

DPMI+ Proposal  
Spring 2014  
PCMI MPA '14  
Dr. Levinger

**Annotated Problem Tree with supporting data (expected submittal March 15<sup>th</sup>)**

Peace Corps Costa Rica has a broad programmatic target of sustaining economic growth and to improve the standard of living for families and communities. In order to work towards this goal, one of my central counterparts is a community-based Microfinance Institution (MFI), called *Empresa de Credito, Isla Chira* (EC, Isla Chira). The application of a Problem Tree will be used in order to contextualize the causes of income inequality, poor access to affordable credit, and stagnant economic growth. This will aid in a more comprehensive understanding of the MFIs role and impact in their community, while also framing and illustrating the status quo of development in the local environment. Included with this deliverable will be pertinent background information, along with the rationale and application of the tool in the project framework.

**Annotated Results Framework with measurable indicators (expected submittal March 15<sup>th</sup>)**

The use of a Results Framework will be used to plan and design a strategy for EC, IslaChira within one of their specified objectives as an MFI. Developing this tool, and its ultimate application will be grounded in EC Isla Chira's fundamental understanding of its determined strategic objective along with the organization's clearly defined course of action on the activity/output/outcome levels. In order to carry out a complete results framework, including intermediate results and indicators, a Performance Monitoring Plan will also be incorporated.

**Organizational Core Competency Map (expected submittal March 15<sup>th</sup>)**

The Core Competency Mapping tool will be designed in conjunction with EC, Isla Chira. This tool is intended to help the organization internalize their distinct value adding activities, especially in the community-banking model, which distinctly separates itself from other for-profit loan models. Mapping of the core competencies, adjacent competencies, and the use of this tool in the Project Cycle will be included in this deliverable.

**Plan for the introduction of collaborative technologies to a development organization. (expected submittal March 15<sup>th</sup>)**

Within the Central American region, Costa Rica as a whole is a leader in technological advancement in business development. Current strategies in the community-banking model are not blind to these advancements and are actively

trying to adapt online accounting and portfolio management software to streamline business processes. One software program that is currently being piloted, Mambu, offers just that. In order for this technology to be of use in the community-banking model, my role as a facilitator is to help train members of the Executive Leadership on how to apply and use this software to their advantage. Included in this deliverable will be the background justification and need for using this software, the pilot program explanation, and a diagram of the implementation.

### **Community Asset Map (expected submittal April 15<sup>th</sup>)**

The application of a community asset map has been a vital tool in my Peace Corps service. The ability to use this tool in starting a dialogue with local stakeholders has aided in discovering an abundance of varying perspectives in my community, despite a very shared history and day-to-day life. Furthermore, the use of this tool has helped to jettison thoughts and ideas from appreciating “where we are” to the goals and dreams of a collective future, and has paved the way to take advantage of current community assets in new and creative ways. Included in this deliverable will be the facilitation session of the application of this tool, the background/context for its use, and it’s utility in the Project Cycle.

### **Design of a training module for participatory development (expected submittal April 15<sup>th</sup>)**

In working with the MFI in my community, many doors have opened to leverage skills in facilitating participatory training modules. These have included workshops and courses in one-on-one mentoring, business planning, feasibility studies, along with project design and management. Currently, I am adapting and applying a twelve-week business development course that is designed for credit applicants and current loan recipients that want to fortify and strengthen their specific social business model in the local market. Included in this deliverable will be a segment of the comprehensive facilitation module, programmatic objectives, and the course methodology.

### **Appreciative inquiry design in the change process (expected submittal April 15<sup>th</sup>)**

The opportunity to work with micro-entrepreneurs and local organizations alike, the use of appreciative inquiry in the context of a consultant relationship has been a major asset in facilitating the change process. Included in this deliverable will be the facilitation methodology of one session using appreciative inquiry with one of the participating members of my consultancies. Also included will be pertinent background information & the rationale for use of this tool in the project management cycle.

## **Case Study (expected submittal April 15th)**

EC - Isla Chira, is the community-owned MFI that is a central counterpart in my Peace Corps service. Established in 2007, this MFI works under the parent organization, Grupo FINCA, for whom they derive their methodology, technical support, back-office outsourcing, and brand identity. Grupo FINCA works in three components, EDESA/Grupo FINCA/Empresa de Crédito, each independent of one another, though very much reliant and institutionally linked. A more robust and complete explanation of these relationships will be highlighted in the case study, though at this juncture worth noting.

My proposed case study will examine the current scale-up of Grupo FINCA's business strategy of expanding operations into neighboring Panama. Examining the complexity of this decision has will have interesting consequences for all stakeholders in and around the Grupo Finca brand. Included in this deliverable will be the following:

- 1.Context description
- 2.Identification and description of key stakeholders
- 3.Issue/problem identification
- 4.Issue analysis
- 5.Recommendations with rationale
- 6.Implications of the case