

Session 1: Define and Monitor Social Goals



With Leah Wardle of the SPTF,
Daniella Hawkins of MicroLoan Foundation,
Malawi



Agenda

- Review of Section 1 of the Universal Standards
- Interview with Daniella Hawkins of MicroLoan Foundation, Malawi
- Discussion with Participants

Section 1 of the Universal Standards

- **Section Title:** Define and Measure Social Goals
- **Rationale:** An institution must have a clear strategy for achieving its social goals and must measure its progress toward achieving these goals.
- **Two standards:**
 - 1a- The institution has a strategy to achieve its social goals.
 - 1b -The institution collects, reports, and ensures the accuracy of client-level data that are specific to the institution's social goals.



1a- The institution has a strategy to achieve its social goals.

Standard

1a- The institution has a strategy to achieve its social goals.

Essential Practices

The institution has each of the following, which are described in the strategy:

- **Social mission**—broader social purpose
- **Target clients**—specific characteristics of clients and how the target outreach is linked to the social mission
- **Social goals**—the client outputs and outcomes expected
- **Social targets**—for client outputs and outcomes
- **Social indicators**—what the institution uses to measure progress toward achieving targets
- **How to achieve social goals**—products, services, delivery models and channels used



1b -The institution collects, reports, and ensures the accuracy of client-level data that are specific to the institution's social goals.

Standard

1b- The institution collects, reports, and ensures the accuracy of client-level data that are specific to the institution's social goals.

Essential Practices

- Have at least one indicator for each social goal.
- Identify: who collects the data; where it is stored; who analyzes it; who verifies its accuracy, how it is reported and to whom.
- Disaggregate client data by gender and other key client characteristics, using the MIS.
- Ensures data quality by: 1) validating the data, and 2) training employees on data collection tools and data entry.
- If *poverty reduction* is a social goal, monitor the poverty levels of its clients using a poverty assessment tool.
- Disclose data, including the MIX Social Performance Indicators, in a public format.



Interview with MicroLoan Foundation, Malawi



Is MicroLoan collecting other types of social data (besides PPI data)?

Yes:

- Food security
- Exit rate
- Client complaints
- Savings



How did MicroLoan decide which social data to collect?

- MicroLoan's social mission: to work with the poorest women and enable them and their families to move out of poverty
- Therefore we needed to know:
 - Are we reaching the poorest? (i.e. poverty outreach)
 - Are clients moving out of poverty (i.e. poverty change)



Why should staff be trained on data collection?

- So staff understand how data collection links to MicroLoan's social mission
- To get staff buy-in
- To ensure consistency of data collection
- To ensure quality of data collection

How does MicroLoan use the social assessment training program?

- SPM Officer and Staff Training Officer in Malawi have been trained in using the manual, and **deliver the training to staff**.
- Trainees **receive workbooks** listing much of the same information as is in the facilitator guide, for them to take notes in which acts as a reference document.
- Half day **classroom training** including role plays.
- Half **day field training** including visiting 2 groups, plus debriefs.
- **Follow up visits** by the SPM Officer to branches.

What other techniques do you use to ensure quality data collection?

- **Spot checks** carried out by Branch Managers, Regional Managers, and SPM Officer.
- Checks integrated into **internal audit**.
- **Refresher training** by the SPM Officer at branch level or via regional meetings.
- **Checklist** for SPM data entry clerk to ensure assessments or spot checks that do not follow procedure are rejected.

How does the social data you collect help you understand how/whether you are achieving your social targets ?

- **Are we reaching the poorest?**
 - Data: In 2010, 53.5% of clients are living under \$1.25/day.
 - Action: Development of pro-poor product removing barriers to entry to the poorest clients.
 - Result: 74.6% of clients using the pro-poor product are living under \$1.25/day. (Increase in poverty outreach- from 53.5% to 74.6%)

How does the social data you collect help you understand how/whether you are achieving your social targets ?

- **Are clients moving out of poverty?**
 - Data: Current data indicates clients are moving out of poverty
 - Planned actions: despite positive results we want to do more to increase poverty change—e.g., by improving flexibility of product design
 - Planned results: additional improved change in poverty status, reduced exit rates, improved savings rates, improved food security status



Discussion with Participants

Where to find resources

- SPM Resource Library for the Universal Standards:

<http://www.sptf.info/spmstandards/standards-resource-library>

- This presentation and audio recording:

<http://www.sptf.info/sp-task-force/online-learning-events#1>