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## CONTACT

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## NEWS

## SUPPORT YOUR MEMBERS TO IMPLEMENT THE USSPM

***New case studies published by SP Fund grantees***

All the case studies developed by SP Fund grantees are available [here](#). The most recent cases cover topics such as: revising institutional mission statements and developing social goals, and lessons learned from [testing and piloting the PPI](#).

Recently MFC has translated several of those cases into other languages. In particular:

- Three cases are available in Russian:
  - [FINCA Azerbaijan: Transforming clients' complaints into loyalty for life](#)
  - [FinDev Azerbaijan: Retaining key staff through a "pay for performance" culture](#)
  - [VF AzerCredit's \(Azerbaijan\) Code of Ethics: Putting values into practice](#)
- Two cases were translated from Spanish to English:
  - [How to set up a strategic alliance to improve financial and social performance based on example of partnership between the World Vision and FODEMI, developed by RFR](#)
  - [ADRA: human resources management in microfinance institution, specifically process of recruitment and staff selection based on social and financial criteria](#)
- One case was translated from English to French:
  - [UGAFODE Uganda: Listening to client complaints](#)



Check [our website](#) for more materials being translated.

***New initiative will promote social performance, client protection, and capacity building throughout the regions***

Drawing on the work of the Social Performance Task Force and the Smart Campaign, Agence Française de Développement (AFD), the French Development Agency, announced grant funding to support a responsible finance initiative in sub-Saharan Africa, the Middle East and North Africa. The fund will implement capacity building in the regions; and conduct cutting-edge research around client protection, transparent pricing, and social performance standards. This initiative will lay the groundwork for locally-led responsible finance and unify local and international

stakeholders.

Working with the knowledge and resource base of the Social Performance Task Force and the Smart Campaign, and drawing on AFD's regional experience, the project will respond to the needs, gaps and readiness of microfinance institutions (MFIs) and associations to understand, accept, and implement organizational changes that will benefit clients. Specific activities will focus on:

- ✓ Capacity building and needs assessments through trainings
- ✓ Co-funding support for MFI activities including social performance and client protection assessments, institutional upgrades to address gaps, Social Ratings and Client Protection Certifications
- ✓ Research to help adapt client protection and social performance standards to digital financial services; research to better understand over-indebtedness within key microfinance markets

To find out more please contact [Roberta Zapf](#)

### **SPTF launches new outcomes working group**

The purpose of the SPTF's new outcomes working group is to develop practical guidelines for credible measurement of, and reporting on, outcomes, drawing on experience with different approaches and tools. The work group has not yet determined the full scope of its activity, but two of its planned deliverables are:

- ✓ Guidance on how implement good SPM practices for outcomes measurement, and
- ✓ A "menu" of outcomes indicators for practitioners to consider using. These will be selected based on field experience, and the group will identify some in each of the major categories of outcomes typically pursued by MFIs (e.g., poverty, health, education, empowerment).

Working group participation is open to all. If you like to learn more, please email [info@sptf.info](mailto:info@sptf.info) and/or read the first presentation and listen to the first webinar posted on the [SPTF working group page](#).

### **SPTF publishes new guidance note how to engage with regulators on SPM**

A year-long project by the SPTF regulators working group has resulted in a new guidance note for the industry. It contains a series of tips, followed by mini case studies describing how networks in different countries have productively engaged with their regulators. The note is available [here](#).

### **About SPTF Resource Center**

Need more information about SPM, tips, tools? Head to the [SPTF Resource Center!](#)

The SPTF Resource Center is a comprehensive online catalogue of the best SPM-related resources, organized according to where they fit within the Universal Standards. On the Resource Centre landing page, a blue banner features the latest essential resources. You can access the rest of the resources by clicking on one the Dimension categories on the Resource Centre landing page, and browse results organised by Essential Practice, divided by resource type. Currently they are divided them into guidelines, tools and templates, case studies and other resources (such as permanent links to relevant and interesting blog posts, etc.). There are also sections of resources in Spanish, French, and resources related to responsible digital financial services.



### **Planning a training on SPM? Check out available materials online first!**

The SPTF continually updates its online guide to SPM training materials that cover the Universal Standards, including client protection, and the SPI4 audit tool. These trainings are in a variety of lengths, including 1 hour, 1 day, and 2 day. The materials are available in English, French and Spanish. Resources are free and available to download by everyone. Can't find what you're looking for? Want to make sure you've got the latest version? Please write to

[info@sptf.info](mailto:info@sptf.info) to request the latest version, specifying the length of time, language, and audience so that you receive the most appropriate materials.

### **Seeking ways to develop network product and services, strengthening capacities?**

Since 1997, MFC has been providing support to networks. During that time, our service offering has expanded in line with our growing experience. Currently our network support package includes trainings, assessments, and study visits, focusing on SPM, client protection, financial education, and financial service delivery. To find out more about how we can support your work, please visit our [website](#) or contact [Ewa Bankowska](#).

## **GRANTEES & PROJECTS**

### **NEWS FROM NETWORKS IMPLEMENTING THE USSPM**

The SP Fund Universal Standards Implementation Component (IC) brings together **9 leading networks** ([see list of partners here](#)) to identify practical examples of good practices in line with the Universal Standards for Social Performance Management among their members. Partner networks deploy different methodologies to help members assess and improve compliance with selected dimensions of standards (at least two). The project is underway till August 2015 [Learn more here](#).

### **AMFIU Uganda launches a documentary**

AMFIU's new documentary presents the PPI implementation in Vision Fund and Pride Microfinance's Complaints Handling System. These two topics and examples were selected based on MFI interest. The documentary also puts these examples into the overall perspective of the Universal Standards for SPM. You can watch the movie [here](#)

### **Good Return Universal Standards video launched online**

Good Return has recently launched a new short video about the Universal Standards. The video gives short overview on what the standards are, supported by practical examples from the field. You can see the movie in English [here](#).

### **Networks share lessons learned**

#### **MCPI (the Philippines) reflects on its work thus:**

*The take up of the Tools Workshop Series was a surprise for the team. The case studies were appreciated because they validated the importance of "living" examples when we ran promotional workshops on SPM. This will definitely be part of MCPI's training services for our members in future.*

#### **AMFA (Azerbaijan), shares these reflections:**

- For any kind of documentation e.g. case studies - *If you want to engage a consultant or journalist – you need to make sure that person is quite familiar with SPM, the Universal Standards and other SP-related industry initiatives.*
- Confidentiality matters! AMFA understood that, the larger, the more developed an institution is, the more it requires more confidentiality commitment when working with it to integrate an SPM lens into its strategic business plan. In this way, a signed confidentiality agreement, included in the project MOU, should be considered for the future.
- Working on improving practice in line with a full dimension was challenging, and it was difficult to engage partners in action plan development when they were interested in working on 2 dimensions in the space of a year. This is because each dimension touches upon many different aspects of an organization's operations, meaning that improved compliance often leads to across-the-board changes.

#### **Your achievements in numbers:**

- ✓ **10** networks supported SPM implementation with members
- ✓ **37** MFIs submitted **133** managerial tools and solutions
- ✓ **21** MFIs fully completed their SPM workplans
- ✓ **92** MFIs improved their SPM practice
- ✓ **27** case studies written to describe good practice

### CMF (Nepal) revealed that:

*Our experience is that middle-level institutions are more interested and effective in SPM improvements than the larger and older MFIs. So, it would be better to select those MFIs with energetic staffs at management/BOD and interested to cover the microfinance market in different way than those established MFIs that are more set in their ways.*

### Copeme (Peru) shared:

- SPM is still often perceived as “separate project” that is not part of routine managerial processes. This is most clear when institution goes through substantial changes and starts to put more focus on its financial performance – often the first person to lose their job is SPM manager.
- We see that regulated MFIs are very interested in customer protection (as this is of interest of regulator) so this is a good starting point in terms of encouraging them to focus on SPM.

## WHAT IS THE SP FUND FOR NETWORKS?

The Social Performance Fund for Networks was launched in 2011 by [the Microfinance Centre](#), with support from the Ford Foundation, in order **to mainstream Social Performance Management across the industry**. The Fund (in collaboration with the Social Performance Task Force) currently supports networks to promote and implement **the Universal Standards for Social Performance Management (Universal Standards)**. For more information about the SP Fund [visit our website](#) at or [contact the Secretariat](#).

ECA	Asia	Africa	Latin America	Global
AMFA, Azerbaijan	CMF, Nepal	APSFDC-IC, Ivory Coast	RFR, Ecuador	MFN, Mexico
	PMN, Pakistan	AMFIU, Uganda	COPEME, Peru	
	MCPI, Philippines			

**The MFC and the SP Fund would like to thank the Ford Foundation and the Social Performance Task Force for their on-going support for its work.**