



July 2020

Dear SPTF community,

Yesterday, our friends and colleagues at the Smart Campaign [announced](#) that the Campaign is coming to an end. SPTF and CERISE send our most sincere thanks and admiration to everyone who has served on the Campaign staff or Steering Committee in the past ten years. Your dedication to client protection has transformed our industry.

As long-time partners of the Smart Campaign, [SPTF](#) and [CERISE](#) are committed to preserving and advancing the **Client Protection Standards**. Dimension 4 of [the Universal Standards](#)—called *Treat Clients Responsibly*—contains all of the Campaign’s Client Protection Standards and is a central part of our work. As time passes, SPTF and CERISE will steward the evolution of this client protection content, ensuring that it continues to be the ‘do no harm’ foundation of social performance management.

Similarly, **SPTF and CERISE will maintain the Campaign’s extensive library of resources**—guides, templates, case studies, and more—in the [SPTF Resource Center](#). Though we already have many of these resources on our website, our Resource Center will soon offer a better user experience and new features that will make it easier to find the resources you need.

With regards to client protection certification, neither SPTF nor CERISE is structured as an accreditation body. However, **we are making ourselves available as a common platform for rating agencies to coordinate on their plans for client protection assessment and rating products**. We are analyzing market demand for different types of assessment and rating products—including interviews with FSPs, networks, regulators, and investors to understand what the market needs. Our recent conversations with rating agencies indicate that they are committed to providing client protection products and are excited about the possibilities for more flexible options for the market.

SPTF and CERISE also wish to recognize the community of experts—trainers, assessors, TA providers, and others—who have brought client protection to life in the field. **We urge these experts who are not already part of the SPTF TA Database to join to [join the SPTF TA Database](#)** which will connect you to our mailing lists, to potential clients, and to other experts. In the coming months, we will have networking and learning opportunities tailored to this community, so please make sure we [have your contact information](#). In the meantime, please email us [[link](#)] with questions and ideas for how we can serve you best.

In the coming months, SPTF and CERISE will continue to wholeheartedly pursue our customer empowerment and customer outcomes agendas. We are excited to build on the client protection work that has been faithfully built over the past decade and to push ahead toward even bolder social goals for our industry.

Thank you for being a part of it. And thank you again to the Smart Campaign!

With respect,
The CERISE and SPTF teams