

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

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www.cerise-spm.org

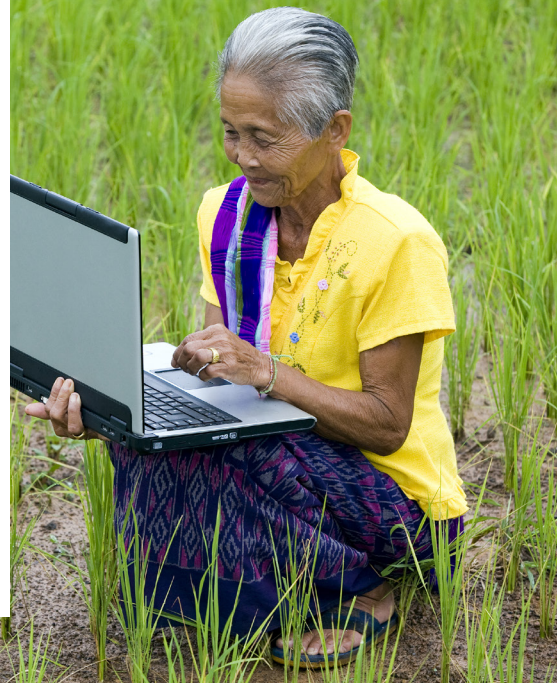
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TURN INTENTIONS INTO IMPACT

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, Grameen Crédit Agricole Foundation, Investisseurs et Partenaires, Pamiga, Proparco, SIDI** and **Stromme Microfinance Foundation-East Africa**.

HOW TO USE CERISE-IDIA

DOWNLOAD CERISE-IDIA

cerise-spm.org/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.

