



Keeping clients first  
in microfinance



## Statement on SPM Collaboration and Updated SPM and Client Protection Standards

August 2016

The drive towards meaningful *social performance management (SPM)*—a systematic way of doing business that keeps customers’ best interests at the center—is one of the most important developments in the financial inclusion industry. Multiple stakeholders have been collaborating since 2005 to develop useful tools and approaches for SPM. Those stakeholders are [the Smart Campaign](#) (producer of the [Client Protection Certification Standards](#)); [The Social Performance Task Force](#) (producer of [The Universal Standards for Social Performance Management](#)); and CERISE (producer of the [SPI4 social audit tool](#)).

In mid-2016, both the client protection standards and the Universal Standards were updated based on extensive input from financial inclusion stakeholders. Simultaneously, CERISE updated the SPI4 to incorporate verbatim the updated versions of both sets of standards. All three organizations are now using the updated standards.

The SPTF, the Smart Campaign, and CERISE are committed to working closely together on both the substance and the timing of our respective work products. Both now and in the future, the Smart Campaign’s standards will be fully integrated into SPTF’s broader Universal Standards—and both sets of standards will form the basis for the SPI4 social audit tool from CERISE.

Our three organizations are proud to work together to advance the financial inclusion industry’s social performance. We believe that the success of that effort will depend to a significant degree on universal availability of the most useful tools—easy to understand, non-duplicative, and delivered on a synchronized schedule. We are also committed to sustaining the global collaboration that has gotten the social performance management effort this far. Like every prior edition, the next round of refinements, scheduled for release in 2019, to the Client Protection Standards and the Universal Standards will reflect input and ideas from our fast-growing worldwide community of practice.

On behalf of all of us at the Smart Campaign, the SPTF, and CERISE, we hope that the 2016 editions of our integrated suite of tools will assist you in your important work.

Cécilia Robès  
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