



GOV. JOSE B. FERNANDEZ, JR.
CENTER FOR SUSTAINABLE FINANCE



Sustainability and Sustainable Finance

Training for Financial Institutions and
Civil Society Organizations

August 17 – 18, 2023

Sustainability and Sustainable Finance Training For Financial Institutions and Civil Society Organizations

Corporate sustainability and sustainable finance provide two perspectives of the same challenge of how the private sector can be more engaged as drivers of change and action toward a healthier and more prosperous planet for all. This requires companies of all sizes and from different sectors to rethink how they do business not just in terms of economic contribution but also in their environmental, social, and governance (ESG) footprints.

However, this is not easy as reducing impacts and improving on ESG performance require internal capacities and resources to implement. Micro, small, and medium enterprises still need to understand the value of integrating sustainability in their business operations. Furthermore, mobilizing resources for these sustainability initiatives requires financial institutions to be ready to finance these as business investments.

The objectives of this training and workshop are to:

- (1) assist financial institutions implement sustainable finance; and
- (2) promote understanding of sustainable finance among civil society organizations.

The program shall enable its participants to learn how to integrate environmental and social risk factors in risk assessment. The program is designed to be a participative and practical training experience to equip the participants with the skills on how to integrate environmental, social, and governance considerations in the operations of their organizations.

IN-PERSON

FPH Case room, G/F

Asian Institute of Management Main Building
123 Paseo de Roxas, Makati City
Philippines 1229

ONLINE VIA ZOOM

Link:

<https://aimedu.zoom.us/j/91726460711?pwd=cW1odWV5Wm5vNWRIRUI2ckdOUUUIUUT09>

Meeting ID: 917 2646 0711

Password: 185670



DAY ONE

Schedule	Activity and Topic	Resource Speaker
8:45 – 9:00 AM	Opening Remarks	Felipe Calderon, CPA, CMA, PhD Asian Institute of Management
9:00 – 10:00 AM	Best practices of Security Bank Corporation <ul style="list-style-type: none">• Governance• Sustainability Framework (Sustainable Finance, Environmental and Social Risk)• Implementation	Nikki Lizares SAVP and Head of Sustainability Security Bank Corporation
10:00 – 10:30 AM	Morning Break and Networking	
10:30 – 11:30 AM	<ul style="list-style-type: none">• Sustainable Finance Innovations: Debt/Bonds and Equity• Risk Management• Sustainable Finance: Global Standards and Best Practices• Impacts and Actual Results	Jo Ann Bueno-Eala Vice President and Head of Sustainability Office Bank of the Philippine Islands
11:30 AM – 12:00 NN	Role of Civil Society Organizations	Victoria Caranay Research and Advocacy Advisor Fair Finance Asia
12:00 NN – 1:30 PM	Group Photo, Lunch Break, and Networking	
1:30 – 2:30 PM	Conversation with Ryan Larobis	Ryan Larobis Corporate Banker
2:30 – 3:00 PM	Afternoon Break and Networking	
3:00 – 4:00 PM	Rural Bank Perspective on Sustainable Finance: Opportunities and Challenges	Atty. Mary Ann Tupasi-Saddul President Rural Bankers Association of the Philippines
4:00 – 5:00 PM	Sustainable Finance Practices of International Banks	Felipe Calderon, CPA, CMA, PhD Asian Institute of Management



DAY TWO

Schedule	Activity and Topic	Resource Speaker
9:00 – 10:00 AM	<p>Sustainable operations and supply (or value) chain</p> <ul style="list-style-type: none">• Using a lifecycle approach in designing resilient supply chains• Sustainable materials• Energy and water consumption• Social dimension• Sustainable criteria in procurement practices	<p>Dr. Maria Angela Zafra Adjunct Faculty Ateneo de Davao University</p>
10:00 – 10:30 AM	Morning Break and Networking	
10:30 – 11:30 AM	<p>Sustainability Practices vs. Greenwashing</p> <ul style="list-style-type: none">• Environmental justice and the role of civil society organizations in sustainability• Definition and examples of greenwashing• Identification and detection of greenwashing practices, and remedies of greenwashing• Transforming business practices from greenwashing to sustainability	<p>Bernadette Victorio Regional Program Lead Fair Finance Asia</p>
11:30 – 11:45 AM	Closing Remarks	<p>Gena Aquino-Arcayera Project Lead in Human Rights Education IDEALS</p>
11:45 AM – 1:30 PM	Group Photo, Lunch Break, and End of Program	

Resource Speakers



NIKKI LIZARES

Nikki Lizares is Head of Sustainability for Security Bank Corporation, one of the largest commercial and retail banks in the Philippines. An environmental scientist and educator, she leads the development of Security Bank's sustainability framework and ESG strategy. She has worked in operational sustainability for more than 15 years, and some of her notable accomplishments include setting up an environmental management and benchmarking system in over 80 global offices for an international law firm and the deployment of a climate and environmental education program in over 200 K-12 schools in the Visayas region of the Philippines. She is currently advocating for the refinement and standardization of sustainability related data for reporting and adoption within the finance industry.



JO ANN BUENO-EALA

Jo Ann Bueno-Eala is Vice President and Head of BPI's Sustainability Office, which ensures that BPI's Sustainability Agenda and its vision and mission to be a Responsible and Sustainable bank are achieved via the bank's strategies, products, services as well as day-to-day operations.

BPI's ESG-related initiatives include:

- BPI's Environmental Risk Assessment (ERA) of assets vis-à-vis natural hazards like earthquakes, typhoons, floods, and volcanic eruption
- BPI's Coal Commitment
- BPI's Sustainable Development Finance (SDF) program, which ensures energy efficiency, renewable energy, climate resilience, green buildings, and sustainable agriculture projects are successful, profitable
- BPI as signatory of TCFD
- Green Building Certification of BPI branches

These cutting-edge innovations allowed BPI to garner the most number of local and international ESG-related accolades and the highest ESG scores among Philippine banks.

Resource Speakers



ATTY. MARY ANN ELIZABETH TUPASI-SADDUL

Atty. Mary Ann Elizabeth Mercado Tupasi – Saddul is the President of the Rural Bankers Association of the Philippines (RBAP) for FY 2022-2023. She is also the President/CEO of Rural Bank of Solano (Nueva Vizcaya), Inc. She also served as a Director of the Agricultural Guarantee Fund Pool (AGFP) from 2017 to 2019. She holds a degree in Bachelor of Science in Hotel and Restaurant Management from the University of the Philippines and finished her Juris Doctor at Ateneo de Manila University in 1995.



DR. MARIA ANGELA ZAFRA

Maria Angela Zafra, DBA is the co-founder and executive director of Strategia Development Research Institute, Inc. (SDRI), a nonprofit research organization based in the Philippines focused on providing policy research, capacity building, and technical assistance in various social and economic development areas. Dr. Zafra's area of work focuses on the nexus of sustainability and the different sectors of societal development. She has completed national and region-wide projects and capacity-building programs for government agencies, international organizations, non-governmental organizations, and the private sector. Dr. Zafra was appointed as a member of the National Panel of Technical Experts for the Climate Change Commission in October 2021. She has a doctorate in business administration from the Ateneo de Davao University, a master's degree in management from the University of the Philippines Mindanao and a bachelor's degree in environmental science from the Ateneo de Manila University. She also completed a postgraduate certificate in public policy from the University of Waikato in New Zealand as a New Zealand ASEAN Scholar. Dr. Zafra is also adjunct faculty at the graduate programs of the School of Business and Governance, Ateneo de Davao University, teaching several courses on research methods, quantitative analysis and economics at the masters and doctorate levels.

Resource Speakers



RYAN LAROBIS

Ryan is a banking professional with over 20 years of extensive experience across top universal banks in the country, mostly in the field of Corporate and Commercial Banking - a segment in charge of providing credit facilities for institutional clients from middle market to conglomerates. As a banker, he also provides financial advisory to the clients. He is presently connected with a top unibank as one of the Team Heads in Commercial Banking.

Ryan has signified interest in Sustainable Finance when it was introduced during his studies at the Asian Institute of Management. As part of the program, he conducted a study on how to operationalize Sustainable Finance in the banking industry – an industry conduit of the ESG implementation.

He graduated with the Executive MBA degree at the AIM in 2021.



FELIPE CALDERON, CPA, CMA, PhD

Dr. Calderon has 34 years banking experience. The first eight years were spent at the Philippine National Bank and followed by four years in two banks in Hong Kong. He later worked for 22 years at the Business Development Bank of Canada in Vancouver.

He holds a BSc in Agribusiness Management from the University of the Philippines in Los Baños and an MSc in International Banking and Financial Studies from Heriot-Watt University in Scotland. He obtained his PhD in Management from the University of St. Gallen in Switzerland, where his thesis was on the topic of sustainable lending. He is also a Canadian CPA and CMA.

Dr. Calderon is currently the Head of the Washington SyCip Graduate School of Business and the Executive Director of the Gov. Jose B. Fernandez, Jr. Center for Sustainable Finance.

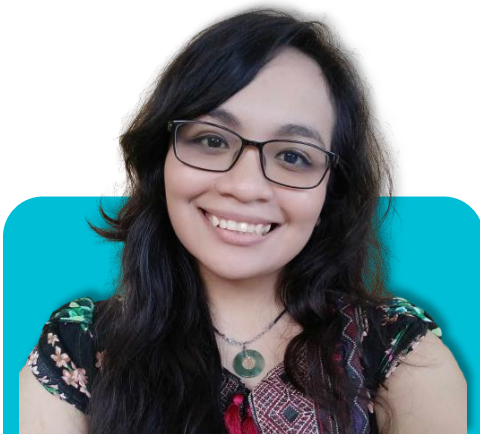
Resource Speakers



BERNADETTE VICTORIO

Bernadette Victorio is an international development and finance specialist with extensive experience delivering high-impact initiatives in a variety of strategic, management, and policy advocacy roles in organizations including the Asian Development Bank (ADB), German International Cooperation Agency (GIZ), and Alliance for Financial Inclusion (AFI). She has a proven track record in influencing policy discussions on financial inclusion, sustainable finance, and ESG (environmental, social and governance) transparency and accountability. Her passion for gender equality is a defining value and key guiding principle both in her personal and professional life. She aims to enable more female voices and leaders to take prominent roles in shaping sustainable and inclusive financial sector policies and practices.

Originally from the Philippines, Bernadette has lived and worked across highly diverse development and cultural contexts in Asia including in Japan, Thailand, Malaysia, and Cambodia. She also worked extensively on assignments to other regions including Africa, Latin America, and the Pacific. Currently, Bernadette leads Oxfam's regional program, Fair Finance Asia, which aims to accelerate policy implementation and action on sustainable finance and responsible cross-border investments across Asia. She holds a master's degree in international development from the International University of Japan.



VICTORIA CARANAY

Victoria Caranay is currently the research and advocacy advisor for Fair Finance Asia (FFA). As part of her role, she manages the flagship regional research and campaigns of FFA. She previously led Fair Finance Philippines from 2018 to 2021 as part of the portfolio she was managing during her time at IDEALS where she was the Economic Rights Program Coordinator. By training, Victoria is a licensed Philippine lawyer, and a political scientist. She is currently based in Malaysia.

Resource Speakers



GENA AQUINO-ARCAYERA

Gena completed her Bachelor's degree in Humanities from the University of Asia and the Pacific in 2012 and obtained her Master of Arts in Political Economy with a specialization in International Relations and Development in 2013 in the same year. She is currently working on her dissertation as part of the major requirement under the Doctor of Public Administration program at the University of the Philippines, Diliman. She works for IDEALS as the Project Lead in Human Rights Education, funded by the United States Agency for International Development. She is also involved as the Advocacy Specialist in the Fair Finance Asia-Philippines funded by the Swedish Embassy in Bangkok, Thailand, which aims to promote sustainable finance in the country.

IN-PERSON

FPH Case room, G/F
Asian Institute of Management Main Building
123 Paseo de Roxas, Makati City
Philippines 1229

ONLINE

Topic: Sustainability and Sustainable Finance Training For Financial Institutions and Civil Society Organizations

Time: Aug 17, 2023 08:45 AM
Aug 18, 2023 09:00 AM

Zoom Meeting Link:

<https://aimedu.zoom.us/j/91726460711?pwd=cW1odWV5Wm5vNWRIRUI2ckdOUUluUT09>

Meeting ID: 917 2646 0711

Passcode: 185670

Note: Please log in at least 10 minutes prior to the start of the training program.



Download zoom application by scanning the QR Code or through <https://zoom.us/download>



LEAD. INSPIRE. TRANSFORM.

ASIAN INSTITUTE OF MANAGEMENT

Eugenio Lopez Foundation Building
Joseph R. McMicking Campus
123 Paseo de Roxas, Makati City
Philippines 1229

*Cover Photo by Kirkamon via Wikimedia
Day One photo by mykelgran via Unsplash
Day Two photo by John Hernandez via Unsplash*