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Microenterprise Results Reporting

Contents

Introduction to Microenterprise Results Reporting

Since 1996, the U.S. Agency for International Development (USAID) conducts a data call to identify and quantify USAIDS's funding obligated to support microenterprise. The data call enables the creation of an online, searchable database of all microenterprise support. A new MRR reporting website will open in 2014.

The latest data call is designed to collect data on FY2013 microenterprise funding on an **obligation** basis, **regardless of the funding year**.

Changes to the Data Call for 2013

The 2013 MRR data call has undergone significant changes from the previous year. The data call now uses a website solely dedicated to data collection purposes, unlike the dual purpose website of previous years that served as a reporting and data collection tool. Because of this change, you will view entries that apply to your operating unit. We have also reorganized the structure of the data call in an effort to simplify the reporting requirements. We highly recommend that all users read this ***User's Guide*** to familiarize themselves with the new website and the structure of the data call.

What is Microenterprise and what projects should be reported?

The definition of microenterprise according to 219 (ADS) on Microenterprise development is "a very small enterprise owned and operated by poor people, usually in the informal sector. For USAID program purposes, the term is restricted to enterprises with 10 or fewer workers, including the microentrepreneur and any unpaid family workers. Crop production activities, previously excluded from the scope of the definition, are now included as long as they otherwise qualify on the basis of enterprise size and the economic status of the owner-operator and employees."

Four types of projects support microenterprise and should be reported in the MRR data call. They are listed below.

Financial Services/Microfinance: Projects that fund the provision of financial services adapted to the needs of low-income people, such as the provision of small loans, the acceptance of small savings deposits and simple payments services needed by microentrepreneurs and other poor people. These services can include microcredit, savings and deposit services, and insurance and remittance services. In addition, obligations that fund grants for loan capital or technical assistance and capacity building of the microfinance industry should also be captured as Financial Services/Microfinance. For example, if an obligation is made to an institution that provides training and capacity building to Microfinance Institutions (MFIs), the obligation should still be classified as Microfinance.

Enterprise Development: Projects that fund non-financial or business development services. These services can refer to the many interventions that help microenterprises start, survive, and grow, including those that help them acquire skills and knowledge, gain access to financing and other inputs, and develop the commercial relationships with other firms (both micro-scale and larger firms) required to integrate into higher-value markets. Examples include skills training; market research and linkages, input sourcing; product development; accounting and financial management; communications and brokering services; business advice; and technology development.

Policy for Financial Services/Microfinance: Projects that fund activities in promoting appropriate legal, regulatory and supervisory practices for both public and private microfinance institutions.

Policy for Enterprise Development: Projects that fund activities in promoting appropriate policy, regulations, and administrative practices governing the business environment in which microenterprises operate.

Reporting Instructions

What are the roles of the Point of Contact (POC)?

The MRR Point of Contact (POC) is the spokesperson responsible for ensuring that the operating unit completes the 2013 MRR data call. She/he represents a specific USAID Mission, a regional bureau, or a Washington bureau for any and all microenterprise projects that transpired in FY2013.

Because she/he is on the "front line", the POC determines what microenterprise project(s) are reported in the MRR data call. The POC knows her/his unique situation and all the factors in her/his reporting unit. The POC has the option (and responsibility) to complete the data call in one of two ways. She/he can:

1. Personally complete the data call, or
2. Assign (some or all of) it to one or more staff members.

Please take note that each reporting unit (the USAID Mission or Reporting Bureau), through the POC, receives one set of credentials – a username and a password. The POC can share these credentials with as many staff she/he feels necessary to complete the task. The POC and her/his staff can work on the data call simultaneously, but not on the same project entry!

In Washington, the MRR team responsible for the data call prefers to communicate with one person – the Point of Contact. Management and decision-making is best left to the POC at the reporting unit site. Help and data call assistance is available, and it is best offered from the MRR Help Team through the POC.

How will this data call information be used?

The MRR Annual Report is prepared in response to a body of Congressional legislation and U.S. government initiatives that testify to the U.S. government's longstanding and strong commitment to effective and targeted microenterprise. The FY2013 MRR Annual Report fulfills the provision in Section 6 of PL 108-484, the Microenterprise Results and Accountability Act of 2004. USAID will submit an annual report on the implementation of 12 reporting requirements by July 2014.

At what level should MRR projects be reported on this data call?

The information should be reported at the "project" or "activity" level. Funding reported at the country or at the strategic objective or agency goal level is too generalized. Note, however, that some "projects" are implemented in more than one country. These should be reported as a single "project" and the funding obligated for FY2013 separated among the relevant countries and regions.

CHECKLIST: What information do you need to complete the reporting?

For each project that obligates any funding for microenterprise you will need to provide:

- The **mechanism number** for the project
- The **name** of the project
- A **brief description** of the project
- The **starting and ending date** of the project
- The **total amount obligated** to the project in FY2013 and the **sub total amount that was obligated solely to microenterprise**,
- The **country(ies) or region(s)** where this project was active in FY2013
- The **funding account(s)** associated with this project
- The **program element(s)** associated with this project
- The **name of the partner organization(s)** that received the funding along with:
    - The **name of a point of contact** (POC) within the organization
    - The **POC job title**
    - The **POC email**
    - The **POC phone number**

For each reporting unit, internal costs associated with the support of microenterprise programming should also be reported.

Further instruction on what information is required is included in the below User's Guide.

User's Guide

This guide provides step-by-step instructions on how to complete the FY2013 online version of the Microenterprise Results Reporting data call.

Login

Open your Internet browser and go to http://mrr.devtechsys.com/survey/

The login page, shown above, asks for your username and password. They can be retrieved from the introductory email sent to the point of contact. The Login page also has links to this ***2013 User's Guide*** and the Help Desk, along with the MRR email address where you can obtain a username and password, if needed.

Microenterprise Reporting Summary

After logging into your account, you will always start at the 'Microenterprise Reporting Summary' page. From this page you can:

- Enter staff and administrative costs that supported microenterprise support in FY2013
- Validate previously submitted FY2011 and FY2012 project entries
- Continue an already existing project entry for FY2013
- Add new FY2011, FY2012, FY2013 project entries
- Print a summary of verified or submitted project entries

MISSION SUPPORT FOR MICROENTERPRISE PROGRAMMING

Mission Support for Microenterprise Programming
Please report the internal USAID costs for support of microenterprise programming; such as travel, staff salaries, staff training, and other administrative costs. These are costs not reported under an implementing mechanism. • Enter 2011 information • Enter 2012 information • Enter 2013 information

At the top of the page, there is a section to report any staff or administrative costs internal to USAID that supported microenterprise programming. To report these costs, select either 'Enter 2011 information', 'Enter 2012 information, or 'Enter 2013 information'. After selecting one of the three options you will be brought to a new page displaying the table below.

FY2013 Mission Support for Microenterprise Programming	
Mission Support FY2013 Obligation *	$ *(in dollars)*
Number of funding accounts *	3
Funding Account *	**Microenterprise Obligation ***
Select a funding account	$
Select a funding account	$
Select a funding account	$
Sum of microenterprise obligations allocated by funding account	**$0**
Mission support FY2013 obligation reported	**$0**

First type the total amount of Mission support obligated in that particular fiscal year in the space by 'Mission Support FY2013 Obligation'. Then select the number of funding accounts from which funds were allocated by using the drop down menu located by 'Number of funding accounts'. One or more drop down menus will appear under 'Funding Account' along with a corresponding field under 'Microenterprise Obligation' depending on the number of funding accounts you select from the drop down menu.

Funding Account:
From the drop down list, select the correct funding account. The drop down list contains all funding accounts for all USAID funded projects.

Microenterprise Obligation:
Type the amount of funds allocated by each funding account. The amount entered at the top of the table is reported as 'FY2011 microenterprise obligation reported'. The sum of all funding accounts for each country or region is reported as 'Sum of microenterprise obligations allocated by funding account'. If these totals do not equal for each section, you will not be permitted to save and return to the 'Project Reporting Summary' page.

MICROENTERPRISE PROJECTS

All previously submitted projects (if any) for FY2011 and FY2012 are listed on this page. For both FY2011 and FY2012 entries, you must verify the project information that was submitted in those years. The purpose of this verification is to ensure that obligations entered in 2011 and 2012 are correct and classified accordingly, and to ensure we have project points of contact with current contact information.

Microenterprise Projects

Add a new 2013 project

Project Name (Mechanism Number)	FY2011 Status	FY2012 Status	FY2013 Status
Project Example 1 (AID-CCC-XX-00-00001)	Verify 2011 information	Continue 2012 data call for this project	Begin 2013 data call for this project Project continuing with no 2013 obligation, but future obligations are planned Project has ended, no 2013 information
Project Example 2 (AID-CCC-XX-00-00002)		Verified [print]	Begin 2013 data call for this project Project continuing with no 2013 obligation, but future obligations are planned Project has ended, no 2013 information
Project Example 3 (AID-CCC-XX-00-0003)		Submitted [print]	Begin 2013 data call for this project Project continuing with no 2013 obligation, but future obligations are planned Project has ended, no 2013 information
Project Example 4 (AID-CCC-XX-00-0004)			Review and submit 2013 information

Add a new 2011 project
Add a new 2012 project
Add a new 2013 project

Logout

To verify a project entry, select 'Verify 2011/12 Information' and begin the verification process. If you need further information on the verification process, please see the Review and Submit section. After reviewing the information and making any necessary changes, select 'Verify Project' and you will return to the 'Microenterprise Reporting Summary' page. That project entry will now be listed as 'verified'. It's important to remember that after verifying an entry, you cannot make any further edits to that entry. However, you can print a summary of the information. To print a summary, select the 'Print' for that entry. If you do need to 'un-verify' a FY2011 or FY2012 project, please send an email to the help desk with the project name and mechanism number, requesting that we 'un-verify' the project.

If you would like to add a project for FY2011 or FY2012 that may have been left off previous data call submission, you may do so by selecting either 'Add a new 2011 project' or 'Add a new 2012 project' at the bottom of the 'Microenterprise Reporting Summary' page. The process for completing a new FY2011 or FY2012 project entry is the same for a new FY2013 entry. If you need instructions on how to complete a new entry, please consult the following sections in this user guide.

For each FY2011 and FY2012 project entry, there are three options in the following year's Status column. The options are listed below.

- Select 'Begin 2012/13 data call for this project' if the project is continued into the next fiscal year and was funded. This will bring you to the 'Project Overview' page, the beginning page of the data call.
- Select 'Project continuing with no FY2012/13 obligation but future obligations are planned' if the project is ongoing, but there was no obligation in FY2013. No further work is needed for this entry, but it will be retained and appear in the data call next year.
- Select 'Project has ended, no 2012/13 Information' if the project has ended. No further work for this entry is necessary.

If you would like to add a project for FY2011 or FY2012 that may have been left off previous data call submissions, or begin a new project for FY2013, select 'Add a new 2011/12/13 Project' at the top or bottom of the page. This will bring you to the beginning of the data call. Once you have begun a new project entry for FY2013, it will be added to the 'Project Report Summary' page. If you have previously logged out of a project entry and you wish to continue where you left off, simply select 'Continue 2011/12/13 data call for this project' and you will brought to the last page requiring entries. Once you have submitted a new project entry it will be listed as 'submitted'.

If you select 'logout' at the bottom of the page, it will bring you to the 'Login' Page. Also at the bottom of this page is an email address and phone number you can use to receive assistance in completing the MRR data call.

Data Call Overview

As you move through the data call, a progress bar at the top of the screen, shown above, will track your movement. At any time you may use the links on this bar to revisit an earlier page in the data call. However, you will not be able to jump ahead in the data call. Certain information is carried over from one screen to the next. If you go back to a previous page and make changes, it will alter the subsequent pages and you have completed. This means you will need to complete those pages again to account for the resulting changes. Finally, remember to save before you move to another page using the progress bar or your data will be lost.

Another helpful feature is the ability to save incrementally. It is not necessary to complete the entire data call in one sitting. You may:
Save and Continue - if you want to save the information you have just entered and move to the next data call screen.
Save and Exit - if you want to save the information you have just entered but return to complete the data call at a later time.
Exit Without Saving - if you want to discard any changes made on the current screen.

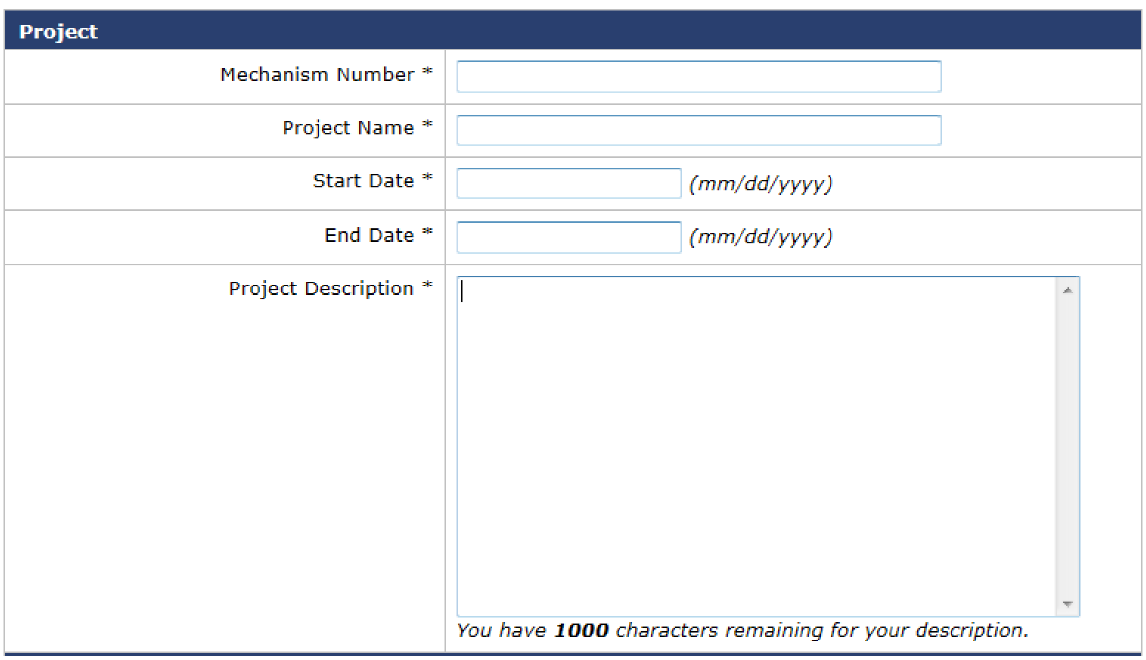
NOTE: If you remain idle for more than twenty minutes on any given screen, your data call session will time out! This will cause you to lose any unsaved information on that particular screen, and you will need to login again in order to continue the data call.

Project Overview

The 'Project Overview' page appears after you select 'Add a new 2011/12/13 project' or 'Begin 2013 data call for this project' on the 'Microenterprise Reporting Summary' page. It is the first of five pages that must be completed for each project entry and the first step in the progress bar.

The first thing to notice on the 'Project Overview' page is that certain fields may already be complete. If you are entering data for FY2013 that was started in FY2012 or earlier then fields under 'Project' will already be completed. Fields under 'Partner Point of contact' will also be complete if you already completed the fields when verifying the project for FY2012. If you are completing a new project for FY2013 all fields on this page will be blank.

PROJECT



Project	
Mechanism Number *	
Project Name *	
Start Date *	(mm/dd/yyyy)
End Date *	(mm/dd/yyyy)
Project Description *	You have **1000** characters remaining for your description.

Mechanism Number:
The Mechanism Number is the award number of the project. If the project is awarded through an IQC or Blanket Purchase Order, please report the Task Order or Delivery Order number. The most commonly used formats are AID-CCC-XX-NN-NNNNN or CCC-XX-NN-NN-NNNNN-NN, where CCC is the 3 digit country or office code.

Project Name:
Type the project name in the space provided. Names of strategic objectives, contractors, and other general titles should not be used. Please spell out acronyms. The project name

should not exceed 200 characters. Please keep in mind that if this project occurs in multiple countries you do not want to name them in the project name.

Start Date:
Type the date the project was implemented in the 'mm/dd/yyyy' format. This date must be in or come before the fiscal year in which this project is listed. For example, a project entry for FY2013 must be in or come before FY2013.

End Date:
Type the date the project ended in the 'mm/dd/yyyy' format. This date must be in or come after the fiscal year in which this project is listed. It must also come after the Start Date.

Project Description:
Type a brief narrative describing the project in the space provided. Ensure that the description reflects the microenterprise portion of the project if there are multiple project objectives. You cannot simply repeat the name of the project. Project descriptions should reflect the Project Elements that you will select later in the data call. Your description should include how microenterprise supporting foreign assistance is transferred to the recipients, e.g., technical assistance, training, resident advisors, or commodity transfers. If it is possible, provide a quantifiable example of the activity. Limit your description to 1000 characters. The data call tool will allow you to monitor the number of characters and alert you if you exceeded the limit.

PARTNER

The information in this section is very important. We will use this information to contact the partner with a survey about its microenterprise supporting activities.

Note: If you have previously completed this section for this project but for another year, then this section will already be complete. If you change any fields, it will change for all the years this project has an entry.

Partner	
Partner *	Select a partner
Partner Point of Contact	
Name *	
Job Title *	
Phone Number	
E-mail *	

Partner:
From the drop down list, select the partner organization that implemented the project. If you do not see the Partner in the list, select 'Other' at the end of the list and type the complete name of the partner organization in the space that appears after selected 'Other'.

PARTNER POINT OF CONTACT

Name:
Type the full name of the person that will serve as the point of contact for this project.

Job Title:
Type the job title this person currently holds within the partner organization.

Phone:
Type the complete phone number of the point of contact including country codes if applicable.

E-mail:
Type the email address of the point of contact. Ensure that this is a current email address. We will use this address to contact the partner organization so it is very important that this address is accurate.

FY2013 OBLIGATIONS

Partner	
Partner *	Development Alternatives, Inc.
Partner Point of Contact	
Name *	
Job Title *	
Phone Number	
E-mail *	
FY2013 Funding	
Total FY2013 Obligation *	$ *(in dollars)*
Microenterprise FY2013 Obligation *	$ *(in dollars)*
Does this award contain a matching funds provision? *	Yes No
Will this recipient "work closely with nongovernmental organizations and foreign governments to identify and assist victims or potential victims of severe forms of trafficking in persons and women who are victims of or susceptible to other forms of exploitation and violence" [from microenterprise law PL 108-484 Section 258(b)(8)]? *	Yes No

Total FY2013 Obligation
Enter the entire amount that was obligated to this project in the specified fiscal year.

Microenterprise FY2013 Obligation
Enter only the amount that was obligated solely to microenterprise activities in the specified fiscal year. To be valid, this amount must be less than or equal to the total obligation.

Does this award contain a matching funds provision?
Select 'Yes' if the partner organization contributed any of their own funds to match any portion of the funds obligated for this project by your operating unit, otherwise select 'No'.

What is the percentage of the matching funds commitment from the partner?
If you selected 'Yes' for the previous question, then this question will appear asking you to indicate the percentage of funds that the partner organization committed to match. Type the percentage in the box below the question.

Will this recipient "work closely with nongovernmental organizations and foreign governments to identify and assist victims or potential victims of severe forms of

trafficking in persons and women who are victims of or susceptible to other forms of exploitation and violence" [from microenterprise law PL 108-484 Section 258(b)(8)].

Select 'Yes' if any portion of the obligated amount will go towards the prevention of human trafficking as described in the excerpt above, otherwise select 'No'.

Countries

Project Overview — **Countries** — Funding Accounts — Program Elements — Review and Submit

In this section you will list all the countries or geographic regions for which this project was obligated funds in FY2013 and the amounts obligated for each country or region. To do this, first select the number of countries or regions by using the drop down menu located at the top of the table. One or more drop down menus will appear under 'Country' along with a corresponding field under 'Microenterprise Obligation' depending on the number of countries or regions you select from the drop down menu.

Countries for Project Example	
Number of countries *	3
Country *	**Microenterprise Obligation ***
Select a country	$
Select a country	$
Select a country	$
Sum of microenterprise obligations allocated by country	**$0**
FY2013 microenterprise obligation reported for this project	**$50,000**

Country:
From the drop down list, select a country or region. Within the drop down menu, the countries are listed first, alphabetically, and then regions are listed, also alphabetically. Whenever possible, please report country-specific projects. Only select a region if the project is truly regional in scope.

Microenterprise Obligation:
Type the amount of funds that were obligated for each country or region in the field that corresponds to that country or region. The total amount obligated to all listed country or region must equal the obligation amount you indicated as the 'Microenterprise Obligation' on the 'Project Overview' page. The obligation amount from the 'Project Overview' page is reported at the bottom of the country page as the 'FY2013 microenterprise obligation reported for this project '. The sum of all obligation listed on this page by country are reported as the 'Sum of microenterprise obligations allocated by country'. If these totals do not equal, you will not be permitted to continue to the next page.

Funding Accounts

The 'Funding Accounts' page is set up much like the 'Countries' Page. There will be one section for each of the countries or regions that you selected on the 'Countries' page, listed in the order you selected them.

There is a drop down menu at the top of each section where you select the number of funding accounts that allocated funds for that obligation, for that country. One or more drop down menus will appear under Funding Account along with a corresponding field under Microenterprise Obligation, depending on the number of funding accounts you select.

Funding Accounts for Project Example in Afghanistan	
Number of funding accounts *	3
Funding Account *	**Microenterprise Obligation ***
Select a funding account	$
Select a funding account	$
Select a funding account	$
Sum of microenterprise obligations allocated by funding account	**$0**
FY2013 microenterprise obligation reported for this country	**$15,000**

Funding Account:
From the drop down list, select the correct funding account. The drop down list contains all funding accounts for all USAID funded projects.

Microenterprise Obligation:
Type the amount of funds allocated by each funding account. This process works the same way as on the 'Countries' page. The sum of all funding accounts for one country or region must equal the amount obligated for that country or region. The obligation amount from the 'Countries' page is reported at the bottom of each country section as the 'FY2013 microenterprise obligation reported for this country". The sum of all funding accounts for each country or region is reported as 'Sum of microenterprise obligations allocated by funding account'. If these totals do not equal for each section, you will not be permitted to continue to the next page.

Program Elements

Project Overview — Countries — Funding Accounts — **Program Elements** — Review and Submit

The Program Elements page is set up much like the 'Countries' page and the 'Funding Accounts' page. There will be one section for each funding account in each country or region you have selected. All the funding accounts for the first country you selected on the Country page will be listed first, in alphabetical order, followed by the funding accounts for the second country you selected and so on.

There is a drop down menu at the top of each section where you can select the number of program elements for that funding account in that country. One or more drop down menus will appear under Program Element along with a corresponding field under 'Microenterprise Obligations' depending on the number of program elements you select.

Program Elements for Laurie Project 2 in Bolivia and funded by International Disaster Assistance and Famine Assistance	
Number of program elements *	3
Program Element *	**Microenterprise Obligation ***
Select a program element	$
Select a program element	$
Select a program element	$
Sum of microenterprise obligations allocated by program element	**$0**
FY2013 microenterprise obligation reported for this country and funding account	**$1,000,000**

Program Element:

From the drop down list, select the correct program element. The drop down list contains all program elements.

Microenterprise Obligation:

Type the amount of funds dedicated to each program element. This process works the same way as on the 'Countries' page and the 'Funding Accounts' Page. The sum of all program elements for each funding account must equal the amount allocated by that funding account. The amount from the 'Funding Accounts' page is reported at the bottom of each funding account section as the 'FY2013 microenterprise obligation reported for this country and funding account". The sum of all program elements for each funding account is reported as 'Sum of microenterprise obligations allocated by program element'. If these totals do not equal for each section, you will not be permitted to continue to the next page.

Review and Submit

Project Overview | Countries | Funding Accounts | Program Elements | **Review and Submit**

On this page you will see a summary of the previous four pages separated into four sections. If you need to edit any page, select an edit option located at the bottom the two tables and you will return to that page so you can make any desired changes.

Project Overview	
Mechanism Number *	AID-CCC-XX-00-0004
Project Name *	Project Example 4
Start Date *	01/01/2005
End Date *	01/01/2015
Project Description *	This project will provide loans to the urban poor and provide business skills training.
Partner *	African Development Bank
Name *	Jane Doe
Job Title *	Program Assistant
Phone Number	555-55-55-5555
E-mail	jdoe@gmail.com
Total FY2013 Obligation *	$100,000
Microenterprise FY2013 Obligation *	$25,000
Does ths award contain a matching funds provision? *	No
Will this recipient "work closely with nongovernmental organizations and foreign governments to identify and assist victims or potential victims of severe forms of trafficking in persons and women who are victims of or susceptible to other forms of exploitation and violence" [from microenterprise law PL 108-484 Section 258(b)(8)]? *	Yes

Edit project overview

FY2013 Obligations by Funding Account and Program Element for Congo (Kinshasa)	
Development Assistance	25,000
4.6.1 Business Enabling Environment	25,000
Total FY2013 Obligations for Congo (Kinshasa)	**25,000**

Edit countries / Edit funding accounts / Edit program elements

Submit Project | Exit Without Submitting

Once you have made changes, remember to save your changes by selecting 'Save' at the bottom of the page. If you simply return to the 'Review and Submit' page your changes will be lost. Once you are satisfied with your work, select 'Submit' at the bottom of the page. Keep in mind, once you select 'Submit', you will not be able to make any further changes to that entry, so be sure that everything is correct. After selecting 'Submit' you will return to the 'Microenterprise Reporting' page.

Please note there is no indication in the data call to communicate you have finished. The final submit completes the questionnaire for that individual project entry. You must send an email to the Help Desk indicating that you have completed the 2013 data call when you have submitted all project entries.