Introduction to the PPI®

Trainer Guide

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Contents

Introduction

This Trainer Guide for the *Introduction to the PPI* course (also referred to as *Introduction to the PPI* workshop) is designed to give you as the trainer the guidance and resources you need to lead participants through the course and achieve its goal and objective.

About This Course

Grameen Foundation developed this course. Grameen Foundation's mission is to enable the poor, especially the poorest, to create a world without poverty. Consistent with this mission, Grameen Foundation in 2005 launched the Progress out of Poverty Initiative, dedicated to enhancing the position of social performance as a complement to financial performance. Specifically, the initiative championed the development of the Progress out of Poverty Index® (PPI®), a client-level poverty measurement tool. Grameen Foundation's Progress out of Poverty Initiative continues to champion the PPI and provides products and services to support its dissemination and use, including this course.

This section of the guide defines the course goals and objectives, outlines the course's modules and describes the audience for this course, prerequisites, length and other relevant information.

Course Goals and Objectives

Introduction to the PPI is an instructor-led, four-hour course that provides an overview of the key aspects of the PPI. See page 4 for a sample agenda.

The course consists of the following three modules:

- Module 1: PPI Fundamentals;
- Module 2: PPI Implementation; and
- Module 3: The PPI and Your Organization.

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

- describe the PPI in the context of social performance management;
- define the PPI in terms of purpose, construction and use;
- explain key steps and best practices in the implementation of the PPI; and
- explain key uses, challenges and benefits of the PPI.

Audience Description

Introduction to the PPI is geared toward technical and program headquarters staff of development organizations who are interested in increasing their knowledge of the PPI and learning how it could be used in their organization. This course is not industry-specific and is appropriate for anyone interested in poverty measurement.

The number of participants per workshop most appropriate for this course ranges from a minimum of 12 to a maximum of 40. It is common for more than one participant from the same organization to attend the course.

Prerequisites

Introduction to the PPI requires a very basic level of understanding of social performance. Furthermore, in order to gain the most benefit from the workshop, participants should attend the full four hours.

Course Length

Introduction to the PPI is designed to be delivered in four hours, including a 15-minute break.

Training Environment

Introduction to the PPI requires that the training venue have electricity, an LCD projector, a projector screen or wall, a laptop and Internet access. The layout of the room can vary, but ideally the room should have worktables that can be set up in a variety of styles (e.g., U-shape).

Instructional Methods and Techniques

The *Introduction to the PPI* workshop is led by one instructor in a classroom-style setting. The modules guide participants through a series of timed sessions. The learning takes place in sequence. Each module lays a foundation for the next.

The workshop uses a "learning by doing" method, applying principles and preferred practices of adult learning. Participants are actively engaged in their own learning. The workshop emphasizes the following training techniques:

- **Guided lecture:** The instructor guides participants through lectures on a module's specialized, technical content. The lectures encourage the participants to share their own experiences and ideas, as well as to reflect on and apply key concepts from the lectures to their work.
- **Group activities/discussions:** Participants work in groups or in pairs on assigned scenarios, case studies or specific topics designed around the content of a module.
- **Practice exercises:** Participants use problem-solving exercises to apply their knowledge. Practice exercises take place in individual or paired activities. At the end of each practice exercise, the instructor facilitates a group discussion on the insights and perspectives gained.

Course Materials

The *Introduction to the PPI* course has materials for both the trainer and participants.

Trainer Materials

Each trainer should have:

- this guide in printed form;
- the accompanying PowerPoint Presentation; and
- other e-files on a USB.

Participant Materials

Each participant receives:

- a participant workbook;
- the case study *Rapid Response in the Wake of Disaster*;
- e-files on a USB (PowerPoint presentation, PPI case studies, etc.); and
- an evaluation form.

Course Supplies and Equipment

Delivery of the *Introduction to the PPI* course requires the following supplies and equipment:

- flipchart easels or whiteboards;
- markers, pens and paper;
- a projector;
- a laptop; and
- an Internet connection.

Trainer Requirements

Trainers of *Introduction to the PPI* must be fluent (in reading, writing, comprehension, and speech) in the language in which the course is delivered. If the course is not delivered in English, trainers must possess a high level of fluency in English. They should be knowledgeable about social performance in general and the PPI in particular and have experience working with development organizations. Ideally, they should also have some experience as a trainer or participant in experiential learning methods of instruction.

Trainers are required to:

- read the Trainer Guide and Participant Workbook;
- review the e-files and handouts;
- organize materials and supplies;
- verify logistics, such as room set-up, with the training host or training facility manager; and
- adapt activities, if needed, to the number of participants.

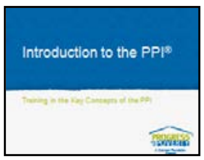
Sample Agenda

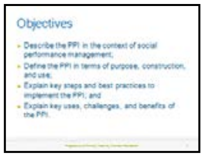
SESSION	TIME
Welcome and Introductions *PPI Fundamentals* ▸ Social Performance and the PPI ▸ The PPI: A Measurement and Management Tool	*10:00 - 11:15*
BREAK	*11:15 - 11:30*
PPI Fundamentals, Continued ▸ The PPI's Construction *PPI Implementation: Key Steps and Best Practices* ▸ PPI Implementation Cycle ▸ PPI Standards of Use	*11:30 - 01:00*
The PPI and Your Organization ▸ Uses, Challenges, and Benefits: Through the Lens of Fonkoze ▸ Next Steps for Your Organization *Wrap-up and Close*	*01:00 - 02:00*

Trainer Instructions

Below are the instructions that you may follow as you become familiar with giving this presentation. The scripted lines are suggestions for how to present the material, but you should try to use your own words and style when possible, ensuring that all the important information is presented.

Welcome and Introductions

Slide	Action
 **Slide 1**	**SMILE and SAY,** "Hello and welcome to *Introduction to the PPI*, a four-hour, introductory workshop for the Progress out of Poverty Index, commonly called the PPI." **SAY** your name and role. **ACKNOWLEDGE** the host of the training, if any. **ASK** the host to say a few words about the workshop (e.g., reasons for having workshop). **SAY,** "Let's get started. This workshop is a mix of presentation, discussion and group and individual exercises." **SHOW** the Participant Workbook and the USB, if a USB is provided. **SAY,** "Everything you need for this workshop is in the Participant Workbook, and you can use it to follow along. The USB contains relevant documents for your future reference and use." **CLICK** to Slide 2.
 **Slide 2**	**SAY,** "Many organizations champion, promote and use the PPI. That said, Grameen Foundation was and continues to be a central, driving force behind the PPI. Grameen Foundation's mission is 'To enable the poor, especially the poorest, to create a world without poverty.'" **CLICK** to Slide 3.
 **Slide 3**	**SAY,** "Through the Progress out of Poverty Initiative, Grameen Foundation develops the PPI and provides those who use the PPI – or are interested in using the PPI – with an array of resources, products and support services. Your guide includes more information on both Grameen Foundation and the Progress out of Poverty Initiative." **CLICK** To Slide 4.



Slide 4

SAY, "As [name of host] mentioned, this workshop will provide you with a basic *Introduction to the PPI*. At the end of this workshop, you will be able to…"

READ the objectives.

CLICK to Slide 5.

Slide 5

SAY, "Our agenda for the workshop has been built around the training objectives. For the next hour or so, we will review PPI Fundamentals. After a short break, we will look at key steps and best practices in implementing the PPI. Then, we will look at the potential of the PPI to be a powerful tool for your organization."

CLICK to Slide 6.

Slide 6

SAY, "Material from the 'SPM Essentials Resource Handbook' written by the Social Performance Task Force has been adapted for this course. Both the Cisco Foundation and McGraw-Hill helped fund the development of this course and material."

THANK any other organization that assisted you in providing training.

CLICK to Slide 7.

Slide 7

SAY, "Now let's take a few minutes to complete the self-assessment in your guide."

SHOW participants the self-assessment in the Participant Workbook on page 3.

SAY, "This self-assessment is for your own use and reference during the workshop. It will help you to gauge your level of understanding of the PPI right now, at the beginning of this workshop, as well as at the end of this workshop. . Please take a couple minutes to fill out the self-assessment now. Because it is for your own use, be honest."

WAIT 2 minutes as participants complete the self-assessment.

SAY, "Excellent. As we move through the workshop, you'll be able to refer back to this. Now one more thing before we dive into the agenda. Let's do a quick round of introductions."

CLICK to Slide 8.

Slide 8

SAY, "When I read a statement that applies to you, please stand up and introduce yourself. You can stay standing (and stretching) until I read a statement that does not apply to you."

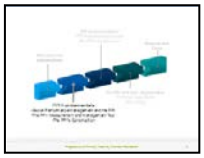
CLICK and READ all eight bulleted statements as they appear.

ASK participants to introduce themselves the first time they stand up.

COMMENT After each statement you can engage the audience by asking questions, such as the following: What was the product or service you launched? What was the subject of the survey? Where did you vacation?

CLICK to Slide 9.

Module 1: PPI Fundamentals

Slide	Action
 **Slide 9**	**SAY,** “Let’s move on to our next session: PPI Fundamentals. In this session, we’ll review three topics: Social Performance Management and the PPI, The PPI as a Measurement and Management Tool and the PPI’s Construction.” **CLICK** to Slide 10.
 **Slide 10**	**SAY,** “The PPI is a tool that many organizations use as part of their social performance management.” **CLICK** to Slide 11.
 **Slide 11**	**SAY,** “Social Performance is the effective translation of an institution’s mission into practice in line with accepted social values.” **CLICK** to Slide 12.
 **Slide 12**	**SAY,** “Social Performance Management is the system of processes and tools that an organization uses to translate social goals into practice.” **CLICK** to Slide 13.
 **Slide 13**	**SAY,** “These tools are what we will focus on today because the PPI is one of these tools. There are many client-level data tools that are used in SPM, but which tool is for which purpose? Which tool is going to meet your needs? Before we can answer these questions, we have to ask ourselves another question – what are our goals in using a tool in the Social Performance Management Toolbox?” **CLICK** to Slide 14.

Slide 14

SAY, "Usually, there are common, over-arching goals in social performance management for any organization – from a microfinance institution to a social enterprise to a non-governmental organization. These goals can be stated in many ways; here they are posed as questions. In social performance management, client-level data tools help answer these questions."

CLICK to Slide 15.

Slide 15

SAY, "Here are some examples of client-level data tools for social performance management. These tools assess outcomes and measure changes at the client level, including changes in quality of life, status of enterprise (profits, skills) and equality.

SAY, "These tools profile clients, segment clients for targeting products and services and track changes in poverty."

REFER to the Participant Workbook for definitions of these tools on page 5.

SAY, "Some of these tools are also referred to as poverty scorecards, including the CASHPOR Housing Index, the PAT and the PPI."

ASK, "Why do we use the term scorecard?"

SAY, "There are scorecards for sports, board games and even businesses, both profit and non-profit. A poverty scorecard is no different in the sense that there are points, or scores, for each survey question on the scorecard, but in this case the scoring system is designed to measure poverty."

CLICK to Slide 16.

Slide 16

SAY, "The PPI is a poverty measurement tool for organizations and businesses with a mission to serve the poor. The PPI is statistically-sound, yet simple to use: the answers to 10 questions about a household's characteristics and asset ownership are scored to compute the likelihood that the household is living below a poverty line. With the PPI, organizations can identify the clients, customers or employees who are most likely to be poor or vulnerable to poverty, integrating objective poverty data into their assessments and strategic decision-making.

Here is the PPI scorecard for India, together with its accompanying look-up table. These two pieces are part of every PPI."

READ two to three questions on the PPI scorecard, for example: How many household members are 17 years old or younger? What is the primary source of energy for cooking? Does the household possess a sewing machine?

SAY, "As you can see, the PPI is made up of 10 questions, which serve as indicators of poverty. These indicators are derived from national household income expenditure surveys. The indicators are non-financial and tend to be verifiable and liable to change over time. It is typically and most properly administered as a survey on-site in a client's home; however, it can be administered on paper or via mobile phone in certain situations."

ASK, "When you look at this, what words come to mind? Does it seem easy to use?"

TAKE 3 to 4 responses.

CLICK to Slide 17.

Slide 17

SAY, "Currently, there are 46 country-specific PPIs and one expert-based poverty scorecard for China, with more being built all the time."

CLICK to Slide 18.

Slide 18

SAY, "What about measuring impact? In the development sector, we are all about results, results, results. I say 'results' three times for a reason. In our field there are three kinds – outputs, outcomes and impact."

REFER to Participant Workbook, page 13.

REVIEW the definitions of outputs, outcomes and impact:

- **Outputs** are the results of an organization's programs, projects or activities. Examples are the number of workshops held, the number of new clients, percentage of women clients and the percentage of clients currently living below $2 a day.
- **Outcomes** are changes that occur, usually over time, among an organization's clients. Examples are the percentage of clients who have moved above the $2 per day poverty line after three years or the number of clients who have a tin roof or better after three years.
- **Impact** addresses cause-and-effect relationships. In other words, they are the outcomes that are directly attributable to a program, project or activity.

SAY, "The PPI measures outputs and, more specifically, outcomes. It measures change, but it cannot measure the extent to which changes in outcomes are directly attributable to the organization's programs, projects and activities. Therefore, the PPI does not measure impact. No client-level poverty data tool measures impact."

CLICK to Slide 19.

Slide 19

SAY, “Now that we’ve looked at Social Performance Management and the PPI, let’s talk more specifically about the PPI – as both a measurement and management tool.”

CLICK to Slide 20.

Slide 20

SAY, “Recall the toolbox. In the toolbox, the PPI is a client-level data tool for poverty measurement. In the toolbox, the PPI is our tape measure, which we use to measure poverty.”

CLICK to Slide 21.

Slide 21

SAY, “Organizations can use the PPI as a measurement tool for client targeting and market intelligence. We can answer questions like, ‘Who and where are the poor?’ and ‘What are the demographics of the poor?’”

SAY, “Also, organizations can use the PPI as a measurement tool to gauge clients’ movement into or out of poverty. We can answer the question, ‘Are the organization’s clients moving out of poverty?’”

SAY, “Let’s look at some examples.”

CLICK to Slide 22.

Slide 22

SAY, “Let’s look at some charts that demonstrate how one organization, Fonkoze in Haiti, is using the PPI to answer these questions and measure the poverty rates of its clients. The charts we are going to look at are taken from Fonkoze’s 2010 Social Performance Report.”

ASK, “Who here is familiar with Fonkoze and what they do?”

TAKE 1 to 3 responses. If no responses…

SAY, “Fonkoze is the largest microfinance institution in Haiti and offers a full range of financial services to rural-based poor. Fonkoze is committed to the economic and social improvement of the people and communities of Haiti and to the reduction of poverty in the country. Fonkoze has embedded the PPI into a tool that collects data on 15 other indicators and uses another client-level data tool, a food security survey.”

CLICK to Slide 23.

Slide 23

ASK, "What does this chart show?"

TAKE 1 to 3 responses.

SAY (if not already stated), "The chart shows the distribution of clients' poverty scores for three programs:

- CLM – non-credit livelihoods program;
- Ti Kredi – introductory lending program; and
- Solidarity – primary lending program."

CLICK to Slide 24.

Slide 24

SAY, "Here are two more charts from Fonkoze's 2010 report."

ASK, "What does the first chart (Percentage of Incoming Clients Living Below $1/day and $2/day by Program) measure in general?"

TAKE 1 to 2 responses.

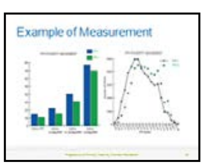
SAY (if not already stated), "This chart takes two poverty lines and shows the percentage of new clients in each program that falls below them. We can see that the new CLM clients are the poorest."

CLICK to Slide 25.

Slide 25

SAY, "Now let's look at an example from Grameen Koota, a microfinance organization in India. This example is from a case study published by Grameen Foundation."

CLICK to Slide 26.



Slide 26

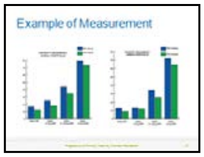
SAY, "Here is chart from Grameen Koota."

ASK, "What does it show?"

TAKE 1 to 2 responses.

SAY (if not already stated), "The chart on the left shows percentages of clients below various poverty lines at two points in time. We can see here that Grameen Koota's percentage of clients in poverty decreases from the first PPI collection to the second. The chart on the left shows that the distribution of poverty scores has increased over time, reinforcing what the first chart shows."

CLICK to Slide 27.



Slide 27

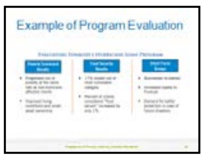
SAY, “Let’s look at two more charts from Grameen Koota. These charts take information from the previous chart and segment clients based on location. We can see here that both rural and urban clients are moving out of poverty. Segmenting data is a great way to discover new information about clients.”

CLICK to Slide 28.

Slide 28

SAY, “We’ve seen how the PPI can be used a measurement tool. Now let’s see how it can be an organizational performance management tool. Data from the PPI, especially if used with other data on clients, can be used to measure progress toward your mission, the extent to which your products and services are being consumed by the poor, the extent to which certain branches or field offices are serving the poor, and so on. Let’s look at a few examples.”

CLICK to Slide 29.



Slide 29

SAY, “Fonkoze has used the PPI as a management tool for program evaluation, specifically for its hurricane loan program. This example is from a case study published by Grameen Foundation.”

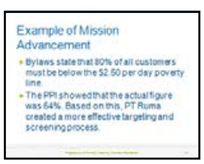
REVIEW Poverty Scorecard Results.

CLICK to Slide 30.

Slide 30

SAY, “In Indonesia, PT Ruma has used the PPI for mission advancement. PT Ruma is a social enterprise that provides those living on less than $2.50 per day opportunities to earn revenue by selling mobile phone airtime. This example is from a case study published by Grameen Foundation.”

CLICK to Slide 31.



Slide 31

READ the text on the slide.

CLICK to Slide 32.

Slide 32

SAY, “CARD Bank in the Philippines used the PPI for product development. This example is from a case study published by Grameen Foundation.”

CLICK to Slide 33.

Slide 33

READ the text on the slide.

CLICK to Slide 34.

Slide 34

SAY, "Let's pause for a moment so that you may ask any questions you may have on what we've covered so far."

CLICK to Slide 35.

Slide 35

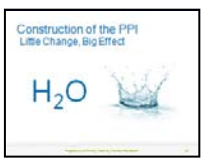
SAY, "If there aren't any more questions, let's take a 15-minute break. When we come back from the break, we'll discuss how the PPI is constructed."

CLICK to Slide 36.

Slide 36

SAY, "Now let's examine how the PPI is constructed. The tool is sound and developed with solid statistical analyses and user reviews. To begin to think about the PPI's construction, it is useful for us to understand that the PPI is only useful as it is provided and that changes can drastically alter results."

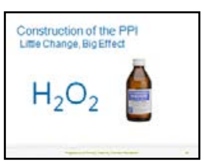
CLICK to Slide 37.



Slide 37

SAY, "Here is a formula that we are all familiar with: H_2O. It is the chemical formula for water: one molecule of water has two hydrogen atoms bonded to a single oxygen atom."

CLICK to Slide 38.



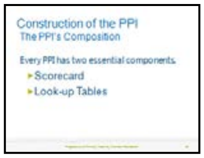
Slide 38

ASK, "What if we changed the formula from H_2O to H_2O_2? On paper, the change appears minimal."

CLICK so that the bottle of hydrogen peroxide appears.

SAY, "But we've actually created hydrogen peroxide. A small change can have a drastic impact. Changing the questions to the PPI, even if only the wording of questions, can appear small but drastically change outcomes of the PPI. The PPI would no longer be statistically sound."

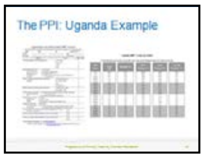
CLICK to Slide 39.



Slide 39

SAY, "When we speak about the construction of the PPI, we are not simply discussing the survey and its indicators, but also the look-up table needed to find poverty likelihoods."

CLICK to Slide 40.



Slide 40

SAY, "This is the PPI for Uganda."

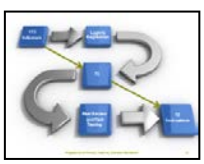
CLICK to Slide 41.

Slide 41

SAY, "We will use the PPI for Uganda as an example to talk about how the PPI, especially the scorecard, is constructed. The construction process for all PPIs is similar. The PPI itself (comprising the scorecard and look-up tables) represents the surface construction – what you see, what you interact with, etc."

SAY, "In building (or updating) a PPI, the developers of the PPI start with the most recent household income or expenditure survey available in a country. These surveys, given by a country's government, typically contain 200 to 1000 questions answered by each household and provide substantial information on a household's asset ownership and income or expenditure level. For Uganda, the 2009/2010 National Household Survey conducted by Uganda Bureau of Statistics was used. 175 possible indicators were used."

CLICK to Slide 42.



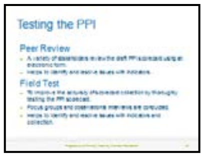
Slide 42

SAY, "These indicators were then ranked according to how strongly they predict poverty levels. This ranking is done using a logistic regression model. Of all the questions in Uganda's National Household Survey, 15 were found to be predictive of poverty and became candidates for the Uganda PPI scorecard."

SAY, "The best indicators then undergo a peer review and field test process, which helps to highlight the 10 most relevant, easy-to-use indicators for the final PPI scorecard."

SAY, "This model is used for all PPIs – the number of indicators in the national survey may change, as well as the top number of indicators derived from the selection criteria. However, the process always distills a large number of questions to 10 that when used together are strongly predictive of poverty in that country."

CLICK to Slide 43.



Slide 43

SAY, "Let's talk a little more about the peer review and field testing. The PPI is constructed with statistical rigor and accuracy, but before it is released for use, it is tested extensively. In particular, the two things done to test it are conduct a peer review and a field test. During the peer review, a variety of stakeholders review a draft PPI scorecard, noting any issues with indicators. Afterwards, a field test is conducted to test the accuracy of scorecard collection. Focus groups and observational interviews are also conducted. This helps to identify and resolve issues with indicators and collection."

CLICK to Slide 44.

Slide 44

SAY, "Let's now use the PPI. We'll administer the survey and use the look-up table to determine poverty likelihoods both for ourselves as individuals and the group as a whole."

REFER to the instructions in the Participant Workbook on page 28.

SAY, "Work in pairs – one person will be the interviewer and the other person will be the client. If you are the interviewer, read each question on the survey. If you are the interviewee, respond to each question. For the purposes of this exercise, you must select one of the choices the interviewer provides but feel free to make up answers since your scores will be shared with the group. If you are the interviewer, tally the score and use the look-up table to determine the poverty likelihood for that score."

KEEP time and **WALK** around to answer questions.

SAY, "Now that we have completed the individual scoring, let's use those poverty likelihoods to determine the poverty rate of the group."

ASK each pair to give you their poverty likelihoods.

RECORD scores on a flipchart (or Excel).

DEMONSTRATE how poverty likelihood of a group is calculated, emphasizing taking the average of all of the poverty likelihoods. Reinforce the fact that the percentage for an individual is a likelihood while the percentage for the group is a rate.

ASK participants if they have any questions.

CLICK to Slide 45.

Module 2: Implementation

Slide	Action
 **Slide 45**	**SAY,** “We are now ready for Module 2: Implementation. In this module, we will take a close look at the PPI Implementation Cycle and the Standards of Use.” **CLICK** to Slide 46.
 **Slide 46**	**SAY,** “To implement the PPI, an iterative cycle works best.” **CLICK** to Slide 47.
 **Slide 47**	**SAY,** “Through the PPI Implementation Cycle, you will design, collect, report, understand and decide. Let’s walk through, at a high-level, each stage of the cycle.” **CLICK** to Slide 48.
 **Slide 48**	**SAY,** “In the design phase, organizations must ask the right questions and make a plan for action. Questions to be asked are:” **READ** each question, give an example, and ask participants for examples from their own work. - “Why do you want to use the PPI in the first place?” **EXAMPLE**: “We want to use the PPI to know whether we are fulfilling our mission of targeting the poor.” - “Who’s involved?” **EXAMPLE**: “Field staff will be administering the survey and will need training.” - “How will you collect the data?” **EXAMPLE**: “We will collect data by hand at clients’ homes.” **SAY,** “Ultimately, you want to design a plan that addresses these questions in order to help make the other stages of the implementation cycle more efficient and effective. Grameen Foundation offers a template to help organizations think

through the design phase, available through the Progress out of Poverty website."

CLICK to Slide 49.

Slide 49

SAY, "In the collection phase of the PPI Implementation Cycle, use your plan to collect data. Training should be in place, as should quality control of survey administration and information management systems."

SAY, "It is important to point out that in terms of data entry, you should make sure that each client surveyed is given a unique identifier number. Keep and record data on both the individual score and the poverty likelihood, not just one or the other."

CLICK to show Report.

SAY, "At this point, you have collected the data according to your plan developed in the design phase. The data should be stored in your MIS. Now what do you do with it? First you need to find and correct simple input errors, or "clean your data."

SAY, "Your plan should describe the types of reports you want to run. For example, perhaps this is your second PPI data collection and you want to compare data."

SAY, "You'll also want to think about how to display the data, to think about how to describe the data in writing and to think about the audience for the reports. These questions are very important to consider when you are working with a statistical tool. Otherwise the data could be open to unintentional misinterpretation."

CLICK to show Understand.

SAY, "Reporting is one thing, but understanding what the data is telling you is more meaningful. This is why we have identified the understand phase as critical in the PPI Implementation process. In the report phase, you have compiled reports with graphs and text to describe the data."

SAY, "At this stage, again, your plan is critical. Go back to your questions. You want to understand what the data is showing, as well as what it is not showing. This stage is also where you make discoveries from the data – sometimes good and other times at odds with your social goals, but always informative. This is the 'A-ha' stage of the cycle."

SAY, "A good example of the type of information that PPI data can illuminate can be found looking at the case of PT Ruma. PPI data showed that the poor in their micro-franchise program were typically good clients once they passed a 3-month mark. However, clients dropped out more frequently in the first 3 months. PT Ruma had questions about drop-outs, but the data helped them to understand just how critical the first 3 months in the micro-franchise program was, especially for the poor at certain poverty likelihoods."

CLICK to show Decide.

SAY, "Since PT Ruma's bylaws stipulate that 80% of all customers must be below the US$2.50 per day poverty line and PPI data showed that the poor frequently dropped out of their program in the first 3 months, PT Ruma emphasized assisting poorer clients to help them get past the first three months."

SAY, "This stage of the PPI Implementation process is when you apply what you've learned and to strategic decision-making."

CLICK to show complete cycle.

SAY, "Once decisions have been made, the cycle begins anew. This is the iterative nature of the PPI Implementation Process. Beginning again, you will apply what you learned from the previous experience."

CLICK to Slide 50.

Slide 50

SAY, "To help ensure accurate, transparent implementation, Grameen Foundation developed the PPI Standards of Use. Organizations may be certified in their use of the PPI using these standards."

SAY, "Grameen Foundation launched the certification program a little over two years ago and many organizations have benefited from certification. There are three levels of certification – Basic, Advanced, and Tracking Over Time. They relate to the three levels of standards."

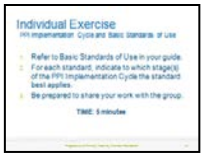
REFER to the different levels of standards in the Participant Workbook, starting on page 32.

SAY, "Here are the standards. Let's take a few minutes to focus on the basic standards and you may review the advanced and tracking over time standards later."

READ through the Basic Standards.

ASK if participants have any questions.

CLICK to Slide 51.



Slide 51

READ slide and **REFER** to the Basic Standards of Use in the Participant Workbook.

ASK, "Do you have any questions? If not, let's get started."

KEEP time for 5 minutes.

ASK participants to share their responses for 1 to 2 criteria under each category: intent, collection, process, training and reporting.

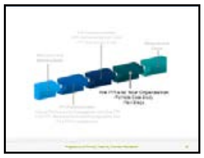
CLICK to Slide 52.

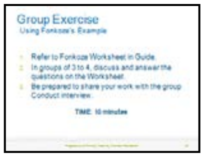
Slide 52

SAY, "Striving to meet these Standards of Use throughout the PPI Implementation Cycle will make it that easier for an organization to become certified."

CLICK to Slide 53.

Module 3: The PPI and Your Organization

Slide	Action
 **Slide 53**	**SAY,** “Let’s use what we know about the fundamentals of the PPI and the key steps and best practices in implementation to look at the PPI and your organization in this third and final module.” **CLICK** to Slide 54.
 **Slide 54**	**SAY,** “To help us understand uses, challenges and benefits, we will return to the example of Fonkoze in Haiti.” **CLICK** to Slide 55.
 **Slide 55**	**SAY,** “We will watch a short video on how the PPI helped Fonkoze to respond to client needs after the devastating 2010 earthquake to get to know Fonkoze even better and to understand how they used the PPI to help shape their post-earthquake response.” **CLICK** the play button to launch a YouTube video (running time is 3:49). **ASK,** “Does anyone have any thoughts about what they just saw that they would like to share?” **TAKE** 2 to 3 responses, if any **CLICK** to Slide 56.
 **Slide 56**	**SAY,** “Earlier we looked at how Fonkoze used the PPI for both poverty measurement and as a management tool, and we just reviewed their experience with the PPI.” **SAY,** “Let’s now take time to pause and reflect on their experiences.” **CLICK** to Slide 57.



Slide 57

READ the instructions on the slide and **REFER** to the worksheet in the Participant Workbook on page 36.

SAY, “I’ll keep time and walk around to see if there are any questions.”

KEEP time and **WALK** around after about 4 minutes, checking in with as many groups as possible to ask how things are going.

KEEP time and after 4 more minutes or so, **REMIND** participants that time is almost up and they should wrap up.

ASK groups to share their responses to the questions on the worksheet.

TAKE 2 to 3 responses from different groups for each question on the worksheet.

WRITE responses on the flipchart or whiteboard, checking off or starring similar responses.

REVIEW the flipchart or whiteboard, noting similar responses.

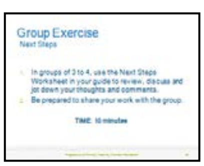
SAY, “Now we have reflected on Fonkoze’s experience, let’s apply what we’ve learned to your organization.”

CLICK to Slide 58.

Slide 58

SAY, “Let’s pull everything together in the context of your organization and the organizations with which you partner. Let’s take 10 minutes to do some small group work on the next steps to consider with regard to the PPI Implementation Cycle, especially the design phase.”

CLICK to Slide 59.



Slide 59

READ the slide and **REFER** to the worksheet in the Participant Workbook on page 37.

SAY, “Again, I’ll keep time and walk around to see if there are any questions.”

KEEP time and **WALK** around after about 4 minutes, checking in with as many groups as possible to ask how things are going.

KEEP time and after 4 more minutes or so, **REMIND** participants that time is almost up and they should wrap up.

ASK groups to share their responses to the questions on the worksheet.

TAKE 2 to 3 responses from different groups for each question on the worksheet.

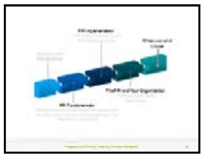
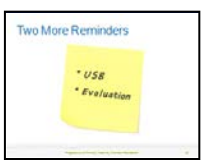
WRITE responses on the flipchart or whiteboard, checking off or starring similar responses.

REVIEW the flipchart or whiteboard, noting similar responses.

SAY, “Now we have a general sense of overall next steps and items for your organization to consider.”

CLICK to Slide 60.

Wrap-up and Close

Slide	Action
 **Slide 60**	**SAY,** “Now you’ve got it! We’ve come to the end and just have a few more minutes to wrap up.” **SAY,** “In PPI Fundamentals, we looked at the PPI in the context of social performance management and we defined the PPI in terms of its purpose, construction and use. In PPI Implementation, we looked at the key steps and best practices to implement when using the PPI, and in PPI and Your Organization, we looked at the challenges and benefits of using the PPI.” **CLICK to** Slide 61.
 **Slide 61**	**SAY,** “Review your self-assessment and now answer these questions: What would you put on a Post-it® as a reminder, follow-up, or to-do for poverty measurement? …about the PPI?” **SAY,** “Take a minute to reflect and write on your Post-it®, and be prepared to share with the rest of the group.” **WAIT** 2 minutes, then **ASK** for volunteers to share what they’ve written. **TAKE** 4 to 6 responses. **WRITE** responses on the flipchart or whiteboard. **COMMENT** on responses (common points, over-arching themes, etc.) **CLICK** to Slide 62.
 **Slide 62**	**SAY,** “Another reminder! Don’t forget your USB. It contains important reference materials, many of which we used today, such as case studies and the Standards of Use.” **DISTRIBUTE** the evaluation forms. **SAY,** “Also, please take a minute to complete this short evaluation form. Your input is critical to helping us improve this workshop for future participants.” **CLICK** to Slide 63.

 **Slide 63**	**SAY,** “For more information about the PPI, you can visit the Progress out of Poverty website. There you will have access to everything you need to start using the PPI – from all available PPIs, case studies, instructional videos and presentations, a discussion forum and more.”
 **Slide 64**	**SAY,** “Thank you.”

Notes

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