-BEE level 2 accredited tuition provider with offices in Sandton and Cape Town.



For more information on how IBTC can address your future skills need visit ibtc.co.za or contact us on

info@ibtc.co.za

Tel: 086 111 1411