



WIT MENA

الشرق الاوسط و شمال افريقيا

Women in Technology :

Middle East and North Africa

Business Planning For Sustainability

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Community Technology Center
Planning & Implementation



INSTITUTE OF
INTERNATIONAL
EDUCATION

WIT Program Overview

Women in Technology (WIT) for the Middle East and North Africa (MENA) Region is funded by the Middle East Partnership Initiative (MEPI) of the U.S. Department of State, managed by the Institute of International Education (IIE) West Coast Center, and implemented in collaboration with local partners in seven countries: Egypt, Iraq, Kuwait, Oman, Saudi Arabia, United Arab Emirates, and Yemen.

Primary Goals of WIT MENA are:

To create a strong base of women with the ability to use IT skills which allow them to gain access to new careers and to influence policies for democratic change.

To provide substantial capacity building to Partner Organizations to expand their reach, sustainability and ability to serve women.

Women In Technology Mission Statement

Women in Technology (WIT) strives to empower women and expand their participation in the workforce by providing Partner Organizations, and the women they serve, with cutting-edge curricula and training opportunities in Business Planning, Professional Development and Information Technology (IT). Our goals are:

- To provide substantial capacity building to Partner Organizations to expand their reach, sustainability and ability to serve women.
- To create a strong base of women with vital IT and Professional Development skills, allowing them to gain access to new careers and training opportunities.
- To empower WIT participants to play an integral role in shaping their country's future.

Community Technology Center (CTC) Initiative

The CTC project is intended to assist organizations in:

- Providing access and opportunity to women in an effort to enhance their marketable skills, gain economic independence and increase the power of the private sector in building a democratic society.
- Increasing the level of women's participation in building pluralistic societies through civil society strengthening.

Community Technology Center (CTC) Initiative

Additional outcomes for partner organizations would include:

- Achieving a sustainable business model for delivering IT and soft skills training to women.
- Increasing the number of low- middle income women who are trained and entering the workforce.
- Providing a professional development network to a diverse group of women who actively participate.

Setting Your Direction

It is important to understand that this particular business planning tool is designed specifically to assist your organization with the development of a **sustainable CTC** and to achieve the outcomes specific to the MEPI and IIE project goals.

Elements of the curriculum include this handbook, as well as the:

- CTC Action Plan Template
- CTC Business Plan Template
- CTC Cost Recovery Financial Tracking Tool
- CTC Implementation Guide Template
- Recovery Statement

The Goal of Your Business Plan

The business model you will develop for the CTC is based on what is known as the cost recovery model. The cost recovery model implies that your CTC will extend upfront funding and recover the operational costs as participants pay fees for training services.

Unique Factors of Cost Recovery

This presents several unique factors for consideration. As you prepare your business plan, consider:

- The estimated length of time it will take the CTC to begin generating income.
- The amount of start up “cash” needed to sustain the CTC, until income is generated.
- The actual expenses that will be generated by the program.
- The appropriate fee(s) you will need to charge in order to recover the expenses that are generated by the program.

Unique Factors of Cost Recovery

How many participants you can realistically serve at any one time?

What the hours of operation will be for the CTC and how many classes can be offered during those hours.

How much staff will be required to service those classes, prepare schedules and maintain the operation of the CTC.

Specific Elements of this Curriculum Include:

- Action Plan
- Business Plan Template
 - Contact Information Page and Executive Summary
 - Organization Description
 - The Market
 - Operations
 - Sales & Marketing
 - Financials
 - Optional Add-Ons
- Implementation Guide
- Cost Recovery Financial Tracking Tool
- Cost Recovery Statement

Benefits of the Development Process

- Considering all the elements that will need support in order for the CTC to be sustainable.
- Fully understanding how much revenue is required to sustain the program.
- Preparing a marketing approach to insure that participants know about the services available through the CTC.

Using the Action Plan Template

The Action Plan Template provides worksheets to outline goals and monitor progress as you develop your CTC Business Plan. The worksheets highlight seven major milestones that involve various elements of the business plan development process. These milestone goals are targeted for specific weeks during a 12 week period.

Using the Business Plan Template

The Business Plan Template is designed to guide you through the writing and development process. Again, remember that your plan is focused on the CTC portion of your organization and not the organization itself. Once you populate the template with content, you may print it and use it for presentation purposes. It has been formatted to provide a professional looking plan that can be used with funders, bankers and other resources as you initiate and build your CTC.

Using the Microsoft Excel Cost Recovery Financial Tracking Tool

The CTC Cost Recovery Financial Tracking Tool is provided as a way to track income and expenses specific to the CTC and the “break even” point of your cost recovery structure. The tracking tool is created in Microsoft Excel.



Using the Recovery Statement

The Recovery Statement is a Microsoft Word template and is provided as a way for you to plan for how to reinvest any recovery revenues that are generated from your CTC.

Using the Implementation Guide Template

Developing a good plan is half the work. The second half is using the plan you develop to create progress and success. The Implementation Guide Template provides a way to track your progress and goals on a quarterly basis and to build in accountability for the members of the team who are responsible for implementing the plan.

The Implementation Guide is a good tool to use to track and monitor progress. It also allows you to change and update your business plan as needed. Specific instructions on how to use the Implementation Guide Template are included in the template document.

Using Your Completed Business Plan

Think of the plan you are about to create as a roadmap. Allow it to guide you through the process of thinking about your CTC, how it relates to the overall organization, what resources it requires, what benefits it can bring participants and how to achieve its mission. By the time you have completed the document you will have answered these questions and much more.

What are some ways you can use your Business Plan?

Description of CTC

This section is Milestone #1 of the Development Action Plan. The timeframe for completing this section is one week.

At the end of this section you will have written the:

- Overview of the IT Training Sector
- Mission Statement for the Organization
- Mission Statement for the CTC
- Relationship of CTC to the Organization
- CTC Organizational Chart
- Description of CTC Training Programs

In completing this section you will need to consider:

- What opportunities exist in the IT Training Sector
- How many other organizations are addressing those training needs
- The mission of your CTC
- How the CTC relates to the overall organization
- How the CTC mission aligns to the mission of the organization
- How your CTC stands out in the IT Training Sector

Overview of IT Training Sector

By understanding the IT Training Sector you can see more clearly:

- Trends that drive participation in your CTC
- Numbers of participants who may be interested in your CTC services
- Numbers of IT Training Centers already serving your target population
- What sets your CTC apart from others providing the service
- How you can better serve the participants you seek

Analyze the Issues

Begin by researching companies or other organizations in your region who are offering the same or similar services. In your research be sure to identify:

- The services being offered
- The target populations being served
- How successful they are with their service
- Any unique technology or innovation they provide

Complete the questions in your participant guide for this section.

Move to Action

After you have gathered information from various sources and answered the questions above, turn to your Business Plan Template and write the ***Overview of the IT Training Sector*** portion of your plan.

Mission of the Organization

Does your organization have a Mission Statement? If not, this may be an excellent time to create one.

You will need an overall organization Mission Statement to continue developing your CTC plan.

Move to Action

Once you have identified the formal Mission Statement for your organization, turn to your Business Plan Template and write the ***Mission Statement of the Organization*** portion of your plan. State the mission as it reads in an official capacity for your organization.

Mission of CTC

To get to a precise statement for your CTC, you want to craft a statement that is:

- Brief yet describes the purpose of the CTC
- Connected to the overall organization's mission
- Inspiring to those who work in the CTC and to participants who seek your service
- No more than 4 sentences in length
- Easy to understand and speak by employees and participants

Analyze the Issues

Research Mission Statements of organizations that you admire or who are successful to understand their approach. The Internet is a great resource because organizations typically have Mission Statements posted on their websites.

- Gather your team
- Brainstorm ideas
- Write ideas down
- Agree on a Mission Statement that works

Complete the questions in your participant guide for this section.

Move to Action

Once you have drafted the statement that everyone, or most everyone can agree on, turn to your Business Plan Template and write the ***Mission Statement of the CTC*** portion of your plan. State the mission as it reads in an official capacity for your CTC.

Relationship of CTC to Organization

Having an IT Center housed within an umbrella organization is almost like having two organizations in one. There are specific services available from each entity, but in the case of the CTC, it must proactively sustain itself, while being guided by the overall organization.

Analyze the Issues

As you define the services of the CTC, remain clear on the objectives of what the CTC can accomplish and what is beyond its scope to do. Be weary of the temptation to borrow resources from the greater organization to make up for any lack of CTC activity. You will need to consider this “relationship” carefully. Focus on the Mission Statement for each entity in order to keep operations separated.

Complete the questions in your participant guide for this section.

Move to Action

Once you have drafted an organizational structure and defined the role of each entity clearly, turn to your Business Plan Template and write the ***Relationship of the CTC to the Organization*** portion of your plan. State how the CTC will be structured, what resources will be utilized, how you will find those resources and by when.

Create an Organizational Chart to show the CTC structure.

Description of CTC Training Program

It's time to provide a detailed understanding of the programs to be offered.

It is better to do a few things really well than many things in a mediocre way. Every business, whether non-profit or for-profit, has limited amounts of time, financial and human resources. This makes it impossible to provide too many services simultaneously.

In trying to do too much, your results will be less than a quality experience for the participants and may lead to a team of employees who are over extended.

Analyze the Issues

- Realistically identify the appropriate number of programs you can initially support
- Focus on what resources you do have
- Provide better service to the participants
- Begin to develop a “good name” for your CTC.

Your focus on a few good programs will benefit both the CTC and the participants you serve.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and defined the initial menu of programs to offer, turn to your Business Plan Template and write the ***Description of CTC Training Programs*** portion of your plan.

IT Training Market

This section is Milestone #2 of the Development Action Plan. The timeframe for completing this section is two weeks.

At the end of this section you will have identified the:

- Target Participants
- Competition
- Organization Positioning
- Estimated Number of Participants
- SWOT Analysis

In completing this section you will need to consider:

- Who is your target market (ideal participant)?
- What avenues will you use to connect with them?
- What organizations/businesses are offering similar services in your area?
- How can you position your CTC and programs to compete with others already in the marketplace?
- How many participants can you realistically expect the first year?
- What are your CTC's specific internal strengths and weaknesses?
- What are some of the specific external threats and opportunities?

Target Participants

Before you can position your CTC and your program offerings in the marketplace it is important to identify who you will target as your “customer.” The word customer is generally a for-profit term, but keep in mind that it is possible to have a socially oriented mission and still see opportunity in the marketplace. This is especially important if your CTC is to be a self-sustaining entity.

Analyze the Issues

As you look at the potential participants be specific in identifying your real “customer.” Perhaps the examples included are appropriate to your CTC. If not, you can change them to meet your needs.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and defined the ideal participant you want to market your programs to, turn to your Business Plan Template and write the ***Target Participants*** portion of your plan. Be extremely detailed in describing who the ideal participant is, how you will identify them as ideal, where you will look for them, why you believe they are ideal.

Competition

It is always important to know your competition. It gives you good information to base decisions on, such as which programs you will offer. The market will only bare so many choices, and if there are too many organizations offering the same services, competition can fracture your chances for sustainable success.

Analyze the Issues

Competition also provides an inside look as to what the market wants. If your competitors are selling similar services, then your CTC must determine how to be unique in what you are offering.

By knowing what your competitors are charging for similar services, it allows your CTC to be competitive and yet still make enough revenue to recover the expenses you will incur in running the CTC.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and defined your major competitors, turn to your Business Plan Template and write the **Competition** portion of your plan. Be extremely detailed in describing how the programs your CTC offers are similar to or different from your competitors.

Organization Positioning

So, how does knowing more about your competition assist your CTC?

Staying close to your competitors can give you insights into new trends happening in the market or provide you with ideas about how to strengthen your own programs.

To set your CTC apart it will be important to strategically identify your own features and benefits that can be communicated outside of your organization.

Analyze the Issues

Take a look at the features and benefits you will offer the participants at your CTC.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and defined the features and benefits of your program, turn to your Business Plan Template and write the ***Organization Positioning*** portion of your plan. Be sure to compare your offerings with those of your major competitors and give a detailed explanation of how you intend to set your program apart from the others. Clearly identify the features and benefits statements you will use to market your CTC.

Estimating the Number of Participants

You are now getting to what is known as the “nuts and bolts” of the planning process. It may be the most difficult part as well; because you are going to begin projecting what you think will happen. Without complete historical data, it is difficult to know what may happen.

From a cost recovery perspective you will have to determine your costs (which will be addressed in the next section) and then analyze whether the number of participants you **NEED** in the program in order to break even each month will equate to the number of participants you feel you can attract to the program.

Analyze the Issues

Focus on the number of participants you feel you can attract to the program. As you move through the process you can make adjustments.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and projected a number of participants for your first year, turn to your Business Plan Template and write the ***Number of Participants*** portion of your plan.

SWOT Analysis

The idea of the SWOT is to provide an objective chance to look at your organization both internally and externally. The word SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats.

In this case, instead of conducting a SWOT analysis on the entire organization, you will think about the CTC when forming your thoughts.

Analyze the Issues

As you begin the SWOT Analysis, you will look at the internal workings of the CTC.

What are its greatest strengths and its biggest weaknesses?

What are its biggest opportunities and threats?

Complete the questions in your participant guide for this section.

Move to Action

Once you have completed the SWOT Analysis Matrix turn to your Business Plan Template and write the **SWOT Analysis** portion of your plan. Be sure to include all of the four areas of information.

Operations of CTC

This section is Milestone #3 of the Development Action Plan. The timeframe for completing this section is two weeks.

At the end of this section you will complete the analysis of:

- Facility & Maintenance
- Equipment & Hardware
- Furniture & Fixtures
- Labor & Salary Requirements
- Expenses & Capital Requirements

In completing this section you will need to consider:

- How much of the facility and maintenance costs currently associated with the overall organization should be associated with the CTC?
- Do you have the necessary equipment and hardware to run your programs or will procurements be needed?
- Do you have the necessary furniture and fixtures to adequately provide for the CTC or will procurements be needed?
- How many employees are needed to support the program activities you anticipate?
- What are the salaries you will need to be prepared to pay?
- What are the other expenses that will be paid directly by CTC activity?

Facility and Maintenance

When considering facility and maintenance for your CTC, you will want to look at two perspectives:

- The obvious costs (also referred to here as operational expenses),
- Whether you currently have or do not have the appropriate facility for your CTC.

Analyze the Issues

You will need to consider expenses such as:

- Rent
- Utilities
- Telephone
- Internet
- Insurance
- Office Supplies
- Postage
- Bank Expenses
- Marketing & Advertising
- Equipment Leases

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed your facility expenses and accommodations, turn to your Business Plan Template and write the ***Facilities & Maintenance*** portion of your plan. Include all the details of the expense list and costs; how you plan to accommodate growth and provide adequate capacity, the number of participants you can serve today, etc.

Equipment & Hardware

You must determine if you have adequate equipment and hardware to provide for your programs.

If your CTC has already made arrangements for hardware and equipment, then this portion may just be an opportunity to review whether what you have is adequate.

Analyze the Issues

If you do not already have your equipment in place, take some time to determine what you will need to provide services when you open your CTC.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed your equipment and hardware needs, turn to your Business Plan Template and write the ***Equipment & Hardware*** portion of your plan. If you have a lease or purchase associated with acquiring the equipment include all the details of the costs for this equipment.

Furniture & Fixtures

You need to analyze your furniture and fixture needs to insure your training center is sufficiently equipped for participants.

If your CTC has already made arrangements for furniture and fixtures, then this portion of the plan may just be an opportunity to review and document what you have.

Analyze the Issues

If you do not already have your furniture and fixtures in place, take some time to determine what you will need to provide services when you open your CTC.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed your furniture and fixture needs, turn to your Business Plan Template and write the ***Furniture & Fixtures*** portion of your plan. Include all the details of the costs for these items if you have a lease or purchase associated with acquiring the equipment.

Labor & Salary Requirements

Salaries are most often any organization's largest on-going expense. They must be considered carefully when you are looking at the expenses that will be generated by your CTC.

The challenge becomes estimating the number of participants and the number of employees it will take to adequately support those participants.

Analyze the Issues

Consider your labor and salary requirements.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed your labor and salary requirements, turn to your Business Plan Template and write the **Labor & Salary** portion of your plan. Include all the details of the costs for all employees, taxes and other benefits that will require money from the CTC.

Expenses & Capital Requirements

For-profit entities often refer to capital requirements as the amount of cash that is required to finance and sustain a business for a particular length of time. This becomes important when you are trying to determine how long it will take you to spend the capital resources you currently have available.

Analyze the Issues

First, you need to determine the annual budget required to sustain your CTC. Then determine how many months you realistically think it will take your CTC to begin to generate income.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed your capital requirements, turn to your Business Plan Template and write the ***Expenses & Capital Requirements*** portion of your plan. Include all details of the annual budget needed and the number of months of working capital it will take to cover your CTC costs until the center begins to generate its own income.

Promotions & Marketing for CTC

This section is Milestone #4 of the Development Action Plan. The timeframe for completing this section is two weeks.

At the end of this section you will complete the:

- Marketing Strategy
- Method of Recruitment
- Advertising & Promotion

In completing this section you will need to consider:

- How much of the facility and maintenance costs currently associated with the overall organization should be associated with the CTC?
- How will our CTC be branded?
- How can I maintain visibility and awareness with potential participants?
- What are the best strategies (given budget and personnel limitations) that we can take to effectively attract participants to our CTC?
- What are ways we can create the best experiences for the participants we serve so that they will either want to continue coming back or will refer us to others?

Marketing Strategy

When considering a strategy for marketing activities, the first step is to realize the importance of being consistent with both your “look” and your “messages.”

The “look” is what is known as branding. When you brand your CTC, you create a consistent graphic message so that people reading your literature or seeing your name immediately connect with your CTC and the services you provide.

The second important aspect to a marketing strategy is to understand that not all strategies work for all entities.

Analyze the Issues

- Understand that your CTC can build its brand on a local level that is strong and easily identifiable.
- Understand that your CTC will need to consider appropriate marketing activities.
- Understand that your CTC may use promotions to gain exposure.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed the strategies you think will work best, turn to your Business Plan Template and write the **Marketing Strategy** portion of your plan. Be sure to include significant detail about your brand by describing it or even including the logo and look in the plan. Also, determine what strategies you think will assist you the most in attracting participants to your CTC. If you are going to advertise, include the costs involved and how you will accommodate those costs with your CTC budget.

Be sure to include the timeline.

Method of Recruitment

What kind of experience do you want to provide participants once they decide to use your services?

Methods of recruitment obviously go hand in hand with marketing activities, but they must be considered carefully for your location, and your target audience.

Analyze the Issues

- Understand what messages you will need to disseminate to attract participants.
- Understand what media will attract the most participants.
- Understand what organizations you can partner with to create interest.

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed the method of recruitment you think will work best, turn to your Business Plan Template and write the ***Methods of Recruitment*** portion of your plan. Be sure to include significant detail about how you will measure success of the activities you choose so that if your recruitment activities are not generating enough activity you can evaluate your plan and adjust your activities.

Advertising & Promotion

If advertising and promotion were a part of your strategic plans, then use this time to provide more detail for what types of advertising you will do, what mediums you will choose, what costs will be associated with your choices, etc.

Is an advertising campaign something your CTC can consider?

Analyze the Issues

Think about a critical message you want people to associate with your CTC. What would make people feel good about your organization and its services and what might move them to come to your CTC to participate in your program?

Complete the questions in your participant guide for this section.

Move to Action

Once you have answered these questions and analyzed the strategies you think will work best, turn to your Business Plan Template and write the ***Advertising & Promotions*** portion of your plan. Be sure to include significant detail about your timeline and the specific mediums you will use to target your messages.

Financials

This section is Milestone #5 of the Development Action Plan. The timeframe for completing this section is two weeks.

At the end of this section you will understand the:

- Cost Recovery Model
- Pricing Strategies
- Cost Recovery Financial Tracking Tool
- Recovery Statement

In completing this section you will need to consider:

- How will you provide upfront funding to launch your CTC programs?
- If you have already launched the programs, you will need to analyze where you are with regard to cost recovery. In other words, are you making enough to recover the costs you have incurred so far?
- What fees will you need to charge participants in order to recover the costs you incur?
- How will you reinvest surplus dollars back in to the CTC, should they exist?
- What kinds of programs will you offer with these surplus dollars?

Cost Recovery Model/Pricing Strategies

The cost recovery model assumes that it is the responsibility of the organization to recover the costs of expenses through the assignment of fees in exchange for providing a service.

The fees help offset the expenses incurred to deliver the service.

Analyze the Issues

This means that your CTC must determine how to charge a reasonable fee to participants, while at the same time recovering the costs to deliver that service. To do this you will need to consider the following elements:

- Total estimated number of participants who will attend the CTC each month
- What categories of fees you will set for participants (remember the “qualifying” criteria you developed for your target participants in your analysis of the IT Training Market?)
- What your total projected expenses will be including facility and maintenance, furniture and fixtures, labor and salary requirements?
- What your capital requirements will be?

Complete the questions in your participant guide for this section.

Move to Action

Let's explore the Cost Recovery Financial Tracking Tool.

As you begin to explore the Cost Recovery Financial Tracking Tool, keep in mind that you are using this tool as a way to track progress. In doing that you will monitor:

- Operational revenue generated by services
- Operational expenses incurred by delivering those services
- Monies spent on capital purchases
- Monies received through other activities
- Overall cost recovery for your CTC

Move to Action

Now it's your turn to try the Cost Recovery Financial Tracking Tool. If your CTC has already started, use the tool to enter the data you have so far.

Don't forget to enter the beginning cash balance you started with, and add revenues, expenses, purchases for equipment (if any), and gains from grants or donations (if any). Complete the form for as many months of data as you have and see where your CTC is in its cost recovery process.

If your CTC is just getting started, perhaps the best approach would be to complete the Cost Recovery Financial Tracking Tool first, as a way to formulate a budget, and second, as a tool to track your actual numbers.

Recovery Statement

The Recovery Statement provides your CTC with a way to account for any surplus revenue that is generated by the CTC and to give possible recommendations about how that surplus can be allocated for additional programs and services that correlate to the WIT Program.



Move to Action

Let's explore the Recovery Statement.

Introductory Elements

The introductory elements of the plan include the Executive Summary, a contact page and the table of contents.

CTC Contact Page

Enter your organization name and the contact information in the appropriate fields. If you have a logo, insert that graphic on the lower right portion of the page. If you do not have a logo, remove the text placeholder.

Table of Contents

The structure of the Table of Contents and the main headings are already in place. Once you have completed your business plan, you will need to return to the Table of Contents section of the template and enter the appropriate page numbers for each topic.

Executive Summary

The Executive Summary is the last piece of the main business plan to be written. It is intended to “summarize” all the plans and goals you have developed along the way.

When a reader sees the Executive Summary it should look and read more like a letter that explains, at a high-level, the overall goals of your CTC and briefly how you intend to reach them.

Do not explain the plan in great length. If the reader wants more detail, he or she can read the content of the document.

Move to Action

Use a blank word document to create a rough draft of the Executive Summary. Allow others to provide input to make sure you have captured the most important aspects of the plan and managed to remain brief in your writing.

Remember, an Executive Summary should only be 1-2 pages in total length. Once you have the letter completed, turn to your Business Plan Template and write the ***Executive Summary*** portion of your plan.

Optional Add-Ons

Though you have now completed the majority of your business plan, the following information is provided as “good to know” information.

- Advisory Boards
- Fundraising
- Presenting a Business Plan