



SPI5 Full

Grow from good to great with a comprehensive social and environmental performance assessment

Now in its fifth version, SPI5 Full has been our flagship assessment tool since 2002. It provides a comprehensive assessment of practices across all 7 dimensions of the Universal Standards, and is the most intensive diagnostic that mission-driven organizations can undertake.

What

A complete inventory of **180 indicators** (compared to 110 indicators for the SPI Entry alternative), SPI5 Full covers the entire Universal Standards, including the full set of indicators from Client Protection Standards

Time needed to fill in SPI5 Full: **five to six days**



On the previous SPI4 version, the Green dimension was optional.

For whom, for what

For Financial Service Providers to conduct comprehensive audit and build their social and environmental statements, based on the greater depth and breadth of analysis of the Universal Standards. More than 1000 audits have been conducted around the world in its previous version SPI4.

Benefits

Use SPI5 Full to:

- Increase engagement and effectiveness of board and management
- Understand how to propose products and services that meet clients' needs and preferences
- Protect clients from harm
- Develop motivated staff members
- Uncover new, diversified opportunities to create great social and environmental impact

Because SPI5 Full integrates all our other signature tools, the users can also: disclose Principal Adverse Impact risk (from ESG Risk), report to investors (from ALINUS), confirm compliance with the Client Protection Certification levels (bronze, silver, gold).

One of an integrated suite

The SPI online tools are **free to use**.

The SPI online offers reference tools aimed at **reducing reporting burden** for the users with a common framework and complementary tools. Each tool generates automatically specific social and environmental **dashboards** to summarize gaps and strengths and identify the actions for improvement.

SPI5 Full is the most comprehensive tool in the range of powerful and complementary tools designed by Cerise+SPTF to give users exactly the information they need to advance progressively their social and environmental goals.

AT-A-GLANCE GUIDE TO ASSESSMENT TOOLS FOR SOCIAL AND ENVIRONMENTAL PERFORMANCE MANAGEMENT

	TOOLS						
	Universal Standards Pathway				Green Pathway	Client Protection Pathway	
	ESG Risk 30 indicators	ALINUS 68 indicators	SPI5 Entry 110 indicators	SPI5 Full 183 indicators	Focus Green 25 indicators	CP Commit 32 indicators	CP Full 78 indicators
Dimension 1: Social Strategy	●	● ★★★	● ★★★ *****	● ★★★ ***** ▲▲▲▲▲▲▲▲▲▲			
Dimension 2: Committed Leadership	●●●●●	●●●●● ★★★	●●●●● ★★★ *****	●●●●● ★★★ ***** ▲▲▲▲▲		●●● ★★	●●● ★★
Dimension 3: Client-Centered Products and services	●	● ★★★★★	● ★★★★★ *****	● ★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲		● ★★★	● ★★★★ *****
Dimension 4: Client Protection	●●●●●●●	●●●●●●●● ★★★★★★	●●●●●●●● ★★★★★★ *****	●●●●●●●● ★★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲		●●●●●●●● ★★★★★★	●●●●●●●● ★★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲
Dimension 5: Responsible Human Resource Development	●●●●●●●●	●●●●●●●● ★★★	●●●●●●●● ★★★ *****	●●●●●●●● ★★★ ***** ▲▲▲▲▲▲▲▲▲▲		● ★	● ★ ▲
Dimension 6: Responsible Growth and Returns	●●	●● ★★★★★	●● ★★★★★ *****	●● ★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲		● ★★★★	● ★★★★ ***** ▲▲▲▲▲▲▲▲▲▲
Dimension 7: Environmental Performance Management	●●●●●	●●●●● ★★★★★	●●●●● ★★★★★ *****	●●●●● ★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲	●●●●● ★★★★★ ***** ▲▲▲▲▲▲▲▲▲▲		

Each shape represents one indicator. The different shapes represent the same indicator appearing in multiple tools:

- = indicators from ESG risk tool
- ★ = additional indicators in ALINUS
- ※ = additional indicators in SPI5 Entry
- ▲ = additional indicator in SPI5 Full

GUIDE TO TOOLS: Choose the tool that is right for you and fits your current needs and goals.

- **ESG Risk:** Ensure compliance with basic “do not harm” principles, disclose Principal Adverse Impacts and manage ESG Risks.
- **ALINUS:** Deliver robust social and environmental due diligence and reporting capabilities, and cultivate a responsible and inclusive investment portfolio.
- **SPI5 Entry:** Take the first step on your social and environmental performance management journey.
- **SPI5 Full:** Grow from good to great with a comprehensive social and environmental performance assessment.
- **Focus Green:** Concentrate exclusively on management of environmental practices.
- **CP Commit:** Provide an overview of the fundamental practices of Client Protection and guidance to start on the Client Protection Pathway.
- **CP Full:** Complete a comprehensive assessment of Client Protection standards to reduce risks to clients.

ABOUT CERISE+SPTF

Cerise+SPTF is a joint venture between two of the global leaders in social and environmental performance management. 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.

