



Integrate Impact into Your Investment Cycle Template

Investors have a great deal of influence – and therefore responsibility – to assess and contribute to SDG impact in *every* stage of the investment cycle. This template is designed to help you consider new or better ways of assessing and managing impact through your own investment cycle. Use this template to document your current practices, consider practices you could add or change, and make note of priority areas. Consider both ***adding positive practices*** that enhance impact, as well as ***reducing negative practices*** or barriers to impact. In the left column, we've outlined some example actions your team could start with.

SDG Outcome:

<i>Current practices:</i>	<i>What to do next:</i>	<i>Priority Notes</i>
Sourcing <ul style="list-style-type: none">○ Networks where more impactful investments can be located or cultivated○ Deal size or other criteria that welcome higher impact investments○ Opportunities for blended finance investments		
Due Diligence <ul style="list-style-type: none">○ Define clear narrative on impact potential○ Integrate impact criteria through DDQ or quantitative weightings○ Eliminate barriers that might disqualify higher impact investments		
Investment Decision-Making <ul style="list-style-type: none">○ Determine how investment committee will weigh impact and non-impact factors○ Develop expertise among investment committee in SDG target areas		

Closing and Deal Structure

- Deal terms specifically related to impact management or performance
- Lighter term requirements or financial return targets for higher impact deals

Monitoring and Management

- Monitor and engage to improve impact performance gaps and meet targets
- Change or remove barriers to impact due to staff incentives, decision-making behavior, or financial structures
- Collaborate with co-investors to meet mutual goals

Exit

- Define key criteria for impact-aligned exit timing, structure, and process that protects the impact of investment
- Consult most vulnerable stakeholders

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