Social Performance Management in Microfinance Training Course

Professional Development Training Course Outline

Category	Microfinance & Financial Inclusion	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Social Performance Management (SPM) in microfinance is a critical pillar for ensuring that financial services are delivered ethically, responsibly, and with measurable impact on low-income and vulnerable populations. As global development agendas prioritize social inclusion, client protection, and sustainable growth, microfinance institutions must integrate strong SPM systems to align their operations with mission-driven outcomes. Social Performance Management in Microfinance Training Course provides participants with practical frameworks, emerging best practices, and digital tools that enhance social impact measurement, client-centric product design, and responsible financial service delivery.

The training also equips participants with advanced skills for monitoring social indicators, managing ESG goals, strengthening governance, and applying global standards such as the SPI4, Universal Standards, and Client Protection Principles. With an emphasis on data-driven decision-making, transparency, and accountability, this course enables microfinance professionals to build institutions that are resilient, ethical, and effective in improving the lives of underserved communities.

Programme Curriculum

Social Performance Management in Microfinance Training Course

Introduction

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Course Objectives

1. Understand core concepts and frameworks of Social Performance Management.
2. Analyze global standards and trending practices in client protection.
3. Apply social impact measurement tools for microfinance operations.
4. Integrate ESG, sustainability, and responsible finance principles.
5. Strengthen governance structures supporting SPM goals.
6. Design inclusive financial products using client-centric methodologies.
7. Improve transparency through effective reporting and disclosure practices.
8. Conduct social audits using internationally recognized tools.
9. Align institutional strategies with mission-driven social outcomes.
10. Utilize data analytics to track client well-being and impact.
11. Identify and mitigate social risks in microfinance delivery.
12. Enhance staff capacity through performance management systems.
13. Develop action-oriented SPM implementation and improvement plans.

Organizational Benefits

- Stronger alignment between mission and operational practices
- Enhanced client protection and improved service quality
- Increased trust and credibility among stakeholders
- Better social impact measurement and reporting
- Improved staff performance across departments
- Strengthened governance and accountability structures
- Increased sustainability through responsible financial practices
- Better risk management for vulnerable client segments
- Enhanced ability to meet ESG and development partner requirements
- Improved institutional performance and long-term resilience

Target Audiences

- Microfinance institutional managers
- Social performance and impact measurement officers
- Field officers and branch supervisors
- Development finance practitioners
- ESG and sustainability teams
- Monitoring and evaluation specialists
- Microfinance policy makers and regulators
- Consultants supporting responsible microfinance

Course Duration: 5 days

Course Modules

Module 1: Introduction to Social Performance Management

- Understanding mission-driven microfinance
- Key components of SPM and global relevance
- Integrating social goals with financial sustainability
- Overview of client protection and responsible finance
- Role of governance in SPM implementation
- Case Study: Transforming institutional mission into measurable outcomes

Module 2: Client Protection Principles

- Understanding the Universal Client Protection Principles
- Identifying risks and vulnerabilities among microfinance clients
- Ethical lending, transparency, and fair treatment
- Preventing over-indebtedness in clients
- Strengthening grievance redress mechanisms
- Case Study: Implementing client protection to reduce complaints

Module 3: Social Performance Measurement Tools

- Introduction to SPI4 and CERISE tools
- Data requirements for effective social measurement
- Collecting and analyzing client-level social indicators
- Using social dashboards for decision-making
- Linking SPM to ESG reporting
- Case Study: Social audit improving institutional transparency

Module 4: Client-Centric Product Design

- Principles of human-centered product design
- Product suitability and affordability assessments
- Using behavioral insights to shape product features
- Improving outreach to women and rural clients
- Digital finance innovations for inclusion
- Case Study: Redesigning microcredit products for vulnerable women

Module 5: Social Risk Management

- Identifying social risks in financial service delivery
- Operational and reputational risks for microfinance institutions
- Assessing risks for vulnerable client segments
- Integrating risk mitigation into institutional policies
- Strengthening internal controls for client protection
- Case Study: Risk mitigation improving service delivery outcomes

Module 6: Governance and Staff Performance

- Strengthening board and leadership involvement in SPM
- Role of staff incentives in supporting social goals
- Building performance management systems

- Training and capacity-building for staff
- Monitoring SPM implementation across branches
- Case Study: Staff incentive systems increasing social impact

Module 7: Social Reporting and Disclosure

- Reporting standards for social performance
- Improving transparency to clients and stakeholders
- Preparing SPM and ESG reports
- Communicating results to regulators and funders
- Ensuring data accuracy and ethical reporting
- Case Study: Transparent reporting improving investor confidence

Module 8: Implementing and Improving SPM Systems

- Roadmap for SPM implementation
- Monitoring and evaluation of SPM progress
- Integrating SPM with digital transformation
- Identifying resource requirements for sustainability
- Strengthening cross-functional collaboration
- Case Study: Long-term SPM integration strengthening institutional mission

Training Methodology

- Instructor-led presentations and concept briefings
- Practical exercises using SPM and social audit tools
- Group discussions and peer learning activities
- Case study analysis from global microfinance institutions
- Hands-on demonstrations of social performance dashboards
- Continuous assessment and feedback sessions

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Online	$1,000
21 Sep 2026	25 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0

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