

Case Study: UBS Optimus Foundation



Strengthening Impact Management Practices

The [UBS Optimus Foundation](#) (UBS-OF) is a grant-making foundation that offers UBS clients a platform to use their wealth to drive positive social and environmental change. UBS-OF were at the forefront of funding innovative social finance and have a 20-year track record of philanthropic impact applying an investment-based approach.

UBS-OF's Need

The Good Economy (TGE) was engaged by UBS-OF in March 2023 to provide feedback on UBS-OF's current impact measurement and management (IMM) system. UBS-OF sought to understand how its practices compare to both established industry standards and emerging impact management norms, as well as to identify opportunities for continuous improvement.

The Good Economy Solution

Gap Analysis

TGE performed a gap analysis using our market-leading methodology to assess and benchmark impact management frameworks. We worked to understand and analyse UBS-OF's current IMM processes and to identify areas to strengthen in the context of its business model and industry best practices. This enabled us to develop tailored recommendations to further align with best practice, as well as provide UBS-OF with guidance on how to implement these recommendations, drawing on peer examples and industry benchmarks.

Outcome

Based on the findings and recommendations of TGE's gap analysis, UBS-OF has adopted a number of best practices and revised its measurement tools. TGE also worked with UBS-OF to further refine their own impact rating tool as well as develop a guidance document for its use across its portfolio of grants and investments. The tool, which can be used both pre- and post- investment, informs decision making and helps to monitor investments at both an individual investment level and at the portfolio level.

"TGE perfectly understood what we were looking for as a Foundation linked to a large financial institution. Their experience in benchmarking impact standards, tools and processes has helped improve our own impact management practices and align better with the impact ecosystem."

- Nalini Tarakeshwar, Head of Programs and Monitoring, Evaluation and Learning