Impact Data Platforms for Investors

Investors need to create a process to regularly review *individual investments* as well as compare and aggregate impact performance *across investments* in a portfolio. This helps them see trends across the portfolio and notice where concerted effort may be needed across several investees to achieve their goals. To this end, some investors choose to use third-party platforms to collect, analyze, and visualize data to get a picture of how their portfolio is performing for each SDG Target Outcome. We have listed here a number of platforms and brief introductions to their offerings.

Aeris

Aeris is an online platform to collect and manage the impact and financial information that supports deep due diligence and monitoring activities most especially tailored towards CDFI's. The tool is tailored to the unique needs of multiple users for the collection, management, and analysis of the impact and financial data of their investments. They have CDFI ratings, data services, and impact management assessments. A specific service, Aeris Atlas, supports collection of investor-defined impact metrics and aligns with existing accounting and emerging impact frameworks and taxonomies.

B Impact Assessment

The B Impact Assessment is a free, confidential online survey that has helped over 50,000 businesses measure and improve impact on workers, community, and the environment. It takes about 30 minutes to get a quick snapshot and 2-3 hours for a full B Impact Report. Once the assessment is completed, the company can generate a customized improvement plan. Some investors ask all portfolio companies to complete the B Impact Assessment annually to generate comparable data across companies.

ImpactableX

ImpactableX is a platform designed for startup founders, impact accelerators, and impact funds. The platform features defined metrics and outcomes aligned with the SDGs, IRIS+, and the Impact Management Platform. It includes mechanisms for analyzing impact attribution, impact valuation, and scenario modeling, among other features.

iPAR

iPAR aims to streamline impact management and communication between investors and investees. The platform is split between Impact Evaluation and Impact Reporting. Under Impact Evaluation, investors determine the most important Building Blocks to their impact and generate baselines to evaluate future progress. Under Impact Reporting, returns are reported at both the investee and portfolio level.

IRIS+

IRIS+ is a free resource managed by the Global Impact Investing Network that aims to help enterprises and investors generate credible and comparable impact data. IRIS+ includes core, standardized metric sets based on impact themes, is aligned with the Sustainable Development Goals and targets, and includes practical how-to guidance to support day-to-day impact measurement and management implementation.

Metric

Metric enables investors and private companies to measure ESG performance indicators, analyze financial impact, access tailored ESG strategies and improve performance, and communicate positive social and environmental impact. The customizable framework can be aligned with the SDGs, GHG Protocol, SASB, GRI, TCFD, and IRIS+.

Proof of Impact

Proof of Impact is a data intelligence platform that transforms data into impact and financial outcomes. They offer solutions for a number of different industries, such as renewable energy, healthcare, real estate, education, and financial services.

pulsESG

A public benefit corporation dedicated to empowering purpose-driven enterprises to manage and improve their ESG footprint with an integrated and comprehensive technology platform built for compliance tracking and insight.

SAMETRICA

SAMETRICA enables investors to measure and grow the environmental and social impact of their investment portfolios. The platform aligns with multiple impact frameworks, including the SDGs and Canadian Index for Wellbeing, includes a data collection tool, and creates real-time reports with dynamic visualizations. SAMETRICA has programs specifically designed for CDFIs and for DEI initiatives.

Tablecloth

Tablecloth's Impact Analytics Platform is designed specifically for the Private Equity world, and can be aligned with different ESG and Impact reporting frameworks, including PRI, SDGs, GRI, and CDP.

Toniic Tracer

Toniic Tracer is a web-based platform with distinct interfaces and features for investors and issuers (enterprises). Issuers report IRIS+ or custom impact metrics and classify investments according to the IMP Impact Class Matrix. These impact metrics are automatically shared with all Tracer investors that have that investment in their portfolio. Tracer also generates reports from these metrics that fund managers and entrepreneurs can use to educate current and prospective investors about their social and environmental impacts. Investors using Toniic Tracer record the impact intentions of their investments along with the financial profile, which facilitates an integrated approach to portfolio construction. Using the provided data, Tracer generates reports that analyze traditional financial aspects alongside impact aspects, providing valuable insights on both the goals and performance of a portfolio.

UpMetrics

This impact analytics platform aggregates numbers from any source, collects new data through a data collector tool, and imports them into user-friendly dashboards. The platform also enables users to collect anecdotes, articles, testimonials, photos, and more, and use tools to tell impact stories.

Vera Solutions

Vera Solutions has built an impact measurement platform that focuses on the following six major themes: Monitoring and Evaluation, CRM & Fundraising goals, Portfolio Management, Supply Chain Management, Case Management, and Community Engagement. The tool provides cloud and mobile solutions that help social sector organizations better track their impact, streamline their operations, and create feedback loops that put data in the hands of those who need it