

# Investing in better futures

Change the world together, **UBS Accelerate Collective, cohort 2**

While traditional grantmaking is in many cases impactful, a social finance approach, where capital is eventually returned to social investors so they can recycle it into further impactful programs, can be a more sustainable and scalable route for achieving impact. While this approach doesn't work across all issues, it can succeed in areas where results are measurable and funders as well as social investors are seeking to achieve better and more efficient outcomes and/or where underlying revenue models exist.

Social finance can be a great tool to maximize your impact and attract more resources toward addressing some of the world's most pressing issues. It can promote financial inclusion, foster innovation, and increase awareness of the importance of using financial tools to address social and environmental challenges. But as it stands today, it's a new and relatively emerging field. By joining the UBS Accelerate Collective, you'll support making it a more integral part of the financial landscape, eventually creating a mainstream social finance movement.

As a member of the UBS Accelerate Collective, you'll be working to:

- support the most vulnerable to help them achieve better social and environmental outcomes, through an impact-first investment approach;
- use your philanthropic capital as a lever to further leverage commercial capital and through a social investment approach achieve funding at scale;
- support social businesses and help them grow, achieve more impact, and take their solutions to their communities and the world;
- create a system where innovative social investments become established as an alternative route to scale social and environmental impact; and
- empower social investors, to become social investors.

## What's involved?

As a member of the UBS Accelerate Collective, you'll be bringing to life the social investment vehicle 'Accelerate the Future', tackling some of the world's most pressing issues. This vehicle will make both direct debt (loans) and equity

investments, in addition to investing in small, specialized funds where investment through such a structure is more effective and efficient than direct investment.

It will be underpinned by a USD 20m philanthropic guarantee by UBS Optimus Foundation. Meaning, your philanthropic contribution will act as a catalyst to 'crowd in' an additional USD 50m of commercial capital – 2.5 times more than would otherwise be available in a traditional grantmaking scenario. Any financial dividend from 'Accelerate the Future' will be recycled into future projects, thereby amplifying your impact.

Through the UBS Accelerate Collective, you'll support vulnerable people in low and middle-income countries in Sub-Saharan Africa, Asia, and Central and South America in the areas of health, education, climate, and environment.

Specifically, your contribution will:

- support primary healthcare interventions, like Penda Health, a social enterprise that provides low-cost, high-quality primary healthcare services to low-income families in urban and peri-urban Nairobi, expanding across Kenya, thereby improving the health of communities for years to come;
- provide children with early childhood care and education, setting the foundation for a child's physical, cognitive, social, and emotional development;
- equip children with foundational skills and help them with education transitions, ultimately creating a better future for children and contribute to a more equitable and prosperous society (e.g., Rising Academies, an affordable high-quality school chain applying and offering edtech tools); and
- improve the environment to enhance the prospects for children and young people through climate mitigation (carbon sequestration, reduction of emissions), climate adaptation, and improved biodiversity – a holistic approach making livelihoods more resilient, enhancing food security, and improving health and wellbeing. An example of a previous investment is Blue Alliance, a self-sustainable eco-tourism project in the Philippines generating funding for the conservation of vibrant coral reefs and mangrove forests.

As a UBS Accelerate Collective member, you can be sure that your contribution only goes towards businesses that can demonstrate a significant impact which is strongly embedded in the business model. Businesses will be able to demonstrate their impact by having completed a rigorous evaluation of their impact or plan on doing so; following a solid theory of change, and having a robust monitoring, evaluation and learning ('MEL') framework in place.

Because strengthening the ecosystem is key to driving change systemically, UBS Optimus Foundation will team-up with you and dedicate resources to continue pursuing activities that enable the success of 'Accelerate the Future'. These include:

- targeted investment-readiness support including grant funding to impact enterprises that can become pipeline for 'Accelerate the Future';
- targeted technical assistance to fund one-time expenses of impact enterprises which will enable them to sustainably increase their impact, such as impact evaluation, piloting/testing a new product, solution, or approach etc.; and
- broader social finance ecosystem building activities, e.g., policy reforms, applied research.

### What's in it for you?

Your role in the UBS Accelerate Collective will do more than enable you to shape a better world. Here's how it can enrich your life too:

#### Belong to a network that maximizes your impact

The UBS Accelerate Collective is an impact network that enables you to achieve more than could ever be possible working alone.

- You'll connect, collaborate, and combine your resources with philanthropists who share your passion for tackling health, education and climate challenges.
- Members commit to donating a minimum of USD 250,000 per year for two years<sup>1</sup>. With this contribution, you'll be supporting reputable impact organizations and projects that have been carefully assessed and vetted by UBS. So you can be assured your contribution will reach projects that are well-placed to succeed. UBS will also team up with you and add 10% to your contribution.
- You can access a global team of philanthropy experts at UBS for support. Our experts have wide experience in innovative social finance solutions. For example, the team spearheaded the first and biggest development impact bond in education. We can also connect you to world-famous philanthropy experts – some who have spoken with us so far include the impact-investing pioneer, Sir Ronald Cohen.

#### Involve and unite your family around shared values

The UBS Accelerate Collective gives you the opportunity to experience philanthropy with your family. It's a great way to show how your family's wealth and philanthropy can change the world – these are great lessons to share with each other, especially with younger family members.

- UBS will guide you and your family on your philanthropic journey, helping you learn and succeed together.
- You'll receive advice on making the most of your family's philanthropy, plus insights into managing other important areas of your wealth.

- Involving family members in the UBS Accelerate Collective will help unite your family around positive values and strengthen bonds between generations.

#### Connect with powerful players and magnify your efforts

The UBS Accelerate Collective goes beyond connecting you with other philanthropists. It also introduces you to influential people and organizations who can turn regional efforts into global success stories.

- Connect with public and private sector partners who are passionate about supporting climate initiatives. Your insights and evidence can inspire them to fund and launch programs and replicate them globally.
- Meet and collaborate with public and government groups who create and implement national policies relating to health, education, or climate.
- Consult philanthropy experts and academics who can advise you on every aspect of your philanthropy, such as exploring social finance solutions and analyzing project outcomes.

#### Access a learning experience that makes you a better philanthropist

The UBS Accelerate Collective gives you exclusive access to a two-year learning experience. The experience will help you understand and examine social and environmental issues and solutions from every angle – and take your philanthropy to the next level.

- Elements of your learning will be delivered at UBS Accelerate Collective gatherings, and via online sessions, but also 'live' on the occasion of an insights trip.
- Your learning will cover topics including:
  - strategic philanthropy
  - social finance
  - changing complex systems
  - advanced strategies
  - leadership
- You'll also be invited to spend a week with the UBS Accelerate Collective's non-profit organization partners. It's the perfect opportunity to learn about the challenges they face and the progress they're making.
- You'll receive invitations to conferences and seminars where you can learn from philanthropy experts and peers.
- You'll also focus on developing your leadership skills, enabling you to inspire and engage others, and maximize your impact.
- You'll have privileged early access to guides and publications focused on philanthropy, health, education and climate.

#### Let's get started together

This is your opportunity to solve the greatest challenge facing the world today – the threat of climate change. To find out more and join the UBS Accelerate Collective, please contact your UBS client advisor.

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<sup>1</sup> Total min commitment of USD 500,000.

**//** This trip has restored my hope that there is a real investible pathway to solve problems at scale. I can see it now! Education felt so large and confusing before I came here. Seeing the hands-on work being done and the level of execution makes me very hopeful to reinvent the way we can see philanthropy. It's encouraging to see everyone, including government come together to try and fix the system.

**UBS Accelerate Collective member, about the insights trip in Ghana in 2023**

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