

2-Day Executive Program May 14th to 15th - Zurich

2020

Blended Finance Program

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

Cover picture by Neil Palmer (CIAT)













Expect the Unexpected – Expand the Known

With this 2-day executive program, we will take you on a journey. The goal is that your trip will not end here: To use public or philanthropic funds more effectively and mobilize private investment to achieve the Sustainable Development Goals (SDGs) needs curiosity, dedication and practical tools that development agencies, public/ multilateral organizations and foundations can effectively put into practice.

In this first stage of the journey, we will map the territory, frame the environment, introduce you to the culture, hint to stumbling blocks and focus on a promising path: How to empower high-impact enterprises with market-based solutions to scale and deliver positive impact in a sustainable way - a bottom-up approach.

Our lecturers and experts will be your guides to the world of blended finance & impact investment on this trip. They will provide state-of-theart knowledge, lead you through interactive sessions and answer your burning questions in a trusted environment. In addition, you will benefit from experiences that your peer travelers will bring from many fields. Carefully selected case studies and group challenges will enrich the experience with practical insights, different stakeholder perspectives and the do's and don'ts of discovering impact finance the novel way. Expand your horizon and become inspired!

Bjoern Struewer Roots of Impact Joan M. Larrea Convergence Dr. Falko Paetzold University of Zurich - Center for Sustainable Finance and Private Wealth (CSP)



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





Participants:

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

Format & Venue:

2-day on-site program at the University of Zurich

Dates:

May 14th to 15th, 2020 (Thursday morning to Friday evening)

Contribution:

Regular fee CHF 2,950.- per participant Early-bird discount CHF 2,450.- per participant for a registration until January 31st, 2020

Key Takeaways:

 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

Program Targets & Details

- 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



IIBF Impact Investment & Blended Finance for Development Agencies and Foundations



Two live cases planned in addition

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Friday, May 15th, 2020 Location: University of Zurich, Zurich, Switzerland **Tentative Agenda: Deeper Dive into Core Areas** Fill Your Energy Tanks: Small Breakfast 09:00-09:30 09:30 - 12:00 Introducing The Travel Tools: The Latest in Blended Finance Approaches and Instruments Aakif Merchant Meet & Greet: Light Lunch 12:00 - 13:00 13:00 - 14:00 Discussing the Culture: Misconceptions in Impact Investing and Blended Finance Impulse by Bjoern Struewer Tracking Your Trip: How Impact-Linked Finance Can 14:00 - 15:30 **Drive Change and Create Results** Dr. Rory Tews (Roots of Impact) 15:30 - 16:00 Boost Your Energy: Tea, Coffee & Fruit Break 16:00 - 17:30 Engaging the Next Generation: How High-Net Worth Millennials Approach Responsible & Impact Investing Dr. Falko Paetzold (University of Zurich CSP) 17:30 - 18:30 Wrap-Up: What Did We Learn? Open Q&A with Bjoern Struewer, Aakif Merchant & Falko Paetzold Farewell **Certificates of Completion for participants**

> I still have some questions Write to Christina Moehrle

I want to enroll in the program Go to application form

Selection of Planned Lecturers



Karen E. Wilson **Finance for Sustainable**

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.



Jeremy Nicholls

Lead Conceptual Frameworks, IMP

Jeremy Nicholls is Professor of Social Value and Impact at Staffordshire University & Lead on Conceptual Frameworks at the Impact Management Project (IMP). Until mid 2018, he was the CEO of Social Value UK and Social Value International, both membership organisations supporting principles and standards in accounting for social and environmental impact. He also chairs the British Standards Institute's social value subcommittee and is a member of the IRIS advisory committee and the Social Value Taskforce.



Aakif Merchant

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 philantropy foundation.



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 is also the Academic Lead of the Initiative for Blended Finance. Previously, he developed sustainable investing funds at Bank Vontobel AG, and advised banks and family offices as a partner with the Contrast Capital consultancy.

IIBFImpact Investment & Blended Finance
for Development Agencies and Foundations



Bjoern Struewer Founder and CEO, Roots of Impact

Bjoern Struewer is Founder and CEO at Roots of Impact, a specialized advisory firm dedicated to pioneering effective financing solutions for scaling high-impact enterprises. After leaving the banking industry, he started to work closely with public funders and impact investors to scale enterprises and innovations with strong potential for positive impact. He leads the Initiative for Blended Finance at the University of Zurich and is Senior Fellow at the Center for Sustainable Finance and Private Wealth as well as mentor at the Harvard Kennedy School's Impact Investment for the Next Generation program.



Dr. Rory Tews Program Manager, Roots of Impact

Rory Tews is Program Manager at Roots of Impact where he manages a multi-year blended finance project in Latin America with the Swiss Agency for Development and Cooperation and New Ventures. He has also co-developed a new impact optimization approach and focuses on impact assessment and guiding social entrepreneurs on impact generation, incentives and measurement.

Program Facilitator

If you still have some questions, write to: cmoehrle@roots-of-impact.org



Christina Moehrle Advisor. Roots of Impact

Christina Moehrle is Advisor at Roots of Impact and Education Lead of the Initiative for Blended Finance at the University of Zurich. She facilitates and manages the IIBF program since inception in 2018 and brings more than 20 years of structured finance, venture capital, investor relations and communications expertise with her. After leaving the traditional finance sector in 2010, innovative impact and blended finance solutions became her passion and profession. At Roots of Impact, she focuses on communications and creating educational content for impact enterprises.