# Global Grants Report Supplement for Microcredit Projects



### A. Rotary Sponsor Information

|  |  |  |  |
| --- | --- | --- | --- |
| Grant Number |  | Project Country |  |
| Host District |  | Host Club |  |
| International District |  | International Club |  |

How often did host Rotarians meet with representatives from the MFI to coordinate activities? Describe how the host Rotarians provided fiscal oversight and monitoring of the microcredit project.

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How did international Rotarians support the implementation of the microcredit project?

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### B. Microfinance Institution (MFI)

Identify the microfinance institution (MFI) that helped administer the microcredit project.

|  |  |
| --- | --- |
| Name |  |
| Mailing Address |  |
| Phone/E-mail |  |
| Website |  |

Attach a copy of the MFI’s most recent annual report with audited financial statement.

### C. General Information

#### Participants

How many clients participated in project activities, including training? How many of these received loans?

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What was the average annual income (in USD) of the clients who participated?

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List the communities where the TRF-funded microcredit project took place.

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#### Financial Sustainability

What is the current portfolio at risk (loans more than 90 days overdue/total loans) for TRF-supported loans?

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What has been the MFI’s collection rate over the past three years (loan amounts collected/total amounts loaned) for TRF-supported loans?

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#### Project Model

Describe the microcredit model used (credit groups, cross-guarantees, individual borrowers, etc.).

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Describe the training (savings, vocational training, literacy, financial literacy, marketing, etc.) that was provided. How many people were trained? Describe the duration and frequency of each training course.

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Who provided the training? If the costs of training were not in the grant budget, how were these costs covered?

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Did the project have a savings component? Who collected the savings? Where were the savings deposited?

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### D. Microcredit Model Used

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| --- | --- |
| Prevailing interest rates in the area | Amount |
|  MFI | % |
|  Bank | % |
| Project |
| Interest rate charged | % |
| Average loan amount per participating client |  |
| Term/duration of loans provided |  |
| Payment frequency (weekly, monthly, etc.)  |  |
| Female client percentage | % |

### E. Actual Microcredit Cash Flow

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| --- | --- | --- |
|  | Number | Amount |
| TRF grant funds allocated for loan capital |  |
| Loans disbursed\* |  |  |
| Loans collected\*\* |  |  |
| Interest (and fees, if any) collected |  |
| Administrative expenses paid from interest and fees |  |
| Net loan fund capital available at end of TRF-funded project |  |

**\***Amount should be at least twice the budgeted loan capital

**\*\***Amount should be at least the budgeted loan capital

Were loans disbursed using a credit group model? Yes [ ]  No [ ]

If yes, please provide information on each group:

#### Credit Groups (add rows as needed)

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Location | Borrowers | Loan Amount |
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|  |  |  |  |
|  |  |  |  |
|  |  | Total |  |

### F. Evaluation Measures

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| --- | --- |
|  | Number |
| Women entrepreneurs and small-business owners supported |  |
| Locally owned businesses launched or revitalized |  |
| Training and skill development programs (to increase the employment of women, youth, and other vulnerable populations) implemented |  |

### G. Microcredit Continuity

Has the MFI managing the funds agreed to continue use of the funds for loan capital?

Yes [ ]  No [ ]

Explain how the host Rotarians will maintain contact with/support of the MFI.

We confirm that all information found in the report supplement is correct to the best of our knowledge and is based upon consistent and strong oversight and management of TRF funds.

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| --- | --- | --- | --- | --- | --- | --- |
| Name (print) |  | Title |  | Signature |  | Date |
|  |  |  |  |  |  |  |

Host Primary Contact

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |

Host Rotary club president (host district grants subcommittee chair if district-sponsored)