



**USAID** | **IRAQ**  
FROM THE AMERICAN PEOPLE

# **USAID-*Tijara***

Provincial Economic Growth Program

**Business Development Services Breakout Sessions**

**SBDC Leadership Conference  
Business Development Services  
November 14<sup>th</sup>-17<sup>th</sup>, 2009**



A Presentation on the  
**Business Development Services Breakout Sessions**

**Raymond Mendenilla**  
Advisor, Business Development Services

Baghdad, Iraq  
2009

# Business Development Services Breakout Sessions

## Objectives

**By the end of the working group sessions, the participants will:**

- Have a clear understanding of developing a work plan and its components.
- Have a clear understanding of how to prepare a proposal for activities that will be funded by USAID-*Tijara*.
- Participate in small group breakout sessions by region to conduct exercises to develop activities for a work plan.
- Present their proposals in each small group on the last breakout session on the activity they will focus on delivering.
- Grant proposals delivered to USAID-*Tijara* by the 30<sup>th</sup> December 2009.

## THE WORK PLAN AND IT'S COMPONENTS

The annual work plan should work towards an overall vision with a mission you are focused on completing.

A ***Mission Statement*** tells you the fundamental purpose of the SBDC. It defines the customer and the critical processes. It informs the reader of the desired level of performance.

A ***Vision Statement*** outlines what the SBDC wants to be, or how it wants the world in which it operates to be. It concentrates on the future. It is a source of inspiration. It provides clear decision-making criteria.

# THE WORK PLAN AND IT'S COMPONENTS



**The Vision statement and the Mission statement connected but have separate purposes.**

Many people mistake vision statement for mission statement, and sometimes one is simply used as a longer term version of the other.

- ✓ The ***Vision Statement*** should describe why it is important to achieve the Mission. A Vision statement defines the purpose or broader goal for being in existence or in the business and can remain the same for decades if crafted well.
- ✓ A ***Mission Statement*** is more specific to what the SBDC can achieve itself. Vision should describe what will be achieved in the wider sphere if the organization and others are successful in achieving their individual missions.

**A mission statement provides a path to realize the vision in line with its values. These statements have a direct bearing on the bottom line and success of a SBDC.**

# THE WORK PLAN AND IT'S COMPONENTS

## How do you define a Vision and Mission statement?

A method to define both is by posing 2 questions.

- ✓ Firstly, "What aspirations does the SBDC have for Iraq or its community in which it operates and has some influence over?"
- ✓ Secondly, "What can the SBDC do or contribute to fulfill those aspirations?"

The basis of the ***Vision Statement*** is answered in the first question.

The basis of the ***Mission Statement*** is answered in the second question.



## THE WORK PLAN AND IT'S COMPONENTS

The annual work plan includes **SMART** objectives that work towards completing the SBDC's mission.

**S** – SPECIFIC  
**M** – MEASURABLE  
**A** – ATTAINABLE  
**R** – RELEVANT  
**T** – TIME-BOUND

# THE WORK PLAN AND IT'S COMPONENTS

**Objectives** – Each work plan activities help complete a mission which works towards fulfilling the long term vision of the SBDC.

**S – SPECIFIC**

**Significant, Stretching, Simple.**

**M – MEASURABLE**

**Meaningful, Motivational, Manageable.**

**A – ATTAINABLE**

**Appropriate, Achievable, Agreed, Assignable, Actionable, Action-oriented, Ambitious.**

**R – RELEVANT**

**Realistic, Resourced, Rewarding, Results/Results-focused/Results-oriented.**

**T – TIME-BOUND**

**Timetable, Time framed, Time-Specific, Traceable, Tangible.**

# THE WORK PLAN AND IT'S COMPONENTS

## How long should a work plan be and how detailed?

- A work plan should be for a period of one year and updated monthly.
- It should be written in enough detail to give a clear picture of the following:
  - ✓ The planned activities to meet your objectives.
  - ✓ When these activities will occur, and the resources that will be required to complete them.
  - ✓ A clear connection to the annual budget.

# THE WORK PLAN AND IT'S COMPONENTS

**What are key things to keep in mind when developing a work plan?**



- To prepare the annual work plan, make a list of all the activities and resources the SBDC will need to accomplish each objective.
- Work plans must also include cost estimates for each activity; these can be helpful in preparing the annual budget.
- Determine the person(s) who will be responsible for each activity and indicate the approximate months and weeks during which the work should be started and completed

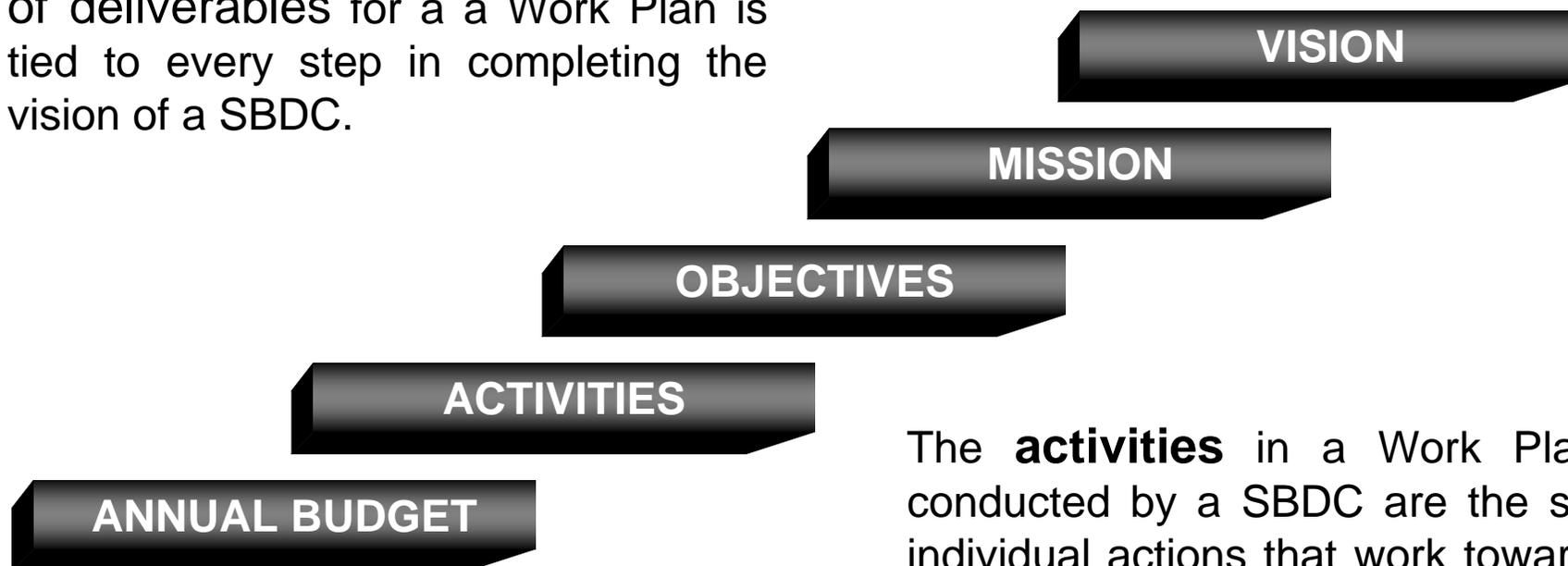
# THE WORK PLAN AND IT'S COMPONENTS

## What are the key components of a budget?

- ✓ A budget provides a forecast of revenues and expenditures i.e. construct a model of how the SBDC might perform financially speaking if certain objectives and activates are carried out.
- ✓ A budget enables the actual financial operation of a SBDC to be measured against the forecast.
- ✓ A budget is a fundamental tool to predict with reasonable accuracy whether the event will result in a profit, a loss or will break-even.

# THE WORK PLAN AND IT'S COMPONENTS

The **annual budget** and **timeline** of deliverables for a a Work Plan is tied to every step in completing the vision of a SBDC.



The **activities** in a Work Plan are conducted by a SBDC are the specific individual actions that work towards the overall vision of a SBDC.

**Preparing a proper proposal for activities is important to a SBDC success.**

# CREATING A PROPOSAL FOR AN ACTIVITY

- **Audience:**

- ✓ Before you begin to write, be clear about who your audience will be.
- ✓ Will your proposal be reviewed by a program officer or a review committee?
- ✓ Will the reader be so intimately familiar with your discipline that very academic or scientific language is not only okay, but expected?

# CREATING A PROPOSAL FOR AN ACTIVITY

- **Writing Style:**

- ✓ Generally, writing to a foundation calls for a different style than writing for the government, a corporation, or an individual.
- ✓ You are building a case based on proven need and innovative solution.
- ✓ Do not use what I call boastful type language. Save this language for your cover letter or for proposals to corporations or individuals.
- ✓ Do not mix rationale with method. Keep your discussion of why you are doing what you propose separate from how you will be doing it.

# CREATING A PROPOSAL FOR AN ACTIVITY

- **The Cover Letter for a Proposal for an Activity (optional):**
  - ✓ Cover letters are like bonuses, especially if there is a proposal page limit. Try to keep them to one page.
  - ✓ Have a top-ranking official sign them. Use them to demonstrate institutional support. Re-emphasize the main goal of the project.
  - ✓ Here is where the writer makes vision statements and states how the smaller project is part of a larger whole, whether it be the work of your institution, or the surrounding community.
  - ✓ Boastful language is acceptable here but keep it professional.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

- **Proposal Contents of an Activity:**

- ✓ Generally, the foundation will give you an indication of what questions it wants answered and that should be your first point of reference.
- ✓ However, if there are not precise requirements, the following provides a good guide to structuring your proposal.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 1. Program Description of an Activity

- ✓ A general description of the proposed program, with an indication of the background, scope, reason for program selection and description.
- ✓ Use the highlights (or topic sentence) from each section of the proposal.
- ✓ Answer the following: what will be done, by whom, for what purpose, for how long, at what cost, what are the outcomes, and who will benefit?
- ✓ Make it clear what you are asking the foundation to do.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 1. Program Description of an Activity

- ✓ What dissemination process do you plan to use? Be creative; an article to a professional journal is only one of many options.
  - Consider pieces to newspapers or articles to more popular periodicals;
  - conference presentations;
  - community outreach activities;
  - a web site dedicated to the project;
  - convening work groups of your peers;
  - reports; briefing papers;
  - press releases; newspaper coverage;
  - getting an interview on your local radio station;
  - Network with other foundations and entities doing similar work.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 2. Purpose - Statement of Need of an Activity

- ✓ What is the issue you are addressing and why does this matter?
- ✓ Why is what you propose necessary and who benefits? Make sure you can indicate the public good achieved.
- ✓ Why hasn't this issue been addressed sufficiently in the past? Who else is working in this field, what have they done, and why wasn't that enough? Demonstrate your knowledge of the field.
- ✓ Assure that there is no duplication of other work. However, if you are seeking to replicate another's work in a new environment or with a different population, that's legitimate.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 3. Strategic Objectives - Project Activity & Outcomes

- ✓ Why did the SBDC choose to address the issue in the manner that you have? Are there other approaches? If yes, why aren't they appropriate to the situation you are seeking to ameliorate?
- ✓ What will be the specific outcomes achieved?
- ✓ What are the specific activities involved? Who will do them? How?
- ✓ Present a timeline of activities.
- ✓ Why is your organization the best one to do what you propose to do?

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 3. Strategic Objectives - Project Activity & Outcomes

- ✓ Why did the SBDC choose to address the issue in the manner that you have? Are there other approaches? If yes, why aren't they appropriate to the situation you are seeking to ameliorate?
- ✓ What will be the specific outcomes achieved?
- ✓ What are the specific activities involved? Who will do them? How?
- ✓ Present a timeline of activities.
- ✓ Why is your organization the best one to do what you propose to do?

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 4. Duration of Activity

- ✓ Present a timeline of activities.
- ✓ What do you plan to accomplish in that timeline?
- ✓ Why do you feel the activity should last as long as you have proposed?
- ✓ What examples can you give to justify the length of time of the activity?

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 5. Sustainability – Evaluation of an Activity

- ✓ In general, evaluation sections of a proposal should assure the potential fun sponsor that there is a way to know whether or not you achieved your goal.
- ✓ First of all, make sure you have project goals and objectives that are truly measurable, otherwise you will not be able to design an evaluation.
- ✓ State what is the goal of evaluation. What do you hope to learn, prove, or demonstrate?
- ✓ Think about what can be learned from your evaluation and with whom you want to share the information.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 5. Sustainability - Evaluation of an Activity (continued)

- ✓ Describe your evaluation methodology precisely. You may mix methodologies depending upon the objective being measured. Be creative; not everything is measured with a survey.
- ✓ Depending upon the nature of the project, an evaluation may examine either or both process and product.
- ✓ It is a good idea to build in evaluation throughout the life of the project so that you can have good information for making mid-course corrections if necessary.

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 5. Sustainability - Evaluation of an Activity (continued)

- ✓ Some parts of what you learn may be for internal uses only, but much can be shared with your peers. Foundations like to think that their grants have a life beyond the single grantee.
- ✓ Specify who will conduct your evaluation; it can be conducted by project personnel or outsiders or both.
- ✓ Utilize on-campus resources to design your evaluation or to gain assessment tools.
- ✓ When you are done describing your evaluation goals and methodologies, you should have answered this question:

**How will you know that you did what you said you would do?**

# CREATING A PROPOSAL FOR AN ACTIVITY

What are the basic components to describe an activity in the proposal?

## 6. Cost Application - Budget of an Activity

- ✓ Show your budget in table form and use a budget narrative to explain each item.
- ✓ Include other sources of funding, both cash and in-kind. Do not overlook the value of all in-kind contributions, including those of your collaborators.
- ✓ Indicate how the project will be funded after the grant has run out.

# CREATING A PROPOSAL FOR AN ACTIVITY

## So how do we get started?

The next step is to breakout into small groups to work together and brainstorm to form ideas for activities for your work plan.



- ✓ This is an interactive activity that requires group dynamics to be successful.
- ✓ Make sure to speak out and often. There is no question that cannot be asked.
- ✓ Each SBDC will be given a task after each session is completed for the following session.
- ✓ After all the sessions are complete each SBDC and the workshop is over it doesn't end there.
- ✓ Each SBDC will be required to turn in a proposal by the 1<sup>st</sup> of December 2009 to fund an activity through USAID- Tijara.

**GOOD LUCK AND HAVE FUN!!!**

**Produced for**



**2009**

<http://www.tijara-iraq.com>

<http://www.sbdc-iraq.com>

**Created and Delivered by**  
**Raymond Mendenilla**  
**Advisor - Business Development Services**