

IIBF

Impact Investment & Blended Finance  
for Development Agencies and Foundations

3-Day Executive Program

August 28th to 30, 2019 - Zurich

2019

Blended  
Finance  
Program

How to use public funds to attract private investment  
for high-impact enterprises addressing the SDG



University of  
Zurich <sup>UZH</sup>

Department of Banking and Finance  
Center for Sustainable Finance and Private Wealth



SOCIAL FINANCE  
ACADEMY

**Impact Investment:**

Investments into organizations, projects and funds that intentionally generate a positive social and/or environmental impact alongside a financial return.

**Blended Finance:**

The strategic use of development finance and philanthropic funds to mobilize private capital flows to emerging and frontier markets.

With support from:



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

**Swiss Agency for Development  
and Cooperation SDC**

**Ready to use your resources for maximum impact?**

To use public funds more effectively and mobilize private investment to achieve the [Sustainable Development Goals \(SDGs\)](#) has become a key concern of many development agencies and donor organizations. While the idea to create blended finance models is compelling, one specific approach holds particular promise: empowering high-impact enterprises with market-based solutions to scale and deliver positive impact in a sustainable way – a bottom-up approach.

This actionable, practice-driven program is specifically designed for providers of public or philanthropic funding, who strive to maximize the impact of their grants or investments and want to be on top of the most innovative solutions and trends. It includes outstanding lecturers, has been tested in multiple workshops for the [Swiss Agency for Development and Cooperation \(SDC\)](#) and received exceptional feedback.

The three-day program will provide valuable insights on strategies and instruments to “leverage” own resources by blending it with private investment for small and growing businesses in developing and emerging countries. It will also shed light on the whole spectrum of finance for impact and international development. A specific focus will be on [catalytic financing tools](#) that are able to attract additional capital for high-impact enterprises.

The program is organized by the [University of Zurich Center for Sustainable Finance and Private Wealth \(CSP\)](#), [Convergence](#) and the [Social Finance Academy](#) (by [Roots of Impact](#)), with support from the SDC.



### Participants:

Project and program managers in development agencies, public or multilateral organizations and foundations with a focus on international development

### Format & Venue:

3-day on-site program at the University of Zurich CSP

### Dates:

August 28 to 30, 2019 (Wednesday morning to Friday afternoon)

### Contribution:

Regular fee CHF 3,950.- per participant

Early bird discount (registration until April 30, 2019): CHF 2,950.- per participant

### Information and Registration:

The program has limited space to ensure a personal, intensive and practice-driven learning experience. For more information please contact: [cmoehrle@roots-of-impact.org](mailto:cmoehrle@roots-of-impact.org) or register directly at: <http://www.finance-weiterbildung.uzh.ch/static/csp-registration/csp-registration.php>

### Planned Training Address

University of Zurich  
Rämistrasse 59  
8001 Zurich, Switzerland

## Content Outline

This hands-on learning experience will deliver **practical, actionable and relevant knowledge** on how to mobilize private investment for sustainable development and use catalytic financing solutions for creating impact at scale:



The role of the private sector for achieving the SDGs



Introduction to impact investing and blended finance



Different approaches to attracting private capital



Choosing the right instruments to catalyze private investment



Pay-for-success instruments



The role of impact management



Mis-conceptions and mis-directions



Case studies: solutions from the field

## Participants will:

- Understand the **huge potential of the private sector** – both companies and investors– to contribute to international development, as well as recognize the **key contribution of small and growing businesses**
- See impact investment and private sector resources as a promising source of capital to be integrated into public and philanthropic strategies
- Identify new ways of **capacity building, catalytic capital and funding mechanisms** to scale high-impact enterprises.
- **Overcome market failures and structural challenges** by blending different types of capital more effectively
- Gain a deeper understanding of impact, alignment of interest and additionality to **design the right incentives and the optimal mix of capital sources**
- **Inspire colleagues and peers** with state-of-the art tools and best practices



88% of the participants in the 2018 iteration rated the program “very good” or “excellent”

*“The results from our **in-house trainings** were exceptional as nearly 100% of participants would recommend this workshop to their peers and 80 % would likely incorporate what they have learned in their work.”*

*– Dr. Peter Beez, Head of Focal Point Employment and Income, SDC*

*“The **speakers’ wealth of knowledge**, enthusiasm and experience were excellent.”*

*“The program was **enlightening** to me and really exceeded my expectations.”*

*“I really enjoyed the training and think that it was **well organized**.”*

*– Participants in the 2018 program iteration*

## Tailored Onboarding

You are invited to have a structured discussion with our program team in an **individual onboarding call** before the training takes place. We will also design **individual pre-course** learnings that will be an integral part of the executive program.

The onboarding will include exploring your personal objectives, circumstances and background, discussing your pre-course learnings and investigating any specific issues that you would like us to cover during the 3-day learning experience in Zurich.

This will also allow us to elaborate on the concrete program objectives and tailor the program to the needs of the participants.

Interested in scheduling your individual onboarding session?

Please contact **Christina Moehrle**,  
Roots of Impact & Social Finance  
Academy at:  
[cmoehrle@roots-of-impact.org](mailto:cmoehrle@roots-of-impact.org)

## Selection of Planned Lecturers



**Karen E. Wilson**

Finance for Sustainable  
Development, DCD, OECD

Karen E. Wilson has been working at the OECD since 2009 with a focus on impact investment and private finance for sustainable development. She is also an Associate Fellow at Saïd Business School at Oxford University and a Visiting Lecturer at the Stockholm School of Economics in Riga. Karen is the Founder of GV Partners, a research and consulting firm focused on entrepreneurship and finance.



**Jeremy Nicholls**

Former CEO of Social Value UK  
& International

Until June 2018, Jeremy Nicholls was the CEO of Social Value UK and Social Value International, both membership organisations for individuals and organisations supporting principles and standards in accounting for social and environmental value. He chairs the British Standards Institute's social value subcommittee and is a member of the IRIS advisory committee, the Social Value Taskforce and the Social Stock Exchange admissions panel.



**Dr. David Wood**

Director, Initiative for Responsible  
Investment at Harvard University

David Wood is an Adjunct Lecturer in Public Policy and the Director of the Initiative for Responsible Investment (IRI) at the Hauser Institute for Civil Society, John F. Kennedy School of Government at Harvard University. Current projects include his work with pension fund trustees on responsible investment policies and a global survey of the relationship between public policy and impact investment.



**Aakif Merchant**

Senior Associate, Convergence

Aakif Merchant leads Convergence's learning and capacity building programs, supporting various organizations to develop their capacity to participate effectively in blended finance transactions. He brings over 6 years of experience as a management consultant, most recently as Principal of NeXus Consulting Group, and worked as Dasra, India's leading venture philanthropy foundation.

## Selection of Planned Lecturers (cont.)



**Dr. James Gifford**

Head of Impact Investing, UBS  
Wealth Management

Since 2017, James Gifford is CIO Head of Impact Investing at UBS Wealth Management. In addition, he is a Senior Fellow at the University of Zurich Center for Sustainable Finance and Private Wealth and Adjunct Professor at Griffith University. Previously, he was Director of Impact at Tau Investment Management and Founding Executive Director of UN-backed Principles for Responsible Investment.



**Dr. Falko Paetzold**

Managing Director, Center for Sustainable Finance and Private Wealth

Falko Paetzold initiated and leads the Center for Sustainable Finance and Private Wealth (CSP) at the University of Zurich, a spin-off from the Next Gen Impact Investing program he co-initiated at the Initiative for Responsible Investment at Harvard University. He also developed sustainable investing funds at Bank Vontobel AG, and advised banks and family offices as a partner with the Contrast Capital consultancy.



**Bjoern Struwer**

Founder and CEO, Roots of  
Impact

Bjoern Struwer is Founder and CEO of Roots of Impact, an impact finance advisory firm working with public funders, philanthropists and impact investors globally. After leaving the traditional finance sector, Bjoern dedicated his work to designing and implementing effective solutions for financing social impact at scale. He is Senior Fellow at the Center for Sustainable Finance and Private Wealth at University of Zurich.



**Dr. Rory Tews**

Programme Manager, Roots of  
Impact

Rory Tews is Programme Manager at Roots of Impact and manages a multi-year blended finance project in Latin America in partnership with the SDC and New Ventures. He has co-developed a new impact optimization approach. His academic work focuses on socio-cultural analysis of the emergence of social entrepreneurship in the broader institutional framework.