



## GROUP INVESTMENT ACTIVITY

# Field Visit and Progress Report

This is a companion document to [A Guide to CARE's Crisis-Adapted VSLA](#), and a sub-tool of the [CA-VSLA Group Investment Activity Standard Operating Procedure](#).

Use this tool during routine field visits to review management and finances, detect and plan to mitigate problems, in each CA-VSLA's group investment activity.

# CA-VSLA Group Investment Field Visit and Progress Report

Date of Visit: \_\_\_\_\_

Field Officer Name: \_\_\_\_\_

## 01 General Information

Group Name: \_\_\_\_\_

Group Location: \_\_\_\_\_

Date of Group Formation: \_\_\_\_\_

Number of Members Present: \_\_\_\_\_

Business Type: \_\_\_\_\_

## 02 Group Investment Activity Status

### **BUSINESS OPERATIONS:**

Is the business currently operating?      Yes      No

If no, explain the reasons:

### **BUSINESS PERFORMANCE:**

What is the main product/service offered by the group? \_\_\_\_\_

What are the group's sales for the past month? \_\_\_\_\_

Are there any challenges related to sales (e.g., low demand, competition)?

#### INVENTORY/STOCK MANAGEMENT:

Does the group have sufficient inventory? Yes No

If no, what is missing?

Are there problems with suppliers or stock management?

## 03 Financial Status

#### PROFIT AND LOSS:

What is the group's total income over the past two months? \_\_\_\_\_

What are the total expenses over the past two months? \_\_\_\_\_

Is the business profitable? Yes No

If not profitable, what are the reasons?

#### PROFIT ALLOCATION:

Has the group transferred profits to the CA-VSLA cash box? Yes No

How much profit has been transferred in the past two months? \_\_\_\_\_

Has the group reinvested profits to investment activity? Yes No

How much profit has been reinvested in the past two months? \_\_\_\_\_

#### LOAN FUND STATUS:

Current total in the CA-VSLA cash box: \_\_\_\_\_

How many members have taken loans in the past two months? \_\_\_\_\_

Are loan repayments being made on time? Yes No

## **04 Group Investment Activity Challenges and Solutions**

### **CHALLENGES:**

**Are there any operational challenges (e.g., equipment breakdown, staff problems)?**

**Are there any financial challenges (e.g., insufficient capital, high expenses)?**

**Are there any market-related challenges (e.g., low demand, high competition)?**

### **SOLUTIONS DISCUSSED:**

**What solutions were discussed with the group?**

**What steps will the group take to address the challenges?**

## **05 Training and Support Needs**

### **BUSINESS TRAINING:**

**Does the group need additional business training?**      Yes      No

If yes, specify the training topics (e.g., sales, marketing, inventory management):

### **FINANCIAL LITERACY:**

**Does the group need more basic financial training?**      Yes      No

If yes, specify the areas of need (e.g., budgeting, profit management):

### **OTHER SUPPORT:**

**Does the group need any other type of support (e.g., equipment, mentorship, market linkages)?**

## **06 Sharia Compliance (if applicable)**

**Is the group ensuring Sharia compliance in its business operations (e.g., no interest on loans)?**

Yes      No

**Is the group following Musharaka or Mudaraba principles correctly?**      Yes      No

**Any concerns or non-compliance noted?**

## **06 Action Items and Next Steps**

### **GROUP'S AGREED ACTION ITEMS:**

**List the agreed actions the group will take before the next field visit:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## **FIELD OFFICER SUPPORT:**

**What support will the Field Officer provide before the next visit?**

1. \_\_\_\_\_
2. \_\_\_\_\_

## **08 Summary of Visit**

### **GENERAL IMPRESSION:**

**Overall progress of the group investment activity (e.g., thriving, needs improvement):**

**Key successes observed:**

**Key challenges needing urgent attention:**

## **09 Next Field Visit**

**Proposed date for the next visit:** \_\_\_\_\_

**Any special follow-up needed before the next visit?**      **Yes**      **No**

If yes, specify:

**Evaluator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_