



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: _____