

BRING CHANGE EFFECTIVELY

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.

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

CONTACT US TO KNOW MORE ABOUT OUR TOOLS AND SERVICES

cerise-spm.org/idia
cerise@cerise-spm.org



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.

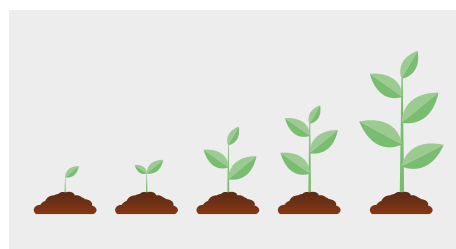
- ▶ Impact thesis
- ▶ Governance
- ▶ Products and procedures
- ▶ Business model
- ▶ Data protocols

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, Fondation Grameen Crédit Agricole, Investisseurs et Partenaires, Pamiga, Proparco, SIDI** and **Soluti Finance**.

PREPARING YOUR OPIM DISCLOSURE STATEMENT ?

IDIA allows signatories of the Operating Principles for Impact Management to prepare their disclosure statement, thanks to a selection of indicators that demonstrate how each Principle is incorporated into the organization's operations.



You can either start with IDIA and copy answers over to the OPIM tab, or vice versa. Either way, the assessment will get you thinking critically about your social strategy and the systems in place to support it.