



## SOCIAL PERFORMANCE MANAGEMENT FOR IMPACT INVESTORS

Social performance management refers to the accepted managerial practices that allow an organization to translate its social mission into practice. SPM provides a broad framework that embeds the social mission in the functions, policies, procedures, management information systems and governance bodies of an organization. In short, SPM is an integrated ESG approach for mission-driven organizations.

## MAKE A POSITIVE DIFFERENCE

- ▶ How can you make sure your investments are having the impact you intend?
- ▶ Are you tracking the right data? Does it serve a purpose, beyond reporting?
- ▶ Are you meeting the needs of your investees in a way that serves their social objectives?
- ▶ Do you check for and react in the case of unintentional negative impact?

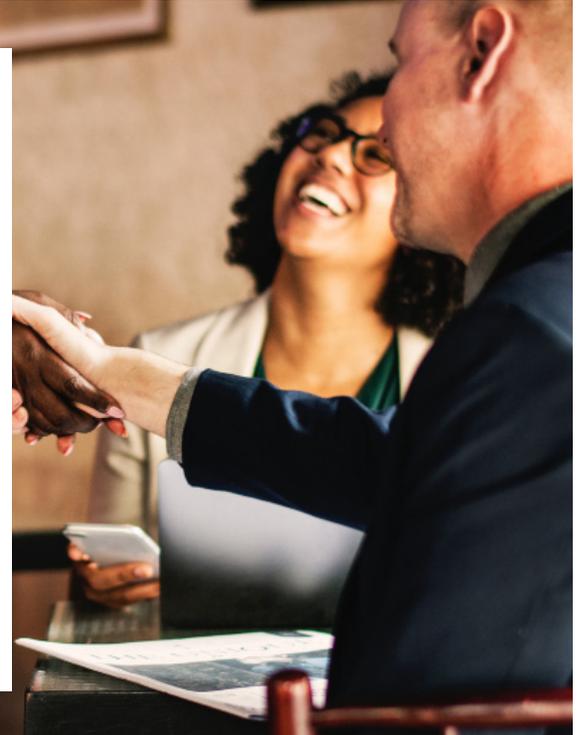
CERISE assists financial intermediaries navigate the many questions that come with having impact goals. We'll find answers that are specific to each your mission, but inscribed in standardized frameworks, to promote a common language. We make sure you make a difference—for your partners and the populations they reach.

CONTACT US TO KNOW MORE ABOUT OUR TOOLS AND SERVICES

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## CUSTOMIZED ADVISORY SERVICES

CERISE – ADVISE is a suite of customized advisory services for impact investors, foundations, holding companies and donors committed to making their mission a reality. CERISE draws on 20 years of expertise in social performance management for microfinance and social business to help investors turn intentions into impact. Whether public or private, an investor or grant maker, CERISE will help your organization achieve what it set out to do.



## GENERATE BUSINESS INSIGHTS

Clarifying your organization's impact thesis and having the systems to make it a reality is not just good for measuring your contribution to change, **it's good for your business.**

- ▶ Hold your organization accountable towards impact goals— because you can't manage what you don't measure
- ▶ Report on progress, to motivate teams and reassure asset owners
- ▶ Make decisions at investee level for investment selection, contractual obligations, technical assistance
- ▶ Inform capital allocations based on which interventions are most relevant to your impact goals
- ▶ Guide business decisions, like what sectors, geographies, markets to go into

## CERISE'S OFFER FOR IMPACT INVESTORS

### Diagnostic

- ▶ Rapid assessment of funds' social strategy with CERISE-IDIA (Impact-driven Investor Assessment)
- ▶ In-depth social audit

### Training

- ▶ Awareness raising and coaching of asset owners, governance bodies, staff
- ▶ Training and coaching on environmental and social risk identification, data collection and analysis, impact reporting

### Direct support

- ▶ Strategy redesign based on impact thesis
- ▶ Identification of impactful business models
- ▶ Definition of metrics linked to SDGs with CERISE-MetODD-SDG (microlevel indicators for SDG Targets)
- ▶ Data protocols and social dashboards
- ▶ Structuration of SPM governance
- ▶ Revision of policies and procedures
- ▶ Investee analysis and profiling