Assessment, loan file and pre-engagement for impact measurement sheet. **Loan of $1 to $50**
Used by CCMV1, 2 et 3 (Centre de Conseils Pour Mieux Vivre) – Goma and Bukavu, D. R. Congo
ACBL (Advisory Centres for Better Living)

File # : _____ Client # :_____(res for CCMV)

1. Names: _____ Age : _____ Gender : _____

   Address; _____Urban quarter/village: _____Reference near: _____

2. What economic activities are you engaged in currently or will be engaged in, in the future? _____

3. What are your real expenses? Per day: _____For: _____, _____, _____, _____

4. What is your present real income? Per day : _____ Profits per day: _____

5. Do you have any loans outstanding in a Cooperative/NGO? Yes/No: if yes, where?_____ &Amount : $_____

6. What do you plan to do with the funds requested?. Max $50 _____

   _____

Do you need any orientation/training to better invest your resources/loans and make profits? Yes/No: If yes, what type? : _____

If yes, are you ready to pay **$ 1** (in installments when you have profits) to enable CCMV organize training:?: **Yes/No**

7. Are you willing to meet with the representatives of CCMV: **Yes/No**. If yes, when? _____

   If not why?_____

This form was returned to CCMV by_____ tel_____ of_____(structure) on_____

8): What are your current assets? And happiness level? (if the client hesitates to give information, do not insist- CCMV staff can document it in 9)		**RESERVED for CCMV Team** **9)** Assets verification by the CCMV team during the site/house visit: **– mainly through observation:**		**RESERVED for CCMV-Team** **10)** After 3/6 months of investing loan, what assets or investments in livelihood enhancement would you do? (e.g. schooling of children, 2 meals a day, medical etc.) See question **12** below for guide:	
Type/Description	Approximate value:	Description	Approx value:	Description	Value of investments planned:
Total Value:					
Current happiness level:	100%, 75%, 50%, 25% 0	Observed happiness level:		Future aspired happiness level after investment:	

RESERVED for CCMV team:

11. What increase in daily income: _____ Daily profits: _____ can you make after receiving and investing your loan of _____. (Field agents/officers please facilitate to develop simple business plan)
12. What changes can you predict in your assets/activities/life after you have received and invested your loan for 3 to 6 months. Please fill out question 10 in table above.

Site/house/enterprise visit done by: _____Signature _____ Date : _____

13. Verify if the client had outstanding loans in other MicroFinance institutions and NGOs/Projects:
COOPEC Imara/COOPEC Tumaini/COFICO/MECREGO/ONGs/ Others _____ Yes//No :_____

Loan approved/Not approved: By the team: if not why?. Observations/reservations: _____

_____

If loan approved: File number: $___CCMV/1/2 _____ Admin fees of $1 paid on: _____ Receipt no:_____

The client is a member of group: _____ with 1 /2 /3 /4 other clients n°s_____