

## **AIDSTAR-Two Project Trip Report – Mexico 03/06/11**

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5 key words:

Strategic Plan, Operational Plan, AIDSTAR – Two, Colectivo Sol, Mexico

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## AIDSTAR-Two Project Trip Report

### 1. Scope of Work:

<b>Destination and Client(s)/ Partner(s)</b>	Mexico City, Mexico
<b>Traveler(s) Name, Role</b>	Yadira Almodóvar-Díaz, Senior Program Officer
<b>Date of travel on Trip</b>	March 6-12, 2011
<b>Purpose of trip</b>	To assist Colectivo Sol in finalizing their 2011-2013 Strategic Plan; develop their 2011 Operational Plan and establish a simple system to monitor the implementation of their Operational Plan.
<b>Objectives/Activities/ Deliverables</b>	<ul style="list-style-type: none"> <li>• Assist Colectivo Sol to finalize their 2011-2013 Strategic Plan</li> <li>• Facilitate a 3-day workshop to develop their 2011 Operational Plan (including activities, targets, and indicators based on their strategic objectives)</li> <li>• Define means for verification and adapt a simple data collection tool (dashboard) to track progress and use this information for decision making</li> </ul>

### Background/Context, if appropriate

Colectivo Sol is implementing a project called “Respondiendo” (Responding) to identify and package effective HIV prevention interventions for men who have sex with men (MSM) in Mexico. The project, funded by USAID/AIDSTAR-Two, will end in April 2011. Part of the technical support provided by AIDSTAR-Two included the development of Colectivo Sol’s 2011-2013 Strategic Plan and 2011 Operational Plan. These plans provide a clear roadmap for expanding the Colectivo’s program portfolio and financial resources, implementing new activities to strengthen other civil society organizations (CSOs), and reaching out to more health care providers and police with sensitization information and tools.

This is an important accomplishment for Colectivo Sol given that in 2009 the organization developed their Strategic Plan with the support of an external consultant, but was not able to implement it due to:

- 1) Its overly ambitious goals and objectives
- 2) Some objectives that were more like transversal strategies (e.g., community mobilization) than actual objectives
- 3) The plan lacked clear indicators and a process for monitoring progress
- 4) It also lacked a strategy for financial resource mobilization
- 5) Over the past two years, Colectivo Sol has evolved as an organization and many of the strategies, objectives and activities outlined in the plan are not applicable or relevant any longer

### 2. Major Trip Accomplishments: Should include the major programmatic goals realized, relevant metrics, and stories of impact from the trip.

1. Conducted a 1-day workshop (March 7) to finalize the 2011-2013 Strategic Plan with the participation of six staff of the Colectivo Sol (see list of participants on Section 4 below). The work completed includes:

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- a. The organizational mission and vision
- b. The four strategic directions and five strategic objectives
- c. Specific activities under each strategic objective
- d. Process indicators and methods of verification for each activity
- e. Result indicators per year, per strategic objective
- f. An assigned responsible staff for each strategic objective

2. Conducted a 2-day workshop (March 8-9) to develop the 2011 Operational Plan with nine staff from Colectivo Sol.

Prior to initiating the development of the operational plan, in plenary, the team reviewed the entire 2011-2013 Strategic Plan to ensure its contents was clear, realistic, and complete. During this presentation, it was agreed that only the strategic objectives and activities for 2011 were to be included in the operational plan. It was also agreed on a format for the plan. The template adapted includes the:

- a. Strategic directions
- b. Name of the strategic objective
- c. Result expected by the end of the year
- d. Specific strategy or strategies
- e. Activities aligned by the month in which should be completed, followed by process indicators, targets, and methods of verification and the responsible staff

To complete the first draft of the operational plan, the participants were divided into 4 small teams of 2-3 people each. Each small team was responsible for outlining the specific activities needed to achieve one strategic objective. The strategic objectives were assigned based on the work that each small team is responsible for doing on a day-to-day basis. The first strategic objective was assigned to Cesar Coria and Kenia Tapia since they are responsible for coordinating the programs focused on institutional strengthening of other CSOs. The second strategic objective was assigned to Juan Jacobo Hernandez and Sonia Ramirez given their work with women, the third was assigned to Rafael Manrique, Carlos Cruz and Maria Solis given their sensitization activities with health care providers and police and the fifth objective was assigned to Gabriel and Minerva Espinosa given its focus on resource mobilization. In the afternoon, each small group presented their work, and with the input of the team, each section of the plan was finalized. At the very end, the fourth strategic objective, which is focused on the internal strengthening of the Colectivo Sol's team, governance and systems, was done by the entire group in plenary.

Each strategic objective was done in separate spreadsheets, which I linked into one file for easier management. This integrated file was reviewed with a smaller team on Thursday, March 10 (see bullet 3 below).

At the conclusion of the workshop, a final evaluation was conducted. This evaluation showed that:

- The process allowed the staff to see the whole picture of what the Colectivo does and gave them an opportunity to plan together what they hope to accomplish in the near future.
- The entire team was very pleased with the level of details and the harmonization between the strategic and the operational plan. "This is the first time we have done something like this," said one participant.
- Given the process established to monitor progress and reflect on the work, the staff feels that it will be easier for them to follow-up on the implementation and also identify corrective actions as needed.

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- The team enjoyed and appreciated the participatory facilitation style used by the facilitator. “It allowed for horizontal learning” and “encouraged staff at all levels to provide input and participate in the decision making process.”
- For the staff based in the field (other cities or rural areas in Mexico), the exercise allowed them to learn about all the activities of Colectivo and the future opportunities they have to capitalize on their work.
- The different group exercises and open discussions motivated the team to analyze what has been the impact of their work over the past few years, how can they improve their measurements (M&E system) and documentation, how can they expand their visibility as an institution, what else can they do to expand their program portfolio, how can they position themselves to establish new strategic alliances and generate new funding, and how can they package their services to be purchased by non-traditional clients (e.g., private hospitals).
- The staff found that the Excel template designed for the operational plan will allow them to continue expanding their skills in the use of this software and also to build it up to a more complex dashboard as they get more comfortable with it.
- The fact that each strategic objective and activity has a responsible staff person, allows the team to ensure someone will be hold accountable for its success. A participant said “I think it’s perfect that we now have responsible persons assigned to each strategic objective and activity.”
- “I love the strategic view that these processes and plans allow us to have. We need to end this attitude of going on a project-by-project basis (“proyectitis”) to move into a more strategic approach as an organization,” said another participant.
- Everyone was satisfied with the work done which was described with a few key words: “ample, deep, assertive, useful and thank you for all the support”.

3. On Thursday, March 10, I facilitated a smaller group discussion with Juan Jacobo, Gabriel, Minerva and Carlos to review the integrated operational plan to ensure harmonization across the strategic objectives and activities, avoid duplication and finalize key indicators and targets.

In addition, Juan Jacobo and I discussed future technical support AIDSTAR-Two could offer to Colectivo should USAID/Mexico be interested in buying-into the project. The areas of support include, but are not be limited to:

- Developing and implementing a business plan for resource mobilization
- Strengthening their internal governance and HR systems
- Developing and implementing an integrated monitoring and evaluation system

Should the local Mission agree, funding could be allocated for Colectivo Sol to implement grant agreements with other NGOs and CSOs to deliver services to most at risk populations and to also strengthen their own institutional capacity. It could be a multi-year project that is set up in a way that allows Colectivo Sol to replicate the technical support received from AIDSTAR-Two with other organizations, building more local capacity and contributing to country ownership. A conference call with Nancy Alvey will be arranged to explore the possibility of future funding for these and other activities.

*Note: The AIDSTAR-Two project has been granted the two optional years and will be implemented through September 2013.*

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4. On Friday, March 11, I finalized the copyediting and linked the tabs of each strategic objective to the table of contents. In collaboration with Lourdes de la Peza, MSH organizational development expert, the final technical review of both the 2011-2013 Strategic Plan and 2011 Operational Plan was completed the week following after my TDY.

### **3. Next steps:** Key actions to continue and/or complete work from trip.

Description of task	Responsible staff	Due date
Coordinate and hold a conference call with Nancy Alvey in USAID/Mexico to discuss progress to-date and the possibility of a future buy-in for FY 2012-2013	Juan Jacobo and Yadira	End of March 2011
Finalize the narrative of the 2011-2013 Strategic Plan (introduction, brief description of the FODA, and the process to monitor the plan)	Colectivo Sol – Juan Jacobo	End of April 2011
Present the 2011-2013 Strategic Plan and 2011 Operational Plan to the Colectivo Sol Board of Directors in their next meeting	Colectivo Sol – Juan Jacobo	July 2011

### **4. Contacts:** List key individuals contacted during your trip, including the contacts' organization, all contact information, and brief notes on interactions with the person.

Name	Title and Institution	Contact information	Notes
1. Juan Jacobo Hernández Chávez	Director and Co-founder of Colectivo Sol	<a href="mailto:juanjacobo.hernandez@gmail.com">juanjacobo.hernandez@gmail.com</a>	<ul style="list-style-type: none"> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
2. Carlos Cruz Camacho	Assistant to the Director Colectivo Sol	<a href="mailto:kalocru@yahoo.com.mx">kalocru@yahoo.com.mx</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning finalization workshop</li> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
3. César Antonio Coria Mercado	Project Coordinator for Vida Digna and Respondiendo Colectivo Sol	<a href="mailto:cesarcoria@hotmail.com">cesarcoria@hotmail.com</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning finalization workshop</li> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
4. Carlos Rafael Manrique Soto	Project Assistant and Co-founder of Colectivo Sol	<a href="mailto:fafafail@yahoo.com">fafafail@yahoo.com</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning finalization workshop</li> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
5. Kenya Lucena Tapia	Project Assistant Colectivo Sol	<a href="mailto:kenyluc81@hotmail.com">kenyluc81@hotmail.com</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning</li> </ul>

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			finalization workshop <ul style="list-style-type: none"> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
6. Sonia Ramírez Guzmán	Project Coordinator of the Condomóvilas Colectivo Sol	<a href="mailto:sonyguz11@yahoo.com.mx">sonyguz11@yahoo.com.mx</a>	<ul style="list-style-type: none"> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
7. María Solís Neri	Project Assistant of the Condomóvilas Colectivo Sol	<a href="mailto:marisoner@yahoo.com.mx">marisoner@yahoo.com.mx</a>	<ul style="list-style-type: none"> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
8. Gabriel Mendoza Anaya	Accountant Colectivo Sol	<a href="mailto:gavoo2001@hotmail.com">gavoo2001@hotmail.com</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning finalization workshop</li> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>
9. Minerva Espinosa Avila	General Administrator/Financial Manager Colectivo Sol	<a href="mailto:minaespinoza@prodigy.net.mx">minaespinoza@prodigy.net.mx</a>	<ul style="list-style-type: none"> <li>Participated in the 1-day Strategic Planning finalization workshop</li> <li>Participated in the 2-day Operational Plan Workshop</li> </ul>

**5. Description of Relevant Documents / Addendums:** Give the document's file name, a brief description of the relevant document's value to other staff, as well as the document's location in eRooms or the MSH network. Examples could include finalized products and/or formal presentations, TraiNet Participant List, Participant Contact sheet, and Meeting/Workshop Participant Evaluation form are examples of relevant documents.

File name	Description of file	Location of file
2011-2013 Strategic Plan of Colectivo Sol		P drive
2011 Operational Plan of Colectivo Sol		P drive