



ASISA

FOUNDATION

Annual Stakeholder Event

Report on 2016 activities

24 February 2017

AGENDA



ASISA

FOUNDATION

Annual Stakeholder Event

Time	Topic	Presenter
10:05	Welcome Chairman's Address	Isaac Ramputa
10:15	CEO Report	Ruth Benjamin-Swales
10 30	Report on Programmes	
10:30	➤ TVET Colleges	Genesis Analytics
10:45	➤ Project Qaphela & WageWise	Genesis Analytics & Grounded Media
11:15	Comfort break	
11:30	➤ FLAME	Grounded Media & Driven
11:50	➤ Retirement Fund Trustee Education	ASISA Academy
12:00	Financial Report	CEO
12:15	Q&A	Janete Nel
12:30	Closing remarks & Thanks	CEO
	Lunch	



ASISA

FOUNDATION

Chairman's Address

Mr Isaac Ramputa

Stakeholder Event

CEO's REPORT

Stakeholder Event



ASISA

FOUNDATION

- Vision, Mission & Profile
- Highlights of 2016
- Consumer Financial Education Programmes
- Acknowledgements
- Governance
- Strategic Vision
- Challenges & Opportunities

VISION & MISSION

Stakeholder Event



ASISA

FOUNDATION

To implement **effective and meaningful** consumer financial education initiatives that have a **significant and sustainable impact** on South African society through greater **financial capability** and **economic participation** by particularly the **poor and needy**

To **foster the future** of South African society and the Savings and Investment industry through effective, objective and targeted consumer financial education to facilitate greater **financial inclusion**

PROFILE

Stakeholder Event



ASISA

FOUNDATION

- Industry initiative
- Trust, NPO, Broad-Based Ownership Scheme
- Board of Trustees – industry /govt
/community /labour
- Compliant with FSC - CFE or SED
- Beneficiary of ASISA ESD Fund



CE Guidelines GN800(a) per FS800

- Content meets definition of CE
- Independent Monitoring & Evaluation
- Target Audience
 - earn < R180 000 pa
 - At least 25% from rural or peri-urban areas
- Interactive programmes >60%
- Limited branding
- No charge

Socio Economic Development per FS700

HIGHLIGHTS OF 2016

Stakeholder Event



ASISA

FOUNDATION

- Expanded Capacity
 - Project manager – Ivor Msimang
- Extended Programmes
 - Impact/Type/Reach
- Funding milestones
- Governance intact
- Strategic partnerships

CFE PROGRAMMES

Stakeholder Event



ASISW

FOUNDATION



ASISW FOUNDATION

WAGEWISE
FINANCIAL LITERACY FOR THE WORKFORCE



ASISW



FOUNDATION

SAVER WAYA WAYA



ASISW



FOUNDATION

FLAME

FINANCIAL LITERACY AND MICRO-ENTERPRISE



ASISW



FOUNDATION

RFTE

RETIREMENT FUND TRUSTEE EDUCATION

PARTNERS - DELIVERY

Stakeholder Event



ASISA

FOUNDATION



ASISA

ACADEMY

G:ENESIS



PARTNERS - FUNDERS

Stakeholder Event



ASISA

FOUNDATION



D Shapiro

GOVERNANCE

Stakeholder Event



ASISA

FOUNDATION

- Board of Trustees
 - New appointees
 - Met 4 times during 2016
- Strategic Planning session Oct 2016
- Lodged amendments to Trust Deed
- Audit reports
 - Comply with FSC Code iro CFE and SED
 - Comply with B-BOS requirements
 - AFS - Unqualified audit report from PWC

Governance



ASISA

FOUNDATION

Stakeholder Event

Trustees	Name	Constituency
Chairman	Isaac Ramputa	Financial Sector Council
Vice Chair	Ingrid Goodspeed	Formerly National Treasury
	Tebello Radebe	Community (Financial Sector Community Coalition)
	Jan Mahlangu	Organised Labour
	Amanda Khoza	ASISA Transformation Skills Development and Education Committee
	Vuyela Killy Bacela	ASISA Consumer Education Standing Committee
	Ruth Benjamin-Swales	ASISA Foundation CEO
By Invitation	Janete Nel	ASISA CFE Point Person
By Invitation	Trevor Chandler	ASISA Founder

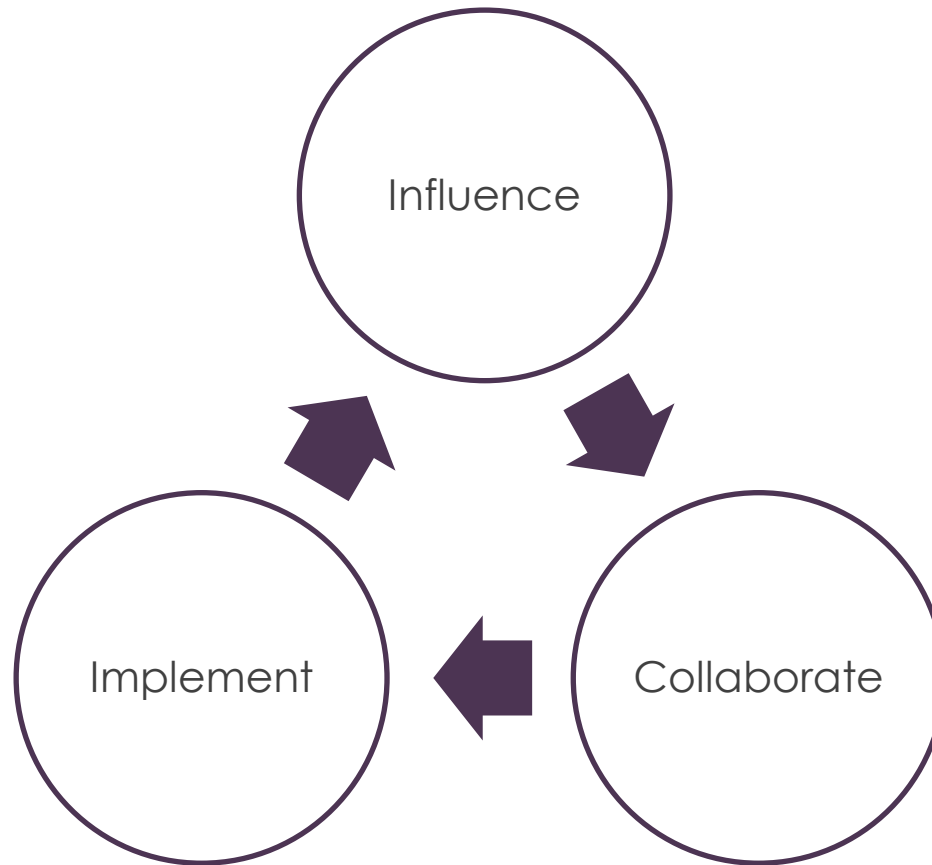
STRATEGIC VISION to 2020

Stakeholder Event



ASISA

FOUNDATION



STRATEGIC COLLABORATIONS

Stakeholder Event



ASISA

FOUNDATION

- ASISA CFE SC
- BATSETA
- FSB
- NCEFC
- NUM
- NASASA
- FPI
- IFIE
- OECD



ASISA

FOUNDATION

Annual Stakeholder Event

Report on 2016 activities

24 February 2017

FUNDING 2016



ASISA

FOUNDATION

Stakeholder Event

	Total to 28/02/2016	Total to 31 Dec 2016
Income Received	R30,0m	R39,6m
Project Expenses		
Hammankraal Pilot	R2,2m	R2,2m
SWW TVET Colleges	R1,0m	R3,7m
SWW FLAME	-	R3,0m
SWW Workers	R3,3m	R6,5m
RFTE	R1,0m	R2,5m

FUNDING

Stakeholder Event



ASISA

FOUNDATION

To 31 Dec 2016	General CFE	SWW Workers	RFTE	Admin	Total
Received	R16,1m	R10,9m	R 7,7m	R4,9m	R39,6m
Spent	R 8,9m	R 6,5m	R 2,5m	R0,5m	R18,4m
Available but Allocated	R 7.2m	R 4,4m	R 5,2m	R4,4m	R21,2m

FUNDERS



ASISA

FOUNDATION

Stakeholder Event

The ASISA Foundation would like to gratefully acknowledge the financial contributions of the following funders:



D Shapiro



CHALLENGES & OPPORTUNITIES

Stakeholder Event



ASISA

FOUNDATION

- Scale
- Funding
- Access to RF Trustees



ASISA

FOUNDATION

Q&A

www.asisa.org.za



ASISA

FOUNDATION

THANK YOU.

www.asisa.org.za