


SAVIX Savings Group Management Information System Training (MIS design, operation and application)

DETAILED COURSE OUTLINE

Course title:	SAVIX Savings Group Management Information System	
Dates:	Start: Thursday 3 rd February 2022	End: Saturday 12 th March 2022
Offered by:		
Website:	vsla.net thesavix.org mis.thesavix.org	

Trainers

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- Note that when sending Assignments, these are attached to the email as a Word document.
- Note that when participating in Discussions, either posting your own contribution or responding to another participant, you send as an email, directly and not as an attachment. This allows for a better back-and forth between participants

1. Background to the SAVIX MIS

Savings Groups (SGs) have been around a very long time, certainly pre-dating INGO involvement and the support of donors. Since 1991, in Niger, where CARE created what is believed to be the first SG programme (Mata Masu Dubara – or Women on the Move), the development industry has been deeply involved in their promotion and, using one SG methodology or another, have trained at least 18 million people in more than 750,000 groups in more than 77 countries. What development professionals brought to a pre-existing informal

base was a strong focus on institutional capacity building, transparent and standardized procedures and record-keeping of increasing simplicity. This sharply reduced the incidence of loss and fraud and SGs are now a trusted and significant part of the financial infrastructure, able to deliver flexible, safe and profitable financial services to the very poor, including remote rural areas. They are also integrated more and more as a cross-sectoral methodology into other interventions offered by local and international NGOs.

At the start, very little effort was made to quantify results, mainly because programmes were experimental and were not trusted to deliver sustainability and scale, but after testing in several countries, many INGOs adopted the SG methodology, aiming for large scale, cost effectiveness and, most important of all, the means to measure efficiency and effectiveness.

Over the following 16 years specialized Excel tools were developed to track performance, but as programmes reached very large scale (with many thousands of groups) and operated across a wide variety of sectors, sometimes in networks, it became necessary to move to a web-server solution, and in 2013 VSL Associates and Software Group created the SAVIX MIS. The current version (2.0) went live in April of 2018. Taken together, the MIS reports on the activities of more than 63,000 groups worldwide, covering more than 14 million members, organised in more than 4,700 projects in more than 1,200 MIS instances worldwide (77 countries).

The benefits of moving to an online system are:

- The system cannot be corrupted by its users
- It allows for aggregation and comparison of projects within organisations and across organisations, both within a given country or across multiple countries
- All reports are real time and updated immediately
- Data can be entered by different authorised users within a single project in multiple locations
- In addition to standard data, user-defined data can be captured and analysed
- Reports can be accessed by external audiences through use of dedicated credentials that allow for review without the risk of interference with data

The course we are offering has been run in 5 different countries in Africa for the last several years, and the online course (now the third in the series, offered every quarter, follows a similar curriculum, but with a greater emphasis on discussions and assignments, to ensure full participation. It is designed so that a participant will be able to set up and manage a national MIS for SGs and will know how to create networks of projects that encompass multiple MIS instances.

2. Prerequisites

- At least one year's experience working with Savings Groups and member owned models, with a special responsibility for performance measurement
- Background in data management and analysis
- An excellent internet connection
- A capable computer that should be serviced and cleared of clutter, so as to optimise speed and reliability – talk to your IT people and get them to help you out. Failure to maintain your software in optimal condition will seriously affect the quality of the learning experience.
- A Zoom account to be set up prior to our meeting on Thursday 3rd February 2022 (**see the Course schedule in section 5 below**)
- A Dropbox account, so that you can access course materials and module content.

3. Learning outcomes

By the completion of this course, individual participants will:

- Be able to design an appropriate architecture for the MIS adapted to organisational structure, organisational information needs and the needs of external audiences
- Assemble the necessary data to allow the system to be set up
- Be able to set up an MIS and multiple projects
- Be able to understand, collect and clean data
- Enter data
- Configure reports
- Analyse results as managers, supervisors and field staff
- Create and maintain networks of projects in different MIS instances, as necessary

4. Modular structure of the course

The course is based around the SAVIX MIS Users' Manual and the curriculum tracks the steps in the manual, from Chapters 1-8. Thus, each module will need students to review the section of the manual that will be sent to them as background reading.

Each module will start with a webinar in which the objectives of the module will be set out and will involve a mixture of

- webinars that will take place at specific dates in real time (but will also be recorded and available to you on Dropbox). Attendance and participation are graded Webinars contribute 20% of your total marks
- discussions that will be moderated and graded. Discussions contribute 20% of your total marks.
- assignments based on the module's main theme and the webinars. Assignments contribute 60% of your total marks.

The number of webinars, discussions and assignments will vary from module to module as below:

Figure 1

Activity	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
Webinars	1	1	1	2	2	2
Discussions		1	1	1	1	
Assignments		1	1	1	2	1

Each module will take between 5 and 7 days to complete before the next is introduced, which will allow students to work at their own pace. This allows the course to be completed in about 5 weeks the course can be completed in just over 5 weeks. The expected level of effort is roughly 5-10 hours per week.

5. Course outline, by module

Each module begins with a webinar in which the key subject matter is covered. This is followed over the next 3 – 4 days with at least one assignment and discussion. See Figure 1 for a list of the assignments and discussions that will take place.

Each module will be accompanied by a power point presentation and by parts of the training manual that cover the module content. These will be built up on Dropbox after every webinar. A recording of the webinars will be posted on the day following the relevant webinar

5.1 Module 1: Pre-Course (present to 3rd February 2022)

- Registration, getting participants set up with passwords and registered on Zoom
- Introductions, expectations, contributions
- Online adult learning approach

Participants must also complete a pre-course self-assessment that will act as a baseline for comparison with a similar survey at the end of the course, upon which certification will be dependent. The purpose of the first Zoom meeting on the 4th November is to test and configure the Zoom class. It will include a briefing on how exercises and discussions will be handled.

Webinar 1 at 1000 German time on Thursday 3rd November 2022

5.2 Module 2: What is an MIS and how do you decide on its architecture? (7th - 11th February)

This module focuses on selecting a system architecture for your MIS that takes into account who will be running the MIS (development agency, supporting partners or the partners themselves) how geographically dispersed a project may be and where data is entered and how the need for non-standard data will have an impact on the number of MIS instances that may be necessary.

Webinar 2 at 1000 German time on Monday 7th February 2022

5.3 Module 3: Setting up an MIS and the first project (12th – 16th February)

This module takes the students through the entire set-up process of the MIS and its constituent projects. What information is needed to complete the set-up at different levels and the roles of the MIS Administrator, Project Administrators and Data Entry Officers. The students' assignment is to set up their own MIS, based on a standard project.

Webinar 3 at 1000 German time on Saturday 12th February 2022

5.4 Module 4: Data definitions, data collection, review and entry (17th – 22nd February)

This module looks at the data that is needed in order to use the MIS. This is divided into Static data (collected only once), Cycle data (collected only once during the operating cycle) and Standard data that is always collected on monitoring visits. It also covers the creation of User-defined fields, which fall into two categories (pre-defined and those created by the user). It covers how the data collection process itself yields MIS information in the field for field staff and groups alike and how this can be used to determine profitability.

Webinar 4 at 1000 German time on Thursday 17th February 2022

Webinar 5 at 1000 German time on Tuesday 22nd February 2022

5.5 Module 5: Report preparation, analysis and application (23rd February – 2nd March 2022)

This section covers the preparation and interpretation of reports at three levels:

- MIS level. Project aggregation and Project comparison. These are reports that are used by programme management to aggregate and compare projects and use synthesized data
- Project level 1. Project performance. Three reports mainly of interest to senior management, donors etc., covering overall project performance, how this compares to the benchmark regional and national standards and how key indicators change over time. The reports are the same as for the MIS Administrator, but cover only a single project.
- Project level 2. Operational performance. Four reports designed to compare Trainer efficiency and effectiveness

The module covers the preparation of these reports and their application to operational planning, the measurement of programme and project progress and to future project planning.

Webinar 6 at 1000 German time on Wednesday 23rd February 2022

Webinar 7 at 1000 German time on Saturday 26th February 2022

5.6 Module 6: Setting up User-defined data fields, networks and reviewing supplemental utilities (3rd – 10th March 2022)

This two-part module covers the establishment of User-defined data fields and networks of projects that are unconstrained by their origins in different MIS instances and allows programmes to aggregate and compare projects in different MIS instances, which also may be in different countries. It also covers miscellaneous utilities that were not covered in the earlier modules.

Webinar 8 at 1000 German time on Thursday 3rd March 2022

Webinar 9 at 1000 German time on Monday 7th. March 2022

5.7 Graduation (12th March 2022)

Online Graduation ceremony.

Webinar 10 at 1000 German time on Saturday 12th March 2022

This webinar will be followed by an optional webinar (Webinar 10) on the use of the SAVIX MIS Mobile data entry application on Saturday 12th March 2022

Note that the timetable has been set up to avoid Friday and Sunday webinars. This is to accommodate the possible need for religious observance.

6. Scoring of Assignments, Discussions and Participation

Figure 2: Scoring

% of overall grade	Assignments	Contributions to Discussions	Participation in Webinars
Module 1	-	-	2
Module 2	5	5	2
Module 3	10	5	2
Module 4 Part 1	15	5	2
Module 4 Part 2	No assignment	Optional discussion	2
Module 5 Part 1	10	Optional discussion	3
Module 5 Part 2	10	5	3
Module 6 Part 1	10	Optional discussion	2
Module 6 Part 2	No assignment	Optional discussion	2
Total	60	20	20

Assignments receive the highest proportion of scores. It is expected that when assignments are issued, students will engage with the trainers as may be needed to clarify the assignments and will also engage with the trainers after webinars are completed for the same reason. Active participation in discussions is a standard requirement of the course, and we will likely contact students whose participation in discussions is low to satisfy ourselves of their level of comprehension. Contributions to discussions need to be thoughtful and substantive and not just a single word response. Participation in live Webinars refers to attendance and commenting/querying on chat or by voice.

A Note on Inactivity

The benefit of online learning is that participants are embedded in life and work, but this can get in the way of steady learning and accumulation of knowledge. You must make a conscious commitment of time and attention to the course for it to be effective.

We will consider a student to be inactive if there is no involvement of any kind (reading, participation in webinars, participation in discussions and completion of assignments) for one week. There is some flexibility as it is understood that emergencies arise. However, it is the professional responsibility of the participant to forewarn the facilitator and provide alternatives to ensuring that outcomes of the course are met. Failure to do so will result in loss of grades.

7. Level of effort required

Attendance at Webinars will always require about 2 hours of your time. Assignments will also require between 2 and 3 hours of your time. As the course proceeds the amount of work on Assignments gets heavier and there is a need to expect that module 5, in particular will need more of your time, because there are two assignments due that are quite demanding and may need engagement with the trainers, outside normal class hours. We have also allowed more days for modules 3 and 4 because we anticipate a lot of one-on-one coaching to facilitate setting up your MIS and entering data.

- The average Webinar will need 2 hours of your time
- The average Assignment will need about 2 hours of your time (Note that 2 Assignments are required in Module 5)
- Modules 2 - 5 require you to participate in discussions and this should take about an hour of your time. You are not only expected to post your opinions, but to engage with other participants in debating and exploring the issues.

Figure 3: Hours required of participants, by module

Module No.	Days per module	No. of webinars	No. of assignments	No. of discussions	Total hours
1	3	1	0	0	2
2	4	1	1	1	5
3	5	1	1	1	5
4	6	2	1	1	7
5	7	2	2	2	10
6	7	2	1	1	7

Please ensure that you attend all webinars. Please arrange your schedules so that this is possible. This is your chance to ask questions and clarify issues and directly engage with the other participants.

8. Course schedule by date, content, assignments and discussions

FEBRUARY 2022					
3 T	Module 1 Introduction	Webinar 1	1000 Germany	No assignment	Optional discussion
4 F					
5 S					
6 S	Module 2 What is an MIS & deciding on architecture	Webinar 2	1000 Germany	M2 Assignment 1 due	Discussion closed
7 M					
8 T					
9 W					
10 T	Module 3 Setting up an MIS and the first project	Webinar 3	1000 Germany	M3 Assignment 1 due	Discussion closed
11 F					
12 S					
13 S					
14 M					
15 T	Module 4 Data definitions, collection, review and entry	Webinar 4	1000 Germany	M4 Assignment 1 due	Discussion closed
16 W					
17 T					
18 F					
19 S					
20 S					
21 M	Module 5 Report preparation, analysis and application: (Management reports & Operational reports)	Webinar 5	1000 Germany	M5 Assignment 1 due	Optional discussion
22 T					
23 W					
24 T					
25 F					
26 S					
27 S					
28 M	Module 6 Setting up user-defined fields, networks and reviewing supplemental utilities	Webinar 6	1000 Germany	M5 Assignment 2 due	Discussion closed
1 T					
2 W					
3 T					
4 F					
5 S					
6 S					
7 M					
8 T					
9 W					
10 T					
11 F	Module 7 Managing networks & Mobile app.	Webinar 7	1000 Germany	M6 Assignmet 1 due	Optional discussion
12 S					
13 S					
14 M					
15 F	Module 7	Webinar 8	1000 Germany	No assignment	Graduation
16 S					
17 S					
18 M	Module 7	Webinar 9	1000 Germany	No assignment	Optional
19 T					
20 W	Module 7	Webinar 10	1130 Germany	No assignment	Graduation
21 T					
22 F	Module 7	Webinar 11	1000 Germany	No assignment	Optional
23 S					
24 S	Module 7	Webinar 11	1000 Germany	No assignment	Optional
25 M					
26 M	Module 7	Webinar 11	1000 Germany	No assignment	Optional
27 T					
28 T	Module 7	Webinar 11	1000 Germany	No assignment	Optional
29 W					
30 W	Module 7	Webinar 11	1000 Germany	No assignment	Optional
31 T					

MARCH 2022

9. Important information

9.1 Time of the webinars

The course is divided into modules that are all approached in a similar way and at a similar time. All webinars in each module take place at the same time as follows:

Figure 4: Time of the webinars

Country	Webinar times
Germany	1000

This table will be completed once enrolment is completed

9.2 Supplementary support.

When you work online to set up your MIS, it is possible that you may find it confusing the first time you do it. Just take a careful look at the Power Points and the part of the manual covered in the webinar. If you need help to actually complete the setup of the MIS, this can be scheduled with Laura, Andrew or myself, on Skype or on Zoom, as you prefer.

9.3 Roles of the Trainers

The training team is made up of Hugh Allen, CEO of VSL Associates, Laura Knapp-Allen, an Analyst of VSL Associates and Andrew Mnjama, CEO of Stewardship Associates.

During the training each one will have specific roles.

Hugh Allen

- Team leader
- Runs webinars
- Participates in and grades discussions

Andrew Mnjama

- Participates in and grades discussions
- Supervises and grades assignments
- Collates all grades and communicates these to students

Laura Knapp-Allen

- Supervises and grades assignments
- Participate in webinars and provide supplementary support as requested by Andrew and Hugh. She is a French speaker.