

SPTF Social Investor Working Group



Monthly investor call
March 10, 2022

Agenda

- 16:30 – 17:00** Update Cerise: SPI Online + SDG Lab/LabODD
- 17:00 – 17:10** Analysis of Feedback from Investors on CP Pathway
- 17:10 – 17:30** Discussion on Ukraine and ECA - Responsible Crisis Management

SPI online

- **User Experience** and a steering committee of users to improve use of SPI, understanding of the tools
 - Technical inputs shared on March 8
 - Meetings of Steering committee: March 22 and March 29
- **Joint branding CERISE+SPTF**
- **Joint platform** SPI for financial inclusion, then agri, digital, etc.
- **No Excel scoring tool** in the transition period with new standards and updated SPI
 - SPI4 and ALINUS still available, with benchmarks and technical resources
 - SFDR/ Principal Adverse Impact and Outcomes indic tested by quarter
 - Transition for all to adapt tools, processes, trainings, messages
 - Updated tools by Q4 to report on 2022 data next year.



OUTCOMES MANAGEMENT FOR FINANCIAL SERVICE PROVIDERS

A proposed standard framework aligned with the Sustainable Development Goals

Guidance Note



Outcome dashboard

- 1 BACKGROUND**
- 2 RECENT TRENDS INFLUENCING OUTCOMES MANAGEMENT**
- 3 CHALLENGES AND FIRST STEPS FOR VALUABLE OUTCOMES DATA, ALIGNING EXPECTATIONS**
- 4 A PROPOSAL FOR OUTCOME INDICATORS BY SUSTAINABLE DEVELOPMENT GOALS AND TARGETS**
- 5 RECOMMENDATIONS: NEXT STEPS ON OUTCOMES MANAGEMENT AND SDG FOR FINANCIAL INCLUSION**

NOW, building an "Outcome" Dashboard for SPI online, aligned with the SDG

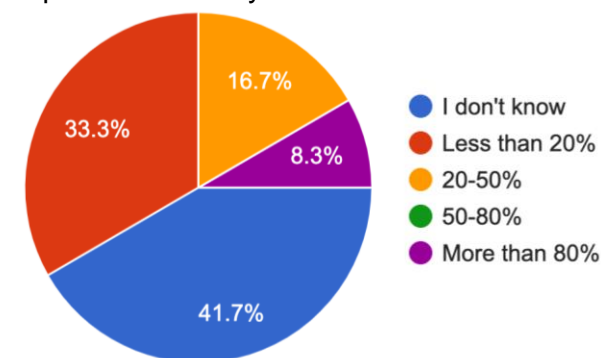
[Download the Guidance Note](#)

With the support of

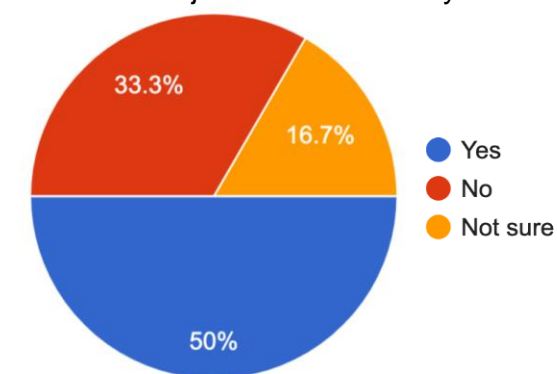
CP Pathway Survey Learnings

- 12 responses
- 3 have more than 20% of investees who signed-up.
- 4 have less than 20% of investees who signed-up, 5 don't know
- 8 require CP Commitment to Implement
- 2 require assessment and 2 require taking action to improve
- 6 have used our comms kit to invite investees to join the pathway
- 3 have used our webpage for prospection
- 3 have used the SPM Pro Network for external audits or TA
- Additional Suggestions: have more training material, more engagement with Latin America, more high-level explanations on the landing page

Percentage of your portfolio signed up to the Pathway



Use of comms kit to encourage investees to join the CP Pathway



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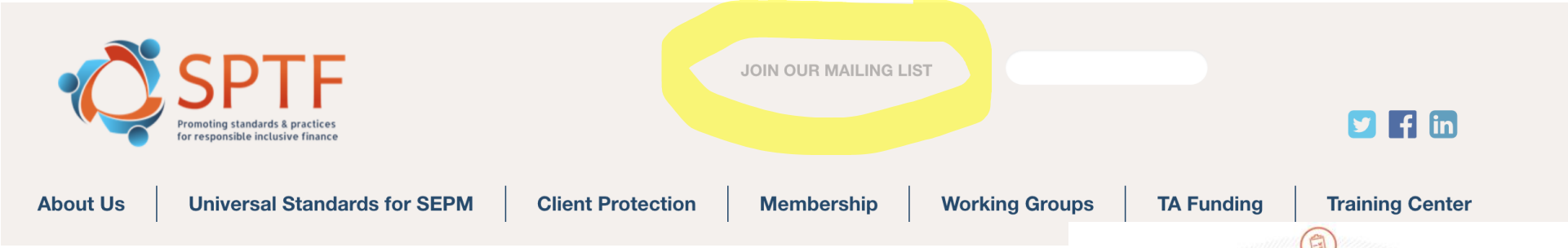
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Responsible Crisis Management

Concluding Announcements

Stay connected!

Would you like to receive the notifications of upcoming events, tools and resources? Sign up for our newsletter at www.sptf.info!



New Universal Standards released in February 2022!

Download the newest standards:
<https://sptf.info/universal-standards-for-spm/universal-standards>

