



WILLIAM DAVIDSON INSTITUTE  
AT THE UNIVERSITY OF MICHIGAN



2017-18  
PROJECT  
LIST

# 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. More than 25 years later, WDI continues to embrace this premise by working with firms in low- and middle-income countries (LMICs) to develop profitable business models and 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 business models with a focus on professional education, healthcare, finance, and energy, in addition to offering measurement and evaluation services. Our engagement model involves WDI staff, research fellows, faculty from the University of Michigan (U-M), faculty from other leading business schools, and/or teams of University of Michigan graduate students working with our clients 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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### ACLEDA Institute of Business in Cambodia (Cambodia)

WDI has been advising ACLEDA Institute of Business (AIB) in Cambodia on building capacity of the school. WDI conducted a benchmarking study to assess AIB's market position and to provide strategic recommendations for AIB's development into a world-class business schools. WDI worked with AIB faculty and staff to identify the school's strengths and weaknesses, as well as available resources and any constraints. Following the study, an AIB delegation visited WDI in the fall of 2017 to meet with University of Michigan Ross School of Business professors and administrators to learn how the school handles a range of operations, including faculty recruitment and promotion, student services, library services, curriculum development and action learning. WDI presented AIB with a final report and suggestions for how to scale operations over the next five years. As a result of the engagement, AIB now has a clear strategy for developing its staff, faculty, operations and degree offerings.

### Empowering Women Leaders in Indonesia (Indonesia)

WDI trained consultants from the firm PwC on how to teach a WDI-developed women's leadership program. The Indonesia-based project was organized by the Center for International Private Enterprise and funded by the U.S. State Department. As a result of the program, over a dozen local Indonesian trainers are now equipped to train local female managers—ensuring they're well positioned to take a leading role in Indonesia's growing economy.

### Institut Africain de Management (IAM-Senegal)

WDI has been working with IAM since 2016 on an academic partnership focused on developing a supply chain program. The goal of the partnership is to graduate students that multinational companies will want to hire for their supply chain needs in West Africa. WDI has been working with IAM on the business model for delivering a supply chain program that will be profitable.

The program includes three key features:

1. It provides curriculum that is consistent with the best business schools in the world while offering the flexibility needed by the Senegal audience. For example, while the initial

program is designed as a Masters in Supply Chain Management, students with more specific educational needs or interests will be able to take just those relevant courses.

2. The pedagogy takes advantage of recent advances in technology and the science of learning by incorporating all forms of teaching including online courses, simulations and action-based learning.
3. The program is working with the private sector to ensure the students understand the application of concepts in companies and to ensure the school has a mechanism to remain in touch with private sector challenges.

In October 2017, the program was launched with an initial cohort of 13 students. WDI has continued to enhance the courses while also adding new elements, including exploring opportunities to introduce internships.

### LIFE: Promoting Refugee Livelihoods in Turkey through Food Entrepreneurship (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, providing entrepreneurs access to training, business support services, and mentorship at Food Enterprise Centers designed by the LIFE project. Working with Turkey-based partners, WDI led the development of an entrepreneurship curriculum composed of 25 modules. In February 2018, WDI conducted a train-the-trainer program in Turkey, training local trainers and consortium partners on how to deliver the curriculum to entrepreneurs. WDI also developed a curriculum to train food incubator personnel on how to build and manage the LIFE Food Enterprise Center, and conducted an in-person training which included a Business Model Canvas workshop. And finally, WDI conducted a mentorship environment assessment in Turkey and developed tools for establishing an entrepreneur mentoring program, which will be made available to all entrepreneurs enrolled in the training program.

## MADE (India)

WDI is a founding partner of the Michigan Academy for the Development of 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 in low- and middle-income countries through Entrepreneur Development Organizations (EDOs). Over the past year, MADE was founded and began developing an instrument used by entrepreneurs to assess specific challenges and develop recommendations on actions they can take to improve their performance. MADE has two distinguishing features. First, MADE's role in connecting the resources of the University of Michigan (U-M) with the EDOs in the field is reflected in its governance, which has a role for different parts of U-M and for EDOs. Thus, the EDOs have a direct role in determining the products and services offered by MADE. Second, MADE has a permanent executive director, but is otherwise completely student run. In the first year, MBA students worked with Ross faculty and staff, the Institute for Social Research at U-M and the university's Psychology department, among other areas, in developing the survey. The team oversaw the development of the first product, the survey tool and laid out a plan for the coming years including expansion plans to countries beyond India.

## M<sup>2</sup>GATE (Egypt, Morocco, Libya and Tunisia)

WDI created the MENA-Michigan Initiative for Global Action through Entrepreneurship (M<sup>2</sup>GATE) program, supported by a grant from the Aspen Institute Stevens Initiative. The virtual exchange program pairs undergraduates from three Michigan universities with their peers from the Middle East and North Africa to work together in finding entrepreneurial solutions to social problems in the region. WDI will complete all three cohorts by the end of July 2018, serving over 500 students. The response has been very positive, with students praising the program for helping them work with people in different cultures and exposing them to new concepts in design thinking, entrepreneurship, leadership and virtual collaboration. M<sup>2</sup>GATE will culminate in a visit by the winning teams to Ann Arbor to participate in a week of entrepreneurial activities, including a business pitch competition, in November 2018.

## NGO Leadership Program (Slovakia)

WDI is working with the Weiser Center at U-M for the fourth year to offer an NGO Leadership workshop to non-profit leaders from across central and southeastern Europe. The workshop

offers modules in marketing, strategic planning, resource mobilization and management to help NGOs run more effectively and sustainably. This fall, the workshop is scheduled to move from Slovakia to Poland, with a new local partner, Education for Democracy Foundation.

### Outbound (Brazil)

Outbound gathers information on startup companies and matches them with sponsors who participate with the organization. It also conducts due diligence on startups within the broader Brazilian market to facilitate investment decisions. The result of the project was a landscape analysis of venture funding in that country and a recommendation on the most profitable direction forward for the organization.

### Palestine Polytechnic University (Palestine)

WDI has been working with Palestine Polytechnic University (PPU) to develop a life skills orientation course for incoming undergraduate students. The goal of the course is to prepare students with important life skills before they begin their university courses so that they are better prepared for their academic and professional careers. WDI is developing a curriculum and is holding a one-week train-the-trainer program to prepare PPU faculty members to run the program.

### Poornatha (India)

WDI has been working with Poornatha or its affiliates for almost 10 years. As part of MADE (description above), a team worked with Poornatha in southern India to test an assessment tool with 42 entrepreneurs developed by MADE. The tool assesses the pain points, knowledge and processes developed by the entrepreneurs and the results in four documents to guide them: an outline of their business model; a SWOT analysis; opportunities for improvement and possible gaps in knowledge. The project led to improvements in the assessment tool and preliminary recommendations on the next step, which is the development of a coaching model based on the assessment tool.

### Society for Human Resources Management (Guam)

WDI began a new partnership with the Society for Human Resources Management Guam with WDI contributed to a conference in Guam entitled “Leadership through Learning.”

### The Technological Institute of the Philippines (Philippines)

WDI developed recommendations on a strategy to reach long-term goals for the Technological Institute of the Philippines (TIP), a private, tertiary education institution that specializes in engineering and technology. In 2016, TIP launched TechnoCoRe, which stands for student technopreneurship and collaborative applied research. Through experiential learning processes that are supported by industry and entrepreneurs, TIP has begun a program to develop engineering and technology students’ skills in transforming problems into opportunities through generation of ideas, validation and project execution. The project resulted in clarification of the TIP’s long-term goals and strategic recommendations on steps to reach them.

## HEALTHCARE

### Analysis on the Availability and Affordability of Cardiovascular Disease (CVD) Medicines

WDI conducted a preliminary mapping of the global supply for CVD medications to develop policy recommendations for the GlobalHEARTS Initiative. Developed by the Centers for Disease Control and World Health Organization, the initiative works to promote research to examine the barriers affecting availability and access to CVD pharmaceuticals in low- and middle-income countries. WDI also analyzed a host of country Essential Medicines Lists for CVD medication inclusion.

### Aravind Eye Care System (AECS–India)

AECS is one of the largest eye care service providers in the world providing care to 4.7 million patients last year and conducting over 450,000 surgeries. It is one of the most successful health care delivery operations in the world and as a result, has been the subject of studies from universities and the World Health Organization for years. AECS has hospitals in 11 locations in southern part of India. WDI has



been working with AECS since 1999 on a series of projects designed to improve operations. AECS opened a tertiary eye care center in Chennai in September 2017 that will ultimately serve more patients than any other facility in the AECS system.

This year, WDI worked on a project with AECS to strengthen the processes necessary to improve efficiency of specialty eye care, as demanded by the changing needs of patients in India. The project emphasized the creation of a new clinical position that would play a greater role in diagnosing and directing patients to the appropriate next step in delivery. AECS Chennai has started taking steps to implement the recommendations.

### Capabilities-System Framework for Planning a Health Supply Chain Improvement Initiative

WDI helped the Bill and Melinda Gates Foundation adapt a “capabilities-system” framework from the private sector for use with a low- and middle-income (LMIC) health supply chain. The work was designed to address a gap between some country government initiatives meant to improve the efficiency and effectiveness of health supply chains that have been successful and others that have not shown significant benefit. Potential causes for this limited impact include a lack of coherence across the initiatives and a disconnect between the initiatives and a country’s overarching public health and health supply chain objectives. By applying this framework, the organizations expect greater overall coherence across projects in a health supply chain improvement initiative as well as with overarching public health and health supply chain objectives. This is expected to lead to greater long-run health supply chain efficacy and efficiency in LMICs.

### CURE-Ethiopia Clubfoot Program (Ethiopia)

WDI worked with CURE-Ethiopia to identify areas of operation that needed improvement, such as procurement and manufacturing of the braces that used to treat clubfoot. The Institute also proposed changes in strategy and operations, including targeted investments, that would allow CURE to treat all patients born with clubfoot in Ethiopia. Since it was founded ten years ago, CURE-Ethiopia has only been able to treat about one quarter of the people born with the clubfoot in the country each year. A WDI team also developed recommendations for expanding the brace manufacturing operation within Ethiopia.

## Designing Global Health Supply Chains for the Future

WDI helped the Gates Foundation build alignment and a clear vision among donor agencies, governments and private companies regarding supply chain investments that must be made now to prepare for future changes in healthcare demand. These investments are driven by a convergence of trends in technology, innovation, economic growth and shifting disease burdens. WDI helped provide this clear vision through a number of different research avenues:

1. Synthesizing reports on future trends across several industries, breaking down the meaning and applicability of those trends for the governments, donor agencies, private companies and patients who comprise the global health supply chain
2. Developing quantitative models to estimate future changes in health supply chain demand levels, based on existing epidemiological, socioeconomic, and medical trends research
3. Simulating the impact of future demand changes on supply chain capacity needs and choice of optimal strategy

Through these various approaches, WDI successfully started a global conversation about the need for more future-oriented supply chain investments.

## Development of a Framework for Evaluating Vaccine Coverage as a Function of Vaccine Presentation

WDI helped the Bill and Melinda Gates Foundation develop a framework that could be used to estimate the expected change in vaccine coverage that could be obtained as a function of the vaccine presentation chosen. While there is widespread recognition that some vaccine presentations are better suited for specific contexts than other vaccine presentations, quantifying the marginal change in vaccine coverage can be difficult given the sparsity of data. By using a supply-demand framework and surrogate markers, WDI developed a relatively simple model to produce useful data for vaccine buyers (e.g., Gavi) and sellers (R&D, manufacturers).

## Development of an Excel-based Tool to Guide Negotiations with Potential Manufacturers

WDI's project goal was to provide the Bill and Melinda Gates Foundation and partners (i.e. "buyers") with a structured way of evaluating and negotiating potential investments related to the manufacturing of specific vaccine presentations. WDI hypothesized that it 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. The expected outcome of this work is increased availability of vaccines in low- and middle-income countries.

## Development of Tool to Estimate 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.

## Ethiopian American Doctors Group (EADG–Ethiopia)

EADG is a group of more than 250 Western-trained clinicians who have committed time and money toward the development of a world-class tertiary care hospital in Addis Ababa. EADG broke ground on the hospital in 2017 year and expects to open in 2020 with 300 beds, 8 operating rooms and an 80-room multi-specialty clinic. WDI has worked with EADG since 2014 on the governance of the hospital, capital equipment planning and a financial model. This year, WDI developed a model to train nurses that meet international standards. The recommendation also includes financial analysis and partnership recommendations.

## Grace Care Center (Sri Lanka)

WDI's work focused on the value of a technician training program that would allow doctors to see more patients without reducing quality. WDI has been working with Grace to develop a model to serve diabetes patients in Sri Lanka since

2015. Collaborating with faculty from the University of Michigan as well as staff at Grace, the projects have looked at financial viability and the triage process.

#### HANSHEP Health Enterprise Fund Grantee Study (Kenya & Ethiopia)

WDI is studying how the availability of grants and technical assistance facilitates the efforts of health enterprises to reach scale, particularly in the provision of family planning products and services. This study tracks the performance of a subset of participants in the HANSHEP Health Enterprise Fund (HHEF). In the first year of this study, the research team identified a set of key capacities that participating health enterprises considered to be important in achieving increases in access to family planning, and how support from the HHEF helped to build these capacities. In the second year of the study, the team is seeking to better understand the economics of how family planning products and services are integrated into the enterprise's business model. The team is also exploring other sources and types of support received by these enterprises and any gaps that remained, with the aim of improving the design of similar interventions in the future.

#### Harm Reduction Care—Potential Cost-Savings Opportunities Related to the Delivery Model (Georgia).

WDI investigated how the cost of harm reduction services varied across health centers within the country of Georgia, and identified potential cost-saving opportunities related to the delivery model. Within Georgia's current HIV/AIDS program, the Global Fund supports harm reduction services for injection drug users. However, Georgia is expected to fully transition to local financing of its HIV/AIDS and TB programs by 2022. In preparation for this transition, Georgia has been interested in identifying ways to reduce the cost of harm reduction services to ensure sustainability. While the focus of WDI's work was harm reduction services in Georgia, the principles behind it are applicable to other partner countries, particularly to those that are transitioning. This work was done under WDI's ongoing contract with the Global Fund.

#### Health Supply Chain Improvement Project (Togo)

WDI assisted the government of Togo in identifying and addressing performance bottlenecks in the public-sector health supply chain. On behalf of the Gates Foundation, WDI assessed the current operations of the Togolese health supply chain across a wide range of functions,

products and health system levels. WDI identified root causes for the last-mile stock out of essential medicines and validated these root causes during a meeting convening 50 high-level local stakeholders. WDI then developed a clear process and strategic framework for designing and implementing activities to address root causes. This project provided the government of Togo with the evidence and tools needed to make significant improvements to the public-sector health supply chain. Moreover, many aspects of WDI’s engagement—from the use of management consulting-based strategic frameworks to research on capabilities of private pharmaceutical wholesalers—helped to lay a foundation for supply chain improvement activities which are driven by private sector principles and lead to market-oriented solutions.

### Health Supply Chain in Senegal, with a Focus on the Last Mile (Senegal)

WDI extensively reviewed literature, conducted interviews with in-country stakeholders and consulted with cross-sector supply chain experts to develop a report on behalf of the Gates Foundation that provided recommendations for strengthening Senegal’s health supply chain, specifically in regard to last-mile delivery. WDI also delivered recommendations for better incorporating service to the last mile in the national health supply chain strategy. Senegal faces several challenges to ensuring that existing health supply chain continues to expand its reach, product range and quality of service. Several initiatives to improve the function and reach of the health supply chain have been implemented over the previous decade, including the “Informed Push Model,” which has achieved notable success at increasing product availability at the “last mile.”

### Holistic Framework for Assessing Supply Chain Cost Effectiveness (Zimbabwe, Tanzania, Nigeria, and Togo)

WDI developed an approach and toolkit to help governments and donor agencies manage complex data and conflicting priorities when evaluating supply chain designs. On behalf of the Gates Foundation, WDI developed an approach for quantifying the priorities of individual stakeholders and then used those priorities to weight the observed performance of a supply chain model. Drawing upon academic and industry research in multi-criteria decision analysis, this approach resulted in a simplified, composite performance metric that enabled easy comparison across different supply chain models and stakeholders. By applying this approach retrospectively to health supply chain pilot

analyses in Zimbabwe, Tanzania, Nigeria and Togo, WDI increased government and donor awareness of the true diversity of real-world stakeholder priorities and highlighted the importance of addressing such priorities in the performance management process.

### Improvement of the Cost-Recovery System for Health Products in Madagascar (Madagascar)

WDI, with funding from USAID, is working with the government of Madagascar and the Global Health Supply Chain Program to develop a financial model for the country's existing cost-recovery system. This financial model will then be used to identify policy recommendations to improve the likelihood of consistent financial solvency for each of the entities involved in the cost recovery system.

The expectation is that the recommendations generated would improve the financial solvency of Madagascar's cost-recovery system, which is meant to recover the logistics and administrative costs associated with the provision of essential medicines.

### Infection Prevention and Control (Kenya)

WDI is working with global medical device company, Becton Dickinson (BD), on 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, OGAC and CDC. 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. WDI is designing and implementing an assessment of the impact of the new program.

### Institut Africain de Management (IAM-Senegal)

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The program includes three key features:

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2. The pedagogy takes advantage of recent advances in technology and the science of learning by incorporating all forms of teaching including online courses, simulations and action-based learning.
3. The program is working with the private sector to ensure the students understand the application of concepts in companies and to ensure the school has a mechanism to remain in touch with private sector challenges.

In October 2017, the program was launched with an initial cohort of 13 students. WDI has continued to enhance the courses while also adding new elements, including exploring opportunities to introduce internships.

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

WDI is working with Becton Dickinson (BD) on two components 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. WDI will design and conduct an assessment of the third Labs for Life cohort, exploring the influence of the Strengthening Laboratory Management Towards Accreditation (SLMTA) training, BD mentorship, specimen referral system strengthening, leadership training and other activities on labs in the cohort over the period of the program. WDI's second assessment involves the impact of selected activities within Phase 2 of Labs for Life, including Kikuyu lab's accreditation. This included a quantitative and qualitative analysis as well as 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.

## Livewell (India)

WDI has worked over the past year on the opening of a second location of Livewell, which provides rehabilitation services to patients who need therapy and limited clinical oversight but do not require hospitalization. The new facility, in Hyderabad, opened in October 2017 and WDI's work has focused on improving the internal processes in anticipation of significant growth. Recommended changes focused on the staffing model and metrics that identify ways to improve operations on a continuous basis and demonstrate effectiveness of treatment. Four of the recommendations were implemented within two months.

In 2011, WDI worked with the Livewell leadership in the planning and early operations of its first facility in Madurai.

## Market Assessment of Pregnancy Tests in Five Countries

WDI assessed the market conditions for pregnancy tests in both public and private sectors for five selected country regions to determine whether and how access to both pregnancy tests and hormonal family planning methods could be improved. Studies suggest that making pregnancy tests more widely available can increase the same-day start of contraception for women seeking family planning services, reducing delay and client drop-off. WDI worked with Abt Associates and an in-country consultant to collect information on pregnancy test markets, such as availability price, quality perceptions and provider behavior. WDI then analyzed the findings with a USAID framework and used a consultative process to identify the most promising solutions for each country. This work provided USAID with strategic recommendations for the local conditions within each country, forming the basis for consultation and planning with USAID country mission teams.

## MarketBookshelf.com

WDI partnered with the Reproductive Health Supplies Coalition (RHSC) and USAID to develop a large open-access collection of global health market literature, known as MarketBookShelf.com. The objective of this work was to address the need for one, easy-to-navigate online platform to facilitate the dissemination and sharing of global health knowledge. With colleagues from RHSC and USAID, WDI designed and developed the website, conducted literature searches to source content, and engaged contributors and users across the



global health community. This knowledge-sharing platform will increase returns on donor and other stakeholder-funded research, and help advance global health objectives.

#### Peruvian American Medical Society (PAMS–Peru)

WDI is working with PAMS, which operates a primary care clinic in Chinchipe, Peru, to assess the market potential for a specialty in gastroenterology and ophthalmology. WDI also is developing a clinical plan to expand operations into a gastroenterology center, with the goal of generating revenue to support the clinic’s general care operations.

#### Ruli District Hospital and the Ihangane Project (Rwanda)

Ruli Hospital serves seven in-district health centers as well as six to eight out-of-district health centers, a catchment area of about 100,000 individuals. The hospital offers outpatient consultation, emergency services, in-patient hospitalization, maternity, ophthalmology, dentistry and mental health services. WDI has been working with Ruli District Hospital and the Ihangane Project in Rwanda since 2010 to improve operations and the financial viability of the hospital. This year, WDI reviewed the market opportunities and financial benefits of a private clinic within the hospital to generate revenue to support the overall hospital.

#### Sahel Women’s Empowerment and Demographic Dividend (SWEDD)

WDI, in a second phase of support to the SWEDD initiative, drafted a report summarizing the strengths, weaknesses and lessons learned during the execution of the first phase of the initiative’s supply chain activities. The report captured the perspective of stakeholders at all levels of implementation - from donor organizations to independent consultants at the country level. The lessons learned from the execution of the SWEDD supply chain activities were shared with teams at the Global Fund and the Bill & Melinda Gates Foundation, encouraging greater efficacy and efficiency of future, similar country engagements.

#### VAYU (Kenya, the Philippines, Zambia and Senegal)

WDI is conducting market research for a company that designs and manufactures unmanned aerial vehicles (UAV) to transport small goods. Use of UAVs to transport items in low- and middle-income countries is low but they show significant potential for making healthcare

commodities available in settings with poor infrastructure challenges. As a result the Bill & Melinda Gates Foundation is interested in helping UAV companies that serve these markets to reach a financially sustainable position. The purpose of WDI's market research is to identify opportunities for this company's expansion into both healthcare and non-healthcare sectors in Kenya, the Philippines, Zambia and non-healthcare sectors in Senegal. Data have been collected from decision-makers in public and private organizations in each country covering several topics such as product use cases, current transport activities and factors influencing the purchase or lease decision. Data will be analyzed and summarized into a go-to-market strategy for this UAV company in these four countries.

## IMPACT ASSESSMENT

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

Developmental evaluation 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 developmental evaluation 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 developmental evaluations while WDI's role is to serve as an evaluator and assess the effectiveness of developmental evaluation within and across pilots.

In collaboration with DEPA-MERL team, WDI seeks to answer the following three research questions for each developmental evaluation: (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 stakeholders consider to be the value (added or lost) of conducting a developmental evaluation compared to traditional evaluation approaches?

## The Work

This project currently includes the following developmental evaluation pilots:

1. Family Care First in Cambodia (Nov 2016–Mar 2018)  
DEPA-MERL conducted a developmental evaluation 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
  - b. Final Report from the Family Care First Developmental Evaluation Full Report  
Developed by Search for Common Ground, this report documents the implementation of DEPA-MERL's developmental evaluation pilot with the Family Care First Initiative in Cambodia
2. USAID Global Development Lab (Feb 2017–Dec 2018)  
This ongoing pilot examines USAID's uptake of innovations.

In addition to the pilots, the consortium also provides guidance based on learnings to date 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](#).

## Infection Prevention and Control (Kenya)

WDI is working with global medical device company, Becton Dickinson (BD), on 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, OGAC and CDC. 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. WDI is designing and implementing an assessment of the impact of the new program.

## Integrating Monitoring, Evaluation, Research and Learning with Design for Good Program Management (BalancedD-MERL)

The Balanced Design, Monitoring, Evaluation, Research, and Learning (BalancedD-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 BalancedD-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 BalancedD-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. Global Health Ebola Team (Dec 2016 - Present)

The BalanceD-MERL consortium is conducting 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 manages 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.

Labs for Life (Kenya, Uganda, Ethiopia, Rwanda, India, and Haiti)

WDI is working with Becton Dickinson (BD) on two components 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. WDI will design and conduct an assessment of the third Labs for Life cohort, exploring the influence of the Strengthening Laboratory Management Towards Accreditation (SLMTA) training, BD mentorship, specimen referral system strengthening, leadership training and other activities on labs in the cohort over the period of the program. WDI’s second assessment involves the impact of selected activities within Phase 2 of Labs for Life, including Kikuyu lab’s accreditation. This included a quantitative and qualitative analysis as well as 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.

**ENERGY**

Accelerating an Impact Industry: Lessons from the Clean Cookstove Industry (Kenya, Bangladesh)

WDI reviewed and documented lessons learned by the Global Alliance for Clean Cookstoves (the Alliance) since its inception. The Alliance is a public-private partnership hosted by the United Nations Foundation that aims to save lives, improve livelihoods, empower women, and protect the environment by creating an efficient and thriving global market

for clean and efficient household cooking solutions. The alliance's goal is to facilitate the creation of a market that enables 100 million households in developing countries to access clean cooking solutions by 2020. Through interviews with staff and alliance partners in Washington, D.C., Kenya and Bangladesh, WDI sought to identify which of the alliance's efforts focused on building the market for clean cooking solutions have worked, which of these efforts have been less successful, and how these outcomes might be translated into lessons learned and strategic options for the alliance. WDI also sought to develop insights that could be beneficial for other organizations interested in a global approach to market creation in low income settings. This work also resulted in the development of a conceptual framework for how to accelerate impact industries, which was the subject of an article published online by *The Stanford Social Innovation Review* in June 2018.

### Business Models for Energy Entrepreneurship in Emerging Markets (India, Uganda, Cuba)

WDI's research project aims to identify the factors influencing the performance of energy enterprises in emerging markets, and provide a framework and methodology for documenting and assessing these models. The team will identify factors that relate to the technical, business, policy and socio-economic contexts that energy enterprises operate within, and compile an initial repository of energy business models using these factors as an analysis methodology. It also will look at energy enterprises in Uganda, India and Cuba leveraging existing relationships across both WDI and the Erb Institute.

### Ecoprise (Nepal)

Founded six years ago, Ecoprise designs, builds and installs clean energy products in Nepal for the underserved, energy-poor communities in order to create positive economic, environmental and social impact. Ecoprise recently started AgroHub, a pay-as-you-go service-based business model that aims to provide access to solar-powered infrastructure for remote underserved farming communities. These hubs provide farmers with access to equipment for irrigation, clean drinking water, food-processing and refrigerated post-harvest storage as a service, with ownership of equipment remaining with AgroHub or Ecoprise. The WDI intern, Matthew Carney, developed a theory of change report and a

business plan for Ecoprise's AgroHub model as part of its efforts to bring solar-powered agricultural services to subsistence farmers in the western Nepal region of Terai.

### Energy Access India Study (India)

WDI is gathering data from enterprises that are part of the Miller Center for Social Entrepreneurship's Energy Access India portfolio, impact investors and other ecosystem players to identify learnings that may be helpful to entrepreneurs seeking to enter the energy access space in India. These learnings will also be relevant to investors interested in supporting these enterprises, and those stakeholders seeking to improve the ecosystem of support. Data has been collected through in-person interviews conducted during a field visit to India, and through phone interviews and analysis of secondary data. The findings from this work will be published and launched at an EAI event in Delhi in September 2018 upon conclusion of the project.

### REFRESCH (Gabon)

The project is part of the University of Michigan-funded REFRESCH program, which has proposed the development of the REFRESCH Institute for Sustainability Education (RISE) in Lambaréné, Gabon. REFRESCH refers to Researching Fresh Solutions to the Energy/Water/Food Challenge in Resource Constrained Environments and is consortium of educators and researchers working to improve the lives of those living in resource-constrained communities. This proposal envisions an institute that will develop and implement innovative entrepreneurial educational methodologies centered around some of Gabon's most significant development challenges, including access to affordable, renewable energy. RISE will provide students with a program of entrepreneurial education specifically tailored to launching and managing energy enterprises that increase energy access. WDI worked with REFRESCH to assess the market demand for PV solar energy in rural off-grid areas of Gabon to determine if there is sufficient demand to support a profit-seeking enterprise.



**WILLIAM DAVIDSON INSTITUTE**  
AT THE UNIVERSITY OF MICHIGAN



724 E. University Ave., Wylie Hall, 1st Floor  
Ann Arbor, Michigan 48109-1234 USA  
P: +1.734.763.5020 • F: +1.734.763.5850  
[wdi@umich.edu](mailto:wdi@umich.edu)