

IIBF

Impact Investment & Blended Finance  
for Development Agencies and Foundations

3-Day Executive Program

September 8th to 10th - Zurich

2021

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)



Initiative for  
Blended Finance  
at the University of Zurich



University of  
Zurich<sup>UZH</sup>



### 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.



## 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, features inspiring live cases and received exceptional feedbacks in several program runs since inception in 2018.

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 [Initiative for Blended Finance at the University of Zurich](#), with program partners [Roots of Impact](#), [University of Zurich Center for Sustainable Finance and Private Wealth](#), and [Convergence](#).





**Participants:**

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

**Format:**

3-day on-site program

**Dates:**

September 8th to 10th, 2021  
(Wednesday morning to Friday afternoon)

**Contribution:**

Regular fee CHF 3,950.- per participant  
Early bird discount (registration until April 30, 2021): CHF 3,350.- 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 apply directly at: [bit.ly/IIBF\\_Zurich\\_Application](https://bit.ly/IIBF_Zurich_Application)

**Planned Training Address**

Zurich, Switzerland. Exact venue to be announced yet.

**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



100% of the participants in the most recent iteration  
rated the program “very good” or “excellent”

*"I like that the speakers have **different perspectives** about the **same problem**, with examples and challenging views about blended finance."*

*"I enjoyed the **engaging sessions** that generated good discussions and reflexions"*

*— Participants in the 2019 program iteration*

*"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**

OECD & Associate Fellow  
Oxford Said Business School

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**

Professor, Staffordshire University, &  
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.



**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**

Manager, 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.



### Taeun Kwon

Research Lead on Blended Finance, Center for Sustainable Finance and Private Wealth

Taeun Kwon is the Research Lead on Blended Finance at the Center for Sustainable Finance and Private Wealth at University of Zurich, where she is responsible for academic and practice-oriented research on innovative and blended finance, and leads the research side of the Initiative for Blended Finance. Her recent research topics include the effectiveness of various instruments, across sectors such as water and education. Before, she was responsible of the Sustainable Investing Capabilities of Private Banks report as the Head of Wealth Manager Programs.



### 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

Lead Research & Development, Roots of Impact

Rory Tews is Lead Research & Development at Roots of Impact and an expert on social entrepreneurship and impact incentivization. Among other projects, he manages a multi-year blended finance project in Latin America with the Swiss Agency for Development and Cooperation and New Ventures. He also shapes Roots of Impact's efforts to promote blended finance as a solution to unleashing the positive social and environmental impact potential of social enterprises worldwide.



### Program Facilitator

### 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. 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 actors.