

# SPI4



**1<sup>ST</sup> WEBEX CALL  
FEBRUARY 28TH, 2014**

# Agenda



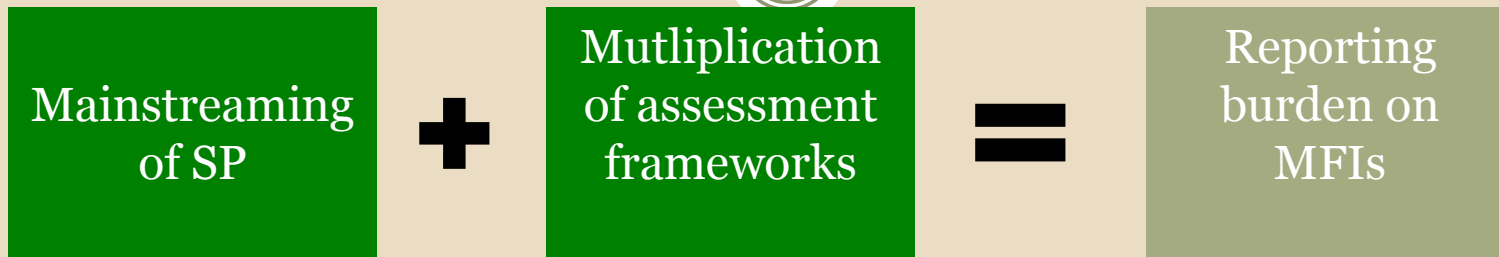
1. Why SPI4?
2. How to use SPI4
3. Beta testing – getting started
4. Next steps
5. Q & A

# SPI4 – what is it?



- A **universal social performance assessment tool** that integrates emerging industry social performance standards.
- Fully aligned with the Universal Standards, the Smart Campaign's Certification Standards for Client Protection, and the MIX social reporting.
- Structured around the 6 Dimensions of the Universal Standards, with indicators for each Essential Practice.
- SPI4 will also offer users with **a specific mission focus** - green, poverty, rural, gender - to assess their practices thanks to optional indicators that reflect the latest industry thinking in these areas

# SPI4 – why does the sector need it?



Investors due diligence



# How was it developed?



- Designed through a **1 year consultative process** with MFIs, networks, TA providers, investors, raters (and 3-year process on the Universal standards & Indicators)
- By combining the latest thinking from industry initiatives, we hope to **reduce the reporting burden** on MFIs and other stakeholders, **improve the quality and consistency** of social performance information, **facilitate dialogue** among stakeholders and foster SPM.

# Expert panel involved in development

SPI4 Expert Panel: Technical Committee that participated in the design of SPI4

- Paris meeting in October 2013
- Regular calls to provide inputs

## INDUSTRY PLATFORM REPRESENTATIVES



## MFI REPRESENTATIVES



## INVESTORS REPRESENTATIVES



## REPRESENTATIVES OF SP APPROACHES



# SPI4 – why use it?



**Learn and  
improve**

**Decrease FI  
reporting  
burden**

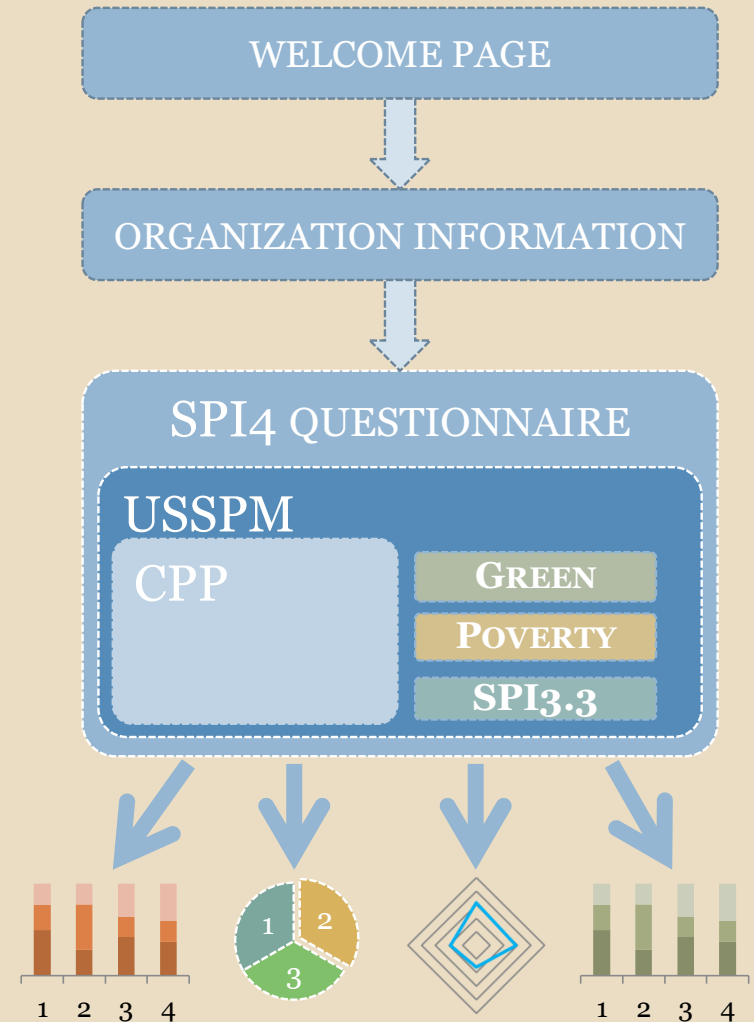
**Increase quality  
of SP data**

**Improve SP  
benchmarks**

**Measure, manage and improve to  
better serve clients!**

# How to use SPI4

- **Welcome Page**
  - Choice of modules
- **Organization Information**
  - Profile and results data
- **Questionnaire**
  - Core Universal Standards(CPPs integrated)
    - 6 Dimensions
    - 19 Standards
    - 85 Essential practices
    - 230 Indicators
  - Optional modules
- **Outputs** – tables of scores and graphs automatically generated





# How to use SPI4



- Activate macros (and save on xlsx format with macro)
- At a minimum, **fill in the entire Core Module**: which includes the Organization Information sheet and the Questionnaire.
- You may also complete additional modules if you wish.
- Please take the time to fill in the **Please Specify** column. This information is critical for a full and accurate analysis of the indicators.
- For each indicator, all answers need to be checked to have the automatic calculation of scores and the different outputs generated.

# How to use SPI4



- Basic reporting options available to all users
  - Universal Standards
  - Client Protection Principles
  - Social Dashboard
  - MIX SP data
- Optional reports based on specific modules
  - Green (e-MFP)
  - SPI 3.3 (CERISE)
- After each final version of those initiatives is finalized:
  - Poverty (Truelift)
  - Rural (ForoLac)
  - Gender (WWB)

# How to use SPI4



- Where to find support ?
  - SPI4 wiki : **<http://spi4wiki.pbworks.com>**
    - ✦ Download latest version of the tool
    - ✦ Guidance material and glossary
    - ✦ Report bugs and feed FAQ
  - Regular Webex calls
    - ✦ Updates on the beta testing process
    - ✦ Sharing lessons learned and addressing FAQs
    - ✦ Discussing content-specific issues (e.g. how to assess certain indicators, feedback on scoring, how to analyze results, etc.)
  - Help Desk : **[spi4@cerise-microfinance.org](mailto:spi4@cerise-microfinance.org)**
    - ✦ dedicated email to answer any inquires about the tool or the process that may require clarification.

# Getting started



- Let us know if you are beta testing! [spi4@cerise-microfinance.org](mailto:spi4@cerise-microfinance.org)
- Check out the wiki. All info is public. However, ask for a log in (it's free) so that you can leave comments and questions!  
<http://spi4wiki.pbworks.com>
- Download the tool
- Familiarize yourself with the Feedback Survey – see **Things to keep in mind** link on the wiki!
- Familiarize yourself with the **Technical Bugs log** – on the wiki!

# Next steps



**In the coming weeks:** Finalization of translation of SPI4 to French and Spanish and development of training/guidance

**March – May 2014:** beta testing of version 1.0

**June 2014:** Feedback and exchanges (SPTF annual meeting in Dakar early June)

**July 2014:** Version 1.1

**Dec 2014:** Version 1.2 including update of Smart assessment on Responsible Pricing and new products (mobile banking, savings, insurance) and aligned with MIX SP report for 2015

SPI 4 will then be stable for **3 years**

# Q & A





**Thank you !**

[spi4@cerise-microfinance.org](mailto:spi4@cerise-microfinance.org)

<http://spi4wiki.pbworks.com>