

## **Steps to Ensure Project Success**

### **“Green Team”**

- Will help to find ways to increase the tools utility beyond compliance (Patrick Crompton/FINCA)
- Will help to link to impact assessment (Nigel Biggar/GFUSA)
- Interested in how the legislation is applied, i.e. implementing regs which will drive the practitioners’ incentives. Does it apply only to incoming and prospective clients or to all clients? To prospective clients? How to make the tools apply to multi-product, multi-clientele institutions, e.g. a bank for whom only 10% of the 200,000 savers are very poor (as defined by legislation). (Zan Northrip/DAI)
- I am available to ensure the success of the tools in the following areas: a) utility beyond compliance, b) data collection, c) working with prospective clients, d) training clients in rural or urban areas. (Joshua Nzueni/CVS)
- To be a good advisory panel member, focusing on the issues of KISS and utility beyond compliance. To help train practitioners and national MED associations to learn how to apply the tools in a valid but relatively inexpensive manner. (Carter Garber/IDEAS)
- Listening and participating in the PAWG, USAID-IRIS team. Trying to be a “devil’s advocate” in trying to ensure that the tools selected are the least imperfect for the practitioners to apply. (Evelyn Stark/USAID)

### **“Blue Team”**

- Promote interests of non-credit only institutions that reach diverse clients and do not target the poor. In that vein, review indicators, offer feedback, provide suggestions and if applicable, apply for field testing in credit unions grant xxx and not a credit union financial expense. (Anna Cora Evans/WOCCU)
- Encourage field programs to implement tools once certified. This will include programs owned by WR and those we partner with that do not receive A xxxx funding. (Wendy-Ann Rowe/ World Relief)
- Disseminate information to encourage buy in/involvement from practitioners and others. (Anna Awimbo/MCS)
- Contribute understanding of benefits and challenges of using data from credit application process. (Karen Horn Welch/ACCION)
- Test and report on the feasibility (cost/time/ease and accuracy) of one or more poverty assessment methods. (Chris Dunford/FFH)

### **“Pink Team”**

- Ensure that ME practitioners & projects of DAI are “in the loop” on the certified tools and how they will apply to ME. (Colleen Green/DAI)
- I will represent the activities of this group to CRS programs and partners, and in return, represent CRS programs and partners to the group, with a particular focus on developing a tool that is easily used & has applicability beyond meeting USAID compliance. (Jennine Carmichael/CRS)

- Offer the MFIs in World Relief Network operating in conflict affected environments to test applicability of tools in these types of environments. Scott to promote tools in MFA in countries. (Robert Gailey/World Relief)
- Ensure tools are appropriate to BDS and FS service delivery methodologies. (Jeanne Downing/USAID)
- AMAP GUC to facilitate the process – I am available in any way. (Carrie Keju/PACT)
- We are beginning to implement a monitoring system and are wrestling with all of these issues (incentives, ease of use, cost, etc.) so we will continue to share our lessons learned with everyone re: process, multi-use tool. (Brian Beard/OI)
- Participate in monthly meetings/updates of IRIS project & provide constructive feedback. (Mike Getubig/GF-USA)
- Participate in different groups to learn more about impact/measurement.
- Share with my team the ideas learned here.

### **“Yellow Team”**

- Collect feedback from local staff as to the costs/benefits of complying with US government regulations (Cindy Ivanac/CRS)
- Help to keep people in the organization engaged in the project (Cindy Ivanac/CRS)
- Review use of geographic targeting (Jan Maes/Trickle Up)
- Integrate participatory methods (Jan Maes/Trickle Up)
- Keep issues of gender-related poverty and comparisons of gender equity between countries on the table in this discussion (Carrie Johnson/CFED)
- Encourage my institution to stay actively involved in the process (Pierre Nkepnang/World Vision)
- Have Microcredit Summit staff in Asia and Africa lead trainings on the tools developed (Sam Daley-Harris/MCS)
- Encourage the World Bank, regional banks, and UNDP to fully join this process (Sam Daley-Harris/MCS)
- Continual follow-up with practitioners through the PAWG, project listserv, and individual phone calls (Kate Druschel/IRIS)
- Balance Congressional requirements and practitioner priorities (Scott Kleinberg/USAID)
- Help MFIs use the results to reach downmarket with market research and the development of poverty focused tools (Patty Devaney/ACCION)
- Continuing to develop ACCION tools and bring it to both USAID-funded and other MFIs. Make poverty assessment a priority with ACCION (Patty Devaney/ACCION)
- Try to develop/identify accurate and cost-effective tools/indicators (Omar Azfar/IRIS)

- Work with a team to brief the Hill and the USAID missions on the current state of play (Kate McKee/USAID)
- Lobby national governments, and UN and Bretton Woods institutions to include more operational poverty indicators into their national expenditure surveys (Manfred Zeller)
- Contribute to methodology development and testing (Manfred Zeller)
- Do my best to stay on the fine line (tightrope) between correct methodology and practitioner involvement/usefulness (i.e., listen more, sleep less) (Thierry van Bastelaer/IRIS)
- Make sure that the practitioner voice(s) is center to this process (Laura Foose/PAWG)