



GROUP INVESTMENT ACTIVITY

Mid-Term Business Evaluation

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 form to gather qualitative and quantitative information about each CA-VSLA's group investment activity, assess progress, and identify areas for improvement.

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Mid-Term Business Evaluation

Date of Evaluation: _____ Name of Evaluator: _____

01 Group Information

Group Name: _____

Group Location: _____

Date of Group Formation: _____

Number of Members: _____

Group Composition (male/female/mixed): _____

02 Business Overview

Name of Business: _____

Type of Business: _____

Date Investment Started: _____

03 Financial Performance

Initial Investment Amount: \$

Current Value of Investment: \$

Total Revenue Generated to Date: \$

Total Expenses Incurred to Date: \$

Net Profit/Loss to Date: \$

04 Progress Assessment

Rate the following statements from 1 (Strongly Disagree) to 5 (Strongly Agree):

Statement	Rating (1-5)
The group has successfully pooled resources.	
Profit from the business has been reinvested effectively.	
The group is meeting its financial targets.	
Members are satisfied with the investment outcomes.	
The business is contributing to the community.	

05 Challenges Faced

What challenges has the group encountered in managing the investment?

How have these challenges impacted the business?

06 Capacity Building

Has the group received any training or support related to business management?

Yes No

If yes, please specify:

07 Future Plans

What are the group's plans for the next six months?

What support does the group need to achieve these plans?

08 Additional Comments

Please provide any other relevant information regarding the group investment activity:

Evaluator Signature: _____

Date: _____