

Final Evaluation of  
***The Art of Crafting a Business Plan for Social Return on Investment***  
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Management Sciences for Health  
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**Management and Leadership Project (M&L)  
 Management Sciences for Health (MSH)**

**Evaluation of *The Art of Crafting a Business Plan for Social Return on Investment***

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## Executive Summary

The purpose of the final evaluation was to assess the delivery and immediate impact of the pilot program, *The Art of Crafting a Business Plan for Social Return on Investment (July- December 2002)* and provide recommendations that will be used to modify and refine the subsequent version of the program.

The Business Planning Team has worked in close collaboration with the Management and Leadership (M&L) Program's Monitoring and Evaluation (M&E) Unit to develop an M&E plan to measure the program's Strategic Objective of: *PROCOSI Member NGOs expand and diversify their funding base*. The final evaluation is one component of the 360 degree evaluation being applied to the program.

Cecilia Boada, MSH/Bolivia, Fiona Nauseda, MSH/Boston, and Alex Bermudez, MSH/Boston conducted 8 focus groups with the teams who participated in the pilot program. Six of these original eight teams completed a business plan.

The focus group questions were divided into three sections: 1) General perceptions about the program; 2) Specific perceptions regarding the program; and 3) Final comments.

Key findings regarding the **program's impact** on participating organizations include:

### *A transformation of attitudes and concepts:*

- Participants are more client focused
- Participants have adopted a more active attitude within their organization - generating ideas based on the target populations' needs
- Participants think in terms of products and services instead of projects

### *Improved internal processes and systematization of information*

- Participants have a greater understanding of their own organization
- Participants are able to articulate their organization's mission to others more clearly

### *Strengthened organizational teams*

- Participants are able to propose solutions to problems and make decisions in coordination with their directors

### *Application of new skills and concepts*

- Participants are applying the program methodology to other areas of their work
- Participants are using new terminology and have adopted business language

**Recommendations** for future teams participating in the program:

- Ensure institutional support for the program, including assigning a dedicated team and allocating the time and resources to the program
- Establish multi-disciplinary teams who will enroll others in their organization into the program and process
- Establish and communicate written guidelines regarding the process for seeking funding for the business plans upon completion of the program
- Maintain high quality and timely feedback from facilitators
- Clarify, document, and communicate all expectations related to MSH's counterpart's (Agent) role in delivering and replicating the program
- Make minor modifications to program content. Adjust time allocation of some of the modules.

## I. Introduction

### A. Program description

The program *The Art of Crafting a Business Plan for Social Return on Investment* uses both face-to-face and electronic methodologies to guide participating organizations through a 6-module learning technology to develop a business plan.

Participating organizations work in teams of 2-5 individuals. Throughout the business planning process, participants gain skills and expertise in areas such as: articulating and packaging breakthrough ideas, identifying a product design team, scheduling product development and roll-out, conducting market research, estimating financial and other resource needs, and projecting social returns on investment. Each of the six modules corresponds to a component of the business plan. Teams complete each module and then send the component to their assigned reviewer for feedback and comments. Each team selects a “captain” whose responsibilities include coordinating and communicating with the reviewer. The team incorporates the reviewer’s feedback and upon completion of the six modules, integrates all of the components into a final business plan.

The program began with a four-day face-to-face launch week. The face-to-face session provided participants with a general orientation to the program, the technology, and the implementation plan. Following the initial face-to-face meeting, teams worked autonomously with their facilitator from a distance for 5 months. The second face-to-face component of the program was the closing ceremony. Teams came together to present an “elevator pitch” of their business plan to potential funders, including individuals from the private sector, international agencies, and other cooperating agencies.

### B. Background: The Pilot: PROCOSI & MSH

*The Art of Crafting a Business Plan for Social Return on Investment* is a pilot program developed by Management Sciences for Health’s, Management and Leadership (M&L) Development Program, MSH Bolivia, and our counterpart agency, PROCOSI, a Bolivian health network of 24 national and international NGOs.

The pilot was made possible through generous funding from NGO Networks, a five-year global health partnership whose mandate is to extend peoples’ access to health care services.

The program was a collaborative effort between MSH Boston, MSH Bolivia and PROCOSI. The MSH Boston team was responsible for developing the program content and delivery system (CD-ROM), acting as reviewers, providing technical support as needed, and capturing all video and audio portions of face-to-face components of the program. MSH Bolivia contributed to the program content development, on the ground coordination with PROCOSI throughout the program, content translation, and on-going follow-up and evaluation activities with the participating teams. PROCOSI contributed to all aspects of the program and content development, selected the participating organizations, provided on-going follow-up and technical support to program participants, and arranged and funded all of the logistics and resources associated with both the launch week and closing ceremony.

In 2000, M&L’s program director met with PROCOSI’s former executive director to discuss ways in which M&L could support and strengthen the network. PROCOSI’s executive director identified diversifying the member organization’s funding base as a priority. The result was a pilot business planning program in which seven member organizations and the PROCOSI Secretariat participated from July - December 2002.

Six of the original eight participating organizations completed a business plan. All eight of the original organizations participated in the final program evaluation. The purpose of this report is to share the key findings from the final program evaluation and to make recommendations for future program offerings.

**C. Overview of final program evaluation**

**Background and Objectives**

The purpose of the final evaluation is to assess the delivery and immediate effect of the *Art of Crafting a Business Plan for Social Return on Investment* and provide recommendations that will be used to modify and refine the subsequent version of the program. More specifically, the objectives of the final evaluation are to:

- Assess the program goals, objectives, content and methodology and the quality of course materials and facilitation.
- Assess the capacity of program participants to develop sound business plans
- Assess the capacity of PROCOSI Member NGOs to expand and diversify their funding base.
- Identify ways that the program and supporting materials could be strengthened for facilitators and participants

**D. Program Evaluation- Previous components**

The final evaluation is one component of the 360 degree evaluation being applied to the program. Other components of the program evaluation include:

- a. Pre-assessment
- b. Daily and final evaluation of face-to-face workshop
- c. Module evaluations
- d. Mid-term evaluation (October 2002)
- e. Facilitator e-journal

The following table contains a brief description and purpose of each of the evaluation components.

Table A: Program Evaluation- Previous components

Data/Datapoint	Description/Purpose of Instrument	Deliverable/Use
<b>Pre-Launch</b>		
Pre-assessment	20 question instrument Interviews with potential participating organizations to gauge: <ul style="list-style-type: none"> <li>• Current knowledge of content areas</li> <li>• Current strategies &amp; mechanisms for attracting funds</li> <li>• Perceived needs of business plan skills</li> <li>• Expected outcomes from learning program</li> <li>• Learning environment &amp; needs</li> </ul> Assess organization's computer-related resources (Internet access etc.)	Program design; progress report
<b>Launch Week</b>		
Daily evaluation in the face-to-face workshop	Open forum to document: <ul style="list-style-type: none"> <li>• Positive aspects of the day</li> <li>• Difficult aspects of the day</li> <li>• The "take-away" from the day</li> </ul>	Progress report
Frequently Asked Questions (FAQs) (face-to-face workshop)	<ul style="list-style-type: none"> <li>• Note cards for individual participants to anonymously write their questions/comments</li> </ul>	Attachment to progress report; program revisions
Final Launch Week Evaluation	Likert scale (1-4) measuring: <ul style="list-style-type: none"> <li>• Clarity of module content</li> </ul>	Progress report; Program revisions

EL ARTE DE **ADAPTAR PLANES DE NEGOCIOS**  
PARA INICIATIVAS SOCIALES

Data/Datapoint	Description/Purpose of Instrument	Deliverable/Use
	<ul style="list-style-type: none"> <li>• Technology</li> <li>• Clarity of roles (captains, facilitators, PROCOSI)</li> <li>• Quality of launch week (including facilitation, timing, materials, participation)</li> <li>• General comments</li> </ul>	
<b>During Program</b>		
Facilitator e- journal	<ul style="list-style-type: none"> <li>• Customized facilitator journal to record comments/observations/ideas during program by module &amp; team</li> </ul>	Facilitator notes for future courses; undelivered messages; program revisions; documenting breakdowns and breakthroughs; FAQs
Techie E-journal	<ul style="list-style-type: none"> <li>• Customized techie journal to record technical issues &amp; observations during program by module &amp; team</li> </ul>	Facilitator notes for future courses; undelivered messages; program revisions; documenting breakdowns and breakthroughs; FAQs
Module evaluation	<p>Each team answers 5 open-ended questions upon completion of module:</p> <ul style="list-style-type: none"> <li>• Positive aspects of module</li> <li>• Difficult aspects of the module</li> <li>• Quality &amp; speed of facilitator feedback/help</li> <li>• Technical problems</li> <li>• General comments</li> </ul> <p>Team members document individual time &amp; contributions made to homework during module</p>	Summary of module evaluations circulated; Program revisions; documenting breakdowns and breakthroughs; FAQs
Midterm evaluation- participants	<p>Telephone interviews with participants</p> <ol style="list-style-type: none"> <li>What has worked best?</li> <li>What changes would you recommend for the second ½ of the program</li> <li>Have you applied skills and new concepts that you've learned in the program to other parts of your work?</li> <li>Is the content clear and appropriate to your level of experience?</li> <li>Suggestions regarding materials</li> </ol>	Progress report; program structure; future revisions
Midterm evaluation- Agents	<p>Telephone interviews</p> <ol style="list-style-type: none"> <li>Is there a sufficient transfer of information &amp; skills in order to easily replicate the program?</li> <li>What has worked best?</li> <li>What changes would you recommend for the second ½ of the program</li> <li>Other comments</li> </ol>	Progress report; program structure; future revisions
<b>Post Program</b>		
Final evaluation	<ul style="list-style-type: none"> <li>• In-depth interviews&amp; focus groups with participants &amp; agents</li> <li>• Revisit initial assessment – use to evaluate</li> <li>• Program</li> <li>• The Product process</li> <li>• Materials</li> <li>• Future use</li> </ul>	Progress report; future revisions
Follow-up (6 months later)	<ul style="list-style-type: none"> <li>• Telephone interviews with selected organizations</li> </ul>	Marketing; lessons learned; future
<b>Pre-Launch</b>		
Pre-assessment	<p>20 question instrument</p> <p>Interviews with potential participating organizations to gauge:</p> <ul style="list-style-type: none"> <li>• Current knowledge of content areas</li> <li>• Current strategies &amp; mechanisms for attracting funds</li> <li>• Perceived needs of business plan skills</li> <li>• Expected outcomes from learning program</li> <li>• Learning environment &amp; needs</li> </ul> <p>Assess organization's computer-related resources (Internet access etc.)</p>	Program design; progress report

EL ARTE DE **ADAPTAR PLANES DE NEGOCIOS**  
PARA INICIATIVAS SOCIALES

Data/Datapoint	Description/Purpose of Instrument	Deliverable/Use
<b>Launch Week</b>		
Daily evaluation in the face-to-face workshop	Open forum to document: <ul style="list-style-type: none"> <li>• Positive aspects of the day</li> <li>• Difficult aspects of the day</li> <li>• The “take-away” from the day</li> </ul>	Progress report
Frequently Asked Questions (FAQs) (face-to-face workshop)	<ul style="list-style-type: none"> <li>• Note cards for individual participants to anonymously write their questions/comments</li> </ul>	Attachment to progress report; program revisions
Final Launch Week Evaluation	Likert scale (1-4) measuring: <ul style="list-style-type: none"> <li>• Clarity of module content</li> <li>• Technology</li> <li>• Clarity of roles (captains, facilitators, PROCOSI)</li> <li>• Quality of launch week (including facilitation, timing, materials, participation)</li> <li>• General comments</li> </ul>	Progress report; Program revisions
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Facilitator e- journal	<ul style="list-style-type: none"> <li>• Customized facilitator journal to record comments/observations/ideas during program by module &amp; team</li> </ul>	Facilitator notes for future courses; undelivered messages; program revisions; documenting breakdowns and breakthroughs; FAQs
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Module evaluation	Each team answers 5 open-ended questions upon completion of module: <ul style="list-style-type: none"> <li>• Positive aspects of module</li> <li>• Difficult aspects of the module</li> <li>• Quality &amp; speed of facilitator feedback/help</li> <li>• Technical problems</li> <li>• General comments</li> </ul> Team members document individual time & contributions made to homework during module	Summary of module evaluations circulated; Program revisions; documenting breakdowns and breakthroughs; FAQs
Midterm evaluation- participants	Telephone interviews with participants <ol style="list-style-type: none"> <li>a) What has worked best?</li> <li>i) What changes would you recommend for the second ½ of the program</li> <li>j) Have you applied skills and new concepts that you’ve learned in the program to other parts of your work?</li> <li>k) Is the content clear and appropriate to your level of experience?</li> <li>l) Suggestions regarding materials</li> </ol>	Progress report; program structure; future revisions
Midterm evaluation- Agents	Telephone interviews a) <ol style="list-style-type: none"> <li>a) Is there a sufficient transfer of information &amp; skills in order to easily replicate the program?</li> <li>m) What has worked best?</li> <li>n) What changes would you recommend for the second ½ of the program</li> <li>o) Other comments</li> </ol>	Progress report; program structure; future revisions
<b>Post Program</b>		
Final evaluation	<ul style="list-style-type: none"> <li>• In-depth interviews&amp; focus groups with participants &amp; agents</li> <li>• Revisit initial assessment – use to evaluate</li> <li>• Program</li> <li>• The Product process</li> <li>• Materials</li> <li>• Future use</li> </ul>	Progress report; future revisions
Follow-up (6 months later)	<ul style="list-style-type: none"> <li>• Telephone interviews with selected organizations</li> </ul>	Marketing; lessons learned; future

## Highlights from previous evaluation components:

### Pre-assessment

The purpose of the pre-assessment was to design and plan for the program delivery. It was also used as a baseline for the final evaluation. One of the major findings from the pre-assessment was the need for a highly practical program that participants could easily apply to their organization. It is worth noting that the organizations that participated in the program assessment were not necessarily the same organizations that participated in the program. For a complete summary of the pre-assessment findings, please see Appendix 5.

### Daily and final evaluation of face-to-face workshop

Daily evaluations during the launch week face-to-face workshop gave participants an opportunity to voice positive, difficult, and salient moments from each day. Positive comments included interaction with the facilitators and other participants, the user-friendliness of the CD-ROM, and the ability to work in teams. Difficult aspects related to some environmental/logistical factors including the use of cell phones during the sessions. Salient aspects included learning new terminology such as “social return on investment” and learning how to generate “revolutionary ideas that can impact our target communities and markets.”

The final evaluation of the launch week used a Likert scale to measure 1) The clarity of the module contents, 2) The usability of the CD-ROM, 3) The clarity of the roles of the reviewers, team captains, and PROCOSI staff, 4) The overall quality of the launch week, and 5) General comments. Participants ranked the final launch week evaluation favorably, stating:

*“I think this new technology can benefit organizations in several ways:*

- To discover new possibilities*
- To develop teams, and*
- To realize our potential as participants in the development of our county (more purposeful, innovative, and integrated)”*

### Module evaluations

The purpose of the module evaluations were to document teams’ progress during the program and to identify difficulties/questions as they arose. Teams were also asked to document how much time the module took (by person and role on the team.) Participants consistently stated that lack of time was a difficulty they encountered.

The following is a **summary of the total time the teams reported spending on each module.** (Please note this does not reflect all of the teams’ work, only the module evaluations that were received; Assumption 2 weeks per module)

**Module 1:** average: **36 hours/team** (based on 4 teams)  
**Module 2:** average: **19 hours/team** (based on 4 teams)  
**Module 3:** average: **9.9 hours/team** (based on 7 teams)  
**Module 4:** average: **23.4 hours/team** (based on 5 teams)  
**Module 5:** average: **29 hours/team** (based on 5 teams)  
**Module 6:** average: **15.3 hours/team** (based on 3 teams)

**Total average: 22 hours per module**

## Mid-term evaluation (October 2002)

Cecilia Boada conducted the two parts of the mid-term evaluation:

### 1) A participant mid-term evaluation:

Seven of teams were interviewed via telephone. In addition, she interviewed nine people. Participants commented that the facilitator feedback and technical support they received from PROCOSI were optimal. They made several recommendations for the second half of the program, including electing team captains based on their time availability, modifying the time, and appointing a second team captain. When asked if they were applying what they had learned from the Business Planning Program in other areas of their work, one of the teams stated that they were applying tools, another said they had learned to differentiate between a product and a service. A different team commented that they had not had the opportunity to apply what they had learned. Finally, one of the teams stated that now that they were in the stage of trying to secure funding, they would be putting what they had learned into practice. Teams also responded to the question of whether or not the content was clear and at an appropriate level for their professional experience. All of the teams commented that it was clear and comprehensible. One of the teams commented that at times it was too easy. The only recommendation that a team made regarding the materials was to revise the translation.

### 2) PROCOSI and MSH Bolivia

PROCOSI and MSH Bolivia staff commented that there was good communication and information sharing. The PROCOSI team however commented that they would have liked to have been better intermediaries between the NGOs and the facilitators so that they were seen as helping MSH/Boston and be more identified as the future facilitators. PROCOSI revised the modules along with the MSH/Bolivia team, however there was not enough clarity regarding how best to help and support Boston.

When asked about future suggestions and changes for the second ½ of the program, the organizations commented that a closing face-to-face session would be beneficial. They stated that the NGO directors should allocate work time to the business planning program.

Other comments included the need for more emphasis on the “elevator pitch”. PROCOSI also expressed that there wasn’t a clear vision for the future with relation to the network. One PROCOSI team member commented that he felt that some of the organizations weren’t prioritizing the work, that in some cases they were only adapting work they had already done.

### Facilitator e-journal

The facilitator e-journal is a tool for reviewers to document their experience, findings, teams’ progress, points to follow-up on, etc. during the program. One of the facilitators used the journal to record all of the changes she wanted to make to the modules. The e-journal is not intended to be an extra step or to make additional work for the facilitators; it is another instrument for recording and evaluating the program implementation.

## E. M&L Evaluation

The Business Planning Team has worked in close collaboration with M&L’s M&E Unit to develop a M&E plan to measure the program’s Strategic Objective: *PROCOSI Member NGOs expand and diversify their funding base*. In addition, M&L’s M&E Unit has worked with the BPP evaluation team to develop the final evaluation instruments.

Please see Appendix 3 for M&L’s M&E Plan.

## F. The Participants

PROCOSI's secretariat selected organizations to participate using the following criteria:

- √ The size of the organization
- √ Equipment (computers and access to the Internet)
- √ Geographic location (at least one NGO) from a geographic region
- √ Commitment to replicate the BPP with other members of the network
- √ Interest in participating
- √ Committeemen to create an institutional product

Eight organizations were selected to participate in the pilot:

1. Asociación de Promotores de Salud de Area Rural "**APROSAR**" (Oruro)
2. **ESPERANZA BOLIVIA** (Tarija)
3. Servicios de Asesoría a Comunidades Agrarias "**SACOA**" (Santa Cruz)
4. Centro de Multiservicios Educativos "**CEMSE**" (La Paz)
5. Asociación de Programas de Salud del Area Rural "**APSAR**" (Cochabamba)
6. Project Concern Internacional "**PCI**" (La Paz)
7. Centro de Investigación, Educación y Servicios "**CIES**" (La Paz)
8. Programa de Coordinación en Salud Integral, Secretaría Ejecutiva "**PROCOSI**" (La Paz.)

PROCOSI's executive secretariat notified the organizations that they were selected to participate on May 23, 2002. The organizations confirmed their participation and presented a minimum of 3 participant names to the Secretariat before May 28, 2002.

On June 4, the NGO directors met with the Executive Secretariat to discuss the program details, including their commitment and the information that the participants needed to collect for Module 1. The Secretariat clarified that the program was not a training in how to develop a business plan, but that the product would be a business plan for the institution.

## II. Program Objectives & Goals

### A. General observations

There are two primary expected outcomes for the pilot program: *The Art of Crafting a Business Plan for Social Return on Investment*. The first relates to the participating organization's ability to complete the program, secure funding for their business plan and to ultimately implement the plan. The second primary outcome of this pilot is the complete transfer of the program from MSH Boston to PROCOSI. As a program agent, PROCOSI will assume ownership for replicating and distributing the program in Latin America.

The report will document progress to date and next steps related to both of these outcomes.

### B. Final evaluation methodology

**The final evaluation team consisted of:**

- Cecilia Boada (Moderated focus groups)
- Fiona Nauseda (Moderated focus groups)
- Alex Bermúdez (Video-taped focus groups)

**The team conducted focus groups with all 8 participating organizations**

- The focus groups were open, confidential conversations that lasted approximately 1 ½ hours.

**The focus group questionnaire consisted of 12 questions, divided into 3 sections:**

- General perceptions
- Specific perceptions
- Final comments

**The focus groups were filmed** in order to document the conversation and aid in the analysis of the material. The videos were used by the evaluation team only and participants were asked for their permission to capture the session on tape.

(Please see Appendix 2 for the final evaluation questionnaire)

### III. Outcomes & Key Findings

#### A. Key findings and general observations:

All eight of the original participating organizations demonstrated an incredible level of effort to complete the program modules, often working on their plans in the evenings, on week-ends, and during holidays in order to complete their assignments.

Only one of the eight teams interviewed worked on their business plan during office hours. This team benefited from institutional support and interest from the organization's director.

Although different external factors ultimately resulted in two teams dropping out of the program, they both confronted the same challenge of lack of institutional support. Both of the teams fully completed Modules 1 and 2 and dropped out approximately two months after the program began.

The first team was pulled off of the business planning program in order to work on a proposal that was deemed critical for the organization's survival. The second team also dropped out of the program in order to respond to a RFP that was equivalent to 10 years worth of funding. The organization's director was a part of the business planning team. The lack of political will was obvious when the director stated that "it was a lot of work for not a lot of money." This team also struggled trying to reconcile completing a business plan for a new product or service and securing and maintaining funding for existing products or services.

The final evaluation findings are divided into the following key categories:

- **Factors that facilitate success**
- **Impact and actual application**
- **Lessons Learned and Recommendations**

#### B. There are a variety of factors which facilitate an organizations' success:

The following list has been compiled from the focus groups and represents the key themes and findings that were common to several or all of the participating organizations.

##### **Organizational factors**, including:

- An explicit selection process
- Clear and open communication/information about the program
- Institutional support within the participating NGOs including:
  - Dedicated work time
  - Physical space
  - Making the program a priority (even when the organization is confronting external pressure)
  - Internal communication
- Follow-up and support from PROCOSI
- An agreement between MSH Boston/Bolivia to coordinate and resolve problems

##### **Factors related to the participating teams**, including:

- Form multi-disciplinary teams
- Seek help and support throughout your institution

- Organize the work according to responsibilities and expertise
- Define the captain's role and support that person
- Maintain the same team members (prevent turn-over)
- Capitalize on individual team members' strengths

**Factors related to the facilitators, including:**

- More exchange of ideas and examples among the teams
- The importance of having a working knowledge of the participating organizations
- The importance of timely and thoughtful feedback

**C. The Programs' Impact and Application**

*The Art of Crafting a Business Plan for Social Return on Investment* has had an impact on the individuals, teams, and organizations who participated in the first pilot program.

**The evaluation findings regarding the program's impact are divided into four main areas.**

1. *A transformation of attitudes and concepts:*
  - Participants are more client focused
  - Participants have adopted a more active attitude within their organization, generating ideas based on the target populations' needs
  - Participants think in terms of products and services instead of projects

*"We are closer to our clients... our focus has changed, now we adapt to their needs."*

2. *Improved internal processes and systematization of information*
  - Participants have a greater understanding of their own organization
  - Participants are able to articulate their organization's mission to others more clearly
  - Participants and teams in different departments and areas of the organization are better integrated

*"The Program has allowed me to have a clearer and more organized way to prepare new proposals."*

3. *Strengthened organizational teams*
  - Participants are able to propose solutions to problems and make decisions in coordination with their directors

*"(The program) has helped us to know and understand true team work."*

4. *Application of new skills and concepts*
  - Participants are applying the program methodology to other areas of their work
  - Participants are using new terminology and have adopted business language
  - Participants gained a better understanding of concepts such as "Terms of Reference" and are applying this to select appropriate personnel.

*"We learned a new term...the costo de fracaso.. how much it can cost, how it can affect everything, and what the risk is for the funder."*

**D. BPP Outcomes as related to M&L's M&E Plan**

The BPP M & E Plan outlines 2 major outcomes from the pilot program:

**Outcome #1:**

NGO Business Plans receive funding

Breakthrough product or service developed as proposed in the Business Plans

Output 1.1:

6 of 8 participating organizations completed the program and developed business plans that met the facilitators' criteria of a "sound business plan."

Output 1.2:

6 of 8 participating organizations were trained in the BPP "technology."

**Outcome #2:**

PROCOSI replicates Business Planning course for other NGO members  
Plans to replicate the program are currently pending

Output 2.1:

PROCOSI staff received Business Planning training through M&L

Output 2.2:

Business Planning course is refined for replication according to participant evaluations  
(Pending)

Output 2.3:

PROCOSI develops a roster of potential funders for NGO Business Plans  
(Pending)

Please see section IV, B for the "Transfer of the Business Planning Program to PROCOSI"

**Other program outcomes that were not outlined in the M&E plan:**

**Transfer of the program and local capacity building:**

Although not explicitly stated in the M&E plan, an additional intended outcome for the program was building local capacity. Cecilia Boada's role has been critical in pushing the program forward since it began and maintaining the programs' momentum since its conclusion.

Cecilia has worn multiple hats during the program, including coordinating efforts during the program launch week, being responsible for the launch week evaluation, the final program evaluation, and finally post program follow-up and coordination between the participating organizations, PROCOSI and MSH Bolivia and MSH Boston. Cecilia communicates program updates to the team, supports and answers participant questions, and meets with PROCOSI on a regular basis.

Having a staff member who can be a consistent presence throughout the program and dedicate time to the program after its conclusion has proven to be invaluable to the program.

**Skill building:**

The business planning development/design team gained skills developing and delivering this blended learning program.

- Program facilitators learned how to facilitate the program over an extended period of time.
- Program e-developers identified modifications that needed to be made to the CD-ROM.
- Program developers/design team gained skills and learned lessons regarding how best to work with new agents.

**E. Lessons Learned and Recommendations**

Clear communication, organizational commitment, and a clear vision for the future are the key factors that influence the success of the business planning program.

It is essential that agents, participating organizations, and teams have a clear understanding and expectations regarding how and who will seek funding for the business plans.

There needs to be an understanding and agreement that organizations and teams will be able to dedicate and allocate resources to the program.

Organizations and teams need a clear understanding of the overall purpose of the business plan. Teams need a vision of the program beyond completing the business plan; to have a vision for how a new product or service would benefit their client population.

1. All of the 8 teams interviewed articulated and demonstrated the importance of having **institutional support** for the business planning program.

**Recommendation:**

Require participating organizations to sign an agreement which outlines the required time commitment, and clearly states expectations regarding both the agent's and the organization's role in the program.

2. **Participating organizations:**

**Recommendation:** Ensure organizational commitment on two different levels.

- a. **To the program agent:**

- A commitment to fully participate and complete the program
- To assign a dedicated team to participate in the entire program

- b. **To the participating teams:**

- Assign regular office hours to complete the work
- Assign a physical space and the necessary material resources
- Prioritize the business planning program, in spite of potential conflicts with other organizational needs.

3. **Participating teams:**

**Recommendation:** Form multi-disciplinary teams of 2-5 people. All of the teams interviewed stated the importance of being able to draw on one another's areas of expertise and strengths. Form teams with the following characteristics:

1. Elect a Captain with the following characteristics and role:
  - Has sufficient time
  - Coordinate the teams' work
  - Act as the team spokesperson (communicate with the facilitators)
  - Act as the internal ambassador within the organization
2. Obtain "buy-in" and interest from the rest of the organization
  - Share and articulate the program with others
  - Maintain the director's interest
  - Help the institution to internalize the product/service by:
    - letting others know what they are doing
    - giving updates and progress reports throughout the program
    - discussing the program and new product/services' utility
    - emphasizing the importance of others' help
    - emphasizing who will benefit from the new program
    - emphasizing the impact the product/service will have
  - Organize team meetings
  - Distribute work and responsibilities among team members
  - Establish commitment

#### 4. The Agent:

**Recommendation:** Clarify, document, and communicate all expectations related to the agents' role.

1. Identify a clear selection and application process for enrolling organizations.
2. Establish clear lines of communication at the beginning of the selection process:
  - a. About the vision and parameters of the program
  - b. The criteria used to select organizations
    - Organizational requirements for participation
    - The feedback and support the organization will receive
    - Individual requirements for participation
3. Assist participating organizations with:
  - Ideas and suggestions about their ideas
  - Sharing relevant examples
  - Capacity to provide technical support
  - Additional support such as bank of potential donors or potential contacts
  - Provide on-going support and follow-up to participants

#### 5. Program structure:

**Recommendation:** Make minor modifications to program content. Adjust time allocation of some of the modules. Address establishing a plan to seek funding with the participants during the program.

1. Redistribute the time assigned to the modules:
  - Modules I and II require less time
  - Module III and V need more time and more references
2. Expand Module 6 (Return on Social Investment) to include more details.
3. Include more examples in the printed materials (binder)
4. Share more examples of teams' work
5. Clarify translation
6. Make the following specific modifications to the modules:
  - Eliminate months in the chronogram
  - Modify design team format so that it doesn't include names (focuses on roles)
7. Introduce plan/ideas regarding seeking funding and potential funders for the business plans during the program (once a product/service has been identified).

### IV. Future Business Planning Programs

#### A. Program conclusion

The four month pilot concluded with a "closing ceremony" on February 10, 2003. Members of the international donor community, local businesses and other potential investors were invited to hear the 6 participating teams give an "elevator pitch" of their idea.

The closing ceremony was followed by a cocktail reception in which participants received diplomas and t-shirts. The purpose of the reception was to give donors an opportunity to approach organizations regarding their business plans.

For more details regarding the closing event and potential leads, please see the February 9-15, 2003 "Progress Report on Activities Undertaken with PROCOSI," written by Judy Seltzer, Jude Griffin, Fiona Nauseda, and Alex Bermudez.

## **B. The transfer of program to PROCOSI**

It is important to note that during the program delivery, PROCOSI underwent several staffing changes including the appointment of a new Executive Director and Director of Development.

During this transition, key information regarding the program and MSH's agreement with PROCOSI was lost.

PROCOSI's new Executive Director, Roger Dupuis, has appointed Claudia M. Reyes as MSH's new counterpart and lead for the business planning program.

To facilitate the transfer of the BPP to PROCOSI, Judy Seltzer and Jude Griffin traveled to La Paz to work with Claudia to identify next steps, address pending questions and unresolved issues, and to hold the closing ceremony.

The transfer of the program to PROCOSI hinges on four key aspects:

- Ability to integrate BPP into PROCOSI product line, including establishing a market and fair price
- Ability to meet market demand
- Ability to support program delivery, including facilitation and technical support
- Ability to make changes and upgrade the CD-ROM and other supporting materials.

The team identified the following next steps:

Current plans to replicate the program:

1. With the remaining members of the network
2. With health municipalities in Bolivia
3. Expand to Latin America with potential clients in:
  - Nicaragua
  - Paraguay

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PARA INICIATIVAS SOCIALES

Appendix 1: Cronograma de entrevistas para Evaluación Final del Programa

“El Arte de Adaptar Planes de Negocios para Iniciativas Sociales”

<b>Lunes 3 de Febrero</b>	<b>Horas</b>	<b>Actividad</b>	<b>Lugar y dirección</b>	<b>Personas/Instituciones</b>
	09:00- 11:00	Reunión	MSH Edif.Victor piso 4	Fiona/Alex/Cecilia <b>MSH</b> /Boston y Bolivia
	11:30-12:30	Reunión	Sala de reuniones de PROCOSI	Fiona/Alex/Cecilia MSH/Boston y Bolivia con <b>Roger Dupuis</b> de PROCOSI
	14:30-18:30	Trabajo en Instrumento de Evaluación y Organización de la Semana	MSH Edif.Victor piso 4	Fiona/Alex/Cecilia <b>MSH</b> /Boston y Bolivia
<b>Martes 4 de Febrero</b>	07:00-07:30	Viaje ida AeroSur 111	La Paz a Cochabamba	Fiona/Alex/Cecilia MSH/Boston y Bolivia
	10:30-12:00	Grupo focal (aplicación cuestionario)	Oficinas APSAR Quillacollo Av. Ballivian esquina Carmela Serruto # 142 <b>COCHABAMBA</b> Tel 4. 426.1170	<b>Equipo de APSAR de Cochabamba Adela Asbun/Katya Dosserich/Franklin Wilfredo del Castillo</b>
	19:25-19:55	Viaje retorno Aero Sur 118	Cochabamba a La Paz	Fiona/Alex/Cecilia MSH/Boston y Bolivia
<b>Miérc. 5 de Febrero</b>	08:30-10:00	Grupo focal (aplicación cuestionario)	Sala de reuniones de PROCOSI	<b>Equipo CEMSE</b> Wilmer Tapia / Rosario Rueda
	10:00-11:30	Grupo focal (aplicación cuestionario)	Sala de reuniones de PROCOSI	<b>Equipo APROSAR</b> de Oruro Marco Antonio Herbas/Anastasio Choque/Ramiro Maldonado
	11:30-13.00	Grupo focal (aplicación cuestionario)	Sala de reuniones de PROCOSI	<b>Equipo PCI</b> Claudia Albarracín y Hernán Taina
	15:00-16:30	Grupo focal (aplicación cuestionario)	Sala de reuniones de PROCOSI	<b>Equipo CIES</b> Karina Cabrera/Patricia Figueroa/Delia Oviedo/Gerardo Calisaya
<b>Jueves 6 de Febrero</b>	07:00-08:00	Viaje ida LAB 931	La Paz a Santa Cruz	Fiona/Alex/Cecilia MSH/Boston y Bolivia
	09:30-11:00	Grupo focal (aplicación cuestionario)	Oficinas de SACOA c.Manuel Jesus Parada # 80 3er. Anillo paralelo a la Av. Virgen de Cotoca (doblar a la altura de vidriería Redibol) a la derecha dos veces - Tel 3.347.2002 <b>SANTA CRUZ</b>	<b>Equipo de SACOA de Santa Cruz</b> Segundino Pelaez/Martha Zapata/Freddy Salazar
	20:00-21:05	Viaje retorno LAB 932	Santa Cruz a La Paz	Fiona/Alex/Cecilia MSH/Boston y Bolivia
	11:00-12:30	Grupo focal (aplicación cuestionario)	Sala de reuniones de PROCOSI	<b>Equipo de PROCOSI</b> Alejandra Villafuerte/Alvaro Soruco/Iván Pino/Claudia Muñoz Reyes/Mauricio Espinoza

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	<b>Horas</b>	<b>Actividad</b>	<b>Lugar y dirección</b>	<b>Personas/Instituciones</b>
	14:30-18:30	Trabajo en sistematización y vaciado de datos	Sala de reuniones de PROCOSI	Fiona/Alex/Cecilia MSH/Boston y Bolivia
<b>Sábado 8 de Febrero</b>	09:00-12:00	Continuación trabajo de sistematización de la información	MSH Edif.Victor piso 4	Fiona/Alex/Cecilia <b>MSH</b> /Boston y Bolivia
<b>Domingo 9 de Febrero</b>	17:00-19:00	Reunión de Coordinación	MSH Edif.Victor piso 4	Equipos <b>MSH</b> /Boston/ <b>MSH</b> /Bolivia/ <b>PROCOSI</b>
<b>Martes 11 de Febrero</b>	8:30-10:00	Grupo focal (aplicación cuestionario).	Sala de reuniones de PROCOSI	<b>Equipo ESPERANZA</b> de <u>Tarija</u> , Evelin Villagran/Beimar Saavedra/Eduardo Suarez

## Appendix 2: Final evaluation instrument

### El Arte de Adaptar Planes de Negocios a Iniciativas Sociales Evaluación Final – Grupos Focales Guía para Participantes

#### Introducción

#### 1. Bienvenido y rol del equipo de evaluación

#### 2. Propósito

- Escuchar y aprender de sus experiencias del programa.
- Ayudarnos a mejorar la replica del programa con PROCOSI y con otras organizaciones al futuro.

#### 3. Las reglas del grupo focal y una guía de preguntas:

Esta es una conversación de una hora y media que es un dialogo abierto en un ambiente de confianza y confidencialidad.

- Nuestro role será es hacer preguntas y guiar la conversación y además de escuchar y documentar su opiniones.
- Es importante escuchar de cada uno de ustedes.
- No hay respuestas incorrectas
- Favor hablar una sola persona a la vez. – esteramos transcribiendo sus respuestas.
- Es importante mencionar que la participación es voluntaria – nadie esta obligada a responder
- Los participantes tendrían la libertad de pedir un descanso en cualquier momento.

#### 4. Grabando con confidencialidad

Con el propósito de documentar la conversación, estaremos grabando y capturando las ideas de los mensajes clave. Es posible que utilicemos algunas de estas imágenes en materiales de Mercado del programa , en cuyo caso nos contactaremos con usted para pedirle su permiso para utilizar su imagen en un clip.

El equipo de evaluación esta compuesto por Cecilia, Alex y mi persona, quienes seremos las únicas personas con acceso a los videos y las notas de esta discusión.

Si usted se siente incomodo al ser grabado en video, entonces nos gustaría utilizar una grabadora de voz en su lugar.

#### 5. Resultados de la evaluación

Vamos a escribir un informe con los resultados encontrados en los grupos focales. Este informe final será compartido con PROCOSI, colegas de MSH Bolivia & Boston.

#### 7. Pregunta rompehielos

1. *Percepciones sobre salientes del Programa*

- 1.1 Describa algunos de los **puntos fuertes y bajos** de este programa?
- 1.2 Usted siente que su organización se ha beneficiado participando en el programa? (si no, no continúe con las siguientes preguntas) Si no, Por que no?
- 1.3 Cómo se benefició su Organización al haber participado en el programa?
- 1.4 Cuáles fueron sus **expectativas originales** en el Programa?
- 1.5 Fueron encontradas? Porque o por que no?
- 1.6 ¿Que **conceptos y/o practicas del programa están utilizando** en su organización en este momento?
- 1.7 ¿Que conceptos y prácticas, piensa utilizar, a futuro? ¿Cómo?

2. *Percepciones específicas del Programa y aprendizaje del entorno*

- 2.1 Hubo algún **módulo que haya sido particularmente dificultoso** para su equipo? Como éste podría ser mejorado?
- 2.2 Hubo algún módulo que haya sido particularmente fácil para su equipo? Cómo éste podría ser mejorado?
- 2.3 ¿Cómo le pareció **el tiempo programado** para realizar los módulos del programa? ¿Cómo le pareció **el tiempo programado** para realizar el programa en general? (6 meses Julio - Enero) Tiene recomendaciones en relación al programa? Sobre la prolongación del tiempo asignado y el tiempo designado para cada módulo?
- 2.4 Cual es su opinión sobre la **facilitación del programa** en cuanto a la retroalimentación sobre el desarrollo de su plan de negocios.  
Que recomendaciones tienen para mejorar el rol de las facilitadoras en el taller?
- 2.5 Que consejo le gustaría dar a un nuevo equipo inscrito en el programa, específicamente en lo relacionado a la forma de organizarse internamente, dividir responsabilidades y completar las tareas?

3 Durante la semana de lanzaM & Ento, establecimos los siguientes roles y responsabilidades para el **capitán de equipo**:

- a. Ratificar apoyo político con sus directores
- b. Revisar, ajustar y fortalecer el equipo de trabajo
- c. Asegurar la réplica del Programa interna y externamente
- d. Mantener contacto permanente con PROCOSI

Esta fue una descripción acertada sobre el rol del capitán de su equipo?

Tiene algunas sugerencias en relación al rol de capitán de equipo?

4. Cuál fue la mayor dificultad que enfrentó **utilizando el CD-ROM** durante el programa?
  - Usted recibió apoyo adecuado y oportuno de PROCOSI para resolver este asunto?
  - Tiene algunas **sugerencias** en relación al apoyo técnico provisto a los equipos durante el programa?
5. ¿Utilizó usted la **carpetaa durante el programa**?
  - ¿Cómo la utilizó?

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- Tiene algunas sugerencias para mejorar estos materiales?
6. ¿Que **información o materiales** le hubiera gustado recibir, que no recibió en el curso?
7. Podría desarrollar un Plan de negocios el próximo año por su cuenta (sin facilitación) usando los materiales existentes?
- Cuál podría ser la mayor dificultad haciendo esto?
8. El programa de planificación de negocios fue práctico y de fácil aplicación para su organización?

*Comentarios Finales:*

9. Cómo planea usted **solicitar financiamiento** para sus planes de negocios durante los siguientes 6 meses?
10. Que tipo de apoyo institucional recibió durante el programa y que tan útil fue de:
- PROCOSI?
  - MSH Bolivia?
  - Su organización?
- (Favor sea específico)  
Qué recomendaciones crea que nosotros deberíamos hacer a otras instituciones nuevas en el programa?
11. ¿**Recomendaría usted este programa** como apoyo institucional a otras organizaciones?
12. ¿**Otros comentarios** y/o sugerencias sobre el programa? Lecciones aprendidas.

Pregunta final-

“Por favor escriba una frase u oración que mejor describa su experiencia en el Programa?”

*Resumen del conversación*

Appendix 3 : M&E Plan

PROCOSI BUSINESS PLANNING M&E PLAN

**Strategic Objective:** PROCOSI Member NGOs expand and diversify their funding base

Outcomes and Outputs	Indicators	Required data	Source of data	Frequency of data collection
<b>Outcome #1:</b>  NGO Business Plans receive funding	% of Business Plans that are funded within 6 months of course completion	<u>Numerator:</u> # of Business Plans funded within 6 months of course completion <u>Denominator:</u> total # of Business Plans developed and accepted	Financial Records Phone Interviews	6 months after course completion
Breakthrough product or service developed as proposed in the Business Plans	% of new products or services launched as outlined in the Business Plans	<u>Numerator:</u> # of new products/services launched as proposed in the Business Plans <u>Denominator:</u> total # of Business Plans that are funded	Phone interviews with NGOs and PROCOSI	9-12 months after course completion

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## PARA INICIATIVAS SOCIALES

Outcomes and Outputs	Indicators	Required data	Source of data	Frequency of data collection
<p><b>Output 1.1:</b> 7 NGO Business Plans produced</p>	# of participating NGOs that have produced a Business Plan that meets course criteria (list criteria for sound business plan...)	Criteria for a sound business plan Copy of NGO business plans	Business Plans submitted and accepted at the end of the course	Post course
<p><b>Output 1.2:</b> 7 NGO participants trained in Business Planning for social return on investment</p>	# of participating NGOs that complete entire 6 module Business Planning course	NGO course participants	Participant list/facilitator's log	Post course
<p><b>Outcome #2:</b> PROCOSI replicates Business Planning course for other NGO members</p>	<p># of training replications using the Business Planning platform in the 12 month period following completion of first course</p> <p># of NGOs trained by PROCOSI in Business Planning in the 12 month period following completion of first course</p>	<p># of times PROCOSI course is replicated</p> <p># of NGOs participants in PROCOSI training</p>	<p>PROCOSI records</p> <p>Participant lists</p>	Annual

# EL ARTE DE ADAPTAR PLANES DE NEGOCIOS

## PARA INICIATIVAS SOCIALES

Outcomes and Outputs	Indicators	Required data	Source of data	Frequency of data collection
<p><b>Output 2.1:</b> PROCOSI staff receive Business Planning training through M&amp;L</p>	# of PROCOSI staff that participated in Business Planning course	NGO course participants in M&L training	PROCOSI Participant list	Post course
<p><b>Output 2.2:</b> Business Planning course is refined for replication according to participant evaluations</p>	Business planning course is refined/updated following course completion using participant feedback	Business planning course content	Finalized Business Planning course Course evaluations Facilitator notes	Post course
<p><b>Output 2.3:</b> PROCOSI develops a roster of potential funders for NGO Business Plans</p>	Roster of potential funders developed	Funder/donor contact information	Database or other roster format	Six months following course completion

## Appendix 4: Resumen de cada grupo focal

### APROSAR

#### Puntos fuertes.-

- ⇒ Equipo amplio trabajando
- ⇒ Se asumió la metodología
- ⇒ Sirvió para ordenar procesos
- ⇒ Descubrir el verdadero trabajo en equipo
- ⇒ Acerca M & Ento a los beneficiarios
- ⇒ Herramienta útil

#### Puntos débiles

- ⇒ El Módulo 5 no tanto por el tiempo sino por limitación institucional

#### Beneficio para la Institución

- ⇒ No solo es útil para este plan,
- ⇒ Fortalece la institución
- ⇒ Ayuda a ordenar procesos
- ⇒ Útiles la metodología y los procesos

#### Espectativas originales.-

Procedimiento M & Ento permanente  
Encontraron lo que esperaban y mejoraron sus expectativas

#### Dificultades.-

Módulo de Finanzas por el conocimiento M & Ento previo, fue desafiante, aunque requirió más esfuerzo, esto enriquece y reta al equipo.

#### El Módulo más fácil.-

El número uno estaba casi hecho

#### Facilitación.-

Inmediata, oportuna y pertinente  
De aplicabilidad todas las observaciones

#### Consejo

Que los nuevos equipos sigan las normas  
Que elijan personas adecuadas y comprometidas  
Que tengan buena predisposición, que crean en lo que están haciendo  
Que tomen en cuenta a todo el personal

#### Rol del Capitán.-

Se ha cumplido  
El director estaba involucrado  
Hubo compromiso institucional pero faltó tiempo asignado por la institución

#### CD ROM.-

No tuvo problemas es un software amigable

#### Carpeta.-

Se la utilizó aunque no en su integridad  
Se revisaron áreas específicas

Podrían hacer solos su plan pero les gustaría tener una orientación.

Practico.-

Fue de fácil aplicación

La voluntad política fue importante

Fue práctico y lo podríamos aplicar

Comentarios.-

Felicidades

### **CIES**

Puntos fuertes.-

La parte presencial y la fase primera de los Módulos I y II

Los puntos débiles.- fueron la saturación de la rutina del trabajo

Cayo todo el peso sobre el capitán en ocasiones

A veces no se cumplieron con los tiempos de los módulos

No se profundizaron algunos conceptos, se pudo aprovechar más el curso

Metodología.- se puso mucho énfasis en la organización y se dejó un poco la parte más difícil

Beneficio para la Org.-

Es un fortalecimiento no solo para institución sino para el equipo

Es una herramienta palpable y tangible

Expectativas.-

Necesidad de conocer algo más

Deseaba tener más tiempo de entrega

Fueron colmadas y hasta rebasadas

Dificultad.-

La mayor fue la parte de indicadores que nos gustaría profundizar

Fácil.-

Cada área tiene su propia fortaleza

Como equipo nos demoró mucho el Módulo II, no lográbamos ponernos de acuerdo

Tiempo.-

Fue bueno en general pero el problema fue interno

No hicimos distribución de prioridades

La parte de Mercadeo requiere de más tiempo.

Facilitación.-

Fue buena

Inmediata y Oportuna

Consejo.-

Que se formen equipos multidisciplinarios

Que cada uno aporte sus fortalezas

Que midan el tiempo que se puede dar y lo establezcan antes de iniciar el Programa

Rol del Capitán.-

El más importante fue el ratificar el compromiso político con la dirección a nivel interior de la institución

CD ROM.-

No tuvo problemas

Carpeta.-

Se sugieren lecturas de apoyo y ejemplos de referencia

Desarrollo de su Plan.-

Podrían hacerlo solos con la herraM & Enta, pero con asesoraM & Ento puntual y trabajar con un modelo

Practico.-

El nuevo estilo debe ser adoptado por la evidencia

Fue muy importante la práctica en grupo

Al ser una temática innovativa tendrá financiaM & Ento

Recomendación y consejo.-

Es una herraM & Enta nueva y que aprovechen el instrumento que ordena y organiza

Carpeta.-

Sugieren lecturas adicionales

Se requiere un mayor respaldo teórico

Comentarios.-

Fue útil y practico mil gracias

Felicidades

## • Conclusiones

### Apsar

“conocer mas al fondo a mi organización y las necesidades por las que se trabaja y con la ayuda del plane de negocio saber solucionar problemas y necesidades”

“ayudar a las comunidades rurales a mejorar su condiciones de vida a través del autofinanciaM & Ento conservando los valores y respetando la cultura.”

“lo mas importante fue la manera de impartir concieM & Ento de MSH a los demás y la utilidad de esta programa por mi institución, gracias por todo.”

### Cemse

“experiencia: enriquecedora y agradable.”

“BPP...valió la pena...gracias.”

### CIES

“El planteaM & Ento correcto de nuevas ideal basado en un modulo actual, breve pero sustancioso que nos permita conseguir financiaM & Ento para ayudar!”

“el programa del plan de negocios, la experiencia fue para mi aprender y aplicarlo en la institución que pertenezco y la gente que necesita.”

“con una nueva herraM & Enta tengo mayor capacidad para hacer productivo el reto que mi dieron, para mi y para mi organización.

La pelota esta en manos con mayor con mayor capacidad de logro.”

“el programa tuvo la característica de integrar áreas no afines en mi institución para lograr el objetivo proyectado.”

### **PCI**

“Una capacitación que impulsa a crear iniciativa nuevas para apoyar a quienes mas lo necesitas.”

“es un cambio de actitudes y métodos tradicionales, para entrar a un mundo competitivo.”

### **APROSAR**

“Mutuo aprendizaje entre los M & Embros de una organización en aras de un objetivo común”

“ayuda en la toma de decisiones en diferentes áreas, y en el trabajo en grupo se puede opinar y realizar actividades con el apoyo del director.”

“la experiencia mas importante es reconocer que la intergralidad en la formulación de proyectos factibles es importante para el éxito y el impacto del mismo, en su implementación.”

### **SACOA**

“aprender de lo que hicimos, y lo que no hicimos”

“el proyecto contribuye a conocer nos a nosotros mismos y .... A partir de ello, proyectarnos al futuro.”

“sigan adelante, para que las instituciones crezcan y se fortalezcan más”

### **PROCOSI**

“el programa me ha permitido tener un idea mas clara y organizada para poder preparar propuestas de proyectos.”

“he aprendida a organizar la presentación de una idea de proyecto.”

“manera innovativa de presentar proyectos.”

### **Esperanza:**

“El mirar un entorno social te ayuda a comprender mejor necesidades de la Población pero desde una perspectiva de inversión.”

“expectativa. Motivación para profundizar en el enfoque de diseño de servicio/productos y para ser proyectos de una vista desde una perspectiva empresarial.”

## EL ARTE DE ADAPTAR PLANES DE NEGOCIOS PARA INICIATIVAS SOCIALES

“El programa ha contribuido a cambiar nuestros conceptos. No es lo mismo financiar o implementar un proyecto que tiene una connotación de “regalo”; que ofrecer a ayudar a producir un servicio que implica responsabilidad compartida y empoderamiento.”

“Acrecer a Dios a la Vida por darme la oportunidad de ver la luz, al camino para ayudar, servir a mi comunidad y a mi gente por quien trabajo.

Todos los días aprendo; crecí y fortalecí personal.”

### Appendix: 5 Pre-assessment findings

Questions	Key Findings
¿Cuál es la misión de su Organización?	Most organizations interviewed exist to serve that portion of the population, which is currently uncovered or has insufficient health care coverage. Several of the organizations are serving the indigenous populations by providing either/or: primary, secondary or tertiary care, reproductive health services; technical assistance in income-generation activities, such as agriculture and small business development; and health education and other training and educational services.
¿Usted cree que la misión de su Organización cambiará o se ampliará en un futuro cercano? Si es así, cómo?	None of the organizations expressed an intention to change their mission in the near future.
¿Cuales son los servicios y productos principales (que son) ofrecidos por su Organización?	The most commonly sited products are: health education materials, graduate education programs, food and other agricultural products. The most commonly sited services are: health care services at primary, secondary and tertiary levels, micro-loans, small-scale research, pharmacies, and technical assistance in small business development.
¿Que otras Organizaciones de PROCOSI comparten los mismos servicios o productos y mercado con su Organización?	In general, only a few member organizations named another member organization that shares the same market for services or products.
¿Nombre otras Organizaciones de PROCOSI que colaboran con ustedes en la entrega de servicios o productos?	Nearly every organization mentioned that they are collaborating with another member organization to carry out their activities. The Chagas and TB Collaborative Project involves a number of the member organizations, and is considered a pilot collaboration project for the PROCOSI network.
¿De qué forma deciden en esta Organización la conveniencia o no de introducir un nuevo servicio o producto al público?	The majority of the member organizations interviewed indicated that pilot projects are established and monitored over time to decide on the relevance and potential demand for such a service or product.
¿Cómo estudia su organización el comportamiento del mercado externo?	Most of the organizations interviewed said that they carry out user satisfaction surveys and KAP studies, though neither are done routinely. Others indicated that they monitor donor trends and some mentioned that they do market studies occasionally. A couple of organizations stated that they carry out pricing studies prior to introducing a new product or service.
¿Cuál es el mecanismo utilizado por su organización para proyectar necesidades financieras?	Plans and corresponding budgets, based on historical expenditures appear to be the most common mechanism for projecting financial needs.
¿Qué tipos de análisis financieros son generados rutinariamente por su organización?	The most commonly sited financial reports were: income reports, balance sheets, audit reports, and variance studies. Many of these reports are prepared by cost center or project, and rolled up to produce a financial statement(s) for the organization.
¿Cómo se mide en su organización el éxito de un producto o servicio nuevo?	To measure the success of a new product or service, the organizations interviewed said that they evaluate outputs against pre-established targets.
¿En su organización cual es la distribución porcentual de ingresos por fuente este año (2001)?	While a number of organizations were approaching full institutional sustainability, all had anywhere between two and 7 or more, sources of funding.
¿Cómo se beneficiaría su organización al tener la capacidad de elaborar planes de negocios?	Most organizations interviewed stated that there were two major benefits to drafting business plans: 1) diversifying their funding bases, and 2) researching the demand for new products and services from which

# EL ARTE DE ADAPTAR PLANES DE NEGOCIOS

## PARA INICIATIVAS SOCIALES

Questions	Key Findings
	income can be generated.
¿Cuáles son sus expectativas sobre el curso de planes de negocios que ha sido propuesto?	The expectations from participating in the program are: 1) to learn to draft a business plan, 2) to look for areas of collaboration across the network, 3) use this technology to attract and retain talented staff, and 4) to distribute leadership across the organization.
¿Cuánto tiempo a la semana estaría usted dispuesto a dedicar a este curso entre Febrero y Abril de 2002?	The average response was about 1-2 hours/day for a 3-month duration, assuming a team approach to learning and completing assignments.
Pensando en sus experiencias de aprendizaje en este último año, ¿cuál de ellas usted considera la mejor? Y cuál la peor?	In general, those courses that received the most praise were those that were highly practical, well-organized, well-facilitated, and easy to apply. Those that received poor reviews were those that were too theoretical and poorly designed and delivered.
¿Puede dar un ejemplo de su aprendizaje personal? ¿Sobre sus colegas? ¿Acerca de su jefe?	Respondents varied in their ability to answer this question, and almost all had to stop and think. Ironically, the person who answered quickest and with the most confidence stated that the most important thing she had learned from the people she supervised was to listen.
Acerca de su experiencia de trabajo en equipos, mencione lo que más le ha gustado. ¿Qué le ha gustado menos?	Almost all of the organizations interviewed said that they work regularly in teams and enjoy doing so, since it provides opportunities for efficiencies and synergies.
¿Cómo le gusta a usted aprender cosas nuevas?	Almost everyone indicated that they like to learn things in a practical format which allows the time and opportunity to apply what is being learned.
¿Qué le motiva hacer su trabajo bien?	Most respondents said that helping those for whom there is no advocate, motivates them to do their work well.
¿Mencione algunos aspectos de su trabajo que le gustan más? ¿Que aspectos le gustan menos?	In general those working for the member organizations like their mission-driven work because they feel they can make a difference in the lives of the disadvantaged. Being out in the field and seeing the impact their work is having first hand, is what is most gratifying about their work.