Microfinance M&E Training Course

Professional Development Training Course Outline

Category	Monitoring and Evaluation	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Microfinance M&E Training Course is a comprehensive, hands-on program designed to empower professionals, practitioners, and institutions with advanced skills in tracking, assessing, and optimizing microfinance initiatives. This course integrates data-driven insights, impact assessment, digital M&E tools, and evidence-based strategies to enhance operational efficiency and financial inclusion. Participants will gain practical knowledge on measuring client outcomes, evaluating loan performance, and designing robust microfinance programs that are sustainable and scalable.

Through a combination of interactive workshops, real-world case studies, participatory learning, and digital M&E applications, this course ensures participants develop the expertise to make informed strategic decisions. By leveraging innovative metrics, performance indicators, and outcome-based evaluations, learners will enhance the transparency, accountability, and social impact of microfinance projects. This training is ideal for organizations aiming to strengthen financial inclusion, optimize microcredit programs, and achieve measurable social and economic results.

Programme Curriculum

Microfinance M&E Training Course

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10 days

Course Objectives

By the end of this course, participants will be able to:

1. Apply data-driven M&E frameworks in microfinance programs.
2. Develop and utilize key performance indicators (KPIs) for financial inclusion.
3. Implement impact assessment tools for client outcomes.
4. Conduct loan portfolio performance analysis for sustainability.
5. Use digital M&E platforms for real-time reporting.
6. Enhance data visualization skills for decision-making.
7. Integrate risk management indicators into microfinance evaluations.
8. Apply evidence-based strategies to improve financial literacy programs.
9. Evaluate social and economic impact of microfinance interventions.
10. Design client-centered monitoring systems for microfinance institutions.
11. Implement beneficiary feedback mechanisms to improve services.
12. Utilize predictive analytics for portfolio risk assessment.
13. Strengthen governance and accountability frameworks in microfinance operations.

Target Audience

1. Microfinance practitioners and program managers
2. Financial inclusion officers
3. Social enterprise managers
4. Development organizations and NGOs
5. Policy makers and regulators in finance
6. Data analysts and M&E specialists
7. Bank and SACCO managers
8. Consultants in microfinance and impact assessment

Course Modules

Module 1: Introduction to Microfinance M&E

- Fundamentals of microfinance and financial inclusion
- Role of M&E in microfinance success
- Designing effective M&E frameworks
- Understanding donor and stakeholder reporting requirements
- Case Study: Evaluating the impact of a rural microloan program

Module 2: Designing Indicators for Microfinance

- Difference between output, outcome, and impact indicators
- Developing SMART indicators for microfinance
- Incorporating gender and social inclusion metrics
- Selecting financial and non-financial KPIs
- Case Study: Gender-sensitive microfinance performance indicators

Module 3: Data Collection Techniques

- Quantitative vs qualitative data in microfinance
- Surveys, focus groups, and client interviews
- Mobile and digital data collection tools
- Ensuring data accuracy and reliability
- Case Study: Mobile survey data collection in urban slums

Module 4: Loan Portfolio Performance Monitoring

- Tracking repayment rates and default ratios
- Loan classification and risk assessment
- Portfolio at Risk (PAR) calculations
- Identifying early warning signals
- Case Study: Reducing non-performing loans in microfinance

Module 5: Client Impact Assessment

- Measuring socio-economic benefits for clients
- Client income, savings, and business growth tracking
- Using household surveys for impact measurement
- Client satisfaction and empowerment evaluation
- Case Study: Assessing impact of microcredit on women entrepreneurs

Module 6: Digital Tools for M&E

- Overview of M&E software and dashboards
- Data visualization for stakeholders
- Automated reporting and real-time monitoring
- Integrating mobile apps for client data
- Case Study: Implementing a cloud-based M&E system

Module 7: Risk Management in Microfinance

- Identifying operational and financial risks
- Designing risk indicators
- Monitoring portfolio vulnerabilities
- Strategies for mitigating client and institutional risk
- Case Study: Portfolio risk reduction in small-scale lending

Module 8: Financial Literacy Monitoring

- Evaluating financial education interventions
- Tracking client knowledge and behavior change
- Measuring savings, budgeting, and investment habits
- Linking literacy programs to repayment performance

- Case Study: Financial literacy program impact on women borrowers

Module 9: Governance and Accountability

- M&E for compliance and transparency
- Stakeholder reporting and accountability frameworks
- Audit trails and record-keeping
- Performance review mechanisms
- Case Study: Strengthening accountability in a SACCO network

Module 10: Data Analysis and Interpretation

- Descriptive and inferential statistics for microfinance data
- Identifying trends and patterns
- Using dashboards for evidence-based decision-making
- Presenting actionable insights
- Case Study: Data-driven decision-making in rural lending

Module 11: Predictive Analytics in Microfinance

- Introduction to predictive modeling for loan risk
- Client segmentation and scoring
- Early detection of defaults
- Scenario analysis for portfolio management
- Case Study: Predictive analytics reducing loan defaults

Module 12: Feedback and Learning Systems

- Collecting client feedback effectively
- Integrating learning loops into M&E
- Using feedback to improve programs
- Continuous program improvement strategies
- Case Study: Beneficiary feedback improving service delivery

Module 13: Reporting and Communication

- Writing actionable M&E reports
- Visual storytelling for stakeholders
- Dashboards, infographics, and policy briefs
- Customizing reports for donors and regulators
- Case Study: Communicating program impact to funders

Module 14: Scaling and Sustainability

- Evaluating scalability potential
- Monitoring sustainable growth
- Social impact sustainability metrics
- Long-term monitoring frameworks
- Case Study: Scaling a community microfinance program

Module 15: Capstone Project and Practicum

- Designing a full M&E plan for a microfinance program

- Data collection and analysis
- Dashboard creation and presentation
- Peer review and facilitator feedback
- Case Study: Implementation of an end-to-end M&E system

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

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

23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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