

Three-day executive program

Impact Investment & Blended Finance for Development Agencies & Foundations

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



**University of
Zurich** UZH

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



SOCIAL FINANCE
ACADEMY



Executive Program

Theme:

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

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

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](#).

With support from:



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development
and Cooperation SDC



Participants:

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

Format & Venue:

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

Dates:

August 29 to 31, 2018
(Wednesday morning to Friday afternoon)

Contribution:

Regular fee CHF 3,950.- per participant

Early bird discount (registration until April 30, 2018): 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 or register directly at: <http://www.finance-weiterbildung.uzh.ch/static/csp-registration/csp-registration.php>

University of Zurich
Center for Sustainable Finance and Private Wealth
Plattenstrasse 32, 8032 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 - case studies and best practices
- Introduction to impact investing and blended finance
- Different approaches to attracting private capital
- Choosing the right instrument to catalyze private investment
- Pay-for-success instruments
- The role of impact management
- Mis-conceptions and mis-directions
- Case studies: impact investments, blended and innovative finance solutions from the field

Participants will:

- Understand the huge potential of the private sector - in particular of small and growing businesses - to contribute to international development
- 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.

Ready to use the resources for maximum impact?

Register now to raise the bar and become more effective!

Testimonial

Feedback from blended finance trainings @ SDC performed by the



"The results from the 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, Swiss Agency for Development and Cooperation (SDC)

Tailored Onboarding



Before you join our Executive Program, you are invited to have a **structured discussion** with our program team in an **individual onboarding call** before the training takes place.

This includes exploring your personal objectives, circumstances and background, as well as investigating any specific issues that you would like us to cover during the 3-day learning experience in Zurich.

This will allow us to elaborate the program objectives, and to 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, cmoehrle@roots-of-impact.org

Our Lecturers & Guest Speakers

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 Said 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.

Joan M. Larrea

CEO of Convergence



Joan M. Larrea is the CEO of Convergence, the global network for blended finance. Prior to Convergence, she led the U.S. Overseas Private Investment Corporation's (OPIC) efforts to partner with philanthropic and private investors to increase capital flows to OPIC's target markets. While at OPIC, she also directed a pilot program to finance smaller, high impact, and innovative funds, many of which drew on blended finance structures.

Jeremy Nicholls

CEO of Social Value UK & International



Jeremy Nicholls is the CEO of Social Value UK and Social Value International (until June 2018), which are 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. 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.

Our Lecturers & Guest Speakers (cont.)

Dr. David Wood

Initiative for Responsible Investment at Harvard KS



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.

Dr. Falko Paetzold

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.

Dr. Annette Krauss

Center for Sustainable Finance and Private Wealth



Annette Krauss is Director of Teaching of the Center for Sustainable Finance and Private Wealth at the University of Zurich. She is responsible for developing the for-credit consecutive and executive teaching on sustainable finance at the Department. Her research interests include microfinance market development and investment channels as well as sustainable and impact investment strategies.

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.

Our Lecturers & Guest Speakers (cont.)

Dr. Rory Tews

Programme manager at 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, the IDB/MIF 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.

Guest speakers and live case studies include:

