

2017 SPTF Annual Meeting | Mexico City, Mexico | June 5-8 Krystal Grand Reforma Uno Hotel

Monday, June 5: Pre-meetings

Time	Session	Room
9:00-17:00	<p>ADA Network Exchange Symposium (NEX)</p> <p>This workshop will showcase the experiences of associations from Central and South America, South East Asia, and Africa. They will be invited to present their history and challenges, their relationships with their members and donors, and their impact on national regulation. Discussions will include funding strategies, the evolution of their sectors and their members' needs, and how they have adapted their services accordingly. Participants will work in groups to apply the lessons from the presentations to their daily operations.</p> <p>Open to all—priority given to national and regional associations.</p> <p>Language: English/Spanish simultaneous interpretation.</p>	Alameda 4

Tuesday, June 6: Pre-meetings

Time	Session	Room
<p>All meetings today will observe the following break times:</p> <p>* 10:30—Coffee Break #1 *12:45 to 13:45—Lunch</p> <p>* 15:30—Coffee Break #2</p>		
9:00-17:00	<p>Introductory Training on the Universal Standards for Social Performance Management</p> <p>This training will introduce first-time participants to the Universal Standards for SPM, the SPI4 social audit tool and the resources available to financial service providers (FSPs) to improve practice and implement the Universal Standards. Participants who are new to SPM and/or the SPTF are highly encouraged to attend this training.</p> <p>Open to all—training content is focused on FSPs and support organizations.</p> <p>Language: Spanish only, no interpretation.</p>	Gran Insurgentes
9:00-17:00	<p>Assessor Training on the SPI4 Social Audit Tool</p> <p>This training will teach the structure and functionalities of the SPI4 social audit tool. It is for those who are already familiar with the Universal Standards and want to 1) perform a self-assessment of their own institution and/or 2) become a qualified social auditor. The first step required to become a qualified auditor is this classroom training delivered by Cerise. The cost of this training is US\$75 which must be paid through online registration, prior to the event.</p> <p>Open to all—training content is focused on FSPs and support organizations.</p> <p>Language: Spanish, without simultaneous interpretation. However, slides will be in both English and Spanish, workshop leaders speak both languages, and breakout groups will be organized by language.</p>	Alameda 1
9:00-17:00	<p>Outcomes Working Group Meeting</p> <p>This meeting will be a working session for members of the Outcomes Working Group and anyone interested in discussing advances, challenges, and practices related to the measurement and use of client outcomes data. Open to all participants.</p> <p>Language: English/Spanish simultaneous interpretation.</p>	Alameda 4
9:00-17:00	<p>Social Investors Working Group Meeting</p> <p>This meeting will discuss progress, challenges, and updates to ongoing investor initiatives in responsible inclusive finance. This is an investor-only meeting. Find the full agenda on the SPTF Investor Working Group webpage. Open to investors only.</p> <p>Language: English only.</p>	Alameda 3
18:00	<p>SPTF Board Meeting. Closed meeting of the SPTF Board of Directors.</p>	Alameda 3

Wednesday, June 7: Plenary Meeting, Day One

Time	Session	Room
8:00	Registration & Briefing Materials Pick-up	
9:00-9:30	Welcome from Meeting Hosts and National Representatives Keynote Speaker: Cynthia Villareal Muraira, PRONAFIM (Mexico) Language: English/Spanish simultaneous interpretation.	Revolución
9:30-10:30	What's Working and What's Not? An Honest Conversation about SPM in Latin America Has SPM taken deep root in Latin America, or does it only exist only at the surface level? Panelists from diverse parts of the region will answer questions about the state of SPM in their country, highlighting achievements as well as obstacles. The discussion will help set the stage for the remaining conference by raising some of the fundamental concerns about the future of financial services in Latin America. Moderator: Alexandra Annes da Silva, Consultant/SPTF (Brazil/Mexico) Speakers: Isabel Baggio, Associação das Organizações de Microcrédito e Microfinanças (Brazil); Iván Gutiérrez, Red Centroamericana y Del Caribe de Microfinanzas (Nicaragua); Guillermo Colín García, Asociación Mexicana de Sociedades Financieras Populares (Mexico) Language: English/Spanish simultaneous interpretation.	Revolución
10:30-11:00	Networking Session & Refreshments	
11:00-12:30	Fintech: Bringing Providers Closer to Their Clients Given the importance of technology in our field, how can more FSPs embrace technology while also protecting clients' interests? Is fintech just making it easier for providers to sell more products and cut costs, or do <u>clients</u> also benefit from new and innovative products that are better suited to their needs? Should Latin American providers invest in technology right now, or watch and wait? Moderator: Indira Melgar, Consultant (Peru) Speakers: Mauricio Osorio Sanchez, Crezcamos (Colombia); Marcelo Rocha, PoloCred (Brazil); Vicente Fenoll Algorta, Kubo Financiero (Mexico) Language: English/Spanish simultaneous interpretation.	Revolución
12:30-14:00	Lunch Buffet Please see the handout provided at your seat for descriptions of today's optional lunch meetings.	
14:00-16:50	Breakout Workshops: Creating Shared Value Choose one workshop. See language offerings in the descriptions.	
	1. Managing Employee Retention Many Latin American providers struggle to recruit and retain talent in key positions. This interactive workshop, led by microfinance-HR expert Solymar Torres, will explore practical ways to increase employee satisfaction and reduce turnover. Regional and global examples, useful handouts and tools, and discussion among participants will highlight practical and cost-effective measures to achieve your HR goals. Moderator: Solymar Torres, Human Capital MF (Colombia/USA) Language: Spanish only.	1. Gran Insurgentes
	2. Empowering Customers to Use Digital Financial Services This CGAP-led workshop will showcase fintech solutions that have the potential to empower clients to have more control over their financial lives. Participants will explore experimental digital services from around the world and discuss how innovations apply in their own country context. Moderators: Yanina Seltzer, CGAP (USA); Gabriela Zapata Alvarez, consultant (Mexico) Language: English/Spanish simultaneous interpretation.	2. Revolución
		3. Alameda 4

*****SEE NEXT PAGE FOR AN ADDITIONAL WORKSHOP OPTION*****

3. Indications of Financial Stress and Health Among Clients

This workshop, led by Grameen Foundation and the Smart Campaign, will explore client-level indicators of financial stress and health. How do providers know when clients are struggling to manage their debt and other financial obligations? What early indications of client over-indebtedness can providers measure, in order to prevent a portfolio crisis? Turning the question around—how do providers know if their clients are financially *healthy*? Participants will discuss a set of proposed indicators and which ones apply to their operating environments. **Moderator:** Bobbi Gray, Grameen Foundation (USA); Isabelle Barres, Smart Campaign (USA)

Language: English, without simultaneous interpretation. However, workshop moderators are bilingual and participants can have breakout discussion groups in Spanish. Those with working proficiency in English are encouraged to attend.

16:50-
17:00

Announcements and Dismissal

In your
workshop
room

Thursday, June 8: Plenary Meeting, Day Two

Time	Session	Room
9:00– 10:30	<p>Make or Break: A Conversation between Regulators and the Regulated</p> <p>Poorly designed regulation can spell disaster for financial service providers, whose crisis is then passed on to clients. This session will examine regulation—national regulation and self-regulation—from the provider perspective. Which countries are creating supportive enabling environments, which are not, and where does Mexico fall on this spectrum? What do providers wish that regulators knew when creating policies? What do regulators wish providers knew about how to best participate in the process of regulation creation and adoption?</p> <p>Moderator: Claudia Revilla Ostos, ProDesarrollo (Mexico) Speakers: Rudy Araujo Medinacelli, ASBA (Mexico); Mario Di Constanzo, Condusef (Mexico); Jim Madriz López, Comision Nacional de Microfinanzas (Nicaragua); Jose Auad Lema, CRECER (Bolivia)</p> <p>Language: English/Spanish simultaneous interpretation.</p>	Revolución
10:30– 11:00	<p style="text-align: center;">Networking Session & Refreshments</p>	
11:00– 12:30	<p>Responsible Pricing: Are We Getting Close?</p> <p>Over the past few years, the industry has created new and better ways of defining and holding providers accountable for fair and affordable pricing. This session will look at the progress that has been made and examine some questions that remain: Have we arrived at a shared definition of “responsible” pricing? Has competition among Mexican institutions driven prices down <i>enough</i>? What factors make high prices in certain markets so hard to change? What else can we do as an industry to bring down prices?</p> <p>Moderator: Andrea Domínguez, Oikocredit (Uruguay/Holland), Speakers: Blanca Aldasoro, Fundación Alemana Servicios (Mexico); Maria Silvia Abalo, RADIM (Argentina); Anna Kanze, Grassroots Capital (USA); Claudia Rojas, Triple Jump (Mexico)</p> <p>Language: English/Spanish simultaneous interpretation.</p>	Revolución
12:30– 14:00	<p>Lunch Buffet</p> <p>Please see the handout provided at your seat, for descriptions of today’s optional lunch meetings.</p>	

14:00—	Plenary: Measuring and Using Client Outcomes Data	
14:45	<p>This plenary session will share new resources developed by the SPTF Outcomes Working Group over the past 12 months, including guidelines for both FSPs and investors on outcomes management. Two financial service providers that have been actively engaged for years in measuring and using client outcomes data will share their practices and lessons learned.</p> <p>Moderator: Amelia Greenberg, SPTF (USA) Speakers: Monica Velasco, IDEPRO (Bolivia); Verónica Robles Moreno, Fondo Esperanza (Chile)</p> <p>Languages: English/Spanish simultaneous interpretation.</p>	Revolución
14:45-	Case Study Discussions: Measuring and Reporting Client Outcomes	
16:30	Please choose one session to attend. See language offerings in the descriptions.	
	<p>Case study 1: Investor-Investee Partnerships to Improve Outcomes Management</p> <p>Global Partnerships is working with six of its investee institutions to conduct field research and document these financial service providers' current practices and results on measuring and monitoring clients' social outcomes. Global Partnerships' VP for Impact and Strategic Initiatives will moderate a panel of three investees, who will share their successful experiences with outcomes management. Moderator: Tara Murphy Ford, Global Partnerships (USA) Speakers: Monica Velasco, IDEPRO (Bolivia); Jose Auaud Lema, CRECER (Bolivia); Belinda Gomez Barrios, ADRA (Peru)</p> <p>Language: Spanish only, no simultaneous interpretation.</p>	1. Alameda 4
	<p>Case Study 2: Practical Indicators for Client Outcomes Measurement</p> <p>In 2016, the SPTF Outcomes Working Group (OWG) created a consensus set of client outcomes indicators in four topics within social outcomes. Now, financial service providers are pilot testing some of these indicators in Latin America and India. The goal is to offer FSPs that want to measure client outcomes a menu of well-vetted indicators from which they can choose the ones most relevant to their work. This session will include presentations of initial findings by the research coordinator of the pilot in India and an FSP that is piloting many of these indicators in Guatemala. Moderator: Calum Scott, Opportunity International (Australia) Speakers: Caitlin Scott, Friendship Bridge (Guatemala); Devahuti Choudhury, Grameen Foundation India (India)</p> <p>Language: English only, no simultaneous interpretation.</p>	2. Gran Insurgentes
	<p>Case Study 3: Innovations for Creating Shared Value</p> <p>SPM helps create shared value for both financial service providers and their clients. This session will look at the experiences of two FSPs who use an innovative tactic to benefit clients while generating new business for their own institutions. These institutions locate the points of service in their agent networks within their clients' businesses, so that clients can transact in their own neighborhoods and client-agents get more foot traffic and therefore revenue for their businesses.</p> <p>Moderator: Fabiola Céspedes, Función Social (Bolivia) Speakers: Edgardo Pérez, Fundación Génesis Empresarial (Guatemala); Liliana Portillo Miranda, ASP Integra Opciones (Mexico)</p> <p>Language: English/Spanish simultaneous interpretation.</p>	3. Revolución
16:30-		Revolución
17:00	Closing Ceremony	