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MICROENTERPRISE LTBA
V E G A
Volunteers for Economic Growth Alliance

VEGA Microenterprise Development Long Term Business Advisors Quarterly Report (January 1 – March 30, 2007)

**LEADER WITH ASSOCIATE AGREEMENT (LWA)
EEM-A-00-04-00002-00**

**Associate Cooperative Agreement
EEM-A-00-05-00009-00**

Prepared for the United States Agency for International
Development (USAID)

Implementing Organizations:

INSTITUTE OF
INTERNATIONAL
EDUCATION

Summary:

This is a report on the four remaining 2005-2006 Advisers who concluded their assignments within this reporting period. We also provide updates on the two 2006-2007 Advisers whose assignments are in progress.

Tasks completed this quarter:

- All six EMDAP Advisers who had completed or were in the process of completing their 2005-2006 assignments attended a program de-briefing on March 8 & 9, 2007, in Washington, DC. The highlight of the de-briefing was the series of presentations that alumni gave to USAID, VEGA, host organizations based in Washington, DC, and IIE. Each presentation focused on the special rewards and challenges of the assignment, the impacts of the Adviser's assistance to the host organization and to USAID, and whether similar assignments should be funded in the future. (These PowerPoint presentations are now available on the VEGA website at www.vegaalliance.org/files.asp?FileCatId=99).
- Senior Program Officer Usha Balakrishnan completed a visit to current Adviser Ana Luisa Pinto's site in Chiapas, Mexico (see her summary remarks under Ana Luisa's assignment update).
- Adviser Nina Kolbe completed a USAID-sponsored value chain workshop.
- Monitored Case Study development progress of current Advisers and alumni.
- Disbursed funds to Advisers.
- Received and evaluated reports submitted to IIE.

NOTE: Beginning with the 2006-2007 groups, IIE, in consultation with VEGA, designed two sets of report templates to measure impact: the Projected Impact Report and the Training and Technical Assistance Activity Report. Advisers are required to submit these reports to IIE periodically along with other standard reports. All Projected Impact Reports and Training and Technical Assistance Activity Reports received to date from Ana Luisa Pinto and Nina Kolbe are included as separate files with this report. Future quarterly reports to USAID/VEGA will include the Adviser reports received for the given reporting period.

Follow up on microLINKS Notes from the Field: In an effort to ensure the inclusion of at least two EMDAP Advisers' *Notes* in this important publication, EMDAP staff initiated frequent communication during this reporting period with the QED Publications Manager. Advisers/EMDAP staff edited and submitted several versions of *Notes* using the editorial guidelines and specific feedback provided by the Publications Manager on early drafts. However, the Publications Manager ultimately determined that *Notes* was not the appropriate venue to feature individual EMDAP Advisers and their host organizations. Instead, she has offered to write one *Note* highlighting the collective experiences of the six 2005-2006 Advisers based on the PowerPoint presentations they gave during the de-briefing. EMDAP provided a CD with all these presentations to the

Publications Manager on March 14, and we stand ready to provide additional information as needed.

Volunteers and Assignments:

1. Dianna Darsney, Income Generation Specialist, Conservation International (CI), Lethem, Guyana

Contact e-mail: dianna.darsney@gmail.com

Assignment Period: 12 months: February 13, 2006-February 12, 2007

Training: “Making Markets Work for Business and Income Growth,” The Springfield Centre, Glasgow, Scotland. July 23-August 4, 2006

Dianna’s impact on the CI project to which she was assigned was significant. Kathryn Kelly of CI/Washington attended the de-briefing in Washington, DC and asserted, only half-jokingly, that if CI had the funds, it would keep her on “forever.”

Among her accomplishments, Dianna lists:

- Capacity building: conducted training in entrepreneurship, costing, accounting, marketing, business management, technical modules on handicrafts, tourism and animal husbandry
- Grant-making policies: revised criteria for the Voluntary Community Investment Fund (VCIF) projects
- M&E and data collection: developed measures to monitor socio-economic factors

Although her EMDAP assignment has ended, Dianna is staying on through the spring, at CI’s invitation and with its direct support, to carry out an ambitious plan to transfer all her responsibilities/works in progress to her CI counterpart. A sampling of this long list includes: business planning and management for Voluntary Community Investment Fund (VCIF) projects in Apoteri, Rewa, and Crash Water communities; enterprise development assistance and training for the Wai Wai community in Southern Guyana; development of income generating activities under the KfW Protected Areas support program for the Kanuku Mountains; and drafting and submitting project proposals to funding agencies to finance community enterprise development. Dianna’s strategies for transference include one-on-one job shadowing, informal training, and the identification of formal training courses and resources.

2. Sarah Kasven, MF Advisor, CRS LINKS Project, Manila, Philippines

Contact e-mail : sarahkasven@yahoo.com

Assignment Period: 12 months: February 15, 2006-February 14, 2007

Training: Boulder Microfinance Training Program at ILO, Turin, Italy,

July 17- August 4, 2006

In her final report, Sarah reflects: “EMDAP gave me the opportunity to branch out of my existing skill set and be a part of a committed group of practitioners.” She observes that she “provided critical technical support to a busy staff” and feels she had “an important presence at LINKS and with their partners.”

Among her accomplishments, Sarah created a marketing plan for the LINKS Learning Center; developed training modules on market research and promotional marketing; designed promotional materials for LINKS and partner organizations; and coordinated key elements of the LINKS Annual Partners Meeting and facilitated a training workshop.

3. Sadaf Zahid, MF Advisor, Save the Children/Asasah, Lahore, Islamabad

Contact e-mail: zahid_sadaf@hotmail.com

Assignment Period: 12 months: March 15, 2006-January 15, 2007, extended to March 15, 2007

Training: Boulder Microfinance Training Program at ILO, Turin, Italy, July 17- August 4, 2006

Sadaf observes that her assignment to Save the Children/Asasah during a transition period of rapid growth was timely, giving her the opportunity to fill a notable technical assistance gap. One of her proudest accomplishments was an improved data collection system. In addition, she was instrumental in enhancing the Save the Children/Asasah partnership. She completed several strategic planning exercises with senior management and drafted Asasah’s business plan to share with current and potential donors and investors. She completed a market study on micro leasing and made recommendations to Asasah on product features. As a result of her technical assistance, she thinks her host organization counterparts are “clearer about future directions.”

Sadaf announces that her involvement with Save the Children will continue past her EMDAP assignment at Save the Children’s direct invitation. “I am staying on an additional year to develop a Business Development Department which will directly assist in Asasah’s growth. Through this department I will build capacity of marketing and product development executives and hire research staff.”

4. Gabriela Prudencio, Business Promotion Adviser, PROFIT, Lusaka, Zambia

Contact e-mail: gabriela.prudencio@gmail.com

Assignment Period: 10 months: February 13, 2006 - December 12, 2006, extended to February 12, 2007

Training: “Making Markets Work for Business and Income Growth,” The Springfield Centre, Glasgow, Scotland, July 23-August 4, 2006

In her final report, Gabriela discusses what she considers her two most important contributions to PROFIT. First, she developed an in-depth gender study across five different districts in Zambia and created a report coupled with training for staff with specific recommendations for each district. Her gender research and training led to an increase in the number of women participating in PROFIT programs “without causing household turmoil” as well as greater sensitivity among PROFIT staff to gender considerations.

Second, Gabriela was one of the main architects of a user-friendly M&E tracking system that has led to better compliance by counterparts with USAID and internal reporting requirements. Gabriela points out that this system was designed for maximum flexibility and easy transference to new M&E staff.

A full-page feature on Gabriela ran in the February 2007 edition of the VEGA newsletter which can be found at www.vegaalliance.org/newsletters.asp.

5. Ana Luisa Pinto, Marketing Manager, Alternativa Solidaria (AlSol), Chiapas, Mexico

Contact e-mail: pinto.analuisa@gmail.com

Assignment Period: 10 months: September 11, 2006-July 11, 2007

Training: “IV Programa Latinoamericano de Liderazgo en Microfinanzas” (ProDesarrollo Microfinance Training Course), Leon, Mexico, April 16-20, 2007

Ana Luisa’s assignment continues on track. Her work with focus groups as part of her market research responsibilities is two-fold. Her research with clients attempts to gauge satisfaction with their total experience with AlSol, while research among AlSol staff, part of an internal marketing campaign, focuses on AlSol’s image vis-à-vis their competitors and overall quality of service.

In January, Ana Luisa had the opportunity to visit two other MFIs, ProMujer Mexico in Tula, Hidalgo, and FINCA Mexico in Cuernavaca, Morelos, where she compared notes on marketing for microfinance with these organizations’ Marketing Directors.

During her site visit, Usha Balakrishnan, accompanied by Ana Luisa, checked in with USAID/Mexico’s Development Finance Advisor, Geoffrey Chalmers, in Mexico City. She also met with AlSol’s Director General, Katia Corroy. From USAID’s and AlSol’s perspectives, Ana Luisa has surpassed their expectations. In the short time since her arrival, Ana Luisa has designed new marketing materials for AlSol, completed AlSol’s first client survey to help senior management develop a business and marketing strategy, and trained staff to think more competitively. As head of the Marketing Department, Ana Luisa is sought for advice on all marketing matters at senior management meetings.

Ana Luisa will now participate in the search and hiring process for a new marketing manager and will train the new employee to succeed in her position. Her EMDAP assignment has given Ana Luisa valuable field experience in microfinance and has reinforced her interest in continuing to work in this sector. Her case study under development will highlight AlSol's work in a competitive and dynamic microfinance environment.

USAID/Mexico will soon be highlighting Ana Luisa's contributions to AlSol's development in an in-house "Success Story."

6. Nina Kolbe, Tourism Development Advisor, Conservation International (CI), Antananarivo, Madagascar

Contact e-mail: ninakolbe@gmail.com

Assignment Period: 10 months: November 27, 2006-September 27, 2007

Training: "USAID Value Chain Workshop," March 12 – 16, 2007, and "IGP Workshop," March 17 & 18, 2007, Phnom Penh, Cambodia

Nina reports that the CI team has just completed their value chain analysis and stakeholder workshops in two regions. "We had our strategy week with our DC counterparts and teams here and are now in the stage of putting all the information into the implementation plans, finalizing contracts with implementing partners, and starting the implementation activities. One area is going smoothly and the other is proving to be challenging – so it is interesting to be involved in the strategic planning of the same project implemented differently in two areas."

Nina characterizes her recent training workshops, which she attended with two new CI colleagues, as "excellent opportunities for our team to learn best practices, work through constraints and challenges in implementation strategy design, and access tools and resources used to develop competitiveness strategies." She stresses how timely the training was both for team-building and for the preparation of the stakeholder workshops, adding: "The learning network created at the IGP workshop should ensure that the learning continues throughout the project cycle of this grant."

Nina also reports that a film crew from ABC News is currently in Madagascar with the President of CI. A report on the link between biodiversity conservation, tourism and poverty reduction, highlighting the project Nina is working on, is expected to air around the time of this writing.

Report # (circle 1): 1. **Begin Assignment** 2. End 1st Term 3. End 2nd Term
4. End of Assignment 5. (Host only) 6 Mos. following

Assignment

Name of Adviser: Ana Luisa Pinto

Country: Mexico

Name of Host Organization¹: Alternativa Solidaria Chiapas A.C. (AlSol)

Address: Avenida Miguel Hidalgo No. 1, Interior 5,6; San Cristobal de las Casas, Chiapas, Mexico

Contact Name, Title, Phone, Email: Katia Corroy, Executive Director, (01-967) 67-8-14-34, 67-4-05-39

Period of Adviser Assistance: 10 months

I. INDICATORS OF IMPACT (Provide data *only* for those indicator(s) that you believe have been/will be impacted by Adviser's advice/assistance and where data can be obtained without excessive effort/expense.)

(ALL FINANCIAL DATA IN \$USD)

Indicator	Amount during Period Preceding Assistance [June 2005] ²	Amount during Current Period [June 2006] ²	Projection of Amount during Next Period [June 2007] ¹
Number of loans outstanding	4,308	6,580	7,896
Value of loans outstanding	\$ 465,747.18	\$ 913,413.16	\$ 1,096,095.79
Percentage of loan repayment arrearages/problem loans (Portfolio at Risk = Outstanding balance of loans with payments past due / Portfolio outstanding (including amounts past due)	1.02 %	1.13 %	< 1%
Number of deposits	4,308	6,580	7,896
Value of deposits	\$ 139,713.46	\$ 135,917.74	?
Number of services introduced/strengthened			
Number of branches	3	2	4
Number of employees	48	48	53
Employee payroll	\$ 102,979.98	\$ 145,882.28	\$ 161,082.28
Net Profits	-\$ 31,914.30	\$ 90,230.81	?
Other indicator(s) of impact [specify]			

²Preferably, the period is a year, to facilitate comparison with other periods.

¹The organization with which the Adviser is working on a day-to-day basis during his/her assignment.

* Clients pay 20 % of their loan amount during the life of the loan period which is returned to the clients at the end of the loan.

II. BENEFICIARIES (Provide any quantification you can of the people who have received/will receive an increase in income or other tangible improvement in their lives as a result of Adviser's work. Some of these data may match/duplicate data in the table in Section I.)

(ALL FINANCIAL DATA IN \$USD)

Category of Beneficiary	Number of People in Category	Income ¹ during Period Preceding Assistance ¹ [specify] ²	Income ¹ during Current Period [specify] ²	Projection of Income ¹ during Next Period [specify] ²	Other Tangible Improvement in Lives [specify]
Owners					
Employees	48				
Clients	6,580				
Other [specify]					
Total	6,628				

¹Specify whether income figures are "Net" (with production expenses subtracted) or "Gross" (with no deduction for costs of production). Net is preferable to Gross.

² Preferably, the period is a year, to facilitate comparison with other periods.

III. DISCUSSION (please use additional pages as necessary)

- A. Briefly discuss the meaning of each of the impacts listed in Sections I and II. Elaborate how Adviser's assistance was/is/will be instrumental in producing them. *Impacts in Section I are caused by efforts of AlSol loan officers, supervision, targets set by Management, and good portfolio management to maintain a low portfolio at risk. Impacts in Section II are difficult to measure because Advisor's work does not directly impact changes in income for the beneficiaries (neither AlSol staff nor AlSol clients).*
- B. Confirm the source(s) of the numbers and how reliable they are. *In Section I, the information is based on financial data that has been disclosed and audited. The information was given to me by AlSol's Financial Manager.*
- C. If there are indicators not included in the questionnaire that would provide better indication of impact, please identify them. *Because every EMDAP advisor's assignment is different, it would be useful for the Advisor to replace or create indicators that would be particular to their work and what they plan to accomplish during their time at the organization. In my case, I will be creating a marketing department for AlSol and implementing new mechanisms to help AlSol expand its operations and acquire new clients as well retain current clients and satisfy their needs. It would be useful to conduct a survey from a sample of loan officers to ask about current marketing activities and how they promote AlSol and also from a sample of clients (semi-urban vs. rural) on how they learned about AlSol. I could first do a baseline survey in November of 2006 and in 6 months conduct the same survey and see if the response has changed. The survey could be administered a third time in November of 2007 with the new Marketing Manager to see if there is a difference in the responses. This is a simple way to measure the impact the new marketing activities had on the clients. The survey could include*

indicators such as the growth in number of clients, the retention rate of clients, and how they view the institutional image of AlSol, since these marketing activities were implemented.

- D. If there are indicators that would provide good indication of impact but cannot be obtained without excessive effort/expense, please identify them.
To find out real impact of program, would want to interview every client or a good sample of them and ask them if their business has grown, how many employees do they have, if they've made improvements on their home, if their children are in school, etc. And then I would have to take into account that AlSol may have contributed to a certain percentage of those changes but there could have been other factors as well that influenced those improvements and changes. There may have been endogenous or exogenous variables that caused these changes. Examples of endogenous factors could have been if AlSol modified a product or service or introduced a new product or if they allied with a health institution and their children are not as sick with respiratory or diarrhiac diseases. Examples of exogenous factors could be inflation, devaluation of the local currency, a government-supported social program that gives vouchers to women who have their children in school, etc.
- E. For all projections (the last column in both tables), explain how certain they are. Are there major threats or risks that could prevent them from being realized?
Projections are estimations based on 20% growth for June 2007 from June of 2006. This is a conservative estimate. I wasn't sure about a couple of indicators which is why there are question marks. I will clarify these for the next report at the end of the first term.

Report # (circle 1): 1. Begin Assignment 2. **End 1st Term** 3. End 2nd Term
4. End of Assignment 5. (Host only) 6 Mos. following Assignment

Period of Adviser Assistance: 10 months

I. INDICATORS OF IMPACT (Provide data only for those indicator(s) that you believe have been/will be impacted by Adviser's advice/assistance and where data can be obtained without excessive effort/expense.)

(ALL FINANCIAL DATA IN \$USD)

Indicator	Amount during Period Preceding Assistance [June 2005] ²	Amount during Current Period [June 2006] ²	Projection of Amount during Next Period [June 2007] ¹
Number of loans outstanding	4,308	6,580	13,000
Value of loans outstanding	\$ 465,747.18	\$ 913,413.16	\$ 1,820,000.00
Percentage of loan repayment arrearages/problem loans (Portfolio at Risk = Outstanding balance of loans with payments past due / Portfolio outstanding (including amounts past due)	1.02 %	1.13 %	< 1%
Number of deposits *			
Value of deposits *			
Number of services introduced/strengthened			
Number of branches	3	3	5
Number of employees	48	48	57
Employee payroll	\$ 102,979.98	\$ 145,882.28	\$ 199,500.00
Net Profits	-\$ 31,914.30	\$ 90,230.81	?
Other indicator(s) of impact [specify]			

²Preferably, the period is a year, to facilitate comparison with other periods.

* ALSol is not a regulated financial institution and as such cannot capture deposits from their clients. It is prohibited to do so under the Popular Savings and Credit Law (Ley de Ahorro y Credito Popular).

II. IMPACT OF MARKETING ACTIVITIES

Indicator	Baseline (November 2006)	6 months later (May 2007)	6 months later (November 2007)
Number of clients*	9,870		
Client retention rate*	74.7%		
How found out about AlSol?	Direct contact with women; Distribution of brochures: Word of Mouth among the clients		
Image of AlSol (clients view)	(Will conduct focus groups with clients in Dec. & Jan.)		
Image of AlSol (staff view)	Loan officers go the clients with cash; Speak their language; Doesn't differentiate; Treat clients with respect and kindness		

* Indicators are based on October 2006 information. Client desertion rate is determined by dividing clients that have left the program by the total number of clients (current clients + new clients – exiting clients). You subtract this rate from 100% and get the client retention rate. The annual rate is an average of all the months.

III. BENEFICIARIES (Provide any quantification you can of the people who have received/will receive an increase in income or other tangible improvement in their lives as a result of Adviser's work. Some of these data may match/duplicate data in the table in Section I.)

(ALL FINANCIAL DATA IN \$USD)

Category of Beneficiary	Number of People in Category	Income ¹ during Period Preceding Assistance ¹ [specify] ²	Income ¹ during Current Period [specify] ²	Projection of Income ¹ during Next Period [specify] ²	Other Tangible Improvement in Lives [specify]
Owners					
Employees	48				
Clients	6,580				
Other [specify]					
Total	6,628				

¹Specify whether income figures are "Net" (with production expenses subtracted) or "Gross" (with no deduction for costs of production). Net is preferable to Gross.

² Preferably, the period is a year, to facilitate comparison with other periods.

IV. DISCUSSION (please use additional pages as necessary)

A. Briefly discuss the meaning of each of the impacts listed in Sections I and II. Elaborate how Adviser's assistance was/is/will be instrumental in producing them. Impacts in Section I are caused by efforts of AlSol loan officers, supervision, targets set by Management, and good portfolio management to maintain a low portfolio at risk. Impacts in Section II are difficult to measure because Advisor's work does not

directly impact changes in income for the beneficiaries (neither AlSol staff nor AlSol clients).

- B. Confirm the source(s) of the numbers and how reliable they are.

In Section I, the information is based on financial data that has been disclosed and audited. The information was given to me by AlSol's Financial Manager.

- C. If there are indicators not included in the questionnaire that would provide better indication of impact, please identify them.

Because every EMDAP advisor's assignment is different, it would be useful for the Advisor to replace or create indicators that would be particular to their work and what they plan to accomplish during their time at the organization. In my case, I will be creating a marketing department for AlSol and implementing new mechanisms to help AlSol expand its operations and acquire new clients as well retain current clients and satisfy their needs. It would be useful to conduct a survey from a sample of loan officers to ask about current marketing activities and how they promote AlSol and also from a sample of clients (semi-urban vs. rural) on how they learned about AlSol. I could first do a baseline survey in November of 2006 and in 6 months conduct the same survey and see if the response has changed. The survey could be administered a third time in November of 2007 with the new Marketing Manager to see if there is a difference in the responses. This is a simple way to measure the impact the new marketing activities had on the clients. The survey could include indicators such as the growth in number of clients, the retention rate of clients, and how they view the institutional image of AlSol, since these marketing activities were implemented.

- D. If there are indicators that would provide good indication of impact but cannot be obtained without excessive effort/expense, please identify them.

To find out real impact of program, would want to interview every client or a good sample of them and ask them if their business has grown, how many employees do they have, if they've made improvements on their home, if their children are in school, etc. And then I would have to take into account that AlSol may have contributed to a certain percentage of those changes but there could have been other factors as well that influenced those improvements and changes. There may have been endogenous or exogenous variables that caused these changes. Examples of endogenous factors could have been if AlSol modified a product or service or introduced a new product or if they allied with a health institution and their children are not as sick with respiratory or diarrhiac diseases. Examples of exogenous factors could be inflation, devaluation of the local currency, a government-supported social program that gives vouchers to women who have their children in school, etc.

- E. For all projections (the last column in both tables), explain how certain they are. Are there major threats or risks that could prevent them from being realized?

Projections are estimations based on 20% growth for June 2007 from June of 2006. This is a conservative estimate.

Report # (circle 1): 1. Begin Assignment 2. End 1st Term 3. **End 2nd Term**
 4. End of Assignment 5. (Host only) 6 Mos. following

Period of Adviser Assistance: 10 months

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II. IMPACT OF MARKETING ACTIVITIES

Indicator	Baseline (November 2006)	6 months later (May 2007)	6 months later (November 2007)
Number of clients*	9,870		
Client retention rate*	74.7%		
How found out about AISol?	Direct contact with women; Distribution of brochures: Word of Mouth among the clients		
Image of AISol (clients view)	<i>Clients are happy that loan officers bring the loans to them and take their payments and they do not have to deposit at the bank (this is especially the case in rural areas!); they are treated with kindness and respect; they feel AISol cares for them. They would like bigger loan amounts, more flexible loan terms, and prizes for their excellent repayment behavior.</i>		
Image of AISol (staff view)	Loan officers go the clients with cash; Speak their language; Doesn't differentiate; Treat clients with respect and kindness		

* Indicators are based on October 2006 information. Client desertion rate is determined by dividing clients that have left the program by the total number of clients (current clients + new clients – exiting clients). You subtract this rate from 100% and get the client retention rate. The annual rate is an average of all the months.

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III. DISCUSSION (please use additional pages as necessary)

- A. Briefly discuss the meaning of each of the impacts listed in Sections I and II. Elaborate how Adviser's assistance was/is/will be instrumental in producing them. *Impacts in Section I are caused by efforts of AISol loan officers, supervision, targets set by Management, and good portfolio management to maintain a low portfolio at*

risk. Impacts in Section II are difficult to measure because Advisor's work does not directly impact changes in income for the beneficiaries (neither AlSol staff nor AlSol clients).

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- E. For all projections (the last column in both tables), explain how certain they are. Are there major threats or risks that could prevent them from being realized?

Projections are estimations based on 20% growth for June 2007 from June of 2006. This is a conservative estimate. Will update for final report due in July, will show them real numbers.

Report #: 1. Begin Assignment 2. End 1st Term 3. End 2nd Term
4. End of Assignment 5. (Host only) 6 Mos. following

Name of Adviser: Nina Kolbe

Country: Madagascar

Name of Host Organization²: Conservation International

Address: 6 Rue Razafindratandra- Ambohidahy, Antananarivo Madagascar

Contact Name, Title, Phone, Email: Norotiana Mananjan, Ecotourism Program
Coordinator, (261) 20 22 60979/61272, n.mananjan@conservation.org

Period of Adviser Assistance: 10 months

I. INDICATORS OF IMPACT *(Provide data only for those indicator(s) that you believe have been/will be impacted by Adviser's advice/assistance and where data can be obtained without excessive effort/expense.)*

(all financial data in \$USD)

Indicator	Amount during Period Preceding Assistance [specify]¹	Amount during Current Period [4 mo]¹	Projection of Amount during Next Period [1 yr]¹
Number of conservation measures introduced/strengthened			
Number of eco-tourism ventures initiated			
Number of other conservation-oriented business activities/products introduced/strengthened			
Number of conservation trainings conducted			
Number of conservation-oriented investments stimulated			
Value of conservation-oriented investments stimulated			
Volume of conservation-oriented products sold			
Value of conservation-oriented products sold			
Number of conservation-oriented contracts signed committing communities to conserve biodiversity in exchange for access to benefits			10
Value of contracts signed			
Number of conservation-promoting jobs created			
Financing accessed [specify kind]			
Conservation-oriented income generated			

²The organization with which the Adviser is working on a day-to-day basis during his/her assignment.

Other indicator(s) of impact [from Cooperative Agreement No. EEM-A- 00-06-00018-00]	Amount during Period Preceding Assistance [specify]¹	Amount during Current Period [4 mo]¹	Projection of Amount during Next Period [1 yr]¹
Number of MSEs assisted by the project			187
Number of supporting market MSEs at the destination level assisted by the project			5
Number national/ international tour operators assisted by the project			5
Number of women owned/ managed MSEs assisted by the project			30
Number of women owned/ managed MSEs assisted by the project (as % of total MSEs assisted by the project)			16
Increase in visitor numbers to the project sites	33,000		43,000
Sales/ income of MSEs assisted by the project	330,000		430,000
Sales/income of tour operators assisted in the project	1,650,000		2,225,000
Community lease payments made by MSEs	0		5,000
Number of new tourism products on offer to the market			20
Number of new sector specific services available			8
Number of new financial services available			1
Number of new non-sector specific services available			3
Number of firms adopting new guidelines			200
Number of new Madagascar products on market			10
Number of National arrivals	228,000		275,000
Number of MSEs linked to lead firms			187
Number of MSEs cooperating with one another to sell to a lead firm			50
Number of MSEs purchasing or acquiring new support services			50
Number of destination sites under an Ecotourism Management Plan including biodiversity monitoring, zoning for tourism, IUCN, red list status of species and habitat quality			5
Revenues from concession agreements invested in improving management of protected areas			\$15,000
Regional tourism office initiatives to support adoption of guidelines			10
Forest coverage change			0
Forest management plans agreed and implemented			2
Forest Fires recorded in pilot sites			TBD
Target species estimated population 1			TBD
Target species estimated population 2			TBD
Target species estimated population 3			TBD

¹Preferably, the period is a year, to facilitate comparison with other periods.

II. BENEFICIARIES (Provide any quantification you can of the people who have received/will receive an increase in income or other tangible improvement in their lives as a result of Adviser's work. Some of these data may match/duplicate data in the table in Section I.)

(all financial data in \$USD)

Category of Beneficiary	Number of People in Category	Income ¹ during Period Preceding Assistance ¹ [specify] ²	Income ¹ during Current Period [specify] ²	Projection of Income ¹ during Next Period [specify] ²	Other Tangible Improvement in Lives [specify]
Targeted individuals					
Clients					
Other [specify]					
Total					

¹Specify whether income figures are "Net" (with production expenses subtracted) or "Gross" (with no deduction for costs of production). Net is preferable to Gross.

² Preferably, the period is a year, to facilitate comparison with other periods.

III. DISCUSSION (please use additional pages as necessary)

A. Briefly discuss the meaning of each of the impacts listed in Sections I and II. Elaborate how Adviser's assistance was/is/will be instrumental in producing them.

There is too much overlap in the numbers from Sections I and II, so there would be double counting of beneficiaries if totaled. Better estimates will be provided in the next reporting period (after baseline data and Value Chain Analysis is completed) because it is not yet determined the interventions, and thus we do not know the specific beneficiaries. I will be instrumental in producing results by conducting value chain analyses in project areas, developing the implementation strategy and assisting in the implementation of the project plan. My role for each impact listed will become apparent after the implementation strategy is developed.

B. Confirm the source(s) of the numbers and how reliable they are.

Cooperative Agreement No. EEM-A-00-06-00018-00, between Conservation International and USAID, is the source of these numbers. These estimates may need to be reviewed after more accurate baseline data is collected and the project strategy is developed more thoroughly. The estimation of the number of women owned/managed assisted in this project is an underestimate.

C. If there are indicators not included in the questionnaire that would provide better indication of impact, please identify them.

D. If there are indicators that would provide good indication of impact but cannot be obtained without excessive effort/expense, please identify them.

The change in poverty levels (measurements to include changes in income, access to basic resources, opportunities, and other factors) as a result of tourism income in rural areas with management rights of protected areas (over time) would be useful as

the primary indicator of whether tourism can help reduce poverty. Additionally, in rural areas where the community has management rights of protected areas, measuring changes in operating budgets for protected area management and improvements in capacity to manage and monitor protected areas, as a result of tourism, would be better indicators of whether tourism can finance biodiversity protection at the community level.

- E. For all projections (the last column in both tables), explain how certain they are. Are there major threats or risks that could prevent them from being realized?

Without accurate baseline data, they are considered estimations. There are major threats and risks that could prevent them from being realized, but we will reassess this after the Value Chain analysis and data collection portion of the project has been completed. It is too early in the project to give meaningful analysis of the threats and risks.

Report #: 1. Begin Assignment 2. **End 1st Term** 3. End 2nd Term
 4. End of Assignment 5. (Host only) 6 Mos. following

Period of Adviser Assistance: 10 months

II. INDICATORS OF IMPACT *(Provide data only for those indicator(s) that you believe have been/will be impacted by Adviser's advice/assistance and where data can be obtained without excessive effort/expense.)*

(all financial data in \$USD)

Indicator	Amount during Period Preceding Assistance [specify]¹	Amount during Current Period [4 mo]¹	Projection of Amount during Next Period [1 yr]¹
Number of conservation measures introduced/strengthened			
Number of eco-tourism ventures initiated			
Number of other conservation-oriented business activities/products introduced/strengthened			
Number of conservation trainings conducted			
Number of conservation-oriented investments stimulated			
Value of conservation-oriented investments stimulated			
Volume of conservation-oriented products sold			
Value of conservation-oriented products sold			
Number of conservation-oriented contracts signed committing communities to conserve biodiversity in exchange for access to benefits			10
Value of contracts signed			
Number of conservation-promoting jobs created			
Financing accessed [specify kind]			
Conservation-oriented income generated			

Other indicator(s) of impact [from Cooperative Agreement No. EEM-A- 00-06-00018-00]	Amount during Period Preceding Assistance [specify]¹	Amount during Current Period [4 mo]¹	Projection of Amount during Next Period [1 yr]¹
Number of MSEs assisted by the project			187
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Number of women owned/ managed MSEs assisted by the project (as % of total MSEs assisted by the project)			16
Increase in visitor numbers to the project sites	33,000		43,000
Sales/ income of MSEs assisted by the project	330,000		430,000
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Number of new tourism products on offer to the market			20
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Number of firms adopting new guidelines			200
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Number of National arrivals	228,000		275,000
Number of MSEs linked to lead firms			187
Number of MSEs cooperating with one another to sell to a lead firm			50
Number of MSEs purchasing or acquiring new support services			50
Number of destination sites under an Ecotourism Management Plan including biodiversity monitoring, zoning for tourism, IUCN, red list status of species and habitat quality			5
Revenues from concession agreements invested in improving management of protected areas			\$15,000
Regional tourism office initiatives to support adoption of guidelines			10
Forest coverage change			0
Forest management plans agreed and implemented			2
Forest Fires recorded in pilot sites			TBD
Target species estimated population 1			TBD
Target species estimated population 2			TBD
Target species estimated population 3			TBD

¹Preferably, the period is a year, to facilitate comparison with other periods.

II. BENEFICIARIES (Provide any quantification you can of the people who have received/will receive an increase in income or other tangible improvement in their lives as a result of Adviser's work. Some of these data may match/duplicate data in the table in Section I.)

(all financial data in \$USD)

Category of Beneficiary	Number of People in Category	Income ¹ during Period Preceding Assistance ¹ [specify] ²	Income ¹ during Current Period [specify] ²	Projection of Income ¹ during Next Period [specify] ²	Other Tangible Improvement in Lives [specify]
Targeted individuals					
Clients					
Other [specify]					
Total					

¹Specify whether income figures are "Net" (with production expenses subtracted) or "Gross" (with no deduction for costs of production). Net is preferable to Gross.

² Preferably, the period is a year, to facilitate comparison with other periods.

III. DISCUSSION (please use additional pages as necessary)

- A. Briefly discuss the meaning of each of the impacts listed in Sections I and II. Elaborate how Adviser's assistance was/is/will be instrumental in producing them.

The meaning of each impact listed in Section I is straightforward. There is too much overlap in the numbers from Sections I and II, so there would be double counting of beneficiaries if totaled. Better estimates will be provided in the next reporting period (after baseline data and Value Chain Analysis) because it is not yet determined the interventions, and thus we do not honestly know the specific beneficiaries. I will be instrumental in producing results by conducting value chain analyses in project areas, developing the implementation strategy and assisting in the implementation of the project plan. My role for each impact listed will become apparent after the implementation strategy is developed in April 2007.

- B. Confirm the source(s) of the numbers and how reliable they are.

Cooperative Agreement No. EEM-A-00-06-00018-00, between Conservation International and USAID, is the source of these numbers. These estimates may need to be reviewed after more accurate baseline data is collected and the project strategy is developed more thoroughly. The estimation of the number of women owned/managed assisted in this project is an underestimate.

- C. If there are indicators not included in the questionnaire that would provide better indication of impact, please identify them.

Other indicators have been included and they are from the project workplan.

- D. If there are indicators that would provide good indication of impact but cannot be obtained without excessive effort/expense, please identify them.

The change in poverty levels (measurements to include changes in income, access to basic resources, opportunities, and other factors) as a result of tourism income in rural areas with management rights of protected areas (over time) would be useful as the primary indicator of whether tourism can help reduce poverty. Additionally, in rural areas where the community has management rights of protected areas, measuring changes in operating budgets for protected area management and improvements in capacity to manage and monitor protected areas, as a result of tourism, would be better indicators of whether tourism can finance biodiversity protection at the community level.

- E. For all projections (the last column in both tables), explain how certain they are. Are there major threats or risks that could prevent them from being realized?

Without accurate baseline data, they are considered estimations. There are major threats and risks that could prevent them from being realized, but we will reassess this after the Value Chain analysis and data collection portion of the project has been completed. It is too early in the project to give meaningful analysis of the threats and risks.

EMDAP ADVISER TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES

Under USAID reporting requirements, EMDAP must compile data on specific Adviser training and technical assistance activities. Advisers are requested to fill in the following two charts on an ongoing basis, adding lines as required, and include them in their quarterly reports to IIE.

TABLE A: DATA ON ADVISER TRAINING¹ ACTIVITIES

Training Event No.	Location (Locality)	Date(s)	Topic(s)	Training Performed By		Duration				Primary Host/Target Group							Number of People Trained						
				Adviser Name	Other Trainer(s) (name and affiliation)	1 day or less	2- 7 days	8-30 days	More than 30 days	For-Profit Enterprise(s) ²	Business Service Provider(s)	Bank(s)	Credit Union(s)	Farmer Cooperative(s) ³	Not-For-Profit Organization(s) ⁴	Educational & Research Institution(s)	Government Agency(ies) ⁵	Male	Female	Total			
1	San Cristobal de las Casas	Jan 8, 2007	Promotion Strategies	Ana Luisa Pinto		X										X					5	3	8
2																							
Totals																							

¹Training defined as a formally structured group educational activity, usually in a classroom or workshop, with formal learning objectives.

²Excluding business service providers and for-profit financial institutions.

³Not-for-profit farmer cooperatives. For-profit cooperatives are reported as for-profit enterprises

⁴Non-governmental, other than farmer cooperatives and educational institutions.

⁵Other than educational and research institutions.

TABLE B: DATA ON ADVISER TECHNICAL ASSISTANCE¹ ACTIVITIES

Technical Assistance Event No.	Location (Locality)	Date(s)	Topic(s)	Technical Assistance Provided By		Duration				Primary Host/Target Group						Number of People Assisted				
				Adviser Name	Other Trainer(s) (name and affiliation)	1 day or less	2- 7 days	8-30 days	More than 30 days	For-Profit Enterprise(s) ²	Business Service Provider(s)	Bank(s)	Credit Union(s)	Farmer Cooperative(s) ³	Not-For-Profit Organization(s) ⁴	Educational & Research Institution(s)	Government Agency(ies) ⁵	Male	Female	Total
1	Motozintla	October 14-28, 2006	Computer Literacy; How to Work in Excel; Internet Use	Ana Luisa Pinto	Pedro Calderon (Alcance)			X										4	4	8
2	Palenque, Yajalon	February 12-16, 2007	Focus Groups; Market Research	Ana Luisa Pinto			X							X				2	2	4
Totals																				

¹Technical assistance defined as any educational activity that is not a formally structured group educational activity with formal learning objectives.

²Excluding business service providers and for-profit financial institutions.

³Not-for-profit farmer cooperatives. For-profit cooperatives are reported as for-profit enterprises

⁴Non-governmental, other than farmer cooperatives and educational institutions.

⁵Other than educational and research institutions.

EMDAP ADVISER TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES

Under USAID reporting requirements, EMDAP must compile data on specific Adviser training and technical assistance activities. Advisers are requested to fill in the following two charts on an ongoing basis, adding lines as required, and include them in their quarterly reports to IIE.

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Training Event No.	Location (Locality)	Date(s)	Topic(s)	Training Performed By		Duration				Primary Host/Target Group							Number of People Trained				
				Adviser Name	Other Trainer(s) (name and affiliation)	1 day or less	2- 7 days	8-30 days	More than 30 days	For-Profit Enterprise(s) ²	Business Service Provider(s)	Bank(s)	Credit Union(s)	Farmer Cooperative(s) ³	Not-For-Profit Organization(s) ⁴	Educational & Research Institution(s)	Government Agency(ies) ⁵	Male	Female	Total	
1	Anatananarivo	1/4-1/5	Value Chain Analysis	Nina Kolbe			X								X					1	1
2	Anatananarivo	1/9-1/12	Value Chain Analysis	Nina Kolbe			X			X									1	2	3
3	Anatananarivo	2/13-2/16	Value Chain Analysis	Nina Kolbe			X			X									7	1	8
4	Morandave	2/19-2/23	Value Chain Analysis	Nina Kolbe			X			X	X				X				8	1	9
Totals																					

¹Training defined as a formally structured group educational activity, usually in a classroom or workshop, with formal learning objectives.

²Excluding business service providers and for-profit financial institutions.

³Not-for-profit farmer cooperatives. For-profit cooperatives are reported as for-profit enterprises

⁴Non-governmental, other than farmer cooperatives and educational institutions.

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