Tackling social and environmental problems is at the heart of impact investing. But doing so efficiently and effectively can be a challenge.

**CERISE–IDIA (Impact-Driven Investor Assessment)** is a social strategy assessment tool designed to help investors, foundations, fund managers, holding companies and donors overcome the challenge of turning intention into impact.

IDIA assesses the implementation of a fund’s impact thesis, thanks to a rapid appraisal of the social strategy, governance, practices and products, business model and outcomes. Easy-to-use and publicly available, IDIA will keep the social strategy on track.

**CO-DEVELOPED WITH INVESTORS**

IDIA first emerged from a collaborative development process between CERISE and Proparco, to help the French development financial institution guide its investment strategy in Social Business Funds. IDIA was redesigned based on testing and exchanges with partners including ACEP group, Advans, ADA, AFD, Grameen Crédit Agricole Foundation, Investisseurs et Partenaires, Pamiga, Proparco, SIDI and Stromme Microfinance Foundation-East Africa.

**MEASURE AND ACT**

IDIA checks whether a fund’s management systems align with its impact intentions. Use IDIA to

- Get an overview of a fund’s social strategy and impact thesis
- Guide the structuring of a new investment fund
- Conduct due diligence of socially driven funds
- Align policies and procedures with the impact thesis

**TURN INTENTIONS INTO IMPACT**

Infusing the daily operations with one’s impact thesis calls for clear vision, strong governance, coherent procedures, useful data and trained, motivated human resources. IDIA is a light and rapid assessment framework that allows funds to verify five areas key to achieving impact.

- Impact thesis
- Governance
- Products and procedures
- Business model
- Data protocols

**HOW TO USE CERISE-IDIA**

Use IDIA as a self-assessment or with tailored advisory support from CERISE ADVISE. We’ll guide you to take stock of your strategy, policies and practices, and help you define an action plan on the basis of a rapid assessment.