



WILLIAM DAVIDSON INSTITUTE
AT THE UNIVERSITY OF MICHIGAN

PROJECT LIST

MAY 2019–APRIL 2020

Overview

[The William Davidson Institute at the University of Michigan](#)

(WDI) was founded in 1992 on the belief that a thriving private sector was essential to the development of an economy. WDI partners with firms in low- and middle-income countries (LMICs) to develop profitable business models. We also apply business approaches to non-profit organizations working in markets that are not served by the for-profit sector.

We apply our extensive experience working with firms in LMICs to develop private sector models with a focus on professional education, healthcare, finance and energy, in addition to offering measurement and evaluation services across these business sectors. Our engagement model involves WDI staff, research fellows, faculty from the University of Michigan (U-M) and other leading business schools, and teams of U-M graduate and undergraduate students. We partner with our clients and assemble multidisciplinary teams to develop solutions. These solutions are tailored to the clients' comparative advantage while accounting for the constraints and opportunities specific to the target market.

The following is an overview of ongoing or completed projects during the last 18 months, categorized by sector or service area.

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[Business & Culture: A Virtual Practicum \(USA, Egypt, Libya, Lebanon\)](#)

WDI is a collaborative, multi-disciplinary organization. As a result, it often engages multiple sector and services teams in our work. The following project undertaken by both our Education sector and Performance Measurement and Improvement service demonstrates our holistic approach.

The Education sector is implementing Business & Culture: A Virtual Practicum—a classroom-to-classroom, action-learning course on international business cultures that brings together undergraduate students from Egypt, Lebanon, Libya and the U.S. The course is expected to run four times at the Ross School of Business, starting in Winter 2020. Participants will attend lectures by international faculty, work on interregional teams through synchronous and asynchronous exchange, employ field research methods to learn about one another’s business cultures and create a final project that captures their cross-cultural learnings. The program will equip young people in the U.S. and MENA region with the competencies they need to communicate, problem-solve and collaborate in a global team environment—all essential 21st century skills in an interconnected world.

In collaboration with the Education sector, the Performance Measurement and Improvement service is leading the design and implementation of an impact evaluation of the program on students in the U.S., Libya, Lebanon and Egypt. In addition to assessing the impact of the program on student outcomes (e.g. empathy, cross-cultural communication skills, business skills and knowledge), the data will also be used to improve the course and develop generalizable knowledge on how to increase the impact of virtual exchange courses.

[CIPE Access to Finance \(Algeria\)](#)

WDI is working with the Center for International Private Enterprise (CIPE) to develop curriculum and teachers’ guides for a training program on access to finance for entrepreneurs in Algeria. Working closely with WDI staff, a WDI consultant is developing modules in the areas of financing fundamentals, financial management for growth, creating business plans and

business pitching. WDI's curricular modules will be used by local trainers in Algeria in a four-day interactive course targeted at owners of fast-growing, small- and medium-sized enterprises.

[CIPE EPT \(Papua New Guinea\)](#)

For the past three years, WDI has been working in partnership with the Center for Private Enterprise (CIPE) to develop curriculum and instructional materials to be introduced at universities in Papua New Guinea. Initially, the project supported three PNG universities; a fourth was added in 2018—the Institute of Business Studies University (IBSU). WDI Faculty Affiliate Julie Felker took her fifth visit to Port Moresby in November 2019 to run a workshop on entrepreneurship and advise the four universities on next steps in their entrepreneurship course development.

[Ford Impact Training](#)

The Ford Community Impact Fellows Training program provides online workshops, funded by the Ford Fund, for Ford Fund Fellows from around the world. Fellows are from a dozen countries, including Brazil, Ghana, Kenya, Mexico, Morocco, and Sierra Leone. The primary goal of the program is to equip them with the skills they need in leadership and communication, using WDI-developed materials hosted on WDI's ExtendEd portal. Fellows learn from interactive online modules, individual and team assignments, and quizzes to test their understanding of the content as they go through the program.

[Livelihoods Innovation through Food Entrepreneurship \(LIFE\) \(Turkey\)](#)

WDI is collaborating with a consortium led by the Center for International Private Enterprise (CIPE) on the Livelihoods Innovation through Food Entrepreneurship (LIFE) project, funded by the U.S. State Department. In addition to CIPE and WDI, consortium members include IDEMA, Union Kitchen and The Stimson Center. This project aims to develop sustainable livelihoods in the food sector for Syrian refugees, other refugees, and their host communities by providing entrepreneurs access to training, business support services and mentorship at Food Enterprise Centers (based in Istanbul and Mersin, Turkey) designed by the LIFE project. In July 2019, a WDI team of two staff members and a consultant traveled to Istanbul to run “train-the-trainer” workshops on several modules, including leadership, customer service and social media marketing. The WDI team also met with some of the graduates of the program and conducted

interviews to assess what elements of the curriculum have been most impactful and what new course material would enhance the program. The WDI team also paid visits to the businesses of several program graduates to offer one-on-one business consulting. During the trip, the team attended a pitch competition at one of the two program site locations, Mersin, with the WDI consultant serving on the panel of judges and a WDI staff member kicking off the competition with an opening speech. WDI is currently finalizing a project workbook that will be used by all program participants as they proceed through the four-month training program.

MADE

WDI is a founding partner of the Michigan Academy for Developing Entrepreneurs (MADE), along with Poornatha Foundation in India and the Zell Lurie Institute at the University of Michigan's Ross School of Business. MADE was established to support small- and medium-sized enterprises (SMEs) in low- and middle-income countries through local Entrepreneur Development Organizations (EDOs). MADE connects the resources of the University of Michigan (U-M) with the EDOs in the field through its governance. The governing board includes seats for different institutes at the University of Michigan and EDOs in different countries around the world. Thus, the EDOs have a direct role in determining the products and services offered by MADE. MADE has involved students and/or faculty from the University of Michigan's Ross School of Business, psychology department, Institute for Social Research, Stamps School of Art and Design, Law School and School of Education.

- [Africa Institute of Management \(IAM—Senegal\)](#)
The Africa Institute of Management (IAM) in Senegal has a number of family-run companies that have asked for help with succession planning—transitioning the ownership and operation of a business from one generation to another. MADE is developing a program that includes a survey to assess the company's current state in terms of transition readiness, mentorship options, access to IAM courses to shore up skills and technical support.
- [Lviv Business School \(Ukraine\)](#)
The Lviv Business School (LvBS) in Lviv, Ukraine is one of the leading business schools in Ukraine. In 2019, based on work completed as part of MADE, LvBS started a consulting program to complement its short-term executive and graduate business education programs. This year, MADE's work with LvBS involves developing a marketing diagnostic tool to help LvBS consultants diagnose the marketing capabilities of its SME clients and identify areas for improvement.

- [Poornatha, \(India\)](#)

Poornatha is taking on its second cohort of SMEs in its Journey in Joy program, which is designed to teach and help SMEs develop comprehensive financial statements and work on general management principles. Over the past year, MADE has helped to adapt the original program to a more scalable version. MADE has also been working to develop a tool designed to help Poornatha consultants identify areas for improvement in client SMEs. This consultant development tool complements an earlier tool developed by MADE that helps SME owners to evaluate their own company.

[NGO Leadership Program \(Poland, Slovakia\)](#)

WDI is working with the Weiser Center for Europe & Eurasia (WCEE) at U-M for the sixth year to offer NGO Leadership workshops to non-profit leaders from across central and southeastern Europe. The workshop offers modules in marketing, strategic planning, resource mobilization, fundraising and management to help NGOs run more effectively and sustainably. In 2020, the workshop will be held in two locations: in Warsaw, Poland held in cooperation with WCEE and Warsaw-based partner Education for Democracy Foundation; and in Bratislava, Slovakia held in cooperation with WCEE and Bratislava-based partner, Ambrela.

[Youth Entrepreneurship Pilot \(Macedonia\)](#)

WDI has been working with CIPE to enhance an entrepreneurship and civic participation training program in North Macedonia targeting recent university graduates (21–26 years old). In the most recent and final phase of this engagement, a WDI consultant provided feedback on the entrepreneurship curriculum, and contributed training materials on customer discovery and lean startup.

ENERGY

[Assessment of Productive Use Assets \(Bangladesh\)](#)

Rahimafrooz Renewable Energy Limited (RREL), a subsidiary of the Bangladesh conglomerate Rahimfrooz, provides solar power to parts of Bangladesh. As part of RREL's goal to expand their services, they would like to identify sources of productive use of solar mini-grid generated energy that they can pair with their existing portfolio. This project is to develop a model that will allow RREL to assess different alternatives and examine the financial prospects of a few preliminary recommended uses.

FINANCE

[International Investment Fund \(India\)](#)

In 2019, Ross School of Business kicked off the International Investment Fund, a WDI supported initiative. As part of that effort, WDI worked with students and faculty from Ross to establish the protocol, review the legal requirements from both U.S. and Indian perspectives, and completed an initial round of due diligence. In 2020, the fund continued by conducting due diligence, providing support to firms interested in becoming investment ready and investigating future opportunities for investments. Some of the SMEs are located in the state of Tamil Nadu, India and are affiliated with Poornatha (a MADE partner). Fund members are developing a mechanism for filtering potential investments in the future, considering different financial instruments and preparing to conduct due diligence on more companies.

[Remittances – Awash Bank \(Ethiopia\)](#)

In 2019, Awash Bank in partnership with WDI explored the development of a program that leveraged remittances as both collateral for the loan and information about the borrower. By allowing the borrower to develop a credit rating, remittances can increase access to capital for SMEs at a reasonable rate. In 2020, Awash Bank formally created the loan product and published a procedure manual. Efforts are underway to market this loan product in Ethiopia and with the diaspora community in the U.S.

[A Total Market Approach to the Last Mile: Learning from a Private Sector Wholesaler Landscape Analysis \(Malawi\)](#)

The global reproductive health community is increasingly seeking to engage the private sector in meeting the needs for reproductive health in low-resource regions of the world. Countries such as Malawi in Eastern Africa have a high level of donor dependence and market conditions which inhibit commercial sector development, particularly for serving the more rural and remote areas. In this project, WDI's Healthcare team conducted a contraceptives distributor landscape analysis and delivered actionable and stakeholder receptivity-tested concepts for stimulating the private sector provision of family planning products and services in rural, remote and other underserved populations. The landscaping assessment involved field research and in-country discussions with market actors, but also utilized a stakeholder-centric methodology to generate ideas for market building. The results and recommendations are being shared with Malawi country stakeholders, as well as with funders and implementers for potential market building efforts, in Malawi and similar countries.

[Center for Diabetes, Endocrinology, and Cardio-Metabolism \(CDEM – Sri Lanka\)](#)

This is WDI's first project with CDEM, the only standalone diabetes clinic in Sri Lanka. The long-term plan is to expand CDEM services across Sri Lanka by integrating satellite locations providing diabetes care in peri-urban/rural areas to CDEM, which is located in Colombo. The first step is considering different models.

[Collaborative Project to Advance the Practice of Hospital Pharmacy \(Pakistan, Namibia\)](#)

WDI's Healthcare team is collaborating with the International Federation of Pharmacists (FIP), Hospital Pharmacy Section and associated pharmacy faculty (including Dr. James Stevenson at the University of Michigan) with the objective of advancing implementation of best practices in hospital pharmacy. This project grew out of an initial collaboration, including funding and assignment of a University of Michigan graduate student pursuing a doctoral of pharmacy degree to conduct a baseline assessment in Namibia during June–July 2018. This project focuses on leveraging the findings from the Namibia

assessment, as well as a Pakistan assessment in order to advance the diagnostic results into capacity building intervention and funding development for the two countries.

[Development of Tool to Estimate the Efficiency of Global Fund's HIV, TB and Malaria Investments \(Nigeria\)](#)

WDI worked with the Global Fund to develop an Excel-based tool to estimate how much money the Global Fund was spending to achieve specific health outcomes for Nigeria, one of its largest country portfolios. This project was started after recognizing the dearth of information regarding what each outcome should cost. This meant that it was difficult for the Global Fund to negotiate with providers for lower costs. This project was done under an ongoing contract with the Global Fund.

[E-Heza Digital Health Record Expansion \(Rwanda\)](#)

E-Heza is a digital health record developed by The Ihangane Project (TIP) in Rwanda at Ruli District Hospital that has attracted the interest of the government and the Global Fund. TIP has been invited to present E-Heza to the investment committee at Grand Challenges Canada Transition to Scale. They have submitted a preliminary plan, and have advised that several of the assumptions will be tested by the WDI team.

[Ethiopia Biomedical Waste \(Ethiopia\)](#)

International Clinical Laboratories (ICL) and its partners have been approached by the Ethiopian government to develop a business that would safely dispose of medical waste for healthcare facilities across Ethiopia. Through a series of projects, WDI has worked with ICL to develop a business and operations plan for biomedical waste that includes financials and an in-depth analysis of the various training requirements, operations complexities and expected costs. In 2020, ICL found a sponsor for autoclave machines and reached out to WDI to provide revised financials for purposes of investment.

[Evaluating the Impact of New Vaccine Technologies on Immunization Coverage Rates](#)

Populations in low-and-middle-income countries face a variety of barriers to receiving vaccinations, such as vaccine stockouts, cold chain breakdowns, difficulty traveling to a clinic or a lack of sufficiently trained clinic staff. New vaccine technologies have the potential to reduce or eliminate many of these barriers, but the impact of such reductions on actual immunization rates is not clear. To address this gap, WDI's Healthcare Team is developing a model to estimate the change in immunization coverage rates associated with a new vaccine introduction. The model includes six main barriers that can be addressed by new technologies. It first considers the prevalence of these barriers in the target population and then considers how effectively a new technology can address those same barriers. Those two factors are combined to estimate the change in population experiencing a barrier, which in turn influences overall immunization coverage levels. This model will help inform donor investment strategy by identifying high-priority new vaccine attributes and pairing them with high-impact target populations.

[Gastrointestinal Center of Excellence \(COE\) Equipment Plan \(Peru\)](#)

WDI has been working with the Peruvian American Medical Society (PAMS) for several years to develop its gastrointestinal specialty services business into a financially sustainable undertaking and to position it as a GI center of excellence. This year WDI completed the business plan and began considering options for purchasing and servicing of equipment.

[Ghana Emergency Medicine Collaborative – Ultrasound Strategy \(Ghana\)](#)

WDI is working with Michigan Medicine's Department of Emergency Medicine to explore point-of-care ultrasonography (PoCUS) in Ghana's hospital emergency departments. This revolutionary technology is low cost, with a broad and growing range of diagnostic applications. In collaboration with GE Healthcare Africa, WDI has begun work on a comprehensive plan for financially sustainable PoCUS throughout Ghana.

[Go-to Market Strategy Dual Pill](#)

WDI provided consultancy services to define go-to-market strategy for the dual pill with Children's Investment Fund Foundation (CIFF). This is a multi-purpose technology incorporating contraception and HIV prevention, and involves CIFF's partnership

with a pharmaceutical manufacturer. WDI contributed technical consulting services to a global health consulting firm contracted by CIFF to conduct this work.

[Grace Care Center: Business Model for Diabetes Assistants \(Sri Lanka\)](#)

WDI has been working with Grace Care Center for the past five years on a model for providing diabetes care in Sri Lanka. All of this work is feeding into developing a financially viable business model for diabetes care that involves reducing the burden on doctors. This year we are beginning to look at a hub and spoke model that capitalizes a successful diabetes center operating in Colombo.

[Harmonization of Donor and Country HIV-Related Budgets and Expenditure \(Rwanda\)](#)

This project is focused on supporting donors and country governments in understanding how much money is spent on each type of HIV-related intervention. While this seems like it should be straightforward, it is not because the both donors and countries use different budget formats, making it very difficult to compare line items between budgets. The long-term objectives of this work are to (a) understand the current costs of HIV-related programs and (b) use this information to advocate for change (increased funding or increased efficiency, depending on the results).

[Improving Reproductive Health Supply Chain Design Through Rapid and Flexible Cost Modeling](#)

An effective and efficient supply chain is critical to building a strong health system, however, identifying and implementing high-performing supply chain designs can be a challenge for many healthcare leaders. Data on supply chain costs and performance are often lacking, as are benchmarks for understanding how much a supply chain should cost. Analyzing potential future design improvements is difficult without expensive, specialized modeling software. WDI's Healthcare Team, in collaboration with VillageReach, is addressing this gap by developing and disseminating an Excel-based rapid supply chain modeling tool. The goal of this tool is to simplify the process of creating, testing and analyzing different supply chain design scenarios within a given country context.

Through this simplified approach, WDI's tool can help health program leaders more quickly and easily identify ways of improving the efficiency of their supply chain.

[Infection Prevention and Control \(Kenya\)](#)

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WDI is working with global medical device company, Becton, Dickinson & Company (BD), to assess the impact of a new program, Infection Prevention and Control, in Kenya. The program is part of the President's Emergency Plan for AIDS Relief (PEPFAR) public-private partnership with BD, the Office of the Global AIDS Coordinator and the Centers for Disease Control and Prevention. The goal of the program is to strengthen health worker and patient safety through appropriate safe intravenous infusion therapy practices, leveraging BD's longstanding knowledge and safety-engineered technology for averting HIV, hepatitis and other blood-borne pathogen transmission.

[Infinity Advanced Technology Solutions \(Ethiopia\)](#)

Infinity Advanced Technology Solutions has been a supplier of imaging and other medical equipment and consumables in Ethiopia since 2016. The company is exploring the possibility of offering radiation therapy and/or a Cyclotron facility for manufacturing Fluorodeoxyglucose (FDG). The WDI team developed a market size estimate, understanding of regulatory hurdles and costs of production as part of a business plan.

[Kisii Eye Hospital Business Plan \(Kenya\)](#)

Kisii Eye Hospital in Kenya is planning for expansion into a new facility and is developing a business plan that will allow it to apply for a loan to the International Finance Corporation (IFC) and other potential investors. The plans are based on the specifications provided by the IFC.

Landscaping of Women's Health Social Enterprises & Investment Opportunities (Latin America)

WDI's Healthcare team conducted a project for the Linked Foundation to inform social enterprise investment in Latin America. The Foundation seeks to identify market-based, impact investment opportunities specific to women's health in Latin America, based on an integrated assessment of the major unmet needs in combination with identification of high-impact solutions and opportunities to foster the enterprise ecosystem and sustainable women's health solutions. WDI developed an analytic methodology, conducted a landscaping for Colombia and Peru, and finalized a report including recommendations for development of the health investment ecosystem. The report has been widely disseminated in the Latin America impact investment community. Linked anticipates this work will inform their investment strategy as well as catalyzing additional resources to the most-needed areas in women's health in Latin America.

SHOPS Plus – HANSHEP Health Enterprise Fund Research Study (Year 4)

Funded by USAID through Abt Associates, this is a longitudinal study checking in annually with a cohort of the original SHOPS grantees—Jacaranda (a low-cost maternity center), Afya Research Africa (health kiosks located in urban slums) and Telemed (call center). The study will capture quantitative data on the extent to which these enterprises increased access to family planning during and since the end of the Health Enterprise Fund. The study will also capture qualitative data through in-person and remote interviews to better understand the role of the Health Enterprise Fund interventions in these results and how such interventions might be improved in the future.

In the first year of this study, the research identified a set of capacities that were considered by participating enterprises to be important in achieving increases in access to family planning. In the second year of the study, the team sought to better understand the sources and types of support received by these enterprises in addition to the Health Enterprise Fund, any gaps that remained and how the implementation of donor interventions to increase access to family planning, such as the Health Enterprise Fund, can be improved. Year three of the study focused on understanding the quality assurance standards and quality improvement processes put in place by these enterprises, and the motivations for implementing high-quality services.

Year four of the HHEF study will seek to better understand and document the experience of HHEF grantees thus far in their efforts to balance affordability, quality and sustainable growth. This work will also explore the barriers these enterprises face in taking the next step towards sustainability at scale, and how such private enterprise approaches might be enhanced and replicated in the future. WDI will research and write a brief to be published as a SHOPS Plus document to include lessons learned and provide recommendations to USAID Missions, and impact investors for supporting the development of private sector health enterprises.

[SHOPS Plus – HIV Core Sustainable Financing for HIV NGOs \(Dominican Republic\)](#)

WDI's Healthcare team has provided diagnostic and consultative services on revenue generation and operational efficiency for four HIV-focused NGOs in La Romana and Santo Domingo since June 2018. WDI serves as a technical contributor and consortium member of the SHOPS Plus USAID-funded project. SHOPS Plus stands for Strengthening Health Outcomes through the Private Sector, which is a natural fit with WDI's mission. The four recipient organizations in the Dominican Republic have historically received a significant portion of their funding from President's Emergency Plan for AIDS Relief (PEPFAR) and are now preparing for transition to sustainable social enterprise models. WDI's onsite diagnostic and related technical assistance was highly customized to the business models and needs of the individual organizations. WDI developed actionable recommendations for the NGO decision makers on how they could modify their strategies and/or operations to work towards financial sustainability. Return visits will be conducted to assess progress and provide additional assistance to the organizations. WDI is also providing consulting services to one of the NGOs, Clinica de Familia, for the development of a sustainable business model for its new dermatology clinic.

[SHOPS Plus – ICFP2021 Private Sector Subcommittee](#)

ICFP is the largest scientific conference on reproductive health and family planning in the world, and brings together the family planning community to share best practices, celebrate successes, and chart a course forward. WDI is co-chairing planning efforts of the newly established private sector subcommittee for the upcoming ICFP conference in 2021. The goal of the new subcommittee is to increase the strategic engagement of the private sector beyond the large manufacturer corporations. This involves

harnessing the full potential of the private sector and to catalyze public-private engagement. WDI is representing SHOPS Plus in the international planning process and co-chairing with leaders from USAID and Population Services International, Uganda.

[SHOPS Plus Madagascar Health Enterprise and Innovation Ecosystem Mapping \(Madagascar\)](#)

Health enterprises that seek to be financially sustainable and provide access to health services to low-income populations are an important part of delivering healthcare through the private sector. These enterprises provide investment opportunities for private capital, they develop innovations that can lower the cost of healthcare through new technologies or business models and they help to identify barriers or gaps in the market environment that, if addressed, could provide opportunities to improve the effectiveness of private sector healthcare delivery more broadly. However, such enterprises require significant support to identify and experiment with financially sustainable opportunities, and design business models to serve these markets. A key first step in understanding how best to support such enterprises in Madagascar is to understand the current landscape of organizations, projects and initiatives that currently operate in the country with these objectives, and what gaps might remain.

Funded by USAID through Abt Associates, WDI conducted a Health Enterprise and Innovation Mapping activity that identified innovative health enterprises in Madagascar, and the partners and types of support available to them. This information was compiled into a Madagascar Health Enterprise and Innovation Directory that illustrates the types of financial and technical support available to health enterprises, and the partners that provide various types of support.

WDI leveraged the insights gathered through the mapping to contribute to the development of recommendations that explore how USAID/Madagascar can promote enterprise innovation, leverage private sector resources and maximize priority health outcomes through financially sustainable health enterprises.

As part of the project, WDI is now providing advice and support to SHOPS Plus Madagascar to implement short-term activities to support health enterprises through a business plan competition in collaboration with Orange Fab in Madagascar and developing seminar content on private sector healthcare business models.

Surfacing Costs and Benefits to Increase Vaccine Access

Vaccines play a critical role in improving global health. While the return on investment of vaccines is on average higher than any other health intervention, there is still a critical need to evaluate the expected return of each individual vaccine presentation. The key driver of the expected return on investment of a vaccine is the price of the vaccine relative to the value that it is expected to generate through increases in coverage/equity. While simple on its face, estimating price and value is often complex since both are multifactorial. The objective of this work was to provide the Bill & Melinda Gates Foundation and partners (buyers) with a structured way of evaluating and negotiating potential investments related to the manufacturing of specific vaccine presentations. WDI team members hypothesized they could facilitate negotiations between buyers and manufacturers of vaccines by developing a flexible tool that incorporates their respective investment decision drivers and key levers related to price and value. To accomplish the objective, WDI had three aims: (1) Understand the investment decision drivers for the Foundation & partners, and potential manufacturers; (2) Identify the key levers that would form the basis of a contract that the Foundation and partners could use in negotiations with potential manufacturers; and (3) Build a tool that the Foundation and partners can use to evaluate scenarios with potential manufacturers. The output of this work is currently being applied to Foundation-related investment questions.

Taxes on Tobacco, Alcohol, and Sugar-Sweetened Beverages in Low- and Middle-Income Countries

In high-income countries, increasing taxes on “bads” such as tobacco, alcohol, and sugar-sweetened beverages has been shown to generate government revenue and reduce consumption. In many low- and middle-income countries, taxes on these products exist, but rates are so low that the effect on consumption is minimal. Moreover, policymakers are unsure whether increased tax rates would result in an amount of additional tax revenue that is meaningful when compared to indicators such as out-of-pocket expenditure on healthcare. WDI developed a set of excise tax revenue simulations for these “bads” in 16 low- and middle-income countries. Simulations used several alternative calculation methods to “triangulate” estimates for the additional tax revenue that could be generated with higher excise tax rates. Results indicate that the additional excise tax revenue would cover a significant proportion of current out-of-pocket expenditure on health for the 16

countries. These results were used during a workshop on domestic resource mobilization in low- and middle-income countries organized by the Center for Global Development.

Total Systems Effectiveness (TSE) Gates Investment Support

Total Cost Effectiveness (TSE) Gates Investment Related Support created a model to assess the business case for various initiatives/new technologies that will allow investors to understand whether a specific technology or initiative would be appealing to business partners, and, if not currently appealing, to determine how much funding would be needed to make the technology financially appealing to business partners. The project also provided overall conceptual support to WHO TSE Steering committee meetings.

PERFORMANCE MEASUREMENT AND IMPROVEMENT

Advancing the Use of Developmental Evaluation at USAID (DEPA-MERL)

Developmental evaluation (DE) was created to evaluate innovative programs that operate in complex environments and are thus expected to adapt over time. The Developmental Evaluation Pilot Activity (DEPA-MERL) under the U.S. Global Development Lab's Monitoring, Evaluation, Research and Learning Innovations (MERLIN) program at the United States Agency for International Development (USAID) is testing the effectiveness of DE in the USAID context. The DEPA-MERL consortium consists of Social Impact (prime), Search for Common Ground (Search), and the William Davidson Institute (WDI) at the University of Michigan.

As part of the consortium, Social Impact and Search are implementing DEs while WDI is serving as an evaluator to assess the effectiveness of this approach in the USAID context.

WDI seeks to answer the following three research questions:

1. How is developmental evaluation effective in the USAID context?
2. What are the barriers and enablers to implementation of developmental evaluation in the USAID context?
3. What do key informants consider to be the value (added or lost) of conducting a developmental evaluation compared to a traditional evaluation approach?

The Work

1. Family Care First in Cambodia (Nov 2016–Mar 2018)

DEPA-MERL conducted a DE with Family Care First (FCF) in Cambodia, in service of FCF's goal of increasing the number of children living in safe, nurturing family-based care.

a. A Study of the Family Care First in Cambodia Developmental Evaluation

[Executive Summary](#) | [Full Report](#) | [Annex](#)

This report provides results from an in-depth mixed-method analysis of a 15-month DE that was conducted with Family Care First in Cambodia.

b. Final Report from the Family Care First Developmental Evaluation

[Full Report](#)

Developed by Search for Common Ground, this report documents the implementation of the DE with the Family Care First Initiative in Cambodia.

2. US Global Development Lab (Feb 2017–Dec 2018)

The Sustained Uptake DE was conducted in service of the Lab's mission to source, test, and scale development solutions. The 22-month long DE helped several of the Lab's teams to collect, analyze, and disseminate learnings regarding the uptake of the innovations that these teams seek to promote within and beyond USAID.

a. A Study of the Sustained Uptake Developmental Evaluation

[Executive Summary](#) | [Full Report](#) | [Recommendations](#)

This report shares results from an in-depth mixed-method study of a 22-month DE that was conducted with the US Global Development Lab.

b. [Top Tips for Conducting Developmental Evaluation at USAID](#)

This one-pager provides guidance on how to manage barriers and promote enablers that influence DE implementation.

c. [Developmental Evaluation: How Barriers and Enablers Emerge Over Time](#)

This document shares the results from an in-depth qualitative analysis of the barriers and enablers that surfaced during implementation of the Sustained Uptake DE.

d. Final Report from the Sustained Uptake Developmental Evaluation

[Full Report](#)

Written by Social Impact, this report documents the implementation of DEPA-MERL's DE pilot with the Global Development Lab.

In addition to the pilots, the consortium also provides guidance for organizations, managers, and evaluators that seek to implement the developmental evaluation approach. See this resource: [USAID Developmental Evaluation in Practice—Tips, Tools, and Templates](#)

[Business & Culture: A Virtual Practicum \(USA, Egypt, Libya, Lebanon\)](#)

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[Good Business Lab \(India\)](#)

The Good Business Lab has co-created a low-technology tool for low-income workers in garment factories to communicate their grievances and suggestions with factory management. The goal is to develop a trusted and transparent

mechanism for grievance redressal for workers in low income manufacturing settings. A team worked with GBL on setting up a market entry strategy.

[Infection Prevention and Control \(Kenya\)](#)

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WDI is working with global medical device company, Becton, Dickinson & Company (BD), to assess the impact of a new program, Infection Prevention and Control, in Kenya. The program is part of the President's Emergency Plan for AIDS Relief (PEPFAR) public-private partnership with BD, the Office of the Global AIDS Coordinator and the Centers for Disease Control and Prevention. The goal of the program is to strengthen health worker and patient safety through appropriate safe intravenous infusion therapy practices, leveraging BD's longstanding knowledge and safety-engineered technology for averting HIV, hepatitis and other blood-borne pathogen transmission.

[Integrating Monitoring, Evaluation, Research And Learning With Design For Good Program Management \(BALANCED-MERL\)](#)

The [Balanced Design, Monitoring, Evaluation, Research, and Learning \(BalanceD-MERL\)](#) consortium is a mechanism under the U.S. Global Development Lab's Monitoring, Evaluation, Research, and Learning Innovations (MERLIN) program at the United States Agency for International Development (USAID). The consortium believes good program management integrates monitoring, evaluation, research, and learning (MERL) activities with program design (D) and implementation to achieve program objectives. Program design and implementation should not be thought of as separate from its MERL activities; these are indeed iterative processes that are deeply interconnected.

The consortium examines how balanced integration across all aspects of D-MERL enables teams to rapidly learn and incorporate findings into program design. The consortium also assesses how four principles—relevant, right-sized, responsible,

and trustworthy—can be incorporated into D-MERL to enable sustainable integration of MERL with program design and adaptive management.

The BalanceD-MERL consortium consists of World Vision (prime), Innovations for Poverty Action, Institute for Development Impact, Search for Common Ground, and the William Davidson Institute at the University of Michigan.

The Work

1. Women + Water Global Development Alliance (Nov 2016–Jan 2018)

The BalanceD-MERL consortium served as MERL technical experts to the [Women + Water Global Development Alliance](#) collaboration among USAID, Gap, Inc., CARE, Water.org, the Institute for Sustainable Communities and the International Center for Research on Women. Together, these organizations are leveraging their complementary strengths to improve and sustain the health and well-being of women and communities touched by the apparel industry. The consortium developed a MERL strategy for the Alliance and captured lessons learned in the following two resources:

- a. [Guiding Questions](#) – Nine action-oriented questions that private sector companies can ask to strengthen the design and implementation of their work with USAID.
- b. [Case Study](#) | [Executive Summary](#) – A document that shares the experience of applying the BalanceD-MERL approach in the Women + Water program and provides key takeaways along with action-items for decision-makers, program implementers, and MERL practitioners to undertake to enhance the effectiveness of this approach.

2. BalanceD-MERL Maturity Matrix

The [BalanceD-MERL Maturity Matrix](#) is a tool that can be used by both program staff and MERL staff. It can facilitate program design (D) and implementation through improved performance management and/or evaluation.

3. Global Health Ebola Team (Dec 2016–Dec 2018)

The consortium conducted an [endline performance evaluation](#) and data quality verification activity for the Global Health Ebola Team within the USAID Global Health Bureau. The Global Health Ebola Team managed a portfolio of activities aimed at addressing the second order impacts of the unprecedented Ebola virus disease outbreak in Guinea, Liberia, and Sierra Leone between 2014 and 2016. The following publications were produced from this work:

- a. [Guidance for Building a Balanced D-MERL System in a Post Response Recovery](#) – The paper comprises six building blocks of strategies which will strengthen and balance D-MERL systems during post response recoveries.
- b. [Heuristic Tool for Building a Balanced-D MERL System](#) – The purpose of this document is to help USAID staff plan for, and implement, effective and efficient programs and MERL systems in a post response recovery. This heuristic tool is a quick reference document developed to assist program managers and MERL practitioners navigating the process of building the balanced D-MERL system in this evolving context.
- c. [Case study](#) – This document provides an inside look at the application of the BalancedD-MERL approach in the Global Health Ebola Team technical assistance pilot.

[Labs for Life \(Kenya, Uganda, Ethiopia, Rwanda, India, and Haiti\)](#)

The William Davidson Institute is a collaborative, multi-disciplinary organization. As a result, WDI often engages multiple sector and services teams in our work. The following project undertaken by both our Healthcare sector and Performance Measurement and Improvement service demonstrates our holistic approach.

WDI is working with BD to measure the impact of Phase III of the Labs for Life program, which is part of the President’s Emergency Plan for AIDS Relief (PEPFAR) public-private partnership with BD, the Office of the Global AIDS Coordinator and the Centers for Disease Control and Prevention. The goal of the program is to support quality laboratory systems which are needed in order to effectively scale-up HIV prevention, care and treatment efforts. WDI developed the Monitoring and Evaluation design and implementation plan. This included co-creating the theory of change with BD, as well as the research design, key performance indicators and data collection plan. WDI is currently collecting data to measure the impact of the program activities that include Strengthening Laboratory Management Towards Accreditation (SLMTA) training and BD mentorship, in multiple labs across Kenya, Uganda, Ethiopia, Rwanda, and Haiti that are participating in the third cohort of the program

For the second cohort of the program, WDI conducted a quantitative and qualitative analysis of impacts on the program in one specific lab in Kenya. WDI also conducted a quantitative assessment of the Kenyan National Public Health Laboratory

Center of Excellence for Equipment Calibration, Certification and Training, which was set up and initiated by BD in partnership with the Ministry of Health.

Using Gender Impact Data to Develop Strategies to Increase Engagement of Women in the Coffee Sector

With funding support from the Aspen Network of Development Entrepreneurs (ANDE) at the Aspen Institute and Canada's International Development Research Centre (IDRC), WDI is working with Gente del Futuro (GDF)—a for-profit partnership between two private players within the coffee sector. Together, GDF and WDI are working to collect empowerment data from women working with GDF in Colombia. GDF believes that making coffee more profitable and empowering young people through practical and technical training can promote a more inclusive approach to develop better functioning coffee chains.

To help accomplish this objective, WDI is supporting GDF to pretest and pilot a short quantitative survey that examines how empowerment differs based on women's role in the coffee value chain. The data will be used to inform GDF's operations, in particular how they can better engage and empower women. The survey will be administered to a sub-sample of the 300–500 women that GDF has worked with over the years in Colombia and will assess decision-making and empowerment at home and work.



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PROJECT LIST

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