

***Strengthening African Churches and Church-Related
Organizations in their Assets Management through
Ethical Investments***

ACAP III

***Workshop: Responsible Asset Management and Ethical principles for
investment***



Photo: participants to ACAP II in Nairobi, Kenya 21-23 September 2017

Welcome to the first workshop of the African Church Assets Programme III

It is our great pleasure to welcome you to this workshop on Responsible Asset Management and Ethical principles for investment. Together with you, we wish to take stock of the current status and future priorities, challenges and opportunities in the areas of Leadership, Ethics, Governance and Sustainability in your institution. Together, we will share 'best practices' and 'best challenges' as Asset Owners and create a common understanding of Ethical Investments, taking your role as a social and political actor seriously.

The African Church Assets Programme (ACAP) has so far seen two phases. The Programme was initiated and undertaken in collaboration with the All African Conference of Churches (AACC) and with the support of Brot für die Welt to support churches and Church-Related Organizations in Africa through training, preparation of inventories and action plans to improve the management of their assets and thereby strengthen their institutional sustainability.

This third phase will focus on orientation and capacity building around what ethical investments are, identification of church funds that are available for investment and of church projects that would have potential for and be attractive to external investors. You will be enabled to take the steps needed to ensure that your institutions' offers for investors are robust and compliant with reporting and accountancy standards and to build and develop ethical investments portfolios that are diversified. You will be exposed to education about ethical investments, receive further skills, resources and training that strengthen the awareness of- and need for ethical investments in assets and provide opportunities for networking.

A baseline study on of ethical principles for investments in selected Churches and CROs in Africa has been carried out, which will serve as a solid basis to further asses the current investment behaviour of the project participants and create a basis for the dissemination of ethical principles for investment. We plan to share the results of this study with you and, moreover, plan to deeper assess your current attitude, practice and needs in Leadership, Ethics, Governance and Sustainability. Together, we will create action plans for responsible asset management, and/or further build on the results of ACAP II.

Also reflecting on what 'Ethical Investment' means for Churches and Church-related Organisations in Africa, we will devote a part of the programme to commonly, in a participatory setting, create an 'Ethical and Sustainable Investment Charter', for which we bear the responsibility to disseminate and advocate on a national level. With this workshop being the first step in the ACAP III programme, we will also devote time to prepare for the future national conferences in the autumn of 2019.

As the institutions that play a key role in spirituality, formation, (mental) health and well-being of individuals and groups, we are all responsible for the long term prosperity of our societies. Together with our combined efforts, we can achieve this.



Prof. Dr Obiora Ike
Executive Director Globethics.net



Programme summary

| | Day 1 – Tuesday 21 May | Day 2 – Wednesday 22 May | Day 3 – Thursday 23 May |
|------------------------------|--|---|---|
| Morning first day: 8.15 | <ul style="list-style-type: none"> Arrivals, registrations and refreshments | | |
| Morning 1 9.00 – 11.00 | <ul style="list-style-type: none"> Arrival and registration Official Opening Welcome address LEADERSHIP: From Preaching to Investing | <ul style="list-style-type: none"> Opening with reflection Today's goals GOVERNANCE: Strong systems to support growth Presentation of Baseline survey results on GOVERNANCE | <ul style="list-style-type: none"> Opening with reflection Today's goals Group sessions: Response and feedback from participants, needs assessment Work sessions: Assessment of current investment and asset management practices |
| Morning Break | 11.00 – 11.30 | | |
| Morning 2 11.30 – 13.00 | <ul style="list-style-type: none"> Presentation Baseline survey results on LEADERSHIP Group dialogues, sharing of challenges, opportunities and best practices on LEADERSHIP | <ul style="list-style-type: none"> Group dialogues, sharing of challenges, opportunities and best practices on GOVERNANCE | <ul style="list-style-type: none"> Co-creation of ethical guidelines and 'Ethical and Sustainable Investment Charter' The dissemination and promotion of the 'Ethical and Sustainable Investment Charter' |
| Lunch | 13.00 - 14.00 | | |
| Afternoon 1 14.00 – 15.30 | <ul style="list-style-type: none"> ETHICS: The integration of Ethics in (religious) Institutions Presentation Baseline survey results on ETHICS | <ul style="list-style-type: none"> SUSTAINABILITY: Aligning with social and environmental goals Presentation of Baseline survey results on SUSTAINABILITY | <ul style="list-style-type: none"> Design of action plans or update of former action plans on responsible asset management and ethical principles for investment |
| Afternoon Break | 15.30 – 16.00 | | |
| Afternoon 2 16.00 – 17.30 | <ul style="list-style-type: none"> Group dialogues, sharing of challenges, opportunities and best practices on ETHICS | <ul style="list-style-type: none"> Group dialogues, sharing of challenges, opportunities and best practices on SUSTAINABILITY | <ul style="list-style-type: none"> Roadmap to the national conferences: commitments and action plans Official Closing |

Methodology and expectations

With experts being present to share their knowledge and experiences on asset management and the four principles within the L.E.G.S. framework, we aim to devote the first part of the workshop to the sharing of knowledge and the baseline survey results. The workshop participants are being stimulated throughout these sessions to provide their own inputs to what is shared and, moreover, serve as resources themselves. Seeing that many participants have also taken part in the second and first phase of the ACAP programme, we aim for an approach where all available knowledge in the room is used. With much time devoted to the sharing of best practices, input from all participants in this part of the workshop is anticipated.

In the workshop programme, time has been allocated for your spontaneous contributions. Nevertheless, if you already have a specific topic in mind, a best practice to share, a workshop to initiate or expertise to bring, and would like to have a designated time and place for this in the programme, let us know through email and we will together look for possibilities. Kindly send an email to: nol@globethics.net

During the second part, which will be even more participatory, involvement and initiative is expected in the common creation of a 'Ethical and Sustainable Investment Charter' as well as an exchange on the delivery and dissemination of this charter on a national and institutional level. Together with the Globethics.net ACAP taskforce, the participants are expected to design a roadmap that leads to the two national conferences in the fall of 2019, and commit to several actions dedicated to:

- Their own development in the integration of ethical and sustainable principles in project investments.
- The design of an action plan (or, for participants ACAPII: a follow-up to their already existing action plan) and accompanying pitch for the national conference, where their increased knowledge in responsible asset management is implemented in a programme, project or institutional change.
- The dissemination and promotion of the 'Ethical and Sustainable Investment Charter' on a national level
- The mobilising of private- and public sector partners to participate in the two national workshops

Practical information and preparations

Some answers to frequently asked questions and other essential information we would like you to be aware of:

- Since this workshop will have a highly participatory focus, we all invite you to bring a device (laptop and/or tablet preferred, smartphone as a second option) that can connect with the internet through WIFI.
- Kindly bring with you (preferably digital documents) any useful previous documentation you might have on the themes that will be central in this workshop and the ACAP programme.
- The support that we have offered you with the travel costs will be reimbursed during the workshop, provided that you have filled in the travel support form and have sent this, along with your flight details, to Globethics.net.

Detailed Programme

Tuesday 21 May

Focus on: Leadership and Ethics

08:15 Arrivals, registration and refreshments

9.00 Welcome, opening remarks and messages

Prof. Dr Obiora Ike, Globethics.net

Dr. Bright Mawudor, AACC

Monica Redecker, Brot fur die Welt (message)

General Introductions Participants

Presentation of the workshop programme

10.00 **LEADERSHIP: From Preaching to Investing: Responsible Asset Management and Ethical Principles of Investment. Challenges and Opportunities**

Presentation by Bright Mawudor

BOOK LAUNCH: African Church Assets Handbook

11.00 Break

11.30 **Presentation of Baseline survey results on LEADERSHIP: 'Current investment and asset management practices within Churches and Church Related Organisations in Africa and the L.E.G.S. framework'**

Presentation by Nadia Balgobin

12.00 **Group dialogues, sharing of challenges, opportunities and best practices on LEADERSHIP**

Facilitation by Ilse Nol, moderation by Bright Mawudor

13.00 Lunch Break

14.00 **Introduction to Globethics.net**

Presentation by Ilse Nol

14.15 **ETHICS: The integration of Ethics in Asset Management and Investment strategies of Religious Institutions**

Presentation by Obiora Ike

15.00 **Presentation of Baseline survey results on ETHICS: 'Current investment and asset management practices within Churches and Church Related Organisations in Africa and the L.E.G.S. framework'**

Presentation by Nadia Balgobin

15.30 Break

16.00 **Group dialogues, sharing of challenges, opportunities and best practices on ETHICS**

Facilitation by Ilse Nol, moderation by Obiora Ike

Wednesday 22 May

Focus on: Governance and Sustainability

- 9.00 **Opening with reflection**
Volunteer from participants
Yesterday's recap, today's goals
- 9.30 **GOVERNANCE: Strong systems to support growth: financial management, legal status, investment policies**
Presentation by William Ogara
- 10.30 **Presentation of Baseline survey results on GOVERNANCE: 'Current investment and asset management practices within Churches and Church Related Organisations in Africa and the L.E.G.S. framework'**
Presentation by Nadia Balgobin
- 11.00 Break
- 11.30 **Group dialogues, sharing of challenges, opportunities and best practices on GOVERNANCE**
Facilitation by Ilse Nol, moderation by William Ogara
- 13.00 Lunch Break
- 14.00 **SUSTAINABILITY: aligning with social and environmental goals, asset management and procurement processes**
Presentation by Nadia Balgobin
- 14.30 **Presentation of Baseline survey results on SUSTAINABILITY: 'Current investment and asset management practices within Churches and Church Related Organisations in Africa and the L.E.G.S. framework'**
Presentation by Nadia Balgobin
- 15.30 Break
- 16.00 **Group dialogues, sharing of challenges, opportunities and best practices on SUSTAINABILITY**
Facilitation by Ilse Nol, moderation by Nadia Balgobin

Thursday 23 May

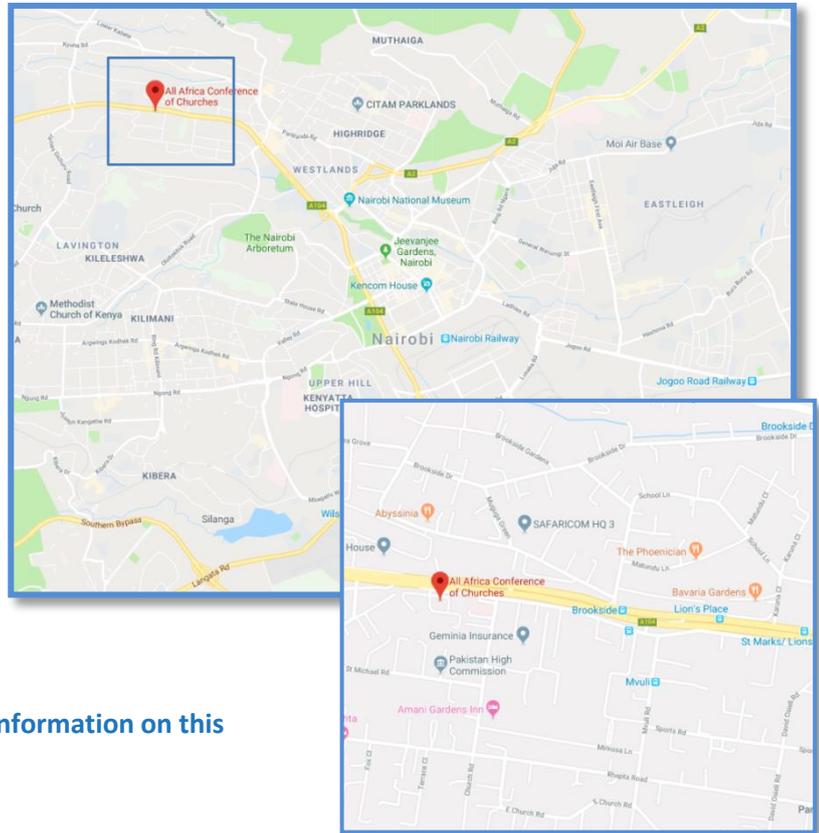
Focus on: Practical applications, Ethical Guidelines, Roadmap to National Conferences

- 9.00 **Opening with reflection**
Volunteer from participants
Yesterday's recap, today's goals
- 9.30 **Group sessions: Response and feedback from participants, sharing of experiences so far, needs assessment**
Facilitation by Obiora Ike, support by Ilse Nol
- 10.00 **Work sessions: Assessment of participants' current investment and asset management practices with support from the L.E.G.S framework.**
Facilitation by Nadia Balgobin, support by Ilse Nol
- 11.00 Break
- 11.30 **Co-creation of ethical Guidelines and 'Ethical and Sustainable Investment Charter'**
Participatory active session
Facilitation by Nadia Balgobin and Ilse Nol
- 12.30 **The dissemination and promotion of the 'Ethical and Sustainable Investment Charter'**
Participatory active session
Facilitation by Nadia Balgobin and Ilse Nol
- 13.00 Lunch Break
- 14.00 **Design of action plans or update of former action plans on responsible asset management and ethical principles for investment**
Participatory active session
Facilitation by William Ogara and Obiora Ike
- 15.30 Break
- 16.00 **Roadmap to the National Conferences: Support and accompaniment in asset management action plans, advocacy and mobilization, commitments**
Participatory active session
Facilitation by Obiora Ike, support by Ilse Nol
- Workshop evaluation**
- 17.30 **Official Closing**
Obiora Ike

Venue



All Africa Conference of Churches
Waiyaki Way - Nairobi, Kenya.
P.O. Box 14205-00800 Westlands,
Nairobi, Kenya.



Website

Documentation, photos and other useful information on this programme may be found here:
<https://www.globethics.net/acap-iii>

Sponsor and Partner



Bread for the World
Germany

Useful contacts

Workshop Queries



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Fire and Ambulance Services

999

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Accommodation Queries



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