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GENERAL MANAGEMENT ASSISTANCE CONTRACT (GMAC)

**Contract No: 674-C-00-01-00051-00**

## **Mitigating the Economic Impact of HIV/AIDS on Very Small Business in South Africa**

Contract or Grantee number: 0143-0404-G-GA44



SABCOHA

This report was produced for review by the USAID. It was prepared as a performance milestone under Mega-Tech, Inc.'s prime contract. The contents of this report address activities performed under USAID/South Africa's Strategic Objective No. 9: Increased Market Driven Employment

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### **Activity Summary and achievements:**

The original project objective of BizAIDs was to mitigate the economic impact of HIV/AIDS on micro, small and medium-sized businesses (MSMEs) through increasing HIV/AIDS health, legal, and business information. The originally proposed targets of the BizAIDs programme were the following:

- at least 10 trainers from the business associations participating in the programme and
- more than 100 MSMEs from the businesses associations and USAID programmes.

During the course of the BizAIDs programme, 22 local trainers (a 220% increase over target) were trained in the BizAIDs methodology and 493 small business owners/managers participated in the BizAIDs training programme (a 493% increase over target). This was accomplished primarily through creative partnerships with local institutions to defray costs, lower than projected costs per training (due to exchange rate differentials), and leveraging other funding from SABCOHA to cover some overhead costs.

### **Project Highlights:**

- A total of 493 businesses participated in the BizAIDs training during the initial phase of this programme. During February to July 2005, 353 small business owners/managers and 22 BizAIDs trainers were trained using BizAIDs training tools and covering the BizAIDs methodology. In July, a further 120 participants were trained, the data from this group is still being collated.
- The BizAIDs programme, originally designed for rural Zambia, was adapted and modified to urban Gauteng. The re-designed training materials were tested with groups of small businesses to assess the scope and depth of the teaching methodologies and materials for usefulness and applicability to the participants.
- Preferred Practices and lessons learnt from Gauteng fed into the JPMorgan Chase Project1 in KwaZulu-Natal during June of 2005.

Refer to the Final Report for a summary of the activities, achievements and lessons learned under this grant.

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<sup>1</sup> IESC was given a grant of \$50,000 to test the BizAIDs methodology in a rural area of South Africa by JP Morgan Chase. The pilot was implemented in strategic partnership with the BizAIDs South Africa programme, including leveraging trainers, materials and lessons learned/best practices. The BizAIDs JP Morgan project was implemented from December 2004-December 2005 in partnership with the Zululand Chamber of Business and its affiliated Amangwe Village HIV/AIDS hospice.

**Contents of this report:**

- 1) Final Report (Feb. 2006); and
- 2) Narrative Progress Report (FY2005).



## BizAIDS South Africa Programme Final Report

**Grant agreement number:** 0143-0404-G-GA44

**Project Period:** 1 August 2004 – 31 December 2005



### Mitigating the Economic Impact of HIV/AIDS on Very Small Business in South Africa

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**Grant agreement number:** 0143-0404-G-GA44

**Project Period:** 1 August 2004 – 31 December 2005

**Focus Area:** A tool to help very small business owners prepare for HIV/AIDS and related emergencies.

**Process:** BizAIDS is a tested strategy for the mitigation of the economic impact of HIV/AIDS and other unplanned risks on micro and small businesses, providing the necessary skills and training to allow the business to continue to operate in the face of risk and to generate income.

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## EXECUTIVE SUMMARY

### **Project Partners**

BizAIDS is a partnership between the International Executive Service Corps (IESC) and the South Africa Business Coalition on HIV/AIDS (SABCOHA). The pilot programme was funded by USAID/South Africa under the Economic Growth Strategic Objective from July 2004 to December 2005.

- The Sub Contractor - IESC, a US-based non profit organisation, is committed to promoting prosperity and stability through private enterprise development, looks for ways to reduce the negative economic impact of HIV/AIDS on communities in Africa. IESC is the original developer of the BizAIDS programme and methodology and is implementing BizAIDS in other countries in Africa under USAID and PEPFAR funding.
  
- The Prime Contractor - SA Business Coalition On HIV/AIDS (SABCOHA) was formed in 1997 to act as a knowledge centre for best practices, policies, news, statistics and other guidance in order to alleviate the economic and social impact of HIV/AIDS. It has since extended the scale and scope of its influence through wide-ranging public and private partnerships, locally and internationally. In 2004, SABCOHA launched the workplace HIV/AIDS toolkit that was developed jointly with Unilever and Standard Bank, with funding from the British Department for International Development (DFID). SABCOHA is the implementing agency for BizAIDS through this pilot project, as well as through ongoing agreement with IESC to represent and implement the BizAIDS programme throughout South Africa.

### **Project Summary**

BizAIDS provides very small business with a risk survival guide. It is a toolkit of practical action plans and guidelines for small business owners, which helps them prepare for HIV/AIDS and other related emergencies.

- Facilitated workshops took place in the greater Johannesburg and Gauteng area between February to July 2005.
- Over 20 Business Management trainers were trained in the BizAIDS methodology.
- Eight trainers facilitated 38 workshop sessions of at least 12 hours each in Benoni, Johannesburg, Soweto and Springs.
- More than 350 small business owners, partners, employees and trainees participated.
- Businesses ranged widely, including:
  - construction and engineering trades people and suppliers
  - coffin makers
  - bead workers
  - IT suppliers and web designers
  - taxi owners
  - spaza and tuck shop owners and operators
  - nutrition and dietary supplement suppliers
  - tavern owners
  - sports and clothing designers, manufacturers and suppliers
  - stationery and school book suppliers
  - perfume and cosmetic distributors
  - trainers, volunteers and social workers in the field of HIV/AIDS.
- Participants saw value in attending BizAIDS for the business strengthening skills and advice on dealing with those infected and affected by HIV/AIDS and sought help to put in place measures to protect and to provide sustainability for their businesses.

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## **PURPOSE OF THE FINAL PROJECT REPORT**

The Final Project Report is the final document produced for the project and will be used by the BizAIDS partners to assess the success of the project, identify preferred practices for future projects, resolve open issues, and formally transfer the project to be managed under its sustainability plan. It also provides a platform to develop a plan

for the National Pilot Programme for roll out of BizAIDS throughout South Africa in partnership with SABCOHA, IESC and DFID. In addition, the report is intended to ensure institutional memory and to make clear and accurate information on the BizAIDS Pilot Programme readily available.

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## PROJECT CLOSURE REPORT GOALS

This BizAIDS Project Closure Report will:

- Review and validate the milestones and success of the project.
  - Confirm outstanding issues, risks, and recommendations.
  - Outline tasks and activities required to close the project.
  - Identify project highlights and preferred practices for future projects.
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## BIZAIDS PROJECT CLOSURE REPORT SUMMARY

### Project Background Overview

- **BizAIDS is a “business health check”**; it focuses on the importance of sustaining business health and continuity in the face of a variety of risks. This is achieved by strengthening the operating ability of very small businesses (employing 10 or fewer employees) to put in place measures to protect and to provide sustainability for their businesses and as a result, the health and well being of the employees and their families.
- **The goals, objectives, and success criteria**
  - To provide the necessary skills and training to allow the business to continue to operate in the face of risk and to generate income.
  - To address the challenges faced by micro and small businesses in dealing with business risks and the HIV/AIDS epidemic.
  - To provide small businesses with the necessary skills and tools to protect the health of owners and employees and that of the business from the damaging economic impact of HIV/AIDS.
  - To support the BizAIDS programme through a network of associations and training providers that will facilitate the transfer of skills to a segment of the business sector that has not previously taken action to identify the risks their businesses face and implement plans to access existing community and workplace resources.
  - To pay particular attention to women-owned businesses and business groups.

## BizAIDS Project Highlights and Preferred Practices

### *Project Highlights:*

- A total of 493 businesses participated in the BizAIDS training during the initial phase of this programme. During February to July 2005, 353 small business owners/managers and 22 BizAIDS trainers were trained using BizAIDS training tools and covering the BizAIDS methodology. In July, a further 120 participants were trained, the data from this group is still being collated.
- The BizAIDS programme, originally designed for rural Zambia, was adapted and modified to urban Gauteng. The re-designed training materials were tested with groups of small businesses to assess the scope and depth of the teaching methodologies and materials for usefulness and applicability to the participants.
- Preferred Practices and lessons learnt from Gauteng fed into the JPMorgan Chase Project<sup>3</sup> in KwaZulu-Natal during June of 2005.

### *Preferred Practices:*

- **Development and implementation of personal action plans by business owners.**  
A practical “take home” workbook was developed to help the business owner identify, document and manage family and business related assets and liabilities. BizAIDS learned that in order to increase impact, workbook materials were an important part of the learning process. These workbooks were provided in English, but are capable of being translated into other languages.
- **Linking and networking small business owners with community service providers.** Very few micro and small businesses have the ability to provide more than very basic assistance to their employees regarding HIV/AIDS and health care. BizAIDS learned that linking these businesses with existing service providers helped the businesses assist their employees better.
- **The particular and unique combination of business strengthening topics, health and legal issues are of interest to small business owners.**  
BizAIDS learned that providing information on businesses risks, including the impact of HIV/AIDS, and how to manage those risks in a business context allowed a greater amount of information on other topics, including HIV/AIDS prevention and inheritance issues, to be shared with the participants in a non-threatening, engaging environment. The various topics covered by the BizAIDS training included:
  - an overview of HIV/AIDS and other health related issues
  - business strengthening techniques
  - coverage of legal issues that business owners must be aware of regarding employees and critical risk protection of business assets through strategic planning, covering the importance of a will and other planning for the future.

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<sup>3</sup> IESC was given a grant of \$50,000 to test the BizAIDS methodology in a rural area of South Africa by JP Morgan Chase. The pilot was implemented in strategic partnership with the BizAIDS South Africa programme, including leveraging trainers, materials and lessons learned/best practices. The BizAIDS JP Morgan project was implemented from December 2004-December 2005 in partnership with the Zululand Chamber of Business and its affiliated Amangwe Village HIV/AIDS hospice.

- **Systematic delivery of training and evaluation methodologies.**  
Local trainers from small business development service providers were equipped with training in BizAIDS, a facilitator’s guide and were coached and guided in the delivery of training to small businesses. Evaluation and feedback processes took place in both directions, from BizAIDS to the trainers and vice versa. BizAIDS learned that in order to engage the most qualified and enthusiastic BizAIDS trainers, a larger group needed to be trained, and then the best selected to ultimately provide BizAIDS training to small business participants.

See Annexure 4 for the report on the Preferred Practices Workshop, page 51.



## PROJECT METRICS PERFORMANCE

### Goals and Objectives Performance

The original project objective of BizAIDS was to mitigate the economic impact of HIV/AIDS on micro, small and medium-sized businesses (MSMEs) through increasing HIV/AIDS health, legal, and business information. The originally proposed targets of the BizAIDS programme were the following:

- at least 10 trainers from the business associations participating in the programme and
- more than 100 MSMEs from the businesses associations and USAID programmes.

During the course of the BizAIDS programme, 22 local trainers (**a 220% increase over target**) were trained in the BizAIDS methodology and 493 small business owners/managers participated in the BizAIDS training programme (**a 493% increase over target**). This was accomplished primarily through creative partnerships with local institutions to defray costs, lower than projected costs per training (due to exchange rate differentials), and leveraging other funding from SABCOHA to cover some overhead costs.

Specific indicators were tracked through the life of the programme to show impact on its participants. It should be noted that it is difficult to measure changes in turnover, employment trends, etc. of very small businesses. Many businesses do not keep records and do not cost staff absenteeism in real terms.

In order to track and report on results of the programme, a random survey <sup>4</sup> was undertaken with participants three months after attending a BizAIDS workshop. The survey was in the form of an in-depth telephonic interview conducted with 82 businesses (random sample of 23 (see paragraph 0 Participant feedback post BizAIDS training, page 38, for a summary of these findings).

In addition, an independent monitoring and evaluation of the BizAIDS programme was contracted in order to provide an objective overview of the programme and how it worked (Appendix 2, page 51).

Indicators	Results
<ul style="list-style-type: none"> <li>• # jobs saved</li> </ul>	Some 2300 employees / jobs (1367 females and 936 males) were measured in the baseline surveys. Although this indicator is a difficult one to establish and measure some participants did acknowledge that during the relatively short period between training and assessment,

<sup>4</sup> Names of business owners, who had completed at least 12 hours of training, were selected from our database. A telephone call was made by a representative from BizAIDS to establish if they would be willing to comment on the range of predetermined questions. The participant's comments were recorded in a database and their comments have been summarized in section 0 on page 38

Indicators	Results
	<p>some new posts had been created or considered. On the other hand, we found that some businesses had in fact closed down by July 2005. BizAIDS training started in February, the original date for the project closure was mid August. See comment in Annexure 2, “A Monitoring and Evaluation Report on the BizAIDS South Africa Pilot Project, page 51.</p>
<ul style="list-style-type: none"> <li>• # business reporting increased access to HIV/AIDS related health information</li> </ul>	<p>51% of participants responded that they had collected HIV/AIDS information for use by their employees. At least 3 HIV/AIDS related handouts were supplied to all trainers and participants. Supplied free of charge by the AIDS Law Project (ALP), Metropolitan Life and the Department of Health, booklets included: ALP “Your Rights in the Workplace” ALP “Know Your Status Know Your Rights”, Metropolitan “Positive Health”. A resource directory was supplied in the participant workbook.</p>
<ul style="list-style-type: none"> <li>• # businesses reporting increased access to legal information</li> </ul>	<p>Six legal and social resources are listed in the resource directory. They included ccounseling and crisis help lines, the AIDS Law Project, Black Sash Advice Office, Gauteng.</p>
<ul style="list-style-type: none"> <li>• # of specific trainings in business skills and planning for clients</li> </ul>	<p>XX training sessions for small businesses were conducted during this phase of the programme. Interactive workshops with practical case studies and action plans covered the following business skills over a period of 12 hours:</p> <ul style="list-style-type: none"> <li>• Understanding and identifying risks</li> <li>• Protecting healthy employees</li> <li>• Business risks of HIV/AIDS</li> <li>• HIV/AIDS legal issues/community resource directory</li> <li>• HIV/AIDS awareness</li> <li>• Access to condoms and proper use</li> <li>• Preparing for temporary &amp; permanent transitions</li> <li>• Impact of short and long-term business interruptions</li> <li>• Stages of a business</li> <li>• Understanding the value of the business</li> <li>• Preparing for changing management or ownership</li> <li>• Legal types of businesses</li> <li>• Recordkeeping and selling a business</li> <li>• Looking toward the future</li> <li>• SWOT (Strengths, Weaknesses, Opportunities, Threats) &amp; Marketing 5 P’s (Product, Person, Price, Place and Promotion)</li> <li>• How can I protect my family?</li> <li>• Planning for income</li> <li>• Identifying personal monthly expenses</li> </ul>

<b>Indicators</b>	<b>Results</b>
	<ul style="list-style-type: none"> <li>• Planning for property</li> <li>• Inheritance laws</li> <li>• Completing a basic will</li> </ul>
<ul style="list-style-type: none"> <li>• # of businesses receiving business training</li> </ul>	<p>493 business owners and partners received BizAIDS training.</p> <p>By the end of July, 2005, 353 business owners and managers had participated in BizAIDS training. Post July, training continued, but for purposes of collating the results of this report, the results were closed off). Their survey results and baseline information sheets were captured, although not reported.</p>
<ul style="list-style-type: none"> <li>• # employees of participating businesses, differentiated by gender</li> </ul>	<p>From a sample of 217 participants, results showed that 560 females and 530 males were employed.</p>
<ul style="list-style-type: none"> <li>• # of employment opportunities (defined as full-time, long-term positions) created</li> </ul>	<p>At least 3 full time positions were created. Whether this was a direct result of BizAIDS training, it would be difficult to confirm. These positions were in the computer (IT) sector.</p>
<ul style="list-style-type: none"> <li>• # of employment opportunities saved as a result of programme impact</li> </ul>	<p>There were approximately 2328 employees at beginning of programme. Qualitative research indicates that participants were better able to manage their employees in their jobs; felt they were more equipped to prevent HIV infections among workers and reduce stigma and absenteeism after implementing information and skills learned as a result of BizAIDS</p>
<ul style="list-style-type: none"> <li>• # of trainers trained</li> </ul>	<p>22 local trainers trained.</p>
<ul style="list-style-type: none"> <li>• # of sessions that trainers implement as primary resource</li> </ul>	<p>39 training sessions were conducted by XX local trainers. XX training sessions were conducted by an IESC Volunteer Expert.</p> <p>37 training sessions were run over 2 days, totalling 12 hours of training                  2 sessions were run over 3 days, totalling 12 hours of training.</p> <p>Are these two the same? It may be a bit confusing for an outsider?</p>
<ul style="list-style-type: none"> <li>• # of MoUs with NGOs partnering with the initiative</li> </ul>	<p>Memorandum of Understanding (MoU) were signed with the following NGOs:</p> <ul style="list-style-type: none"> <li>▪ The AIDS Law Project</li> <li>▪ The Business Place</li> <li>▪ Kagiso Business Consultants – non NGO</li> <li>▪ Boykano Consultants – non NGO</li> </ul>

Indicators	Results
	<p>We had agreements to partner with a number of other organisations, these included:</p> <ul style="list-style-type: none"> <li>▪ The Springs Chamber of Commerce</li> <li>▪ Ekhureni Chamber of Business</li> <li>▪ The Hairdressing Bargaining Council</li> <li>▪ NAFCO (National African Federation of Chambers of Business)</li> </ul> <p>See the list of partners names where relationships were developed in section 0 BizAIDS advisors and partners on page 34.</p>
<ul style="list-style-type: none"> <li>• # of linkages to HIV programmes participating</li> </ul>	<p>Aganang an NGO which is supported by a medical aid scheme and member organisation of SABCOHAi is an example of a service linkage. Aganang have agreed to allow small business owners to participate in counselling, delivery of treatments, advice etc. This service is one of many that started coming on stream towards the close of this grant period. These relationships will be formalised and BizAIDS participants who attended training during this period will be offered these free / low costs services.</p>
<ul style="list-style-type: none"> <li>• % of links to legal assistance</li> </ul>	<p>Post training, 40 participants said that they had taken steps to complete a last will and testament. Fifteen participants from this survey group had actually completed the will. See the directory of services in participant's workbook</p>

Note: while we originally intended to track the number of businesses receiving one-on-one technical assistance, due to a shift in strategy to create a more sustainable programme, BizAIDS did not use IESC VEs to provide technical assistance to business. Instead, they were used to provide train-the-trainer assistance and SABCOHA's capacity development.

## Success Criteria Performance

Although the original timeline was followed as closely as possible, unforeseen challenges as well as opportunities impacted on the timelines in order to maximise programme delivery and impact. As a result, the BizAIDS project's performance substantially exceeded the targeted success criteria originally proposed.

An example of how this kind of adjustment was identified, assessed and solved: at the outset of the project, it became evident that the supply of small business participants would not come from SABCOHA member companies or the larger business associations in Gauteng. SABCOHA's membership base does not include employers of less than 10. A plan was therefore developed to access small business participants through other organisations working in the Gauteng area – including Project Rave, the trainers themselves, and other training companies, bargaining councils, chambers of commerce, business training organisations and organisations dealing with black economic empowerment.

The following chart displays the originally proposed time line and milestones, and how the milestones were met/achieved:

## Milestone and Deliverables Performance

(Project period 1st August 2004 – initially until 15 August, and then extended until 31 December 2005)

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
1	<u>Project start-up</u> : Establish BizAIDS office, create list of potential partner associations and health/legal organisations, develop detailed work plan, hire staff and hold Working Group meetings between IESC/SABCOHA/BizAIDS	1	Draft IESC Subcontract	Months 1 - 2	BizAIDS office and business basic supplies setup within the SABCOHA offices. BizAIDS Coordinator commenced on 6 September. Volunteer Experts Mr & Mrs J Sherman commenced their assignment at the same time.
		2	Start up report: Brief (1-2 pages) narrative of start up activities with the following attachments: <ul style="list-style-type: none"> <li>• Approved quotes for equipment, furniture, etc.</li> <li>• Employment agreement for BizAIDS Coordinator</li> <li>• List of potential partner associations and health/legal organisations</li> <li>• Notes of Working Group Meetings</li> </ul>		Meetings with potential partners in Soweto, Alexandra and Johannesburg Central Business District were held with a number of National Chambers of Business, Bargaining Councils and Employer Associations, Sector Education and Training Authorities (SETA's) from a variety of sectors such as the Chemical, Health and Welfare, Wholesale and Retail, and Education, Training and Development. Small businesses, and community and development centres were visited.
		3	Work Plan		

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
2	<p><u>Assistance to MSEs:</u> Associations and their MSE members work to increase HIV/AIDS awareness and business skills, and protect jobs that may otherwise be at risk due to impact of health-related crisis. Develop partnerships with HIV/AIDS and legal associations and identify and train trainers (TOT). Toolkit modified to fit local community needs.</p>	4	Recruitment of 2 IESC Volunteers (project agreement forms)	Months 3 - 4	<p>Volunteer Experts Joan and Jonah Sherman joined project and attended BizAIDS meetings with potential partners in Soweto, Alexandra and Johannesburg Central Business District. Potential partners included: National Chambers of Business, Bargaining Councils and Employer Associations, Sector Education and Training Authorities (SETA's) from a variety of sectors such as the Chemical, Health and Welfare, Wholesale and Retail, and Education, Training and Development.</p> <p>Alliances developed with AIDS Law Project, Gauteng Department of Health and local business trainers and training organisations.</p> <p>The BizAIDS participant's workbook was developed and made available during September 2004 and the Trainer's guide in March 2005.</p>
	Basic HIV/AIDS info and HIV/AIDS in the workplace training, Legal Rights and Opportunities training	5	<p>MSE Assistance Report:</p> <ul style="list-style-type: none"> <li>• Draft MOU with two partner associations.</li> <li>• List of potential clients for workshops and technical assistance</li> <li>• Health and legal experts identified and letters of agreement signed</li> </ul>		<p>Alliances developed with AIDS Law Project, Gauteng Department of Health and local business trainers and training organisations.</p> <p>The contact details of these resources were listed in the resource directory of the participants' workbook.</p>

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
		6	Training workshops report with attachments: Attendees Participant evaluations Local trainers trained – letters of participation		Training of business owners began in February 2005 by VE Carol Hanlon. She trained 22 Trainers using the Facilitators Guide. Utilising eight trainers, business owners and partners were trained until early July 2005.
3	<u>Assistance to SMEs</u> : In cooperation with associations and their SME members, develop appropriate business management strategy to mitigate economic impact of HIV/AIDS.	7	Recruitment of 2 IESC Volunteers with appropriate notices (project agreement forms)	Month 5 - 8	Carol Hanlon, IESC VE, completed a Facilitator's Guide based on the workbook designed by Joan and Jonah Sherman. She trained 22 trainers in the methodologies and two groups of business owners were also trained in February 2005 to pre-test the facilitator's guide.
	Assess current policies and management issues surrounding impact of HIV/AIDS on SMEs through survey and focus groups. Develop and test new strategy and methodology based on project research and develop tailored toolkit for SMEs in South Africa.	8	SME Assistance Report		See the Participant's workbook, the Facilitator's guide and the report by Sue Gale.
			MOU signed with an additional partner association		MOU's were signed with four partners, see page 17
			List of potential clients for workshops and technical assistance		List of business owners and managers attending BizAIDS by the end of July 2005, see Appendix 3, page 51

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
		9	Copy of contract with local consultant		An example was circulated with the Quarterly report
		10	Consultant final report with attachments: Survey and results Focus group results Draft SME tool kit		Referred to and included in Project Quarterly reports
		11	Methodology Test Report List of participating businesses Participant evaluations Lessons Learned		As above
4	<u>Outreach</u> : To expand the reach of the BizAIDS programme and disseminate lessons learned to the widest audience, BizAIDS will participate in several outreach activities/events during the life of the programme; e.g. Participation of BizAIDS Programme Coordinator in national events, as appropriate. Anticipated Participation in Regional Business HIV/AIDS events in coordination with SABCOHA.	12	1st Quarter report on event participation with appropriate attachments	Month 9 - 11	Circulated 29 October 2004. Identification of potential partner associations and the recruiting of trainers

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
	Conference on Best Practices: Review of programme design, lessons learned, impacts and outcomes and potential strategies for future efforts				The BizAIDS Project Coordinator and a trainer were invited to participate and assist with the training of trainers with the JP Morgan Chase Project in June 2005. The Gauteng facilitator's guide and supporting surveys and audits were used as a basis for this programme.
		13	2nd Quarter report on event participation with appropriate attachments		Circulated 19 December 2004. KAP Survey and Programme evaluation survey tools tested on interested trainers. Two MoU's signed, copy of Participant's workbook published.
		14	3rd Quarter report on event participation with appropriate attachments		Circulated 12 April. Results of 137 participants published.
		15	4th Quarter report on event participation with appropriate attachments		Circulated mid July 2005. Feedback obtained for sample group of BizAIDS participants published.
		16	Best Practices Conference Plan including budget, speakers list, invitees, and venue		The invitation, list of attending guests and a copy of the presentation circulated with the 6-month report. A Preferred Practices Workshop was held in early December, see page 51.
		17	Best Practices Conference report (1-2 pages) with attachments: Attendees Participant evaluations Agenda Handout materials Presentations		In June 2005, a Satellite session was hosted jointly by SABCOHA and the Durban Chamber of Business at the SA AIDS Conference. The meeting highlighted the projects undertaken by both organisations. BizAIDS presented the results of the project to date.
5	Monitoring and Evaluation: To capture relevant information at each stage of	18	6 month programme results report, including VE Project Reports	Month 12	Circulated on 18 July 2005. Summary of activities carried out during this period. See paragraph, 0 on page 28

Task #	Description	Mile-stone #	Milestones (deliverables)	Time frame	Deliverable performance
	project cycle, beginning with baseline data, regular project reviews, revision and evaluation, leading to new project conceptualization, donor and beneficiary reporting and outreach				On 15 July 2005, IESC VE  n Anderson formulated a Strategic Framework for BizAIDS South Africa. He views BizAIDS as a “remarkable programme with the potential to become a significant part of the solution to the HIV/AIDS crisis.”
					During October, quotations were solicited from three providers to conduct a “desk top review” of the project.
		19	Final BizAIDS Report including 12 month results report, best practices and lessons learned, all VE project reports, and tool kits	Months 13 - 17	During September and October, quotations were solicited from a number of media and communications companies.
<sup>5</sup> 6	Printing and Production of DVD Develop materials to support the sustainability of the BizAIDS programme as a result of the USAID funded pilot programme	20, 21	Draft full colour brochure (max 4 pages) highlighting the BizAIDS methodology to be reviewed by MTI for adherence to USAID Logo and publication guidance; Final colour brochure once printed Copy of 10-20 minute DVD illustrating the BizAIDS methodology and relevance to local associations and MSMEs proof that USAID Logo utilized and regulations met.		Both completed in early January, filming delayed slightly for the interview on camera and return of SABCOHA CEO Brad Mears from annual leave.
		22	Final Report		Comment: The BizAIDS programme will continue post USAID funding. Funding has been received from DFID and a national strategy is being finalised.

<sup>5</sup> With the additional funds that accumulated due to the favourable US \$ SA R exchange rate, an additional Tranche (# 6) was developed in July 2005

### Profile of BizAIDS workshop trainers and participants

At the time of compiling this report, 353 participants had worked through the BizAIDS materials during the period February to July 2005.

#### Training was led by:

Trainer	Type	Number of participants	Number of training sessions	Training Venue	City
Carol Hanlon	IESC VE	24	6	The Business Place	Johannesburg CBD
Mmathabo Mngomezulu	Independent trainer	53	6	Johannesburg Career Centre & Senoane Skills Dev Centre	Johannesburg CBD & Soweto
Olga Maupa with husband Kagiso as co facilitator	Business Development Supplier	130	15	The Business Place	Johannesburg CBD
Fanele Sonti	Independent trainer	31	4	Springs Public Library & Daveyton Municipal offices	Springs & Daveyton (Benoni)
Vuyani Ntlabati	Business Development Supplier	46	8	The Business Place & 112 Main Street	Johannesburg CBD
Lawrence Mtsweni and Juksi Kganyago	Business Development Supplier	25	4	Springs Technical College and Springs Public Library	Springs
Norman Mashego Maboke	Independent trainer	44	4	Witwatersrand University	Johannesburg
<b>Total</b>		<b>353</b>	<b>47</b>		

*Number of individuals trained by trainers*

22 workshop sessions, over a 12-hour period were run. They were generally structured in two 6-hour sessions. However, three workshops were run in the 4-hour format (workshops run over 3 days of 4 hours of training per day)

Over 70 participants attended from 25 small businesses on average 3 employees from each business.



**Gauteng trainers (l to r) Kagiso Maupa, Lawrence Mtsweni, Olga Maupa, Juksi Kganyago, Fanele Sonti, Carol Hanlon, Norman Mashego Maboke. Absent: Mmathabo Mngomezulu and Vuyani Ntlabati**



**Mmathabo Mngomezulu Vuyani Ntlabati**

Three hundred and twenty eight participants (93%) completed at least 12 hours of training; 19 or 5% completed half of the required hours.

**BizAIDS participants:**

	Gender			
Age groups	Female	Male	Total	% of total
18 – 29 years	40	55	95	27
30 – 39 years	58	57	115	33
40 – 49 years	55	29	84	24
50 – 59 years	24	9	33	9
60 – 68 years	12	10	22	6
NA <sup>6</sup>	0	4	4	1
<b>Total</b>	<b>189</b>	<b>164</b>	<b>353</b>	<b>100</b>
<b>% of total</b>	<b>54</b>	<b>46</b>	<b>100</b>	

**Participants by age group and gender**

The average age of participants was 37 years.

<sup>6</sup> Not Answered

Age groups	Marital status						Total	% of total
	Single	Married	Divorced	Separated	Widowed	Never married		
18 - 29	85	9					95	27
30 - 39	70	31	4	2	1	4	115	33
40 - 49	19	53	3	5	1	2	84	24
50 - 59	3	17	6	1	3	1	33	9
60 - 66	6	18	1		1		26	7
Total	183	128	14	8	6	7	353	100
% of total	52	36	4	2	2	2	100	

Participants by age group and marital status

Age	Number of individuals in household (where answered)				Total
	Household size				
	0 - 4	5 - 9	10 +	NA	
18 - 29	47	35	3	10	95
30 - 39	56	39	1	19	115
40 - 49	34	40	0	10	84
50 - 59	14	10	0	9	33
60 - 66	8	13	0	5	26
Total	159	137	4	53	353
% of total	45	39	1	15	100

Participants by age group and number of individuals in household

There is a strong possibility that the influence of BizAIDS training may have reached over 1300 household individuals, an average of 5 per household.

Sector (Alpha sort)	Total	Sector	Total (Sorted descending order)
Agriculture	5	Construction	60
Arts & Culture	1	Wholesale & retail	47
Chemical	1	Food & beverages	47
Construction	60	Textiles	34
Education, training	20	Health & Welfare	23
Energy	2	Manufacturing, Engineering	22
Finance & Accounting	2	IS, Electronics Telecom	22
Food & beverages	47	Education, training	20
Health & Welfare	23	Services	17
Insurance	2		
IS, Electronics Telecom	22		
Local Government	2		

Manufacturing, Engineering	22
Media, Advertising Publishing	12
Mining	2
NA	4
Other	12
Services	17
Textiles	34
Tourism & hospitality	9
Transport	7
Wholesale & retail	47
Total	353

- 65% of the participants are from registered businesses (231/353).
- 36% belong to a Business Association (126/353).
- The businesses averaged almost four years in existence employing at least 2,000 employees.
- 51% (181/353) of the businesses keep records.
- 50% or 177 have a business plan.
- 14% or 48 of participants businesses had accessed finances such as financial institutions, family members or through partner capital.
- 50% or 177 of businesses stated that the business had a Business Plan.
- 20% or 73 businesses had given conscious thought to dealing with HIV/AIDS and had an action plan.
- 11% (40 businesses) have a written out plan for the continuity of their business.

These results were gathered from the client baseline, KAP (knowledge, attitude and practices) survey tools.

A telephonic survey was conducted three months after training. These results can be found under section 0 Participant feedback post BizAIDS training, page 38.

## Schedule Performance

### BizAIDS Project Schedule Overview:

Month	Schedule summary
August 2004	SABCOHA hired Programme Coordinator and set up the BizAIDS office.
September	Programme Coordinator started. The BizAIDS Participant Workbook and survey tools were developed and reviewed by the AIDS Law Project. VE's (Volunteer Experts) Joan and Jonah Sherman completed their assignments with BizAIDS. Meetings were held with a number of potential partners.

<b>Month</b>	<b>Schedule summary</b>
October	Programme Coordinator began establishing relationships with Associations; 11 interested trainers were invited to a focus group. IESC started recruiting for consultant to work on toolkit research.
November	Programme Coordinator continued to establish relationships (SETAs, Bargaining Councils, Chambers, BDS-Training Suppliers). Mega Tech completed an Audit and MOU signing with AIDS Law Project. A simple Balance Sheet outline was added to the Participant's Workbook. Project Manager resigned, not replaced.
December	<p>Programme Coordinator continued to build relationships with various organisations such as the W &amp; R SETA's Project Rave organisers and other Business Development Suppliers such as Redpeg, LifeLine and GAPSA etc. Training quotations were called for, MoU was developed, outline of Trainer's Guide and competency profile of BizAIDS trainers were developed. The accounting and administration of BizAIDS accounts were handed over from PWC to Essel Accounting.</p> <p>BizAIDS marketing material was developed. A project outline was placed on the SABCOHA website and at least one enquiry from an interested trainer was obtained from this site.</p>
January 2005	Budget reworked and Programme Coordinator continued to build relationships with various organisations, feedback given to Chairman of SABCOHA. A work plan for Carol Hanlon (VE) was developed.
February	<p>Quotations were received from a number of training organisations and individuals to have their training staff trained in BizAIDS and to deliver training to at least 100 small businesses. Based on these figures, BizAIDS was able to formulate a training fee structure and this was proposed and accepted by a number of trainers and training organisations.</p> <p>Started development of Trainer's Guide and Training of Trainers and initial trainer selection process and development of M&amp;E procedures. IESC Consultant commenced work on comparison and development of Small Business Toolkits. 24 Businesses trained. Application of the Second Tranche was made.</p>
March	Training by BDS's continued (75)
April	Training by BDS's continued (91)
May	Training by BDS's continued (29), Third Tranche applied for.
June	Training by BDS's completed (14) and presentation at SA AIDS Conference and established links with ZCB for national programme, Focus Group with Trainers and started project closure work.
July	Application for the Fourth Tranche. John Anderson – BizAIDS strengthening and strategy development. John Howard – Systems analysis and development. Fourth Quarterly and Six Month reports produced. Drafting of final closure report. Special BizAIDS workshop arranged for members of the USAID, Mega-Tech and SABCOHA Board members – Trish Heimann of Mega-Tech attended a BizAIDS session held on 20 July 2005. 120 Business participants were trained.

<b>Month</b>	<b>Schedule summary</b>
August	The 4th Tranche was received. Drafted first version of KAP (Knowledge Attitude and Practices) Survey, held a telephonic interview with a reporter from the Sunday Times, met a HIV/AIDS positive BizAIDS participant who is prepared to be interviewed, a feedback presentation was made to staff from USAID and Mega-Tech, motivation document prepared for SABCOHA board to motivate the continuation of the programme.
September	The SABCOHA Private Sector Conference due for November was postponed until April. BizAIDS planning session held on 13 September. Planning for spending of extra Tranche – quotations asked for of Monitoring & Evaluating specialist.
October	Met with potential partners and SABCOHA member organisations in Port Elizabeth, local municipal and government officials and the PERCI (Port Elisabeth Regional Chamber of Industry), met with suppliers of rapid HIV tests (Orasure) as the potential supplier of tests to future BizAIDS workshops. Obtained quotation to construct a universal BizAIDS database – secured John Howard to complete work. Presented BizAIDS results to SMME section of the Gauteng Department of Health Convention at Gallagher Estates. IESC proposed MoU for SABCOHA to consider. Contracted with two trainers to deliver more training (possibly funded by SABCOHA/DFID). Met with MegaTech to discuss working with another USAID funded programme to train three small business owners in Soshanguve (north of Pretoria).
November	Tranche 5 applied for 10 November 2005. Follow up interviews were conducted with a random sample of participants. The data was collected and analysed and all other databases were “cleaned” and verified. Proposal for last Tranche were analysed and the consultants appointed. Work continued with the development of a MS Access database for BizAIDS. Met with Zululand Chamber of Business and Amangwe Village BizAIDS training co-ordinators and reported back to IESC on the JPMorgan Funded project. Met with NAFCOC – National Chamber of Business.
December	Compilation and production of the final print and DVD projects and this report. External monitoring and evaluation of the project. Continued marketing and aligning with projects both internal and external to SABCOHA for National Roll-out Pilot project. Field testing of MS Access database designed by John Howard.



*(l – r) VE John Howard, Ashley Gasque (of IESC), Brad Mears (of SABCOHA) and VE John Anderson (15 July 2005)*

**BizAIDS Project Schedule Control Process:**

Regular reporting of issues was done, including risks, progress and constant checking of the implementation plan to ensure that the expected benefits would be delivered and were still valid. All proposed changes, for example and adjustment in the spending from Fixed Costs to Training Workshops, were assessed, agreed to and appropriate action taken with the involvement of SABCOHA and IESC.

**Budget Performance**

BizAIDS remained under resourced in Human Resources from November 2004 until the end of the Project. SABCOHA did not replace Tracy King, the Project Manager. All functions were assumed by the BizAIDS Project Co-Coordinator. Some administrative assistance was supplied by SABCOHA in August.

One audit was conducted by Mega-Tech in November 2004.

Careful attention was paid to separating the BizAIDS accounting from SABCOHA by Essell Accounting, an external firm of Accountants.

9. BizAIDS project - budget vs actual comparison

<u>Expense Heading</u>	<u>Budget Allowance</u>	<u>Total</u>
<u>Salaries</u>		
Admin/Management		44,081
H.Q.Operating		23,664

	<u>Budget</u>	<u>Total</u>
	67,745	
<b><u>Direct.</u></b>		
Salaries	303,600	420,420
	<u>303,600</u>	<u>420,420</u>
<b><u>Operating costs.</u></b>		
Communications	18,360	
Telephone start-up	2,900	
Printing/Copying -Indirect	6,960	
PR Material/Website	6,000	
Postage, Delivery & Courier	5,220	
Vehicle operating expenses	15,312	21,961
Rent	18,000	
Utilities/Insurance	6,960	
Supplies	6,960	
Bank Charges	3,480	
Legal	5,800	
Accounting Services	20,880	
Closing costs	5,800	
Computer expenses	0	
	<u>122,632</u>	<u>21,961</u>
<b><u>Training/Workshops</u></b>		
Workshops /Catering	69,750	103,111
Focus Group	3,521	460
Preferred Practices Workshop	29,000	14,520
Conference Fees	8,700	0
Printing/Copying -direct	4,000	23,748
Training salaries	37,500	
Computer expenses	0	2,977
Consultants fees (trainers fees)		2,487
	<u>152,471</u>	<u>147,303</u>
<b><u>Goods &amp; Materials</u></b>		
Capital equipment	<u>52,637</u>	
<b><u>Travel</u></b>		
Air travel	7,250	12,460
Local travel	12,000	16,528
Daily allowances	7,975	10,825
	<u>27,225</u>	<u>39,813</u>
<b><u>Additional Grant</u></b>	<u>100,800</u>	
M & E - independent review		22,800
Print & DVD		93,746
<b><u>GRAND TOTAL</u></b>	<u><u>827,110</u></u>	<u><u>746,043</u></u>

	<u>Budget</u>	<u>Total</u>
Summary of costs		
IESC	723,690	804,757
SABCOHA	827,110	746,043
	<u>1,550,800</u>	<u>1,550,800</u>

## BIZAIDS PROJECT CLOSURE TASKS

### Resource Management

- **Resource needs that changed during the project**

The position of Project Manager was not replaced, and the project was administratively stretched until the appointment of a part-time administrator towards the end of the project.

- **Project knowledge (Intellectual Property) from project team members has been captured and retained for future projects**

A Memorandum of Understanding was signed between SABCOHA and IESC in December 2005 to formalise the continued relationship and roll-out or pilot roll-out in 2006.

All reports and other printed materials and reports relating to the project have been stored within SABCOHA and IESC.

### **Coordination with SABCOHA for National BizAIDS Rollout**

In June 2005, Daryl Wearne, Fanele Sonti from Gauteng and Moses Mbawo of BizAIDS Zambia were invited to participate during the training of the trainers in the Richards Bay area. Everyone contributed during the training of trainers and it was an excellent opportunity for an exchange of ideas about the programme and its future development. With the potential national rollout in mind, Daryl Wearne, the BizAIDS Programme Coordinator for SABCOHA and, met the staff at ZCB/Amangwe Village and established relationships for future cooperation relating to BizAIDS and its objectives.



*(l – r) Moses Mbawo from BizAIDS Zambia, Carol Hanlon IESC VE and Fanele Sonti trainer from Gauteng*

## **Issue Management**

See a list of issues still outstanding at the end of the project, 0 Post BizAIDS Project Tasks, page 49.

## **Quality Management**

We used a number of quality management activities, including:

- Meetings to discuss the importance of quality trainer briefing and coaching
- Templates and checklists to manage certain aspects of work
- Performing evaluation and feedback of trainers
- Involving our partners and the participants in the feedback process
- Timeously making improvements and adjustments.

### **Survey conducted with BizAIDS participants post training**

Feedback from participants took place immediately after the training session and a telephonic interview was conducted within three months of training. See a summary of the Participant feedback post BizAIDS training, page 37.

## **Communication Management**

BizAIDS conducted a stakeholder assessment, categorised them into various categories and audiences. In addition to IESC and the SABCOHA Board, our stakeholders included:

- Advisors
- Business Chambers
- Business Development hubs
- Business Development Suppliers
- Chambers of business
- various consultancies
- Employer bodies
- Member associations groups
- Professional bodies
- SETA's (taxation funded Sector Education and Training Authorities)
- a Trade Union.

Regular project status reports were submitted to the IESC partners and our Funders. The relationship between IESC and the Project Coordinator allowed for timely and novel adjustments to the project plan and schedule.

The CEO of SABCOHA expanded the reach of the BizAIDS programme through regular feedback to the SABCOHA Board and he participated in several outreach events such as a Workplace Seminars and Conferences.

### **BizAIDS advisors and partners**

BizAIDS worked with the following organisations and individuals:

**Aids Law Project** – Centre for Applied Legal Studies, University of Witwatersrand, Johannesburg

Angie Naidoo of **Durban Institute of Technology** (Durban Technikon)

**Black Sash**

**BMF** – Black Management Forum

**BRAIN** (Business Referral and Information Network, through the Department of Trade and Industry)

**Department of Health - Gauteng**

**Dispute Resolution Centre**

**Durban Chamber Foundation**

**Junior Business Executive Council of Soweto**

**SACOB** (South African Chamber of Business)

**Springs Chamber of Commerce**

**Business Opportunity Centre**

**Small Scale Mining Development** (through Mintek's Bopa Batho's project)

**The Business Place**, Johannesburg and Cape Town

**Career Skills**

**GAPSA**

**Kagiso Business Consultants**

**Micro-MBA** - Luleka Ngiba

**Nigel Caring Community**

**Synergy Health**

**WinWin Group**

**Wits Enterprise**

**LifeLine**

**Alexandra Chamber of Commerce**

**BUSA** (Business Unity South Africa)

**FABCOS** (Foundation of African Business & Consumer Services)

**Gauteng Association of Chambers of Commerce & Industry**

**Johannesburg Chamber of Commerce**

**The Greater Germiston Chamber of Commerce** (now called the Southern Ekureleni Chamber of Business)

**The Springs Chamber of Commerce**

**Ezee-Dex**

**The HR Practice**

**Vogue HR Services**

**AHBEASA** (Afro Hairdressing and Beauty Employers Association of Southern Africa)

Aruna Ranchod of the **RMI** (Retail Multi Association)

**Bargaining Councils:**

- National Association of Bargaining Councils
- Goods Canvas Industry (Witwatersrand & Pretoria)
- Hairdressing and Cosmetology Trade, Pretoria
- Hairdressing and Cosmetology Services (semi-national)
- Motor Industry
- Restaurant, Catering and Allied Trades

**CATRA** (Restaurant/caterers Employers Association)

**Gauteng Master Builders' Association**

**Retail Motor Industry Employer's Association**

**Setlakana Business Development, NAUSA, BEECA, ACHIB**

**Senethemba Commercial Farmers Co-Operatives** (connected and individual contact that BizAIDS made)

**Micro Enterprise Alliance**

**NAFCOC** (National African Federated Chamber of Commerce and Industry)

**Women for Housing**

**Johannesburg Development Agency**

**The Informer Magazine** – Derek Coyne

**Reaching Out Magazine** - Roxanne Reid

Hope Worldwide

**Gauteng Entrepreneurs Propeller**

**CHIETA** - Chemical Industries Education and Training Authority

**EDTP SETA** - Education, Training and Development Practices Sector Education and Training Authority

**HWSETA** - Health and Welfare Sector  
Education and Training Authority

**W&R SETA** - Wholesale and Retail  
Sector Education and Training  
Authority, Project Rave

**UASA** (United Association of South  
Africa)

**Aganang** – a **HIV/AIDS disease  
management organisation (NGO)**

### Communication processes

One-to-one marketing of the programme was the prime communication tool during the project's first phase.

Information on the objectives and methodologies of the pilot were hosted on the SABCOHA web site.

More utilisation should have been made of the print media by SABCOHA such as its own member newsletters, feature articles or advertorials in HIV/AIDS journals such as Leadership in HIV/AIDS.

Feedback on project progress was presented to SABCOHA members and other invited guests at a satellite session at the SA AIDS Conference in Durban (June 2005).

The BizAIDS concepts were easily grasped and understood by Trainers and participants. See 0 Participant feedback and 0 Trainer feedback what our trainers had to say about BizAIDS, page 37.

### Customer Expectation Management

#### Participant feedback on trainers and workshop content

The BizAIDS Workshop Evaluation Survey revealed the following results from 231 participants.

#### Evaluation of the BizAIDS Workshops:

	Presenter's content		Workshop notes	
	Total	% of total	Total	% of total
<b>Excellent</b>	<b>142</b>	<b>61</b>	<b>129</b>	<b>56</b>
Very effective	58	25	67	29
Effective	19	8	23	10
Poor	0	0	1	0
NA	12	5	11	5
Total	231	100	231	100

	Presentation level			Content level	
	Total	% of total		Total	% of total
Basic	39	17	Too detailed	37	16
Varied	42	18	Too general	27	12
Advanced	73	32	Too theoretical	15	6
<b>Just right</b>	<b>41</b>	<b>18</b>	<b>Correct</b>	<b>106</b>	<b>46</b>
NA	36	16	NA	46	20
Total	231	100	Total	231	100

### Participant feedback post BizAIDS training

By end of October, BizAIDS had randomly sampled 23% (n = 82) of participants and our survey revealed the following:

% answered “yes”		Pre BizAIDS, the responses received from this sample group:
51%	Have collected HIV/AIDS information for use by their employees	20% (n = 17) business had planned for HIV/AIDS and related risks
63%	Are planning or have conducted any HIV/AIDS related training for their employees	
51%	Have identified or started cross-training or additional skills training programmes for their employees	
62%	Have identified a plan for how your business will continue running during their temporary absence	
68%	Have confirmed their tax and company registrations	68% (n = 56) businesses are formally registered
88%	Have gathered all their business records in one location	
80%	Have shared their business records with a family member or someone else who can run the business in the owner’s absence?	
54%	Have given thought to the long-term plan for transitioning their business to a family member or someone else	
65%	Have identified ways to extend their business and get new customers or have explored new business opportunities	
60%	Have identified ways to reduce costs in their business	
77%	Have discussed their household expenses with their partner and /or children	

54%	Have thought about how they will distribute their property in a will	11% (n = 9) have a written out plan for the continuity and succession of the business
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<b>Follow-up question, post BizAIDS workshop</b>	<b># Yes</b>	<b>% "yes" of total survey responses</b>	<b># "yes" responses Extrapolated</b>	<b>No</b>	<b>% "no" of total survey responses</b>	<b>Not applicable / not answered in survey</b>	<b>Survey Total</b>	<b>Total # participants</b>
Have you collected HIV/AIDS information for use by your employees?	42	51	181	40	49	0	82	353
Are you planning or have you conducted any HIV/AIDS related training for your employees?	52	63	224	28	34	2	82	353
Have you established any HIV/AIDS policies for your workplace?	13	16	56	67	82	2	82	353
Have you made a first-aid box available on your work site?	32	39	138	47	57	3	82	353
Have you identified or started any cross-training or additional skills training programmes for your employees?	42	51	181	37	45	3	82	353
Have you identified a plan for how your business will continue running during your temporary absence?	51	62	220	27	33	4	82	353
Have you confirmed your tax and company registrations?	56	68	241	19	23	7	82	353
Did you identify a need to change your company's legal structure?	10	12	43	71	87	1	82	353
If so, have you started to make this change?	1	1	4	80	98	1	82	353
Have you gathered all your business records in one location?	72	88	310	8	10	2	82	353

<b>Follow-up question, post BizAIDS workshop</b>	<b># Yes</b>	<b>% "yes" of total survey responses</b>	<b># "yes" responses Extrapolated</b>	<b>No</b>	<b>% "no" of total survey responses</b>	<b>Not applicable / not answered in survey</b>	<b>Survey Total</b>	<b>Total # participants</b>
Have you shared your business records with a family member or someone else who can run your business in your absence?	66	80	284	10	12	6	82	353
Have you given thought to the long-term plan for transitioning your business to a family member or someone else?	44	54	189	34	41	4	82	353
Have you identified ways to extend your business and get new customers or have you explored new business opportunities?	53	65	228	26	32	3	82	353
Have you identified ways to reduce costs in your business?	49	60	211	31	38	2	82	353
Have you discussed household expenses with your partner and /or children?	63	77	271	16	20	3	82	353
Have you purchased any additional insurance?	5	6	22	73	89	4	82	353
Have you thought about how you will distribute your property in your will?	44	54	189	37	45	1	82	353
Have you pursued preparing your will?	33	40	142	48	59	1	82	353
Is it complete?	12	15	52	57	70	13	82	353

## **BizAIDS business case studies**

Four case studies were developed.

### **Case study 1: Responding to customer demand and branching into new ventures**

A true entrepreneur, Aubrey Mojaji responds to the everyday needs of ordinary South Africans to provide hair and cosmetic care – and a bit more.

Aubrey started his distribution and sales business from his hair salon, which is situated in a busy shopping complex. His offer to customers has since expanded from offering well groomed hair into distributing hair products and his own line of cosmetics to other hair salons in the area. Aubrey runs a tight operation and looks for ways in which to improve his delivery route to save on petrol and other running costs.

But, like most South Africans today, HIV and AIDS has impacted on his venture. Aubrey shares a story of a highly skilled stylist whose premature death from AIDS meant a loss of these valuable skills for the salon. Realising that other employees didn't grasp the significance of this, Aubrey took the initiative to invite a person living with AIDS (PLWA) to address his staff. This, he says, helped to raise his employees' awareness that HIV and AIDS isn't something that happens to other people, but that it can happen to anyone – and that discrimination against people who are living with HIV and AIDS is unnecessary and wrong.

Aubrey says that the condom use training he received from BizAIDS was a useful element of the course. Although he has been distributing condoms to staff and customers for a while, he now has the right knowledge to promote the correct and consistent use of condoms. This adds on to the information the salon received from the PLWA and Aubrey hopes that these interventions will help staff and customers pursue healthy sexual practices.

BizAIDS training also helped him manage the finances and threats to his business better, says Aubrey. He now has a will, should anything unplanned happen to him, and the training has opened up new business opportunities, such as lunch-time deliveries to office workers in the shopping centre.

### **Case study 2: Soul food for hungry customers**

Beauty Moeng's Nibeushar Restaurant & Take-Away is situated in Johannesburg's buzzing central business district and in close proximity of six recording studios.

Food is not just food for Beauty. A primary healthcare course on nutrition and malnutrition equipped Beauty with an understanding of how to feed customers so they get the best out of her freshly prepared home-style food – and no leftovers are ever served!

Beauty is an impressive lady. She cares about her business, her staff and her customers. And sharing information and open discussion on HIV/AIDS is a part of the care and service she provides. BizAIDS has equipped Beauty with basic and accurate information about condom usage and HIV transmission, and she willingly shares her knowledge with her colleagues and customers. Beauty is aware that there is much misconception about the disease and that this creates fear amongst people. She has made it one of her missions to dispel myths, reduce stigma, encourage people and as she says, to provide much needed spiritual healing.

Women, she says, are especially uncertain about condom use. Not her, since the training, and she now carries condoms in her purse at all times, both for her own use and for her customers, who have built up a trusty relationship with her and can confidently discuss relationships and sexual practices.

But, the training has also given Beauty insight into business management. In addition to expanding her services into catering for the nearby offices and recording studios, she is working on her will and succession plans, her annual plans are in place and the trained staff can cope when she takes her annual leave.

Beauty's commitment to the wellbeing of her family, employees and customers are indeed food for thought for any budding entrepreneur!

### **Case study 3: Building blocks for a healthy business**

A thriving building and construction business that employs 36 builders, painters and cleaners keeps Edgar Dujnaje, the business owner of Khaya Elighle Building Construction, very occupied. This trained builder, registered with the National Housing Registration Council, is well aware of factors that can impact on his company, and he keeps a close watch over petrol prices, transportation requirements, salaries and equipment costs.

Edgar has close relationships with his family. His daughter oversees the management of the construction business and he provides for seven family members, including two grandchildren who are at school. The financial and business management aspects of the BizAIDS training have come in handy, especially due to a challenge resulting from an incorrect classification by SARS, which has impacted on Edgar's cash-flow.

Edgar understands that HIV and AIDS are real issues affecting real South Africans. During the training, he spoke of his grief as AIDS took away two of his sons and a daughter-in-law within a period of 18 months. This changed his role of a grandfather to that of a primary caregiver for the grandchildren.

Edgar has also lost employees to AIDS, and he is surprised and concerned that many people around him remain ignorant and careless about HIV transmission and dealing with AIDS. Although Edgar and his customers, such as Impala mines, make HIV/AIDS information and services freely available, his advice to workers and his children regarding financial and funeral planning and behavioural change have so far been largely ignored.

Despite these challenges, Edgar is optimistic about his business, and regards his 10-years of building industry experience, and cost management and supervising skills as competitive advantages that have enabled the sustainability of Khaya Elihle.

#### **Case study 4: Being prepared for any eventuality grows competitive edge**

Mapaseka Mono and her partner run a small information technology firm “Tefelsol” that provides essential IT services in the rural areas of South Africa, including the Eastern Cape and North West.

Mapaseka attended the BizAIDS training to grow her knowledge about competitive advantages and business management techniques. Although Tefelsol employs only five people – Mapaseka, her partner and three IT trainers – she is aware of potential risks to her business and believes in being prepared to tackle them.

While Tefelsol has not yet implemented HIV/AIDS training for its employees, Mapaseka works hard to grow the business and realises that soon there will come a day when, with a bigger staff complement, Tefelsol will need to provide a workplace HIV/AIDS intervention.

Another consideration that is on her mind is possible competition from the government which might also gear itself up to provide a similar service to her customer base across rural schools.

Mapaseka works hard to mitigate these risks timeously and to ensure that Tefelsol continues to provide an efficient and cost-effective service to its customers.

#### **Trainer feedback what our trainers had to say about BizAIDS**



*“In my view, BizAIDS brings a shining light to small business and the family business owner who may be struggling to find himself. BizAIDS is designed in such a unique way that it is simple, but comprehensive, it focuses on the health of the business, the health of the family and the health of the individual. BizAIDS could not have come to small business at a better time. It helps them prepare for the huge social challenges facing them.*”

*BizAIDS gives the family owned business owner something to focus on, many are struggling to get their business going, BizAIDS helps them to frame a view of the threats that threatens their very livelihood, BizAIDS links HIV/AIDS to their business. Participants show an appreciation for the framework to help them deal in some small way with their employees and customers, in a respectful and meaningful way.*

*BizAIDS has elevated me in the business community; the business owners I worked with certainly did appreciate and respected me for bringing new tools to small business. They appreciate this information so much. – Fanele Sonti*



*My involvement with BizAIDS was purely due to my passion for training. There is a lot that needs to be done on development, on transferring of skills and applying the knowledge thereof. It brings me such a pleasure to see the impact information can make on an individual, their participation, arguments and involvement especially in-group discussion, and that shift of a mindset, hence I enjoy training so much. I have been involved with BizAIDS programme for five months now (March – attended train of trainer session; I conducted my first training on 29 & 30 April and led subsequent groups during the periods 5 & 6 May and 13 & 14 July) and there were very exciting training sessions. It is exciting for a number of reasons, for example on a recent condom demonstration, I observed the expression of delight on the face of a 64 year old gentleman, he was delighted to learn from a younger participant in the group. There is a greater acceptance for the use of condoms. There is a distinct move by women to take charge in their lives, in big issues such as finances, reducing their exposure to risky behaviours, insisting on the use of condoms, setting up support groups, and to speak honestly and openly about their fears and concerns.*

### **Materials**

*Easily communicated in English and African languages. I did not encounter any language barrier with the materials. The flow of chapters was very easily understood, which made training much easier and more enjoyable.*

### **Content**

*The learning programme is flexible, relevant and designed with national needs as well as the needs of prospective employers. The programme is very practical and easily applicable.*

### **Introduction**

*Normally with every training, a trainer will need to be very creative “with breaking the ice”, purely because the content is very academically orientated, irrespective of the levels (NQF’s) and again because we are humans and very emotional, one needs to be careful not to appear too friendly, rigid or intimidating. The BizAIDS introduction of “you work hard every day to support your family: to provide food, to maintain a home, to pay school fees for your children” etc, etc. This is reality, it talks to them and it simply says we are with you and we understands your issues, and they easily get out of their comfort zones, making it easier for the facilitator to stick to time*

*allocations. The case studies are very relevant and participants can relate to them. I thoroughly enjoyed the introduction of the 4 legs of a chair concept and all other BizAIDS topics. Very impressive!*

**Structure**

*The structure is well planned; one chapter connects with the next.*

**Attendees/Participants**

*I had such a variety of business participants in each training session. I had the youth, the mature youth and the adults (which are a bit illiterate), but that did not put any dent on the flow and the time frame of each activity as every thing is well explained and connected. There was so much enthusiasm and willingness to learn, and participation was phenomenal. I personally enjoy case studies for the fact that it is real and someone is a living testimony of that. Normally I would allow participants who had businesses before and that had collapsed to tell their stories. That truly makes an impact.*

**Time frame**

*The time allocation on each activity is well paced.*

**Why I am so enthusiastic about this project ...**

*The programme covers a wide range of topics, resources and skills, which are pivotal for an entrepreneur to grow and develop. It is a lifelong learning experience. I thoroughly enjoyed facilitating this programme and thank you for giving me this opportunity to grow personally and with every individual. Mmthabo Mngomezulu*



*“I needed to implement some of the action plans personally. I tended to ignore them as if they would automatically be done. After completing the training in March, I was visited by financial advisor to draft a Will.*

*Discussing the condom demonstration with my eight year old daughter opened up the lines of communication at home. She has started asking specific questions about issues such as rape and abuse – at what point does someone consider that to be an offence?*

*Some participants felt that the workshop came at the right time and are confident that they will start to implement most of the concepts learned.*

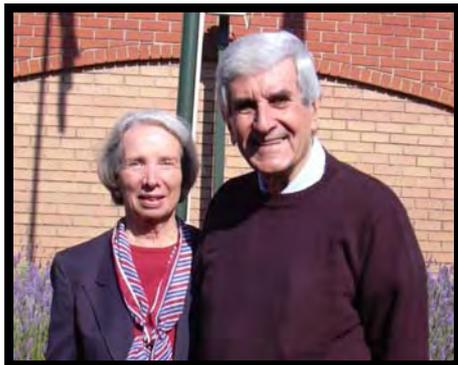
*The way a trainer conducts herself is critically important during and after the training. It was a breakthrough when one of the candidates confided his HIV status to me. The best way for me to explain this is “with respect comes responsibility”. People know that they can discuss / share with you their burning or painful experiences without you divulging the information...*

*I could see that the programme exceeded the expectations of the participants ... BizAIDS does not only address one aspect of the business. By the end of day one, their negative attitudes towards HIV positive people change because of the clearing of misconceptions.” – Olga Maupa*

## **Lessons Learned**

### **IESC’s team of BizAIDS VEs (Volunteer Experts)**

IESC have a large complement of industry experts and professional staff who implement multi-disciplinary, cross-sectoral economic development programmes, including on-site consulting assignments at hundreds of businesses and institutions to help them achieve bottom-line results. In addition, IESC’s volunteers are experienced business and professional people, who contribute their expertise to create positive change in people’s lives. The BizAIDS VE’s are acknowledged for their contributions and are pictured below.



(U L) Joan & Jonah Sherman



(L – R) Carol Hanlon

John Anderson

John Howard

### **1. Personal and Business Action Plans**

More attention should be placed on the action plans during the training session. Training days should be split by a few days or a week to allow for completion of worksheets and action plans.

## **2. Reduction in participant note-taking during sessions**

Some of the text specific to business types and inheritance issues could be a hand out – less note taking on the participant's part. (Is note taking undesirable? Some people learn by taking notes. Also saves cost to BizAIDS and is more personally applicable.)

## **3. Businesses employing 1 – 10 was the right target group for this type of training**

There are a number of challenges that face very small businesses. BizAIDS uses a unique methodology which does not appear to be in the market place at present. The methodologies are simple in design and can be transferred with ease. One example is how the Gauteng (urban) and Zambian (semi-rural) formats easily blended into an appropriate format for the Richards Bay pilot programme.

## **4. HIV/AIDS awareness and workplace training**

BizAIDS participants rated HIV/AIDS in the workplace, business skills and wills as being the most valued topics in the programme.

Small businesses are experiencing HIV/AIDS close hand, and are willing to allow employees time off to attend HIV/AIDS awareness sessions

## **5. The condom demonstration**

The condom demonstration did not feature in the original Zambian format. It was recommended that it be included in all BizAIDS training if the introduction of condoms by the business owner is anticipated.

Correct use of both the male and female condom has proven to be a valuable segment of the 12 hours of business owners training and has been included based on the anticipated and the actual demand for this kind of information by participants.

## **6. Further research on location of the businesses and HIV & AIDS impact on them**

Working with the BizAIDS participants could be an ideal starting point for further work.

## **7. Closing up shop**

During training sessions it was observed that there appeared to be a natural inclination by business owners to “close the shop doors” rather than entrust the business with another person to keep the business going during a temporary absence by the small business owner. Post BizAIDS training interviews revealed that a more serious approach to keeping the business open was taking place.

## **8. BizAIDS is a sought-after commodity**

The original intention of the programme designers was that the training would be free of cost to the business owner. The past experience of training providers showed that when a “commitment” fee is charged, participants are more likely to attend as they place value in something that is paid for.

## **9. Anticipating growth**

There is reluctance by most business owner participants to disclose estimates of their business turnover figures, even after being re-assured that this information will not be disclosed to anyone. It was anticipated that having access to these figures would indicate the scope of the impact that BizAIDS is making.

### **10. Trainers were Learners**

Many trainers found the course content valuable and applied it to their own lives and work environments. They indicated that they took many of the principles and processes from the training and applied them to their lives, their families and their businesses.

### **Post BizAIDS Project Tasks**

#### **Outstanding issues for this project**

- **Issue of session attendance certificates**  
A certificate of attendance has been developed and will continue to be circulated to participants who complete the training sessions.
- **Testing and signing off of the BizAIDS database and synchronisation of the survey forms to meet the new database requirements.**
- **Formalisation of linkages with HIV/AIDS partners such as Aganang to provide free or low cost counselling and support services to BizAIDS participants**

### **BizAIDS Project Closure Recommendations**

The pilot project has now closed and all the milestones have been met. BizAIDS will continue its operations with funding from DFID (the Department for International Development), the UK Government department responsible for promoting development and the reduction of poverty.

The small number of outstanding items (not specified in the original milestones), will be satisfactorily addressed.

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## **BIZAIDS FINAL REPORT AND CLOSURE REPORT APPROVALS**

**Prepared By** \_\_\_\_\_  
BizAIDS Project Co-Ordinator

**Approved By** \_\_\_\_\_  
CEO of SABCOHA

\_\_\_\_\_  
Vice President of IESC (Africa)

\_\_\_\_\_  
Regional Director of IESC Africa

**Approval Date** 1st March 2006

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## APPENDICES

### BizAIDS Project Closure Report Sections Omitted

- Project quarterly reports
- Half year and annual reports

### Reports and Supporting Documents Included

Annexure Number	Title
1	“Rolling-out BizAIDS into a National Programme”, by Boitumelo Kenoshi & Associates, September 2005
2	“A Monitoring and Evaluation Report on the BizAIDS South Africa Pilot Project” by ahcomm, January 2006
3	List of participating businesses and business owners
4	Preferred Practices Workshop Report by Chris Murray
5	BizAIDS KAP survey
6	“Review – SME Management HIV/AIDS Strategies (10 – 50 employees)”, by Sue Gale

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## **GMAC Grantee Narrative Report**

Grantee: SABCOHA (South African Business Coalition on HIV/AIDS)

Grant agreement number: 0143-0404-G-GA44

Project Period: 1st August 2004 – 31st December 2005

Focus Area: A tool to help small business owners prepare for HIV/AIDS and related emergencies

Report for the period: October 1, 2004 through September 30, 2005

### **Main accomplishments during the period October 2004 - September 2005**

**Project Summary :** BizAIDS is the micro business, risk survival guide. It is a toolkit of practical action plans and guidelines for the small business owner, to help prepare for HIV/AIDS and other related emergencies.

Facilitated workshops took place in the greater Johannesburg and Gauteng area during the period February to July 2005. Over 20 Business Management trainers were trained in the BizAIDS methodologies, 7 trainers facilitated 47 workshop sessions of at least 12 hours each in Benoni, Johannesburg, Soweto and Springs. Over 350 small business owners, partners, employees and trainees participated. Businesses ranged widely from Construction and Engineering trades people and suppliers; Coffin Makers; Bead Makers; IT suppliers and web designers; taxi owners; spaza and tuck shop owners and operators, nutrition and dietary supplement suppliers, tavern owners, sports and clothing designers, manufactures and suppliers; stationery and school book suppliers; perfume and cosmetic distributors; trainers, volunteers and social workers in the field of HIV/AIDS. They saw value in attending BizAIDS for the business strengthening tips and advice on dealing with those infected and affected by HIV/AIDS and sought help to put in place measures to protect and to provide sustainability for their businesses.

A summary of the main activities and achievements are tabulated below:

<b>Month</b>	<b>Schedule summary</b>
October	The BizAIDS Programme Coordinator began establishing relationships with Business Associations and potential partners; 11 interested trainers were invited to a focus group. IESC started recruiting for a consultant to work on a small business toolkit research.
November	Programme Coordinator continued to establish relationships (SETAs, Bargaining Councils, Chambers, BDS-Training Suppliers). Mega Tech completed an Audit of SABCOHA. MoU signing with AIDS Law Project was concluded. A simple Balance Sheet outline was added to the Participant's Workbook. Project Manager resigned, not replaced.
December 2004	Programme Coordinator continued to build relationships with various organisations such as the W & R SETA's Project Rave organisers and other Business Development Suppliers such as Redpeg, LifeLine

Month	Schedule summary
	<p>and GAPSA etc. Training quotations were called for, an outline of the Trainer's Guide and competency profile of BizAIDS trainers were developed. The accounting and administration of BizAIDS accounts were handed over from PWC to Essel Accounting.</p> <p>BizAIDS marketing material was developed. A project outline was placed on the SABCOHA website and at least one enquiry from an interested trainer was obtained from this site.</p>
January 2005	<p>The budget allocations were reworked and Programme Coordinator continued to build relationships with various organisations, feedback given to Chairman of SABCOHA. A work plan for Carol Hanlon (VE) of IESC was developed.</p>
February	<p>Started development of Trainer's Guide and Training of Trainers and initial trainer selection process and development of M&amp;E procedures.</p> <p>BizAIDS workshop topics include: Understanding risk; Stages of a business; Legal types of business; SWOT &amp; Marketing 5 Ps; Inheritance laws; Completing a basic will; Business Risks of HIV/AIDS; HIV/AIDS Awareness (Hints &amp; things to consider); Proper Condom Use; Action Plans and Worksheets; HIV/AIDS Legal Issues; Impact of Short &amp; Long-Term Business Interruptions; Recordkeeping &amp; Selling a Business</p> <p>Quotations were received from a number of training organisations and individuals to have their training staff trained in BizAIDS and to deliver training to at least 100 small businesses. Based on these figures BizAIDS was able to formulate a training fee structure and this was proposed and accepted by a number of trainers and training organisations. Contracts were developed and signed with these individuals and training organisations to deliver BizAIDS. 24 Businesses trained. Second Tranche applied for.</p> <p>IESC Consultant commenced work on comparison and development of Small Business Toolkits.</p>
March	<p>Training by BDS's <sup>7</sup> continued (75)</p>
April	<p>Training by BDS's continued (91)</p>
May	<p>Training by BDS's continued (29), Third Tranche applied for.</p>
June	<p>Training by BDS's completed (14) and presentation at SA AIDS Conference on the successes to date. Established links with ZCB <sup>8</sup> for national programme, a Focus Group with Gauteng Trainers was held and started project closure work (Original project close date was July 2005)</p>
July	<p>Fourth Tranche was applied for. John Anderson a IESC VE prepared a BizAIDS strengthening and strategy development. John Howard a IESC VE completed a Systems analysis and development analysis and plan. Fourth Quarterly and Six Month reports produced. Drafting of final closure report. Special BizAIDS workshop arranged for members of the USAID, Mega-Tech and SABCOHA Board members – Trish Heimann of Mega-Tech attended a BizAIDS session held on 20 July 2005. 120 Business participants were</p>

<sup>7</sup> Business Development Supplier

<sup>8</sup> Zululand Chamber of Business

Month	Schedule summary
	trained. Project extension date approved until end of August.
August	The 4 <sup>th</sup> Tranche was received. Drafted first version of KAP (Knowledge Attitude and Practices) Survey, a feedback presentation was made to staff from USAID and Mega-Tech, motivation document prepared for SABCOHA board to motivate the continuation of the programme and for additional funding post the USAID grant period. Project date extended until end of December 2005.
September 2005	BizAIDS planning session was held on 13 <sup>th</sup> September. Planning for Pilot rollout of BizAIDS Nationally and the spending of the extra Tranche was discussed. Quotations are being sought for the Monitoring & Evaluating project, and the production of the information brochure and complimentary DVD. In the National Pilot Business Plan, it is anticipated that a portion of the current grant will be utilised to explore the national roll out in areas other than Gauteng. During this planning session certain issues such as SETA short-course accreditation would be placed as an ongoing item on the BizAIDS agenda. A record of this planning session will follow in due course. BizAIDS was featured on Summit TV, an interview with Ashley Gasque of IESC was recorded on 14/9/2005 – TV time was sponsored by Daimler Chrysler. Eighty BizAIDS participants will have been interviewed (telephonically) to establish and record their progress post BizAIDS.

In my capacity as the grantee agent, I hereby certify that to the best of my knowledge, the above information is accurate.

Authorised Signature: \_\_\_\_\_

Date: \_\_\_\_\_

14 September 2005  
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