

## Invitation

### ***MICROFACT WORKSHOP ON PERFORMANCE EVALUATION***

### ***“LET YOUR FIGURES TALK”***

***6 – 8 APRIL 2020, LUSAKA, ZAMBIA***

The **Association of Microfinance Institutions of Zambia (AMIZ)** is pleased to invite you to the workshop on Financial and Social Performance Indicators for microfinance institutions (MFIs), organized with **Microfact**, initiative of **ADA** (Luxembourg) and **BRS** (Belgium).

ADA and BRS share a common interest and purpose of increasing access to financial services through the provision of quality microfinance services. It recognizes the greater need to propagate, strengthen and enhance the availability of microfinance services.

The general objective of the workshop is to give MFIs a better insight in the actual financial and social situation of their own organization and their position in the market of microfinance. This peer-to-peer learning workshop will give better insights on the financial performance. Specific attention will be given to the communication about the financial performance with all stakeholders of an MFI (clients, staff, board, investors, ...).

3 day workshop includes:

- Analysing performance in microfinance - the microfinance key performance indicators in the following areas: Portfolio Quality. Efficiency and Productivity, Financial Management, Profitability and sustainability and Social Performance
- Enhance the skills and capacity of management in interpreting ratios, analysing financial trends, positioning themselves within the industry (benchmarks) and identifying key areas of risk to mitigate
- Promotion of the exchange of knowledge and experience among participating MFIs.

- How to use the MFI Factsheet tool in your day-to-day management and in your communication with the stakeholders.

### **Training method**

Microfact workshop has distinctive didactical features so as to generate:

- **Interactivity:** Results for each MFI's performance indicator is illustrated through graphs built from the financial and social data provided by MFIs. The graphs show each MFI's performance with reference to the current situation, benchmarking and trends over the last 3-5 years.
- **Participation and exchange:** Participants are invited to give their interpretation and to comment on the graphs in light of their specific operational context and institutional organization, and to share/exchange their experiences and practices.
- **Putting learning into practice:** Practical exercises and analysis of trends are also part of the course. A final case study encompassing all the notions reviewed is ultimately carried out.

### **Trainers:**

Four local microfinance experts (Maluba Wakunguma, Bethel Nakaponda, Anthony Moonga, and Kennedy Mazala) will be undergoing training of trainers (ToT) by Senior Microfact trainers (Petronella Dithima and Januario Nthungwa) from 29 March – 1 April, 2020 in Zambia, to build local training capacity. Thereafter, the four trainee trainers will, in pairs of two, conduct replication training workshops for microfinance staff, with the first scheduled for almost immediately after the training of trainers (ToT) from 6 – 8 April 2020, at a venue TBA but in Lusaka, under the supervision of one Microfact senior trainer, as part of their certification.

### **MFI Factsheet:**

- Simple, user-friendly and fast
- Calculates main performance indicators and graphs automatically
- Based on the consensus of the microfinance industry
- Multi-language function (English, French, Spanish, Portuguese, Russian, Vietnamese, Lao Khmer and Arabic)
- Manual built-in in the tool
- Free to use with an online support
- Compatible with the MFI Factsheets Compiler, SIMFI and SPI4

More information: <http://www.microfact.org/microfinance-tools/mfi-factsheet/>

### **Logistics:**

The replication workshops are intended for the (financial) decision makers of microfinance institutions typically the financial or general managers. An understanding of basic accounting principles and

fundamental microfinance principles, is required. Participants should therefore have at least 2 years of experience in the delivery of microfinance products.

The ideal number of participants for each training course is between 15 and 25 from the region where the training is to be held, with a minimum of 10 MFIs, maximum of 2 participants per organisation to encourage exchanges between them (but in this case the participants will come from MFIs in Zambia).

Registration fee are **US\$150** in local currency equivalent per participant (documentation, lunch and trainers fee included). Transportation and accommodation costs will be at the charge of participants.

As earlier mentioned, the first replication training workshop will take place in Lusaka, from 6 – 8 April 2020 under the supervision of a Senior Microfact Trainer.

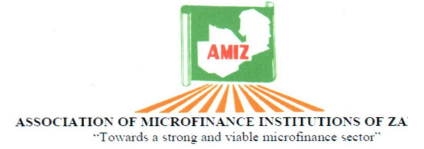
**In order to confirm your participation, please send us this form filled in by 6<sup>th</sup> March 2020 to the following address:**

**Association of Microfinance Institutions of Zambia (AMIZ)**

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**Contact Person: Webby Mate**

**+260 978 727 000**



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INSTITUTION NAME: .....

NAMES AND POSITIONS OF PERSONS WISHING TO ATTEND THE WORKSHOP ON FINANCIAL AND SOCIAL PERFORMANCE INDICATORS FOR MFIs (DATE....):

NAME: .....

POSITION: .....

NAME: .....

POSITION: .....

PLACE: .....

DATE: .....