

**ESS**  
l'efficacité nouvelle

**SSE**  
the new efficiency

**ESS**  
la nueva eficiencia

# 8<sup>th</sup> Mont-Blanc Meetings

8<sup>èmes</sup> Rencontres du Mont-Blanc

8<sup>os</sup> Encuentros del Mont-Blanc

**6-7-8 December 2017**

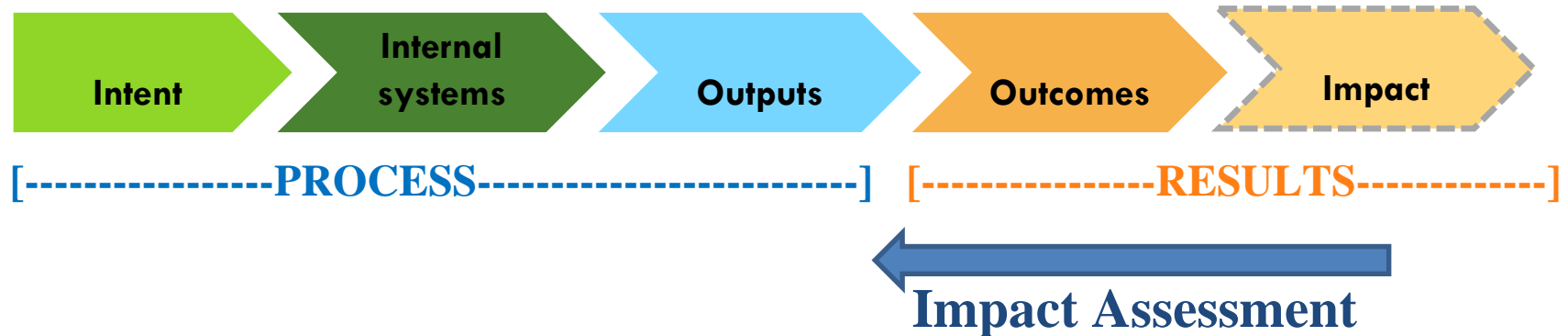
Archamps, Grand-Genève Français



- **A network of practitioners:** promoters of best practices in social performance management for ethical and responsible finance – since **1998**
- **Our objective** is to make social performance evaluation as practical and reliable as financial performance evaluation
- **CERISE has developed free tools available online:**
  - **SPI4** and **ALINUS** - Social Performance Indicators, audit tool to assess the social performance of Micro Finance Institutions.
  - **SBS** - Social Business Scorecard, to facilitate assessment, strategic and operational planning, and both internal and external communication of Social Businesses

# Building on the microfinance industry experience

## Impact assessments in microfinance

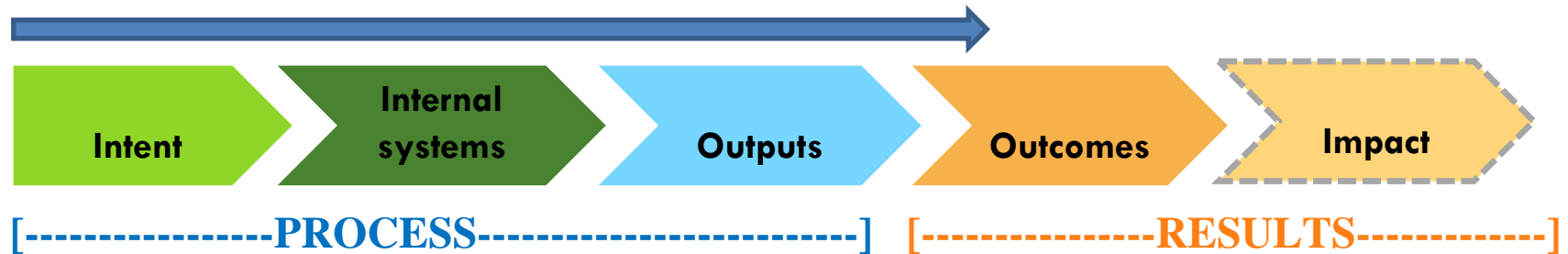


Over 140 assessments between 1995 and 2011 (Bédécarrats, 2012):

- **Traditional methods:** Quantitative and qualitative both showed tepid results coupled with methodology disputes and flaws
- Limited validity but tempting generalization due to **high costs**
- **New approaches:** hybrid or more operational (“proxy means testing” such as the PPI), requiring more research
- **In the hand of practitioners,** closer to market research and customer satisfaction analysis
- But how to **prove the “win-win” promise** of microfinance then?

## Building on the microfinance industry experience

### SPM, the microfinance practitioners answer Social Performance Management



“Simply put, **social performance is about ‘truth in advertising’** :

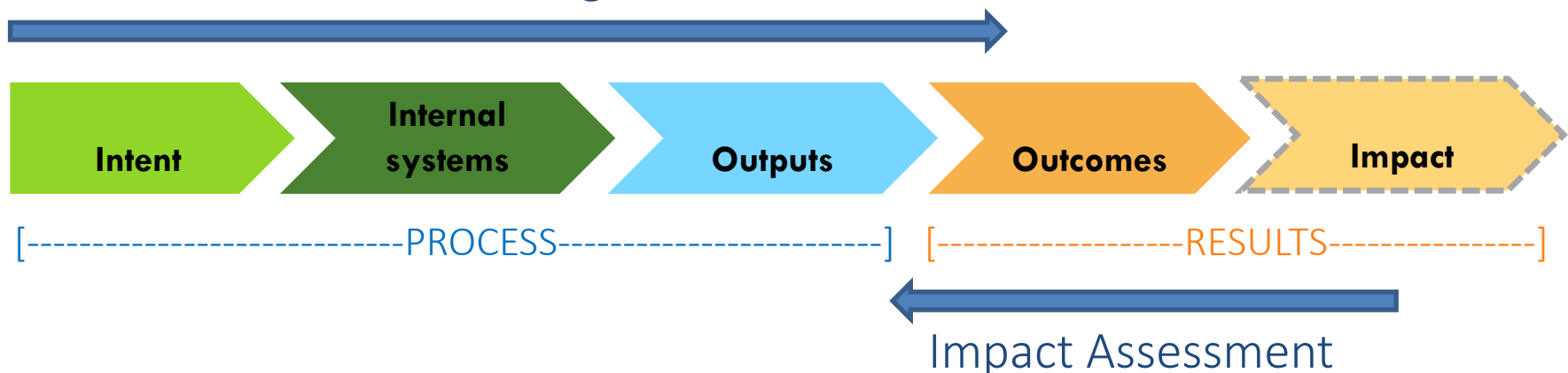
- Based on the intent and **mission oriented**
- **Focused on processes** thus under the stewardship of the organization
- More operational as meant **for piloting purposes**
- Can be externally assessed which can **help building credibility**
- Borne by the intuition that good processes will generate better outcomes and impact – **Yet to be proven**

# SPM, the new best practice in microfinance

## What is Social Performance?

- **Social Performance:** The effective translation of an institution's mission into practice in line with accepted social values.
- **Social Performance Management (SPM):** the implementation of management practices that put into practice the social mission of the institution.

### Social Performance Management





# The Universal Standard for Social Performance Management

## Standard at sectorial level

19 standards,  
organized in 6  
dimensions

Represent the  
culmination of 10  
years of industry-  
wide collaboration,  
coordinated by the



to align definitions &  
consolidate best  
practice around SP  
management and  
assessment.



# SPM, the new best practice in microfinance

## The way SPM is transforming the sector

### At MFIs level

- Trend towards refocusing services around the needs and preferences of the customer
  - + KPIs include both social and economic aspects
- Growing number of boards have SP Committees or “SP Champions”
- Expectations: reducing the reporting burden

### At sector level

- Trends to go from unattributable impacts towards accurate outcome
  - Outcomes are closer to market-like data therefore useful to decision making

# SBS, CERISE social audit and due diligence freeware

## An assessment tool for social businesses to drive their performance.

# CERISE SBS



- A learning tool, in French, English, Spanish



- A management tool listing more than 50 good practices to implement



- A reporting tool (social dashboard under construction)



# SBS, CERISE social audit and due diligence freeware

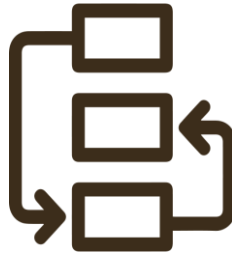
## Valuable data for efficient Social Businesses



Identify your social business profile and refine your social strategy



Define the social indicators relevant to monitor



Drive decision making based on your mission



Improve products and services adequacy with target and purpose



Communicate on your social achievements

Download the tool, get the guides, discover case studies and testimonies from other users on our website:

[www.cerise-sb.org/](http://www.cerise-sb.org/)