**Title[[1]](#footnote-1)**

***Written by:***

|  |  |
| --- | --- |
|  | **Table 1: Key performance indicators** |
| **Area/year** | **2009** | **2010** | **2011** | **2012** |
| Clients  |  |  |  |  |
| Loan portfolio ($K) |  |  |  |  |
| Savings clients |  |  |  |  |
| Savings portfolio ($K) |  |  |  |  |
| PAR% (<30 days) |  |  |  |  |
| Client exit (%) |  |  |  |  |
| Outreach to women (%) |  |  |  |  |
| Outreach to rural clients (%) |  |  |  |  |
| Staff (total) |  |  |  |  |
| Staff turnover (%) |  |  |  |  |

# **1. Background**

MFI background: type of organisation, year founded, outreach (number, gender focus, geography)

Mission details, goals and objectives. Operational/SPM maturity level? Financial/social rating grade (year)

Operational details: targeting approach, services offered

Table with key performance indicators over the past three years

Context: key market, regulatory points that affect operations/strategy

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| --- |
| Box 1: The SP Start-up Fund |
| The MFC Social Performance (SP) Fund for Networks[[2]](#footnote-2) is designed to mainstream the new Universal Standards for SPM. The Implementation Component works with ten networks that are more experienced in supporting and promoting SPM. They undertake 18-month projects to achieve two core aims: firstly, they document learning and experience around innovative solutions to implementing the essential practices of the USSPM. They also support their members to reach full or partial compliance with at least two sections of the standards. Supported by the Ford Foundation, the Fund is managed by the Microfinance Centre (MFC), a microfinance resource center and network serving the Europe and Central Asia region and beyond. |

This case study has been written with a specific audience in mind: microfinance providers who seek to improve their practice in relation to specific standards of the Universal Standards for Social Performance Management (USSPM)[[3]](#footnote-3). This case study provides a practical overview of the process of developing and implementing [org name, solution name]. The case also provides recommendations on improving the effectiveness of the [solution] in relation to the Universal Standards for Social Performance Management, and some general lessons for practitioners.

# **2. Overview**

Which essential practice is being addressed? Why this is an important step for THIS institution to be taking?

What was the state of practice before the solution was implemented? (Problem statement) How did they know there was a problem (information used)?

Briefly describe solution: objectives, key challenges/considerations

 “Pull quote template” –Name, Title

# **3. Solution details**

## Developing the [solution name]

|  |
| --- |
| **Table 3: Level of effort required to develop the [solution name]** |
| **Position** | **Role in brief** | **Time**  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

General reflections on the development process

What internal resources (operational precedents) were used to develop the solution?

What external resources (experts, online resources, examples from other institutions) were used? (Give links to all online sources/materials)

Who was involved and how?

How long did it take (time period, level of effort)

Challenges/solutions

## Implementing the [solution name]

Set out the detailed steps of the process – talk about the objectives of each step, what practically happens and how, how long it takes, who is involved, and how each person is involved. Draw on your “time and skills” and “implementation process” tables from the diary to set this out.

Discuss challenges and solutions

|  |
| --- |
| **Box 1: Title**  |
| Use boxes to give details about key aspects of the implementation process (e.g. example survey questions, training agendas, details of incentive systems, etc.) |

**Figure 1: Title**

# **4. Improving the [solution name]**

## Recommendation one

## Recommendation two

details – what change is needed and why? what will the potential payoff be? what are the potential costs?

## Recommendation three

details – what change is needed and why? what will the potential payoff be? what are the potential costs?

# **5. Lessons learned**

## Benefits and costs

How has the organization benefitted from the solution? What evidence can we see of this?

How have staff benefitted from the solution? What evidence can we see of this?

How have clients benefitted from the solution? What evidence can we see of this?

How do these benefits compare, generally speaking, to the costs involved in developing/implementing the solution? Will the recommendations improve this comparison?

## Lessons for other practitioners

list insights emerging from the MFI here (advice they’d give another MFI)

# **6. More information**

Find more information about developing your own code of ethics, as well as the work of VF AzerCredit and its supporters by following the links below:

Link to the org tool (MFC to insert)

Link to the MFI website

Link to the MFI mix market profile

[Microfinance Centre: SP Fund Grant manager](http://www.mfc.org.pl)

[Social Performance Task Force Website](http://www.sptf.info)

Email MFC copies of all other relevant materials (training agendas, policy language, reporting formats, etc. that relate to the development and implementation of this solution) to be posted online and linked here

1. The development of this case benefitted from the insights of [name staff involved in documentation and interview process here. give special thanks to the person within the organization who coordinated the process on your behalf, if any]. [↑](#footnote-ref-1)
2. More information can be found at [www.mfc.org/en/content/sp-start-fund](http://www.mfc.org/en/content/sp-start-fund) [↑](#footnote-ref-2)
3. The Universal Standards for Social Performance Management (“Universal Standards” or USSPM) are a set of management standards and practices that apply to all microfinance institutions pursuing a double bottom line. For more information, visit [www.sptf.info/spmstandards/universal-standards](http://www.sptf.info/spmstandards/universal-standards) [↑](#footnote-ref-3)