

IIBF

Impact Investment & Blended Finance
for Development Agencies and Foundations

3-Day Executive Program

September 8th to 10th - Zurich

2021

**Blended
Finance
Program**

Agenda



**Initiative for
Blended Finance**
at the University of Zurich

The Journey

EXPECT THE UNEXPECTED – EXPAND THE KNOWN

With this 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, preparation 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, experts and guest speakers will be your guides to the world of blended finance & impact investment on this trip. They will provide state-of-the-art knowledge, lead you through interactive sessions and answer your burning questions in a trusted environment. In addition, you will benefit from a wealth of experiences that your international peer travelers will bring from many fields and countries. Four “live” cases will frame your track into uncharted territory: [Bridge for Billions](#), [Root Capital](#), [Novulis](#), and [Bamboo Capital](#). They will enrich the experience with practical insights, provide different stakeholder perspectives and share the do’s and don’ts of discovering impact finance the novel way.

[Expand your horizon and become inspired!](#)

Bjoern Struwer
Roots of Impact



Aakif Merchant
Convergence



Taeun Kwon
*Center for Sustainable Finance
and Private Wealth (CSP)*



**University of
Zurich** UZH

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

Agenda: Day 1 – Lay of the Land, Ecosystem & Trends

WEDNESDAY, SEPTEMBER 8, 2021

LOCATION: UNIVERSITY OF ZURICH ZENTRUM FÜR WEITERBILDUNG (CENTER FOR CONTINUING EDUCATION), ROOM F12, SCHAFFHAUSERSTRASSE 228, CH-8057 ZURICH [\[MAP\]](#)

08:30 – 09:00	Fill Your Reserves: Small Breakfast
09:00 – 09:30	Welcome to the Blended Finance Journey! <i>Taeun Kwon (CSP), Aakif Merchant (Convergence) & Bjoern Struwer (Initiative for Blended Finance & Roots of Impact)</i>
09:30 – 11:00	Mapping the Territory: Traveling from Traditional Finance to SDG & Social Innovation Funding <i>Karen E. Wilson (OECD & Oxford Said Business School)</i>
11:00 – 11:15	Coffee & Tea Break
11:15 – 12:45	The Simulation Game Group work with <i>Karen E. Wilson</i>
12:45 – 14:00	Meet & Greet: Light Lunch
14:00 – 14:45	Checking the Barometer: Trends & Players in the Blended Finance Ecosystem <i>Aakif Merchant (Convergence)</i>
14:45 – 15:45	Stories From the Field: Scaling an Impact Enterprise- Bridge for Billions' Journey through the Unpaved Road <i>Pablo Santaefemia (Bridge for Billions)</i>
15:45 – 16:15	Boost Your Energy: Tea, Coffee & Fruit Break
16:15 – 17:15	Stories From the Field: Challenges of an Impact Entrepreneur in Times of COVID-19 <i>Greg Krupa (Novulis)</i>
17:15 – 17:45	Wrap-Up Day 1: Opportunities for Blended Finance During the Pandemic and Beyond <i>Aakif Merchant, Taeun Kwon and Bjoern Struwer</i>
~18:30	Apero & Dinner / Impulse by Jed Emerson Restaurant <i>Lakeside, Zurich</i> [MAP] [WEB]

OPTIONAL!

Agenda: Day 2 – Deeper Dive into Core Areas

THURSDAY, SEPTEMBER 9, 2021

LOCATION: UNIVERSITY OF ZURICH ZENTRUM FÜR WEITERBILDUNG (CENTER FOR CONTINUING EDUCATION), ROOM F12, SCHAFFHAUSERSTRASSE 228, CH-8057 ZURICH [\[MAP\]](#)

08:30 – 09:00	Fill Your Energy Tanks: Small Breakfast
09:00 – 10:00	Stories From the Field: Learnings from a Seasoned Impact Investor <i>Enrique Alvarado Hablutzel (Bamboo Capital Partners)</i>
10:00 – 10:45	Introducing The Travel Tools: The Latest in Blended Finance Approaches and Instruments (Part 1) <i>Aakif Merchant</i>
10:45 – 11:15	Coffee & Tea Break
11:15 – 12:45	The Latest in Blended Finance Approaches and Instruments (Part 2) <i>Aakif Merchant</i>
12:45 – 13:45	Meet & Interact: Light Lunch
13:45 – 14:45	How Much Impact Are We Having and Is It Enough? <i>Group work with Jeremy Nicholls (Staffordshire University & Social Value International)</i>
14:45 – 15:15	Boost Your Energy: Tea, Coffee & Fruit Break
15:15 – 16:15	Framing the Environment: Myths, Realities & Solutions for Impact Management <i>Jeremy Nicholls</i>
16:15 – 17:15	Stories From the Field: Making Blended Finance Work for Smallhold Farmers and Gender Inclusion <i>Katie Naeve (Root Capital)</i>
17:15 – 17:45	Wrap-Up Day 2: What Did We Learn? <i>Open Q&A with the lecturers</i>
OPTIONAL! ~ 18:30	Dinner & Digest: Relaxed Get Together <i>Kunsthaus Restaurant [map] [web]</i>

Agenda: Day 3 – Additional Focus Points & Wrap-up

FRIDAY, SEPTEMBER 10, 2021

LOCATION: UNIVERSITY OF ZURICH ZENTRUM FÜR WEITERBILDUNG (CENTER FOR CONTINUING EDUCATION), ROOM F12, SCHAFFHAUSERSTRASSE 228, CH-8057 ZURICH [\[MAP\]](#)

08:30 – 09:00	Get Your Food Supply: Small Breakfast
09:00 – 10:30	Tracking Your Trip: How Impact-Linked Finance Can Drive Change and Create Results <i>Bjoern Struwer, Ramona Liberoff (Roots of Impact)</i>
10:30 – 11:00	Design Your Own Outcomes Fund <i>Group work with Bjoern Struwer & Ramona Liberoff</i>
11:00 – 11:30	Coffee & Tea Break
11:30 – 12:30	Case Study from the Participant Group [tbd]
12:30 – 14:00	Meet & Exchange: Light Lunch
14:00 – 15:30	Engaging the Next Generation: How NextGen Wealth Owners Approach Impact Investing <i>Taeun Kwon (CSP at University of Zurich)</i>
15:30	Wrap-Up and Saying Farewell – For Now! <i>Bjoern Struwer, Aakif Merchant & Taeun Kwon</i>
DON'T MISS!	-> PARTICIPANTS RECEIVE CERTIFICATES
~16:00	End of Your Blended Finance Journey

Lecturers, Experts & Guests

**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.

**Bjoern Struwer**Initiative Lead IBF & Founder
Roots of Impact

Bjoern Struwer 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.

**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.

Lecturers, Experts & Guests (c'ed)

**Jed Emerson**Global Lead of Impact
Investing, Tiedemann
Advisors

Jed recently joined Tiedemann as the Global Lead of Impact Investing after serving on the Firm's Impact Advisory Council. He has founded or co-founded some of the leading impact investing, venture philanthropy, community venture capital and social enterprises. Jed is Senior Fellow with ImpactAssets, was a senior strategic advisor to 5 family offices with over US\$ 1.4Bn in total assets, and has authored numerous articles on social entrepreneurship and investing, including "Impact Investing: Transforming How We Make Money While Making a Difference", the first book on impact investing.

**Taeun Kwon**Blended Finance Research
Lead, IBF

Taeun Kwon is the research lead for the Initiative for Blended Finance (IBF) at the University of Zurich. Her current research projects include innovative financing in water, education, and sustainable landscapes. She is also the lead of the "Sustainable Investing Capabilities of Private Banks" research project and report at CSP. The project investigates the largest wealth managers in Europe in regard to sustainable investing. Before CSP, Taeun had launched her own ethical t-shirt brand and worked in consulting at Boston Consulting Group, TBWA, and Impact Square.

**Pablo
Santaefemia**CO-Founder & CEO, Bridge
for Billions

Pablo Santaefemia is the Co-Founder and CEO of Bridge for Billions, a digital ecosystem of entrepreneurship programs that connect early-stage entrepreneurs to growth opportunities worldwide. His mission is to democratize access to quality entrepreneurship training, mentoring, and business opportunities globally. Pablo's social enterprise has supported 1500+ entrepreneurs from 70 countries. He has been recognized as a Forbes 30Under30 and Ashoka Fellow and worked in for- and non-profit organizations in China, Thailand, India, the US, Austria and was involved in innovation projects across the globe.

**Enrique Alvarado
Hablutzel**Partner, Bamboo Capital
Partners

An early enthusiast of Blockchain technologies and Crypto asset management, Enrique Alvarado Hablutzel is a Partner, Networks Development at Bamboo Capital Partners. Enrique worked as Strategy and Business Development Manager at Impact Hub Geneva and Lausanne, where his main focus was the financial development of Accelerate2030. He also worked at SeedStars – a Swiss-based group with the mission to impact people's lives in emerging markets through technology and entrepreneurship, and in Virgin Group's strategic management and corporate development team.

Lecturers, Experts & Guests (c'ed)



Greg Krupa
CEO & Founder, Novulis

Greg Krupa was born in the US, however, his heart belongs in Latin America. In 2007, he started his career in public health in Guatemala with the ROMP foundation, providing prosthetics to amputees without access to care. In 2015 he founded his 2nd healthcare organization, Novulis, a B Corp that has mobilized high-quality dental care to +18k underserved patients in Ecuador through mobile, portable, & stationery onsite clinics. In March of 2020, Novulis received Social Impact Incentives (SIINC) to accelerate its scale.



Katie Naeve
Director of Impact & Partnerships, Root Capital

Katie Naeve leads Root Capital's impact program to identify the firms's impact on clients and the clients' impact on farmer households and communities. She also supervises a global team that implements these studies in Latin America and Africa. Prior to joining Root Capital, Katie conducted evaluations of international development projects with Harvard's Center for International Development and Mathematica Policy Research and helped launch a social enterprise (Instiglio) based in Colombia that aims to improve public services through innovative results-based financing.



Ramona Liberoff
Lead Strategic Initiatives,
Roots of Impact

Ramona Liberoff is Lead Strategic Initiatives at Roots of Impact, with over 20 years of experience in inclusive innovation, strategy and impact investment. Prior, she was the COO of the Innogy Innovation Hub, investing globally in the future of renewable energy, and CEO of SPRING Accelerator supporting high impact ventures in East Africa and South Asia. Ramona has been a senior advisor to DFID-(now FCDO) backed Partnerships for Forests, is an early stage investor in global impact tech ventures and has a variety of advisory and mentorship roles.

MORE INFORMATION ABOUT
OUR GUEST SPEAKERS:

Tiedemann Advisors:

<https://tiedemannadvisors.com/>

Bridge for Billions:

<https://bridgeforbillions.org/>

Bamboo Capital Partners:

<http://www.bamboocp.com>

Novulis:

<https://novulismed.com/>

Root Capital:

<https://rootcapital.org/>

Contact & Other Details

ORGANIZATIONAL ISSUES

Rebecca Trubac, Finance & Project Manager, Center for Sustainable Finance and Private Wealth (CSP) at the University of Zurich, rebecca.trubac@bf.uzh.ch

WhatsApp group: [to come]

PROGRAM & CONTENT-RELATED INQUIRIES

CONTENT & CURRICULUM

Christina Moehrle, Lead Education, Initiative for Blended Finance / Advisor Market & Capacity Building, Roots of Impact cmoehrle@roots-of-impact.org

ONBOARDING:

Christina Moehrle & Bjoern Struwer, bstruwer@roots-of-impact.org



Christina
Moehrle



Rebecca
Trubac

DRESS CODE / LANGUAGE

Smart casual / English