

Cerise+SPTF is a joint venture between two of the global leaders in social and environmental performance management. All our activities align to a single vision of responsible inclusive finance. We work at the market systems level, involving all responsible inclusive finance stakeholders—policymakers, regulators, networks, industry associations, rating agencies, impact investors, financial service providers, and clients themselves. The strategies are different but the goal is the same: social and environmental performance that lets people and the planet thrive.

Founded in 2005, the Social Performance Task Force, or SPTF, developed, and regularly updates, the Universal Standards for Social and Environmental Performance Management (the Universal Standards). Cerise, a French nonprofit association created in 1998, pioneered the implementation of social performance management, working with committed financial service providers to launch the Social Performance Indicators initiative in 2001.

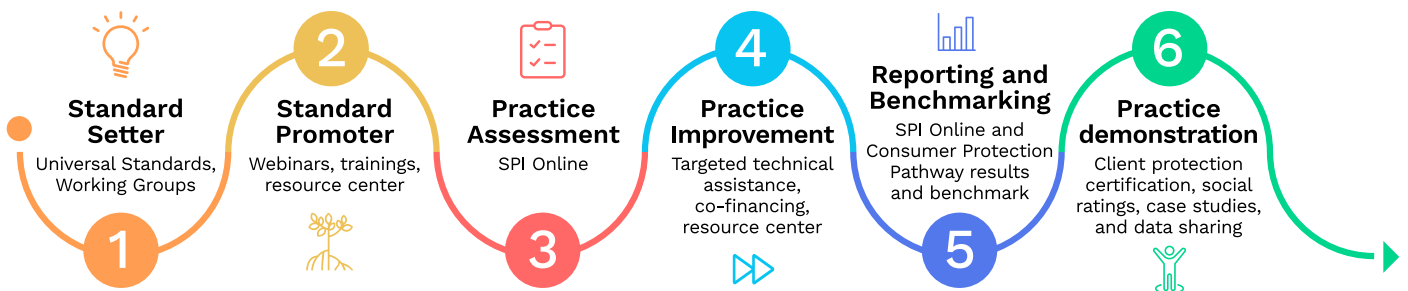
As the developers and champions of interdependent and complementary tools and products, Cerise and SPTF have worked closely together since the mid-2000s. We formalized our cooperation via a Memorandum of Understanding in 2021, and now operate under a common strategic plan, budget and workforce.

Our Vision

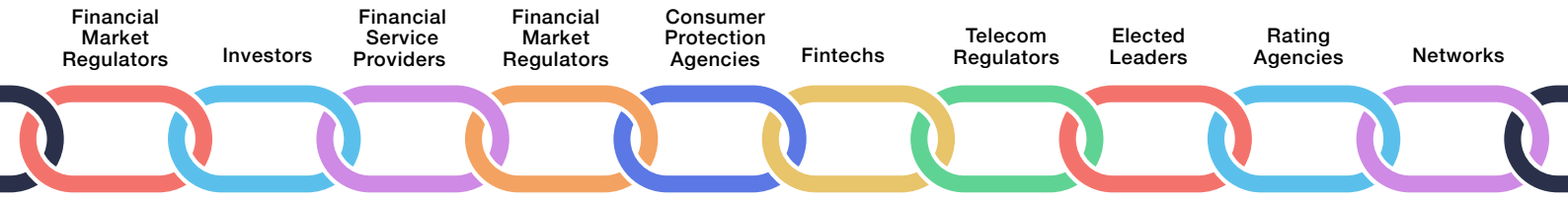
Cerise+SPTF imagines institutions and financial systems, all over the world, that put the best interests of people and the planet at the center of every decision.

Our Mission

Cerise+SPTF supports a wide cross-section of stakeholders from all over the world with the tools they need to achieve their social and environmental strategies. We pursue our mission via an end-to-end strategy focused on promoting consumer protection, improving business practices for social and environmental performance, and strengthening responsible investment choices.



WHAT WE DO



Market systems approach

For responsible inclusive finance to fulfill its promise—empowered customers using safe, affordable, convenient, and effective financial services to seize opportunities and manage risks—all the actors in the chain must do their parts. It is not enough for consumers to be financially literate if they have no access to appropriate services. It is not enough for financial service providers to have good intentions if they lack tools to translate those intentions into strong social and environmental performance. It is not enough to have strong regulatory frameworks without rating agencies to assess providers' compliance.

Cerise+SPTF works on all fronts at once.

Standard setting

Cerise+SPTF develop standards using a methodology that is by the people and for the people. We write standards because our members ask us to identify what practices they can implement to achieve social and environmental impact, and we answer that question by surveying financial service providers around the world to learn what has worked for them.

Our signature product is the Universal Standards for Social and Environmental Performance Management. First published in 2012, the Universal Standards are now in their third edition and are used by financial service providers all over the world.

Data & benchmarking

Our social and environmental audit tools, on SPI Online, let financial institutions assess their practices against the Universal Standards. SPI Online assessment tools have been used to generate thousands of high-quality social audits and has generated one of the most robust bodies of data in the world about social and environmental performance management. The Cerise+SPTF team includes skilled data scientists and analysts who understand how to mine our own datasets and publicly available ones, understand the stories the data tell, and turn those stories into actionable insights.

Technical assistance funding

Cerise+SPTF provides funding to financial institutions who are interested in training or technical assistance to improve their social and environmental performance management practices.

Individuals and organizations apply for trainings and for project co-funding through our Responsible Inclusive Finance Facilities (RIFF), each of which serve a different world region. Currently, we have facilities for applicants located in Sub-Saharan Africa (RIFF-SSA), Southeast Asia (RIFF-SEA), and Central America and the Caribbean (RIFF-CAC).



Advisory services & consultancy

Just as institutions may seek outside expertise when crafting a business plan, so too can purpose-driven organizations benefit from advisory services to help them think through their social performance strategy and tactics. Our services include:

- Strategy redesign based on impact thesis
- Structuring of mission-driven leadership and governance
- Crafting and revision of policies, manuals and procedures to support the social strategy
- Staff training and coaching
- Identification of key indicators to monitor progress towards social goals
- Definition of metrics aligned with the Sustainable Development Goals
- Design and development of social dashboards and reporting formats and protocols
- Client segmentation and analysis

Tools & resources

For virtually every topic in social and environmental performance management, Cerise+SPTF develops and maintains an extensive collection of resources and assessment tools. Our range includes powerful assessment tools related to ESG, client protection, and social and environmental performance management more broadly. Many of our resources, whether manuals, webinars, videos, case studies, PowerPoints, training materials, and more, are available in multiple languages.

Events

Cerise+SPTF hosts training webinars throughout the year focused on various topics in social and environmental performance management. We hold a general membership meeting every two years for our own members and special invited guests, and our members and staff regularly speak at conferences and panels all over the world. Cerise+SPTF-hosted events are usually conducted in either English, French, or Spanish, often with simultaneous interpretation available.

