

# SURVEY AREAS

- GENERAL SHG PROFILE
- OBJECTIVE /GENEALOGY/ VISION/ MISSION / OF THE SHG
- MEMBERSHIP DETAILS
- GRADING OF SHG:
- . DETAILS OF SHG MEETINGS
- GROUP REPRESENTATIVES
- \_FINANCIAL INFORMATION of SHG

contd

- **LOAN AND CREDIT DISBURSEMENT AND REPAYMENT IN SHG**
- **BOOK-KEEPING AND DOCUMENTATION**
- **TRAINING**
- **CREDIT PLUS ACTIVITIES**
- **GROUP DYNAMICS, CAPACITY, COMMUNICATION AND INTERACTIONS (ASSETS-LINKAGE-COVERGENCE-)**
- **CONCLUSION:General information and Future Requirements of members**

# **INVENTORY SCHEDULE** **FOR SURVEY OF SHGs-** **MEGHALYA**

## **A.GENERAL SHG PROFILE**

- 1.Name of SHG**
- 2.Address**
- 3. SHG location**
- 4.Type of group**
- 5. Composition of group**

contd

**6. Community**

**7. Date of SHG formation**

**8. Details of SHG promoting organization**

**9. Details of SHG registration**

**10. SHG affiliations**

**11 Details of SHG Bank Account**

# GENEALOGY/ VISION/ MISSION /OBJECTIVE OF THE SHG

## 1.OBJECTIVES OF SHG

- Economic Objectives
- Social Objectives
- Status of objectives

# GENEOLOGY

- details /events leading to the group formation from conception to present status
- Logical sequence of events
- external agencies in contact with group since inception

# VISION /MISSION GOALS of SHG

- SHG like to achieve in 15-20 years time (Vision)
- strategy/activities/programmes SHG would use to achieve its Vision goals

# MEMBERSHIP DETAILS

- Name of Members
- Gender
- Age
- Marital Status
- Educational Status
- Skills available
- Occupational Status
- No of children
- Economic Status of members (BPL/ APL )



## *Membership details..contd*

- **Number of Members at inception**
- **Number of members at present**
- **Number of members left SHG since inception**
- **No of members who left SHG and returned**
- **Status of group in respect of group size Stable/increased/decreased**
- **Stage/Status of the SHG )  
Formation/ Stabilization/ Maturity**

# GRADING OF SHG:

- Grading status
  - Type of grading
  - Date/Year
  - Graded by
  - Point awarded/Grades obtained

# DETAILS OF SHG MEETINGS

- total no of meetings held since inception
- details of the last four meetings of the SHG

# GROUP REPRESENTATIVES

- Name of SHG Representatives from inception to date
  - Chairman
  - Secretary
  - Treasurer

# FINANCIAL INFORMATION of SHG

## Savings

- Frequency of Regular Savings
  - Monthly
  - Weekly
  - Fortnightly
- Extra saving
- Amount of saving by members
- Non cash forms of savings- types/items

# Contd..

- Sources of funds of the SHG and the amount received
  - Thrift/Savings
  - Revolving Fund. (SGSY)/
  - Bank Loan
  - External Funding
  - NGO support
  - Govt. Agency
  - Any others
  - Interest earned

Contd....

## ■ FINANCIAL STATUS

- Savings
- Interest collected
- Fines collected
- Donation/Grants received
- Loans received
- Other Incomes
- Loan forwarded
- Repayment deductible
- Training Expenses
- Other expenses
- **Cash/Bank balance**

contd

- **Details of Assets Purchased/Received by SHG and its members**
  - **Particulars/Items**
  - **Quantity**
  - **Cost**
- **Pattern of fund drawals of SHG groups**
  - **Method of utilization of funds**
  - **Total no. of drawals since inception**



# **LOAN AND CREDIT DISBURSEMENT AND REPAYMENT IN SHG**

- **Frequency of disbursement of credit in SHG**
- **Norms for sanctioning the loan in the SHG**
- **Loans details in SHG**
- **Profile of Loans taken by SHG members**
- **Credit Utilization and repayment (Amount & No.of members and interest rates)**
  - **Consumption Loans(Domestic/ Emergencies)**
  - **Farm Sector (Agriculture Animal Husbandry )**
  - **Non-Farm Sector (Income Generation activity Asset Building/Investment )**
  - **loans taken by members from outside the SHG/other sources**

# Status of Economic activities of SHG

- 1. Individual Economic Activities
- 2. Group Economic Activity
  - No of members taken up the activity
  - Average Investment (Rs)
  - Average Annual Profit
  - nature and source of investment general indication of profit or loss

# LOAN REPAYMENT

- **Problems of repayment**
- **Measures for loan recovery**

# BOOK-KEEPING & DOCUMENTATION

- Admission Book
- Admission Book
- Minutes Book
- Attendance register
- Cash book
- General ledger
- Savings ledger
- Loan Ledger
- Bank pass Book
- Individual Pass book
- Receipt Vouchers
- Stock book
- AUDIT STATUS of SHG

# TRAINING

- details of trainings of the members of the SHG
  - Name of Trainings
  - Duration
  - members attended
  - Sponsored/conducted by

# CREDIT PLUS ACTIVITIES

- **Intervention social action programmes taken up by SHG:**
  - Health
  - Immunization
  - Education
  - ICDS/Nutrition/Anganwadi
  - Adolescent programme
  - Non formal Education
  - T.L.C
  - Water and Sanitation programme

# Education, Literacy and numeracy skills among SHG members

- **Extent of Skills in literacy/numeracy**
  - No of members
- **Extent of SHG member sending their children to school**
  - No of members

# **GROUP DYNAMICS, CAPACITY, COMMUNICATION AND INTERACTIONS (ASSETS-LINKAGE- CONVERGENCE )**

- **Self-Help and Social Capital**
- SHG contingency arrangement for meeting any difficult/unforeseen circumstances
- SHG a source of helps to other members of village community
- SHG made available to the members new employment activity
- SHG group met officials/NGOs etc to address group or community problem



# LINKAGE-CONVERGENCE

- details of institutions to which your SHGs has established linkage.
  - Monetary Institutions
  - Line Department/Sectoral Department
  - NGO
  - Result of participation in interaction

contd

- **SHG initiative to have a federation of SHG**
  
- **IMPACT OF SHG on SHG members** -Changes on the socio –economic status of the SHG members after joining SHG
  - Mobility
  - Recognition in family
  - Recognition in Community
  - Interaction with outsider
  - Literacy and Education
  - Access t Health services
  - Access to Immunization
  - Access to sanitation facility
  - Access to sources of credit

contd

- Asset Building
- Family income
- Skills
- Voicing your concern
- Nutrition awareness
- Family planning awareness
- Girl Child development awareness
- Health awareness
- Decision making related to child centered
- Decision making related to money centered
- Participation in development programme
- Individual income

# **CONCLUSION General information and Future Requirements of members**

- **main problems related to the functioning of the SHG?**
- **future requirements of SHG indicate the specific areas**
  - **Income generating activities**
  - **Training**
  - **Skills up gradation**
  - **Supply of raw material**
  - **Marketing**
  - **Credit**
  - **Extension services**

Contd...

- Housing
- Health services
- Education
- Food processing
- Food security
- Environmental concerns
- Child welfare services i.e. crèches day care centers

Contd...

- **relevant information/note from the investigator**
- **Suggestion and Feedback**
- **Visit by Observers**