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Strategic plan for HOGAR SAN CAMILO

THESIS TO OBTAIN THE DEGREE OF MASTER IN BUSINESS MANAGEMENT

GIVEN BY

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Resumen Ejecutivo

El virus de inmunodeficiencia humana (VIH/SIDA) es una enfermedad dañina que afecta la vida de personas y familias en todo el mundo. En el año 2014, alrededor de 1.2 millones de personas en el mundo fallecieron debido a esta enfermedad. No obstante, la cantidad de personas en Perú que viven con VIH/SIDA está disminuyendo en los últimos años debido al incremento de la educación, la estabilidad económica y el apoyo del gobierno.

El Hogar San Camilo es una ONG religiosa de tamaño pequeño dedicada a ayudar a personas en Perú que tienen VIH/SIDA y que viven en pobreza. El Hogar San Camilo provee un bienestar holístico a aquellos con la enfermedad y a sus familias, otorgándoles la oportunidad de vivir una vida digna, sana y feliz. Sin embargo, Hogar San Camilo requiere definir la dirección de la organización, sus estrategias y objetivos. Esto permitirá una mayor cantidad de donaciones por parte de entidades nacionales y extranjeras.

El presente plan estratégico fue desarrollado bajo el proceso estratégico y fue adaptado para aplicarse a una ONG. El plan sugiere cuatro estrategias para permitir que Hogar San Camilo sea un referente a nivel nacional y en Latino América al 2020, por proveer un bienestar holístico a personas con VIH/SIDA. Las estrategias son: (a) estrategia interna de gestión de procesos que permita una mejor toma de decisiones para recaudar fondos; (b) integración horizontal al unir los Hogares San Camilo de Lima, Arequipa y Huancayo; (c) penetración de mercado al dirigirse a empresas peruanas donantes actuales solicitando fondos para los programas del Hogar y (d) atrincheramiento para mantener, eliminar o fusionar los programas ofrecidos actualmente por Hogar San Camilo.

Abstract

The human immunodeficiency virus (HIV/AIDS) is a harmful virus that affects the lives of people and their families around the world. In 2014 approximately 1.2 million people in the world died due to HIV-related causes. However, the number of people living with the HIV/AIDS virus in Peru is declining due to increased education, a more stable economy and government support.

Hogar San Camilo is a small religious NGO that is dedicated to help people in Peru living with HIV/AIDS and also in poverty. Hogar San Camilo provides holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life. Nonetheless, the organization is in need of a clear direction, strategy and objectives for the future in order to secure more funding from national and international donors.

The present strategic plan was developed following the strategic process and was adapted in order to be applied to an NGO. The plan suggests four strategies to enable Hogar San Camilo to be recognized by 2020 as a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS. These strategies included: (a) an internal process management strategy by developing a strategic vision that will enable the organization to have a better decision process to receive more funding from donors; (b) a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo; (c) a market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific programs; and (d) a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate or merge the programs.

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The Strategic Process: Overview

The strategic plan developed in this document was prepared according to the sequential model of the strategic process. The strategic process consists of a set of sequentially developed activities that allow an organization to project into the future and to reach its vision. Figure 0 shows the three main phases of such process: (a) formulation, which is the planning stage itself whereby strategies—that will take the organization from its current situation to the desired future state—will be identified; (b) implementation, in which the strategies obtained during the first stage are implemented; it is the most difficult stage due to its strictness; and (c) evaluation and control, in which the activities are carried out permanently throughout the entire process in order to monitor the sequential steps and, finally, the Long-Term Objectives (LTO) and Short-Term Objectives (STO). Apart from these three phases, there is a final stage that presents the conclusions and final recommendations. Notably, the strategic process is characterized by its interactivity—since many people are involved in it—and by its iteration because it generates a repetitive feedback.

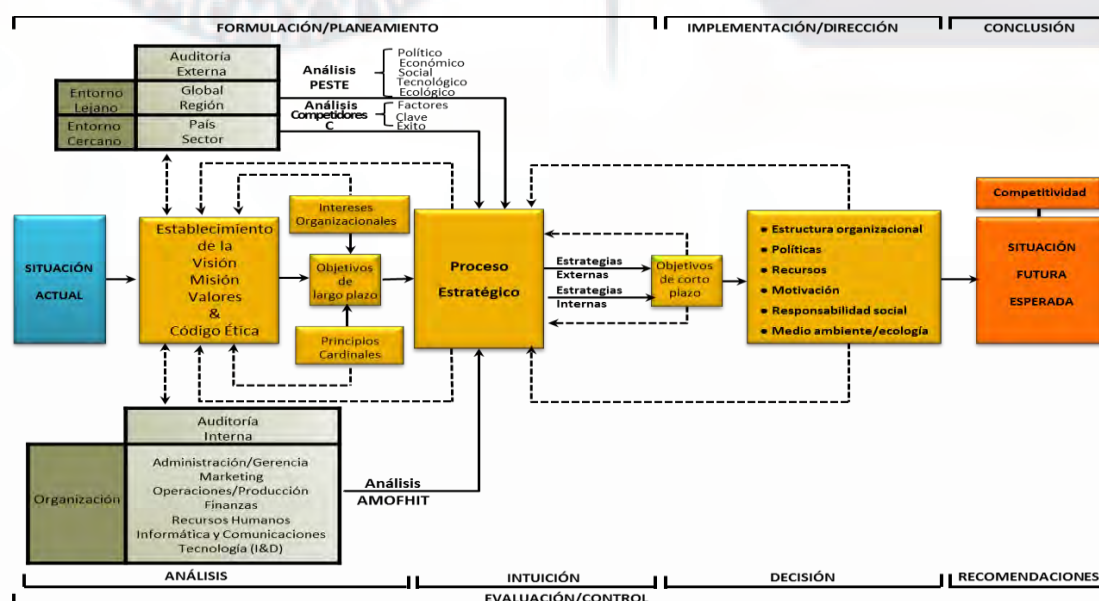


Figure 0. Sequential model of the strategic process.

Note. D'Alessio, F. A. (2013). El proceso estratégico: un enfoque de gerencia (pp. 10). Mexico, D. F.: Pearson.

The model starts with an analysis of the current situation, followed by the establishment of the vision, mission, values, and code of ethics; these four components guide and regulate the activities of the organization. Then, the National Interests Matrix (NIM) and the external evaluation are developed to determine the influence of the environment in the studied organization. In this way, the global industry is analyzed through PESTE analysis (Political, Economic, Social, Technological, and Ecological factors). PESTE analysis originates the External Factors Evaluation Matrix (EFEM), which allows knowing the impact of the environment through the opportunities that could benefit the organization, the threats that shall be avoided, and how the organization is acting on these factors. PESTE analysis and the competitors originate the organization's evaluation in relation to these, from which the Competitive Profile Matrix (CPM) and the Referential Profile Matrix (RPM) are obtained.

Thus, the external evaluation identifies the key opportunities and threats, the situation of the competitors, and the Critical Success Factors (CSF) in the industrial sector. This makes it easier for planners to start the process that will lead to the formulation of the strategies which allow taking advantage of the opportunities, preventing and/or reducing the impact of hazards, knowing the key factors to succeed in the industry, and surpassing the competition.

The internal evaluation is subsequently developed, which is aimed at the definition of strategies that capitalize on the strengths and neutralize the weaknesses, in a way that competitive advantages are built from identifying distinctive competencies. AMOFHIT internal analysis (Administration & Management, Marketing & sales, productive Operations & infrastructure services, Finance & accounting, Human resources & culture, Information, communication, & Technology) is carried out for this purpose and the Internal Factors Evaluation Matrix (IFEM) is obtained from it. This matrix allows evaluating the main

strengths and weaknesses of the functional areas of an organization, as well as identifying and assessing the relationships between such areas. A thorough internal and external analysis is required and crucial to continue with the process that is most likely to succeed.

In the next stage of the process, the interests of the organization are determined, i.e. the most important goals to be reached in order to globally succeed in the markets where the organization competes. From this, the Organizational Interests Matrix (OIM) is derived and it allows establishing the LTO based on its vision. These are the results that the organization expects to obtain. Note that the "sum" of the LTO would lead to achieve the vision and the "sum" of the STO would be the achievement of each LTO.

The matrices presented in stage 1 of the first phase (NIM, EFEM, IFEM, CPM, RPM, and OIM) are key inputs that will enhance the quality of the strategic process. In stage 2, the strategies are developed matching up and combining the strengths, weaknesses, opportunities, and threats along with the previously analyzed results. For this, the following tools are used: (a) the Strengths, Weaknesses, Opportunities and Threats (SWOT) matrix; (b) Strategic Position and Action Evaluation (SPACE) matrix; (c) Boston Consulting Group (BCG) matrix; (d) Internal-External (IE) matrix; and (e) the Grand Strategy Matrix (GSM).

At the end of the strategic formulation, stage 3 is given by the choice of strategies, which represents the strategic process itself. A set of integration, intensive, diversification, and defensive strategies result from the abovementioned matrices. The Strategic Decision Matrix (SDM) selects these strategies, which are specific and not alternative, and whose attractiveness is determined in the Strategic Planning Quantitative Matrix (SPQM). Finally, the Rumelt Matrix (RM) and the Ethics Matrix (EM) are developed to finalize the retained and contingency strategies. After this, the second phase of the strategic planning begins: the implementation. Based on this selection, the Strategies Matrix is developed against the long-term objectives (LTO). This matrix verifies if the LTO can be accomplished by

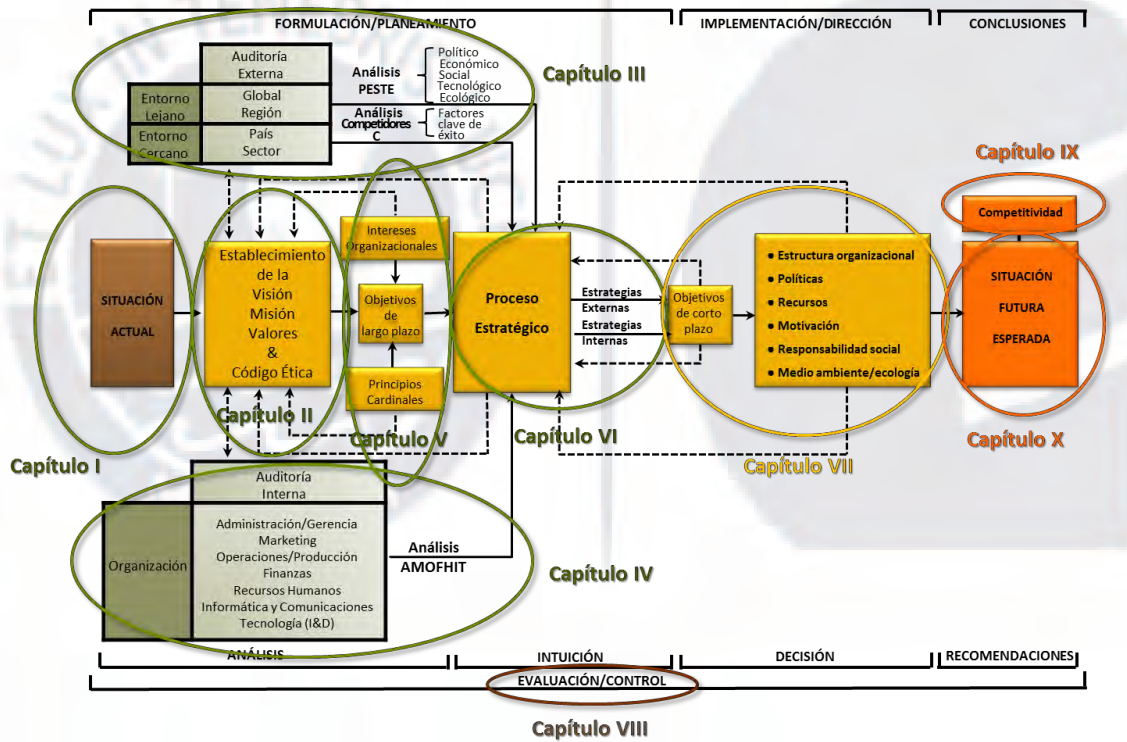
implementing the retained strategies. Likewise, the Strategies Matrix is developed against the Competitors' and Substitutes' Possibilities Matrix (CSPM) that helps to determine how many of these competitors will be able to cope with the strategies retained by the organization. The integration of the intuition with the analysis is essential, since it favors the selection of strategies.

After formulating a strategic plan that allows accomplishing the future projection of the organization, the identified strategic guidelines are implemented. The strategic implementation basically consists on translating the strategic plans into actions and, subsequently, into results. It is worth to point out that a successful formulation does not guarantee a successful implementation, since the latter is more difficult to carry out and it implies the risk of execution failure. During this phase, the STO and the resources allocated to each of them are defined, and the policies for each strategy are established. It is necessary to have a new organizational structure. The worst mistake is to implement a new strategy using an old structure.

The concern for the respect and preservation of the environment, the social and economic sustainable growth considering ethical principles, and the cooperation with the related community (stakeholders) are part of the Organizational Social Responsibility (OSR). Decision makers and those who, directly or indirectly, are part of the organization should voluntarily commit to contribute to the sustainable development by looking for the shared benefit with all stakeholders. This implies that the action-oriented strategies are based on a set of policies, practices, and programs that are integrated into its operations. In the third phase, the strategic assessment is carried out using the four control perspectives of the Balanced Scorecard (BSC): (a) internal learning, (b) processes, (c) customers, and (d) financial, so that the achievement of the STO and LTO can be monitored. From this, the appropriate corrective actions are taken. In the fourth phase, after all the planning, the

conceived competitiveness for the organization is analyzed and the necessary conclusions and final recommendations are suggested to accomplish the desired future state of the organization. Likewise, an Integrated Strategic Plan (ISP), in which the process is displayed at glance, is presented. The strategic planning can be developed for a small business, company, institution, industry, port, town, municipality, region, state, department, and country, among others.

Sequential Model of the Strategic Process



Note. Do not consider Hartmann, National Competitiveness, or Chapter IX. Chapter X becomes Chapter IX.

Chapter I: General Situation of the Organization

1.1. General Situation

The human immunodeficiency virus (HIV/AIDS) is a harmful virus that affects the lives of people and their families around the world. HIV was the cause of more than 34 million lives so far and, just in 2014, around 1.2 million people died due to HIV-related causes globally (World Health Organization [WHO], 2015). It targets the immune system and weakens the body's defense systems against infections and certain types of cancer (WHO, 2015). As the virus destroys and impairs the function of immune cells, infected individuals gradually become immune deficient, resulting in increased susceptibility to a wide range of infections and diseases that healthy immune systems can normally defend against (WHO, 2015). From a medical angle, the virus is effectively controlled through the use of various pharmaceutical medications including several classes of antiretroviral agents that act on different stages of the HIV life-cycle (WHO, 2015).

HIV/AIDS is primarily contracted by: (a) practicing unprotected sex; (b) having another sexually transmitted infection such as syphilis, herpes, chlamydia and gonorrhea; (c) sharing contaminated needles, syringes and other injecting equipment and drug solutions when injecting drugs; (d) receiving unsafe injections, blood transfusions, medical procedures that involve unsterile cutting or piercing; and (e) experiencing accidental needle stick injuries, including among health workers.

The HIV/AIDS virus was a global epidemic in the early 1990's because it was contracted by people in every continent. However, in the last years, the prevalence is much higher in the Sub-Saharan African region than in other places in the world as showed in Figure 1.

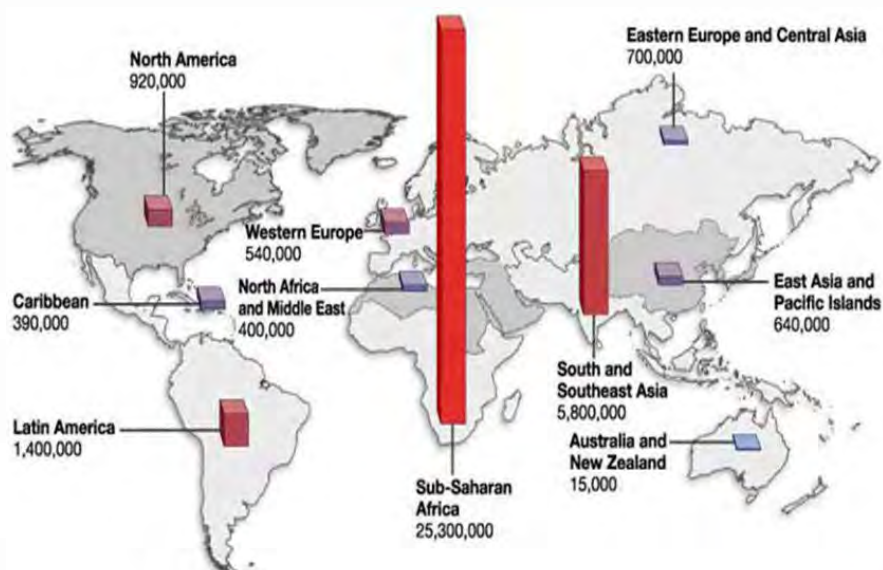


Figure 1. AIDS contractions in the world.

Taken from “Situación actual de la prevención y control de ITS, VIH/SIDA y Hepatitis B” by Benites, C. (2013). Retrieved <http://www.minsa.gob.pe/portada/Especiales/2013/vih/recursos.html>

Between 1983 and 2013, 31,157 cases of AIDS and 52,490 cases of HIV were reported in Peru (UNAIDS, 2014). The distribution of AIDS contraction among regions is shown in Figure 2. Of the reported cases, 71% belong to Lima and Callao.

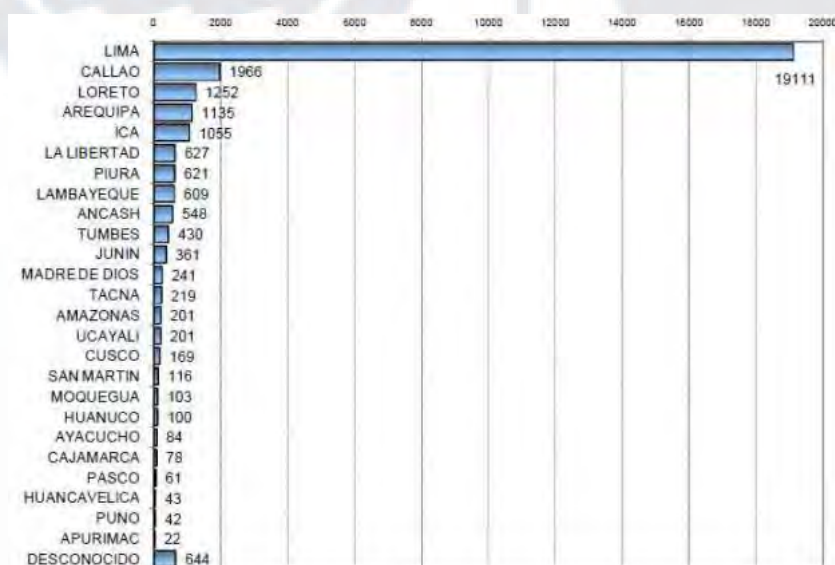


Figure 2. AIDS accumulated cases in Peru from 1983 to March 2013.

Taken from “Situación actual de la prevención y control de ITS, VIH/SIDA y Hepatitis B” by Benites, C. (2013). Retrieved <http://www.minsa.gob.pe/portada/Especiales/2013/vih/recursos.html>

Since the introduction of the Highly Active Antiretroviral Therapy (HAART) in Peru in 2004, the amount of people that died due to HIV/AIDS virus was considerably reduced; and now the Ministry of Health (MoH) considers the HIV/AIDS as a concentrated epidemic, focused in men that have sexual relations with other men and in transgender women. This is supported by the fact that of the total of reported HIV cases in the period 1986-2012 transmitted sexually, 67% were through heterosexual contact, 25% homosexual contact and 8% were caused by bisexual contact (UNAIDS, 2014).

People living with this virus are in need of health assistance. In light of these realities, Hogar San Camilo has dedicated itself to support and care for people with HIV/AIDS and their families. It is a religious non-profit organization that is committed to helping impoverished and marginalized people of Peru, in Lima especially, battle this disease. Hogar San Camilo provides aid in the form of physical, psychological, medical and spiritual treatment. However, in order to maximize its ability to care for people, the organization is in need of a clear direction and strategy to make the necessary internal operational alterations needed to succeed.

There are many other nonprofit organizations (NGOs) in Peru, just like Hogar San Camilo, whose main service is to combat HIV/AIDS. These organizations are largely seen as competitors due to their ability to potentially affect San Camilo's reception of funds from donors. Nonetheless, the government remains a significant actor in providing resources for Hogar San Camilo. With so much uncertainty surrounding the upcoming federal elections, there is a possibility that local NGOs could receive less funding in the future. This is heightened by the limited corporate social responsibility (CSR) practices in Peru.

As the economy continues to grow, labor formalization increases, and poverty levels are reduced, people have become more informed of the issues around HIV/AIDS and have consequently contributed to the overall decline of the virus. Additionally, more affected

people have access to health insurance provided by the MoH. In recent years, Peru has become the largest recipient of HIV/AIDS funding from the Global Fund for AIDS, Tuberculosis, and Malaria (GFATM) in Latin America, with approximately US \$80 million received for projects implemented between 2004 and 2012 (Cáceres & Mendoza, 2009). However, the Global Funds are focused in combating HIV/AIDS globally and their main focus is where the epidemic still exists. The situation in Sub-Saharan African countries is the most difficult and since the Peruvian economy is growing and the epidemic is being partially controlled, it can be expected that Global Funds focus its attention to other realities.

Hogar San Camilo is a religious NGO guided by the Camillian order. The Hogar has an open door approach, receiving all type of patients that live in extreme poverty and does not hesitate to give them shelter, food or clothes. They follow the main message of the Camilo's congregation which is to help the sick and the Hogar is currently working to provide every person living with HIV/AIDS who seeks help from the organization a proper health treatment. Hogar San Camilo welcomes people living with HIV/AIDS, no matter their religion, social status or beliefs.

Hogar San Camilo is a small NGO with 35 workers, thirteen being part of the medical team and twenty-two work on administrative tasks. In addition, it has fifteen temporary volunteers that support Hogar San Camilo's programs. The scope of the strategic plan created for Hogar San Camilo takes into consideration the organization's size and resources so that the proposed plan may be implemented by the Hogar.

Currently, Hogar San Camilo is not following a generic strategy as it strives to provide a differentiated service with a limited budget. For this reason, the Hogar's generic strategy shall be analyzed. Furthermore, the strategic process used in the present project was created for companies that make profit. NGOs on the other hand, focus on creating social

welfare. With this in mind, the strategic plan for Hogar San Camilo follows D'Alessio's (2014) strategic process but it has been modified to adapt to an NGO.

1.2. Conclusions

Hogar San Camilo is a religious non-profit organization that is focused on helping people with HIV/AIDS on a day-to-day basis by providing medical, psychological, counseling and religious services. The Camillian congregation, whose intentions it is to help impoverished and marginalized people living with disease, guides the organization. Hogar San Camilo has dedicated itself to support and care for people living with the HIV/AIDS disease as well as to their families.

Currently, the number of people living with the HIV/AIDS virus is minimal (Vargas, 2015). This is due to increased education, a more stable economy and by support through the government. Although a decrease in HIV/AIDS supports Hogar San Camilo by reducing the amount of people requiring treatment, it also has the ability to make the organization obsolete. Currently the eradication of the disease is unlikely. However, the decline makes the disease less immediate which has the ability to detract funding from donors. Hogar San Camilo is also competing against many other NGOs throughout Peru for funding which is now coming mostly from corporate or individual sponsors and the government as opposed to international organizations.

Therefore, Hogar San Camilo is required to provide better information about its operations to potential and current donors in order to secure more financial support. In order to do so the organization is in need of a clear direction and strategy for the future. To secure more funding and better allocate resources, the organization requires consolidated data in order to better understand their own operations.

Chapter II: Vision, Mission, Values, and Code of Ethics

2.1. Background

Hogar San Camilo is a religious NGO that is dedicated to supporting and caring for people and families affected by, and living with HIV/AIDS. The organization was founded on September 30, 1995 by the Fathers Camilo, a group whose mission it is to help the sick. Inspired by the religious Saint Camillus de Lellis, the congregation was named as Order of the Ministers to the Sick. Hogar San Camilo is legally constituted in Peru as a non-profit private institution (IPREDA) which is independent from the government, public institutions and public entities for cooperation.

The organization's goal is to help as many patients as possible that reside in Peru. It does so by providing physical, medical, psychological and spiritual aid to its patients through specific programs. The majority of people who use Hogar San Camilo's services are people and families affected by HIV/AIDS who live in marginalized communities in Lima and surrounding areas. Hogar San Camilo is a small NGO with 35 workers and fifteen volunteers, where almost a third of the staff is part of the medical team.

As part of its overall treatment program, Hogar San Camilo issues several pharmaceutical medications, such as HAART, to patients in order to cope with the virus. HAART decreases the patient's total burden of HIV/AIDS by suppressing HIV replication. Therefore, the treatment maintains function of the immune system, and prevents potential infections from arising that may lead to death (WHO, 2015). Apart from pharmaceutical care, Hogar San Camilo provides aid to patients through six active programs:

- Alumbrando una vida: Targeted at pregnant women carrying HIV/AIDS. They receive treatment to deliver a healthy baby.
- Camilos vida: Provides care to children from zero to three years old whose mothers have HIV.

- Vida feliz: Provides activities and aid to children from three to eighteen years old who have HIV/AIDS.
- HAART: Seeks to provide HAART medicine given by the government to HIV/AIDS patients.
- In-house visits: Home visits to Hogar San Camilo's patients of all ages who have HIV/AIDS.
- Shelter: Hogar San Camilo has facilities to provide shelter up to twenty male adults that have HIV/AIDS.

Regarding the transmission of the disease, men who engage in sexual activity with other men, including transgender individuals, are at most risk of contracting the virus. Additionally, females are susceptible to having the virus transmitted to them by engaging in sexual activity with men who contracted the disease from previous homosexual encounters. According to a report released by the Peruvian government, 73% of the cases of AIDS occurred in the city of Lima while 27% correspond to the rest of the country (UNAIDS, 2015).

2.2. Vision

Hogar San Camilo's current vision is:

To be a national and international reference regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified and healthy life (Hogar San Camilo, 2014).

This version is simple, ambitious, has a geographical reach and sets a clear idea of where the company is headed. In this sense, it fulfills seven of the nine criteria required for a successful vision (D'Alessio, 2014). The nine criteria are (a) have a central ideology that motivates change; (b) project the organization into the future; (c) be clear, simple and comprehensible; (d) be ambitious and realistic; (e) define a time horizon; (f) project a

geographical scope; (g) be known by everyone in the organization; (h) create a sense of urgency, and (i) develop a clear idea of the aspirations for the organization.

The vision should be modified to include a time frame in order to fulfill all nine criteria and placed in all rooms of Hogar San Camilo so it will be known by everyone involved. Hence, the proposed new vision for Hogar San Camilo is as follows:

To be recognized by 2020 as a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life.

2.3. Mission

Hogar San Camilo's current mission is:

To develop a holistic attention and support model for people who live with HIV/AIDS and their families by providing them health, nutrition, social assistance, psychological, peer counselling and spiritual aid (Hogar San Camilo, 2014).

The mission describes the organization's objective and should follow nine criteria to be a successful mission (D'Alessio, 2014). The nine criteria are (a) define clients, (b) define the product, (c) define the market, (d) define the technology, (e) organizational goals, (f) organizational philosophy, (g) self-concept of the organization, (h) concern about the public image, and (i) concern about the employees.

In this sense, San Camilo's objective should not be to develop a model but to help people with HIV/AIDS achieve personal and physical wellbeing by offering a holistic model of support and assistance. Moreover, the different services provided should not be specified in the mission. By specifying the services, it prevents the Hogar from changing the services in the future and adapting to patients' future needs. In addition, the present mission does not provide a geographical reach or describe the organization's objectives and values. The

mission will be placed in all rooms of Hogar San Camilo so it will be known by everyone involved. In consequence, the proposed new mission is:

To provide wellbeing to people with HIV/AIDS in Peru and their families, so they can live a dignified, happy and healthy life. This will be achieved by providing a holistic support model to the patients and their families that follows Hogar San Camilo's values of honesty, trust, respect and community. This will be achieved by the care and professionalism of our staff and technological infrastructure.

2.4. Values

The values of Hogar San Camilo are (a) solidarity, (b) active listening, (c) accompany, and (d) life. Some of these values could be rephrased and provide a different and better impact within the workers of Hogar San Camilo, especially when they will approach people with HIV/AIDS. For instance, active listening as a value is a good practice but only once the Hogar has developed trust with its patients. When the staff of Hogar San Camilo has conversations with people with HIV/AIDS, the approach to the conversation is very important and for them to effectively communicate, the staff should show a great sense of honesty first.

It is very important to have a staff with strong values that can positively impact the relationship with the patients. In addition, looking for values that are easy to identify in a person and can cover broader life situations as opposed to only while working in Hogar San Camilo are highly desirable. The new values were presented and discussed with Hogar San Camilo's management. The four new values proposed for Hogar San Camilo are:

- Honesty: maintaining the highest level of integrity by always being truthful.
- Trust: committing to patients by fostering and maintaining a safe environment where patients can be assured that they are being taken care of and personal information is kept confidential.

- Respect: always maintaining mutual relationships and commitment to making the world a better place.
- Community: helping others as one wants to be helped and dedicating resources to maximize the social impact by creating a sense of community.

2.5. Code of Ethics

Aiding patients at Hogar San Camilo is a relatively extensive process that must be managed in such a way that maximizes social output. Additionally all practices and procedures must respect the law and the operating regulations. In light of these standards and the values proposed above, Hogar San Camilo possesses an organizational charter of principles that it governs itself.

- Respecting the law: always engaging in practices that are in accordance with government rules and regulation.
- Confidentiality of patient information: always keeping safe valuable and important patient information by using it discreetly and professionally.
- Commitment to values: never engaging in activities that undermine organizational beliefs, ethics and responsibilities.
- Transparency: always being open and honest regarding business practices, financial data and patient information.
- Commitment to the environment: preventing any controllable and unnecessary pollution and avoiding the use of indiscriminately resources and the proper management of waste.

2.6. Conclusions

Strategic planning begins with the creation of aspirational vision and mission statements which act as catalysts of institutional values and principles that will collectively guide management's approach to problem solving and decision making (D'Alessio, 2014).

This vision and mission should take into consideration the general situation and trends of the HIV/AIDS field in which Hogar San Camilo provides its services.

The proposed vision for Hogar San Camilo is its declaration to manifest itself as a leading reference NGO in the future. To make this transformation and direct the Hogar down the desired path, the organization should dedicate to the commitment to the quality care of patients and families living with HIV/AIDS, wellbeing of the greater community, effective management of both information and administrative duties and the maximization of internal efficiency.

The organization's mission is focused on the main drivers of change that affect future policy and help it accomplish goals. The holistic services are the core activities that will guide Hogar San Camilo in the daily activities and will guide the organization to reach its vision.

The values of Hogar San Camilo are related to the way it provides care and its approach to patients. By adopting the proposed values, workers will communicate and create relationships with their patients.

The code of ethics states the boundaries between the acceptable and wrong practices. Since Hogar San Camilo treats with people with HIV/AIDS, it is important to work by according to the Hogar's values and respecting the rules, guidelines and procedures stated for dealing properly with people with HIV/AIDS.

Chapter III: External Evaluation

The external evaluation will assess the key factors that can impact Hogar San Camilo in a direct or indirect way. It will analyze the external factors within the PESTE analysis: (a) political, (b) economical, (c) social, (d) technological, and (e) ecological. Furthermore, the evaluation will cover a competitive analysis based on Porter's five forces. These frameworks will provide the necessary inputs for the external factors evaluation matrix (EFEM), competitive profile matrix (CPM) and reference profile matrix (RPM). The results of this evaluation will provide insight to Hogar San Camilo regarding which external factors ought to be taken advantage of and threats that the organization will need to defend against. This evaluation will also provide information with respect to competitors and referents of Hogar San Camilo as well as information regarding suppliers and buyers of its services. The external evaluation is a key analysis that will lead to consistent and adequate long term objectives.

3.1. Environmental analysis PESTE

By analyzing environmental variables, Hogar San Camilo will be able to identify the most relevant opportunities and threats that can impact its operations. The strategic plan will provide the tools for Hogar San Camilo to defend against threats and to take advantages of the opportunities that the environment permits. The environment cannot be controlled, but Hogar San Camilo can make strategic decisions in order to gain a competitive advantage from its surrounding atmosphere.

3.1.1. Political, governmental, and legal forces (P)

Political, governmental and legal forces affect Hogar San Camilo in many respects. The most immediate being the presidential elections, which will take place in 2016. Consequently, the country will face additional political and economic uncertainty during this time. Even though 78% of the population knows for which candidate to vote, the candidates

themselves hold small percentages; Keiko Fujimori is the leader with only 33% of the votes while Pedro Pablo Kuczynski is in second place with 15%. (“Cae respaldo a posibles candidatos del 2016”, 2015). The uncertainty can decrease the willingness of companies to invest in Peru and donate resources to NGOs.

Hogar San Camilo must operate in accordance to three important laws, two regarding health and one regarding taxes. The first health law the Hogar needs to consider is The Ley General de la Salud N° 26842. This law addresses the rights and responsibilities of patients, the rights and guidelines of health providing entities and the national and international regulation of transmittable diseases. The last section of the document includes transmission of HIV/AIDS remarks (“Ley 26842. Ley general de salud”, 1997). The second health law is the Plan Nacional Contrásida N° 26626 which directly addresses the government’s actions to stop the spreading of HIV/AIDS by stimulating prevention campaigns, providing diagnosis to patients and supplying medication (“Decreto Supremo N° 004-97-SA”, 1997).

As a religious NGO, Hogar San Camilo must follow the Ley del Impuesto a la Renta N° 179-2004-EF. This law states that religious NGOs are exempted from paying income taxes to the government (“Decreto Supremo N° 179-2004-EF”, 2004).

Nonetheless, there is no law in Peru that requires companies to invest in social projects or one that promotes CSR. For this reason, 56% of companies in Peru invest only between 1% and 4% of their budget on corporate social responsibility even though 98% of companies believe that corporate social responsibility is a relevant subject nowadays (“Un análisis sobre la responsabilidad social corporativa en Perú”, 2014). The importance given to CSR nowadays is supported by the creation of the CSR promotion program managed by the NGOs Peru 2021 and Seguimiento, Análisis y Evaluación para el Desarrollo (SASE). This program was launched in 1995 and the Inter-American Foundation provided the required funds. (Sulmont, 2001).

In addition, Hogar San Camilo has a close relationship with the MoH, as the latter provides the medication needed for HAART. The medication includes zidovudine, nevirapine and lamivudine. Hogar San Camilo is one of the three institutions, other than the national MoH hospitals, that is allowed to provide these medications to HIV/AIDS patients (Ministerio de Salud, 2015). In addition, the government publishes a Multi Sectorial Strategic Plan regarding health treatment every five years (Allaín, Mendez & Portugal, 2013). This plan contains the strategies and actions that the MoH will follow to combat HIV/AIDS.

Peru is a country with low institutionalization, ranking 109 out of 149 countries in the World Competitiveness Report 2013-2014 (World Economic Forum, 2013). The most problematic factors for organizations are: (a) inefficient government bureaucracy, (b) corruption, (c) restrictive labour regulations, (d) inadequate supply of infrastructure, and (e) crime and theft. These factors affect the operations of Hogar San Camilo and the rest of NGOs in Peru.

The Peruvian Agency of International Cooperation (APCI) provides international resources to the NGOs registered under Peruvian law. The resources are not only monetary, NGOs can also benefit from consulting, training and volunteer service. These resources come from various entities such as the World Bank, International Monetary Fund (IMF) and United Nations (UN).

3.1.2. Economic and financial forces (E)

“Peru is one of the best performing economies in Latin America” (The World Bank, 2015b). In 2014, Peru had a GDP of US\$ 202.9 billion; this represents a 2.4% increase with respect to 2013. The GDP has grown on average 5.80% each year between 2010 and 2014 (The World Bank, 2015b) and is expected to reach US\$5.8 billion by 2017 (Banco Central de Reserva del Perú [BCRP], 2015). The expected economic growth showed in Figure 3 can lead to better results for the businesses that look for profits in Peru. In addition, the situation

of economic prosperity can lead in an indirect way to more local funds available from local companies towards NGOs.

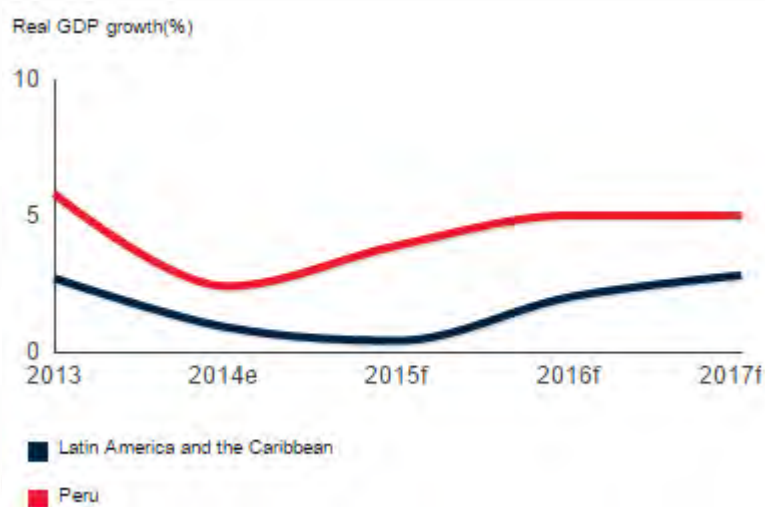


Figure 3. Peruvian Economic Forecasts: GDP growth.

Taken from “Economy and region specific forecasts and data” by The World Bank. (2015a). Retrieved from <http://www.worldbank.org/en/publication/global-economic-prospects/data?variable=NYGDPMKTPKDZ®ion=LAC>

The economy in Peru is influenced by major external events around the globe that can impact organizations. Consequently, the World Bank comments prudently how the Peruvian economy can be influenced: “the country may be entering a challenging period since growth slowed in 2014 as a result of adverse external conditions, a corresponding decline in domestic confidence and fewer investments.” (The World Bank, 2015b).

Inflation in Peru is low, with a 2.6% inflation rate in 2014 (The World Bank, 2015b) but it increased to 3.0% in April 2015 (BCRP, 2015). The Peruvian Central Bank expects inflation to remain moderate and estimates that it will decrease to 2.0% by the end of 2017.

Foreign direct investment (FDI) in Peru was US\$ 10.1 billion in 2013, US\$ 2,067 billion less than in 2012 (BCRP, 2015). FDI is expected to decrease to US\$ 9.4 billion in 2015 but this level of investment remains higher than the one presented prior to the year 2011.

Regarding the CSR incentives for organizations, Lima's stock exchange released an index called Índice de Buen Gobierno Corporativo (IBGC) which list companies that manage adequately its responsibilities against shareholders, stakeholders and that have solid principles of CSR. Being in the IBGC index is an opportunity for companies listed in the stock exchange since investors will allocate funds to those companies (Bolsa de Valores de Lima, 2015).

3.1.3. Social, cultural and demographic forces (S)

Social, cultural and demographic factors have a profound impact on how Hogar San Camilo operates. Firstly, HIV/AIDS is more prevalent in lower to middle income countries and predominantly in people with a low socio-economic status (WHO, 2015). Peru is considered a middle-income country with a GDP per capita in 2014 of US \$6,594.4 compared to the world's average of US \$ 10,803.5 (The World Bank, 2015c). Although poverty rates in Peru have declined from 55.6% in 2005 to 22.7% in 2013, and extreme poverty significantly decreased from 15.8% to 4.7%, the economic disparity between rich and poor is still large (The World Bank, 2015c). Figure 4 confirmed the fact of the existence of economic disparity in Peru with the Gini index. In this index, where the value is zero, means a perfect equality between the members of the country. For the case of Peru, the historic values have been around 45% to 55%. This fact is important because those people living under or close to the poverty rate often have less access to sex education and health services, increasing the likelihood of becoming infected with HIV/AIDS.

The increased development in Peru has led to more focused and better allocation of funds to HIV/AIDS related programs. In 2013, the Burden of Diseases Study reported that from its peak year there was a 54.7% of reduction in AIDS related deaths in Peru (Vargas, 2015). Social programs for HIV/AIDS funded domestically rather than internationally have



Figure 4. Country Inequality Index - Peru.

Taken from “Poverty and equity” by The World Bank. (2015c). Retrieved from <http://povertydata.worldbank.org/poverty/country/PER>

increased significantly from US\$17.7 million per year from 2005-2010, to US\$57.8 million yearly from 2011-2013 (Vargas, 2015).

The estimated number of people living with HIV in Peru has reduced due to the country’s development and access to health and education programs, estimated to be 65,000 in 2013 (Vargas, 2015). Health insurance provided by the MoH called *Seguro Integral de Salud* (SIS) which is the country’s integral health insurance program, provides insurance for those people living in poverty and has assisted approximately 18% of the Peruvian population (Seguro Integral de Salud, 2015). The MoH and Regional Health Bureaus provide crucial HIV/AIDS services, specifically by reaching 81% of HIV/AIDS patients with HAART (Vargas, 2015). Although this initiative has greatly increased access to healthcare, a report by the Peruvian National Institute of Statistics and Information (INEI) suggested that 61.9% of Peru’s population does not have health insurance, primarily because of the bureaucratic measures that Integral Health Insurance imposes (INEI, 2015). Lack of access to insurance and healthcare means that people are less likely to be tested for HIV/AIDS which can increase the spread of the virus.

Access to HIV/AIDS testing for pregnant women was made a country-wide initiative in 2006. However, access to testing for men remained relatively low (UNAIDS, 2012). In 2012, the Peruvian government in conjunction with UNAIDS focused efforts on the “It is better to know: Get an HIV test” campaign that focused on giving men access to free testing on World AIDS Day held on December 1st. Not only are significant initiatives related to HIV/AIDS launched around this day, but also large portions of HIV/AIDS NGO funding is accumulated due to the day’s high-profile.

Although both the MoH and NGOs work towards increasing access to education and awareness of HIV/AIDS, there is still a stigma that surrounds the disease. The negative stigma prevents people from wanting to be tested or to admit to partners that they live with the disease resulting in nearly half of the people unaware of their diagnosis (UNAIDS, 2012). Many avoid the conversation about HIV/AIDS which has increased the need for accurate education and awareness. Education is especially important as it is estimated that over half of HIV positive people in Peru become infected prior to age twenty (UNAIDS, 2012). The annual report of the International Planned Parenthood Federation (2010) suggested that only 34% of women aged fifteen to twenty four were aware that condom use helps to prevent HIV/AIDS transmission.

Therefore, it is evident that awareness is increasing; however, there is still a strong stigma attached to the disease. This increases the need of Hogar San Camilo to continue providing education and spreading awareness amongst the community.

3.1.4. Technological and scientific forces (T)

Technological advancements in the internet, telecommunications, data management and health industry have transformed the way NGOs operate and also how HIV/AIDS is combated.

Firstly, increased access to the internet and telecommunications has changed the way in which organizations can assess information, deliver messages and market their activities. According to the Statistics and IT National Institute (INEI, 2014), fixed telephone line penetration in Peru was 24%, mobile telephone penetration was 85% and with an increasing trend, and internet penetration was 22.7%.

Secondly, technological advancements have made data management more efficient. Sophisticated software systems and cloud computing have the ability to enhance operations of Hogar San Camilo. They require little investment and are easy to use. As these systems become more widely used it is of great benefit to understand and apply these to Hogar San Camilo's organization.

Thirdly, advancements in health-related technology have decreased the spread of HIV/AIDS. HAART has reduced transmission between sexually active partners by 96% (WHO, 2015). This advancement has significantly assisted those living with HIV/AIDS. HAART usage has increased dramatically with over 1.9 million of the 14.9 million people receiving HAART beginning treatment in 2014 (WHO, 2015). Oral Pre-exposure prophylaxis can be taken daily by non-infected people to reduce the likelihood of contracting HIV. If mothers actively participate in HAART, mother-to-child transmission is almost fully preventable compared to the risk of transmission which is between 15% and 45% (WHO, 2015). Almost 75% of infected mothers now undergo HAART treatment, radically reducing the numbers of infants infected.

As there are advancements in medical technologies, the prices of treatments also become more affordable. UNAIDS (2015) reports that price of early infant diagnostic technologies were reduced by approximately 35%.

The advancements in medical technology will provide Hogar San Camilo with the opportunities to obtain cheaper and more effective supplies to better assist its patients. These

medical advancements can reduce the number of people living with HIV/AIDS which could, in the future, lead to lower patient enrolment at Hogar San Camilo.

Going forward in the short-term, it is essential that San Camilo harness the advancements in internet and telecommunications technology in order to develop appropriate marketing and operations plan to effectively reach patients and donors.

3.1.5. Ecological and environmental forces (E)

HIV/AIDS reduces the ability of the immune system to function and weakens its defense to other diseases and infections. People living with HIV/AIDS are more susceptible to harmful environments. There is a correlation between HIV and low-middle income nations in which the most affected nations are located in Sub-Saharan Africa (Benites, 2013). This suggests that many patients are living in marginalized communities. These communities are often plagued with pollution and live in unclean areas. People also have limited choice to live in a safe, clean and protected environment due to their socio-economic status. The high level of pollution can have a great effect on the health of people living in the marginalized communities that Hogar San Camilo helps.

Living in such disparate environments enhances the likelihood that those with depressed immune systems like HIV/AIDS will contract further sickness which will rapidly decrease their health.

3.2. External Factor Evaluation Matrix (EFEM)

Table 1 identifies the six main external opportunities and five major external threats to Hogar San Camilo's operations. The higher value of the responses, the better the organization can exploit opportunities or defend threats. As indicated, the most important opportunistic factors which contribute to Hogar San Camilo in being successful are taking advantage of benefits of NGOs, increasing awareness of HIV, and increase of local funding. The most important threats to consider are the decreasing availability of international

funding, decreasing HIV/AIDS rates, and the stigma attached to the disease. When weight and value were multiplied, it was discovered that the weight average equalled 1.95. This score indicates a weak position for Hogar San Camilo in a challenging external environment. Companies should obtain at least a score of 2, which indicates that it has an average response to the environment.

Table 1

External Factors Evaluation Matrix

Key success factors	Weight	Value	Weight Average
Opportunities: O			
1 Legal benefits for NGOs	0.15	2	0.30
2 Decreasing poverty rates	0.05	1	0.05
3 Increasing awareness of HIV	0.10	3	0.30
4 Access to internet and telecommunications	0.05	2	0.10
5 Increase of local funding	0.10	2	0.20
6 Increasing CSR policies in companies	0.05	2	0.10
	0.50		1.05
Threats: T			
1 Political and economic uncertainty Decreasing available international funding	0.05	1	0.05
2 Decreasing HIV/AIDS rates	0.20	1	0.20
3 Unhealthy environment	0.10	2	0.20
4 Stigma of the disease	0.05	3	0.15
5	0.10	3	0.30
	0.50		0.90
Total	1.00		1.95

Note. Value: 4= Superior response, 3= Above average response, 2 = Average response, 1= Bad response

3.3. The Organization and its Competitors

Part of the situation analysis of Hogar San Camilo is to properly identify its competitors, for example other NGOs that will apply for funding like Hogar San Camilo, its references and benchmarks.

In order to examine the information, the five forces framework developed by Michael Porter will be used. Competition goes beyond including four other forces: customers, suppliers, potential entrants and substitute products (Porter, 2008). Hogar San Camilo should strategically seek a position in order to take advantage of the forces or defend against them if they are not beneficial (D'Alessio, 2014).

3.3.1. Bargaining Power of Suppliers

Hogar San Camilo needs a pool of suppliers in order to provide the holistic services to people with HIV/AIDS. The Peruvian government is a key supplier because it provides the HAART medicine among the public sector and certain NGOs such as Hogar San Camilo. In 2002, the Peruvian government took on the responsibility to provide HAART treatment to children from ages zero to seventeen (Ministerio de Salud, 2015).

Besides this, Hogar San Camilo also needs provisions of other medical supplies, food and clothes. This is provided mostly by donors that want to support the initiative of Hogar San Camilo. Donors that are in a better position to provide medical supplies are private hospitals or pharmaceutical laboratories that are profitable and willing to support as a part of CSR initiative.

Finally, Hogar San Camilo needs volunteers to help it provide the services. Volunteering is a key factor to consider in non-profit organizations. If volunteers feel that Hogar San Camilo provides them with a fulfilling experience, then they will eagerly join Hogar San Camilo by offering better services to patients and eventually reducing administrative costs of having more staff.

Since the whole process of providing a holistic service revolves around the provision of the HAART treatment, the power of the government as a supplier is high. Hogar San Camilo has a high degree of dependency of the policies that the government and specifically the MoH will develop in the future as well as a dependency in the relationship that the World

Health Organization will have with the MoH. The World Health Organization is the major investor in combating HIV/AIDS by providing subsidies to governments.

3.3.2. Bargaining Power of Buyers

As opposed to a typical private organization, an NGO is not looking to sell a product or service to a client or customer, but is looking to help others by different means. The buyers in this case would be the donors. Donors will evaluate the social impact that an NGO like Hogar San Camilo can bring and eventually contribute with funds. Donors will find it more difficult to allocate their funds if there is a wide variety of NGOs and especially if many create value and social impact.

The evaluation of the donors will, as a result, give the power that they have in Hogar San Camilo's operations. The way to estimate the number of donors and their bargaining power is by identifying trends that confirm if the donations to NGOs are increasing or not. Some factors identified in the external analysis are important in order to give an opinion about the situation of the donors. In terms of international funding, as the Peruvian economy continues to grow, global donors are considering switching their support to countries that are in a worse economic position. Additionally, most international donors like the World Bank or IMF are focused on reducing global poverty. The remaining international donors will have more options to invest and Hogar San Camilo will need to present them an attractive marketing and strategic plan to convince them that the Hogar's cause is more valuable than others.

The case of local donors is different. Since the economy of Peru is improving, many companies are operating with increasing profits. Hence, organizations could increase investment in CSR causes. This, in addition to the trend of CSR activities in companies is increasing making it possible that Hogar San Camilo will have more options in the local environment. ("Un análisis sobre la responsabilidad social corporativa en Perú", 2014).

The power of donors, in the case of Hogar San Camilo, will result by jointly evaluating the international and national supply. The overall power of donors will be medium since the power of international donors will tend to be high as it is much harder for Hogar San Camilo to get funds from international donors, and the power of local contributors will be reduced because of the growing number of NGOs.

It is important also to consider that the people that go to Hogar San Camilo and receive treatment are considered buyers as well. Their power will be a consequence of the offers that they could have for their treatment. If they can easily switch to another NGO and receive treatment elsewhere, their bargaining power will be high against Hogar San Camilo. For Hogar San Camilo, the possibility to attend to more people and help them is not only a social cause but also an opportunity to get recognition from the congregation of Camilos, potential donors and society in general. Since the reputation is highly dependent on the people and there are many NGOs offering to combat the HIV/AIDS, it can be concluded that the power of patients as buyers is high.

3.3.3. Threat of Substitutes

The substitutes in the case of Hogar San Camilo would be the NGOs that work in a different field which can be: (a) related to the health industry such as NGOs focused on cancer or tuberculosis, and (b) not related to the industry such as NGOs that work in education, environment or sports. The social impact and value proposition of these NGOs could make potential donors evaluate whether to invest and help Hogar San Camilo or another cause different to HIV/AIDS treatment. In order to identify how strong the threat of substitutes is for Hogar San Camilo, an evaluation of the current NGOs in Peru is necessary.

There are many awarded NGOs in Peru that work efficiently and are a popular destination of funds from donors because of their visibility, social contribution and brand

recognition. Since Hogar San Camilo will face both types of substitutes, it is important to consider the results and reputation of NGOs that operate in other fields.

Enseña Peru is an NGO focused in the field of education. Enseña Peru gathers talented professionals that are willing to share their knowledge with the community and people with fewer resources by an intensive coaching model (Enseña Peru, 2015). With Enseña Peru as a benchmark, many companies such as Telefonica del Peru started its own foundation as a way to engage in CSR activities and contribute to society.

ONG Fondo Verde is an international NGO with operations in Peru focused on the environment preservation and sustainable use of natural resources. This organization is experienced in the execution and management of strategic projects related to environmental issues at the national and international level (ONG Fondo Verde, 2015).

Hogar San Camilo is exposed to compete for funds with different NGOs that know its field of operation and are organized. Consequently, the threat of substitutes is high.

3.3.4. Threats of New Entrants

New entrants are future NGOs that will enter the market to contribute with the HIV/AIDS cause. It is difficult to anticipate new entrants and measure their impact on the donors' decisions. However, an analysis of the quantity and size of the current NGOs can provide an idea on how difficult it could be for a new NGO to gain brand recognition.

There are more than ten NGOs focused on combating HIV/AIDS in Peru and they receive support either from international donors like UNAIDS or from national donors companies with CSR activities. When profitable companies operate in a fragmented industry, the market share that a new entrant can get at first is usually very low. A similar situation will happen to a new NGO when there are already many NGOs in the same field offering a similar value proposition and with a brand already established in the country.

Red SIDA Peru is a conglomerate composed by thirteen NGOs focusing on combating HIV/AIDS (Red SIDA Peru, 2015). Thus, it can be inferred that the entry barrier for a new entrant is high. It is difficult for a new entrant to gain reputation in the first years and start getting the contribution from the donors.

However, it is relevant to evaluate the easiness to start a business under the law, get the working permits from the government as well as the necessary licenses that guarantee health and safety in the establishments. To register as an NGO in Peru, the candidate organization will need to submit a formal request to APCI's executive director including the following information: (a) organization constitution, (b) registration form, (c) board of directors complete information, (d) information about the programs or projects planned to develop, and (e) positive opinion document from the sector (Ministerio del Trabajo y Promoción del Empleo, 2015). Since the procedure is straightforward, it is easy for new NGOs to emerge and provide the same aid that Hogar San Camilo presently receives. Therefore, the threat of new entrants is medium.

3.3.5. Competitive Rivalry

The main goal of NGOs is to provide a social impact for the country or the world. It is important to state that for the purpose of this analysis, the competition of an NGO is other NGOs that are working in the same field and that will try to raise funds to continue with their normal activities. In case of Hogar San Camilo, the field is HIV/AIDS treatment.

As mentioned before, Red SIDA Peru is a conglomerate composed of thirteen NGOs in the HIV/AIDS field. Its members are for example AID for AIDS, APROPO, Asociacion Germinal, Asociacion Kallpa, CEPESJU, FOVIDA, INPPARES, Instituto de educacion y salud, Pathfinder International, Plan Internacional, PROSA, REDESS JOVENES and Via Libre (Red SIDA Peru, 2015).

Moreover, it is important that the following NGOs have been authorized to provide the HAART service: Asociacion Civil Impacta Salud y Educacion, Via Libre, Hogar San Camilo and Medicos sin Fronteras (Ministerio de Salud, 2006).

This is the force that has an immediate direct impact to the operations of Hogar San Camilo. In that sense, the competitive rivalry is high. Figure 5 summarizes the industry situation.

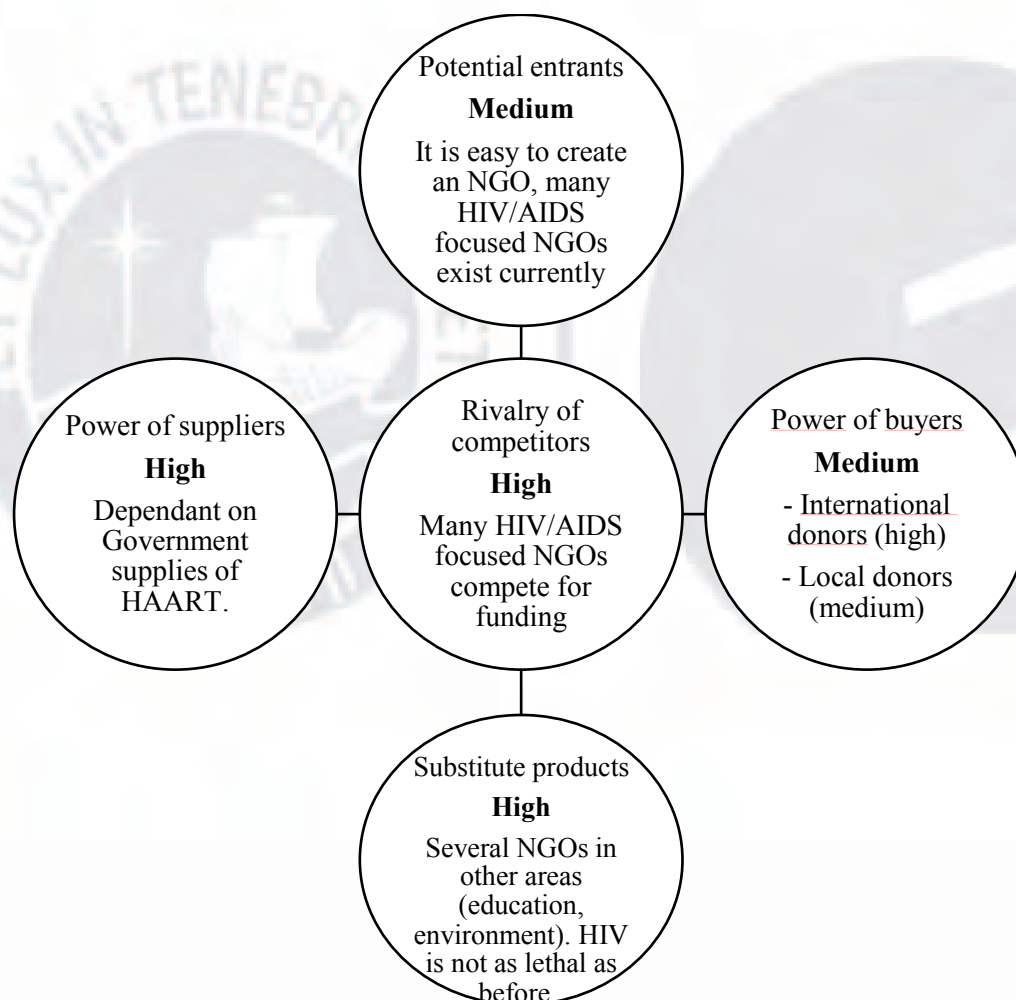


Figure 5. Porter's Five Forces Model

Adapted from "The five competitive forces that shape strategy" by M, Porter, 2008

3.4. The Organization and its Referents

A good practice for companies to follow is to identify benchmarks. Benchmarks are companies to imitate or compare in specific aspects due to its renowned competitive advantages and reputation. In the case of Hogar San Camilo, there are some NGOs with high impact and good recognition in terms of HIV/AIDS treatment. The first one is Caritas, a religious organization that focuses on serving the poor and promotes charity and justice throughout the world. It has international activities to combat HIV/AIDS mostly in Africa, and is widely recognized by the worldwide media (Caritas, 2015). The second referent is the Camillian Home. It is an NGO of the Camillian congregation in Thailand that offers a similar holistic support to HIV/AIDS patients. It receives children with HIV/AIDS and teaches and raises them with values based on their cultural background and beliefs (Camillian Home, 2015).

3.5. Competitive Profile Matrix (CPM) and Reference Profile Matrix (RPM)

The Competitive Profile Matrix (CPM) evaluates the strengths and weakness of Hogar San Camilo and its competitors by rating the response of each organization to certain critical success factors established for the industry (D'Alessio, 2014). The competitors that will be assessed with Hogar San Camilo in the Competitive Profile Matrix are NGOs related to its operations, focused in HIV and capable to provide services to HIV patients. This is particularly important since many other NGOs focused in HIV are focused in spreading awareness and monitoring government activities related to the field. The NGOs Inppares, AID for AIDS Peru and Impacta are leaders in promoting, helping and taking care of people with HIV/AIDS in Peru.

Inppares is a leader in promoting the protection of sexual and reproductive health. HIV/AIDS is one of the major threats that Inppares addresses. As an NGO, Inppares has

worked in several projects in partnership with other NGOs, the government and the private sector giving them the visibility to further funding (Inppares, 2015).

AID for AIDS Peru is a NGO subsidiary of AID for AIDS global. It operates in many countries including Peru and can handle treatment, education, training and legal counseling regarding HIV/AIDS (AID for AIDS, 2015).

Finally, Impacta Peru is a NGO focused in research and development and HIV/AIDS. It works close with laboratories and universities to provide healthcare to its patients (Impacta Peru, 2015).

The critical success factors were obtained by discussing them with Hogar San Camilo management. Table 2 shows the evaluation considering Hogar San Camilo's competition and substitutes. It shows that Hogar San Camilo has a score of 2.35, the weakest result among its competitors. Hogar San Camilo does not have major strengths but has five minor strengths: holistic treatment, infrastructure, availability of HAART medicine, experience of the professionals in charge and brand awareness. The Hogar has three minor weaknesses and two major weaknesses that it should work to improve those critical factors and thus become more competitive. The minor weaknesses are resource management, level of funding and operational efficiency while the major weaknesses are accessibility for patients and quantity of beds, shelters and space per patient.

Regarding the Hogar's competitors, Inppares, AID for AIDS Peru and Impacta have scores ranging between 2.45 and 3.1. Among the three NGOs, AIDS for AIDS Peru has the most strengths. On the other hand, the substitute's final rating does not consider two critical success factors that are not applicable to them. In consequence, Enseña Peru has a score of 2.3 and ONG Fondo Verde 1.8. However, both show that there are other NGOs that get the attention of potential donors by showing credibility, accessibility, infrastructure and efficient operations.

Table 2

Competitive Profile Matrix

Critical Success Factors	Weights	Competitors								Substitutes			
		Hogar San Camilo		Inppares		AID for AIDS Peru		Impacta		Enseña Peru		ONG Fondo Verde	
		Value	Pond.	Value	Pond.	Value	Pond.	Value	Pond.	Value	Pond.	Value	Pond.
1 Resource management	0.15	2	0.3	3	0.45	3	0.45	2	0.3	3	0.45	3	0.45
2 Level of funding	0.1	2	0.2	3	0.3	3	0.3	3	0.3	3	0.3	2	0.2
3 Holistic treatment	0.15	3	0.45	2	0.3	2	0.3	2	0.3		0		0
4 Operations' efficiency	0.1	2	0.2	2	0.2	3	0.3	3	0.3	3	0.3	3	0.3
5 Infrastructure - Comfortable, safe and modern	0.05	3	0.15	3	0.15	4	0.2	3	0.15	4	0.2	3	0.15
6 Availability of medicines and HAART	0.1	3	0.3	2	0.2	2	0.2	2	0.2	Do not apply	Do not apply	Do not apply	Do not apply
7 Accessibility for the people - Geographically and financially	0.1	1	0.1	4	0.4	4	0.4	3	0.3	3	0.3	2	0.2
8 Experience of professionals in charge	0.05	3	0.15	3	0.15	4	0.2	3	0.15	3	0.15	4	0.2
9 Marketing presence and brand awareness	0.15	3	0.45	4	0.6	4	0.6	2	0.3	4	0.6	2	0.3
10 Quantity of beds, shelters and space	0.05	1	0.05	3	0.15	3	0.15	3	0.15	Do not apply	Do not apply	Do not apply	Do not apply
Total	1		2.35		2.9		3.1		2.45		2.3		1.8

Note. Value: 4= Major strength, 3= Minor strength, 2 = Minor weakness, 1= Major weakness

The Reference Profile Matrix (RPM) compares Hogar San Camilo to its benchmarks. Hogar San Camilo has score of 2.35, the lowest score among its benchmarks. Caritas and Camillian Social Center Raygong are identified as benchmarks for Hogar San Camilo and they have a score of 3.6 and 3.35 respectively. Caritas is one of the references because of its international experience and high credibility. Camillian Social Center is the other reference and it is an organization part of the Camilo's congregation focused in Thailand, a country with high incidence of HIV/AIDS. Both NGOs have brand awareness as a shared major strength. This suggests that Hogar San Camilo should focus, among the other critical success factors, on creating brand awareness. Table 3 shows the result of the RPM.

Hogar San Camilo is far of reaching its benchmarks in the short term. However, this matrix gives an insight about which critical success factors the benchmarks are exploiting. These are capacity (quantity of beds), marketing presence and resource management. By improving these areas, Hogar San Camilo can provide better quality services and reach its vision.

3.6. Conclusions

The environment shows that Hogar San Camilo can be influenced by the political situation that Peru will have in 2016 during the period of uncertainty and by the decrease of international funding. These challenges are the main issues that Hogar San Camilo should tackle in its strategy development to avoid problems that could arise in the future. Hogar San Camilo is actively working in the field of HIV/AIDS awareness and it can provide a great service of social assistance and listening towards counteract the constant stigma that people with HIV/AIDS face. The opportunities for Hogar San Camilo are the increasing economic wealth and the CSR activities that Peruvian organizations will do in the following years.

Table 3

Reference Profile Matrix

Critical Success Factors		Weights	Benchmarks					
			Hogar San Camilo		Caritas		Camillian Social Center - Raygong	
			Value	Pond.	Value	Pond.	Value	Pond.
1	Resource management	0.15	2	0.3	4	0.6	3	0.45
2	Level of funding	0.1	2	0.2	4	0.4	3	0.3
3	Holistic Treatment	0.15	3	0.45	3	0.45	4	0.6
4	Operations' efficiency	0.1	2	0.2	3	0.3	3	0.3
5	Infrastructure - Comfortable, safe and modern	0.1	3	0.3	3	0.3	3	0.3
6	Availability of medicines and HAART	0.05	3	0.15	3	0.15	4	0.2
7	Accessibility for the people - Geographically and financially	0.1	1	0.1	4	0.4	3	0.3
8	Experience of professionals in charge	0.05	3	0.15	4	0.2	3	0.15
9	Marketing presence and brand awareness	0.15	3	0.45	4	0.6	4	0.6
10	Quantity of beds, shelters and space	0.05	1	0.05	4	0.2	3	0.15
Total		1		2.35		3.6		3.35

Note. Value: 4= Major strength, 3= Minor strength, 2 = Minor weakness, 1= Major weakness

Hogar San Camilo provides a different approach to working with HIV/AIDS. It is focused on helping people in extreme poverty without restrictions; however, other NGOs which work with a strategic orientation, focus their efforts on a specific target such as homosexuals, mothers diagnosed with HIV or just children. In consequence, results show that Hogar San Camilo should work harder to be as competitive as other NGOs. The areas of improvement for Hogar San Camilo are: (a) be more accessible to the target consumer and (b) work in the improvement of infrastructure and capacity.



Chapter IV: Internal Evaluation

This chapter will focus on assessing the internal aspects of Hogar San Camilo. It will do so by conducting an AMOFHIT analysis which identifies the strengths and weaknesses in seven separate areas of the organization. With the information gathered from this analysis, an Internal Factors Evaluation Matrix (IFEM) is developed. Within the IFEM are the main strengths and weaknesses identified within the organization with both a weight and value attached to each. This matrix allows the organization to understand which strengths it should be focusing on and which weaknesses it should develop.

4.1. Internal Analysis AMOFHIT

The internal evaluation of Hogar San Camilo was done using the AMOFHIT analysis. This analysis covers the main activities, situations and issues related to the functional areas of an organization: Administration and management (A), marketing and sales (M), operations, logistics and infrastructure (O), finance and accounting (F), human resources (H), information and communications systems (I) and technology and research and development (T) (D'Alessio, 2014). This analysis takes into consideration the information provided by Brother Jean Yaurivilca, Director of Hogar San Camilo and internal company reports.

4.1.1. Administration and management (A)

An organizational structure acts as a foundation of present decision making processes, culture and vision. As an NGO, Hogar San Camilo has a Board of Directors that is responsible for reaching a consensus regarding its short and long-term goals, strategy and development initiatives which collectively provide broad guidance for the organization. The Board of Directors is composed of a President (Father Enrique Gonzales), a Secretary (Father Nolberto Aguilar) and an Executive Director (Brother Jean Yaurivilca). Regarding important decisions, Brother Jean is responsible for proposing and discussing projects with the Board of Directors which is composed of two brothers from the Camilo's congregation.

Monthly, Hogar San Camilo must present information with results accomplished in the programs to the Board of Directors. The Board of Directors is the maximum authority of the Camilo's congregation in Peru and also takes care of other units in addition to Hogar San Camilo. In Peru, the Camilo's congregation runs three establishments located in Lima, Arequipa and Huancayo respectively. However, the administrative staff of each location is autonomous and they manage their own decisions and their own meetings with the Board of Directors. Even though Hogar San Camilo in Lima does not have decision power over the other establishments, it provides clothing and foods to them as well as receives patients temporarily. This makes the Hogar incur in extra costs.

Internally, Hogar San Camilo has a policy of open doors for workers and patients. This means that every worker can confront management and share their thoughts or concerns. Sometimes, the concerns are related to human resources issues that the workers experience and that the manager has to take care of due to lack of staff.

Management reputation should also be considered because Brother Jean is a younger director than his predecessors. He has to lead a team of professionals (doctors, therapeutics, social assistants, psychologist and other operational staff) who are older and more experienced. Credibility and leadership are important aspects that need to be considered in Hogar San Camilo's management.

Hogar San Camilo does not have a policy related to sending information to the workers regarding activities and achieved results. This task was improved in the last year with an initiative from Brother Jean that was based on having meetings after every event. The purpose of those meetings was to share the results of the activities such as the funding reached and how it would be invested in the short-term.

Hogar San Camilo does not have a strategic plan to which it can align its vision, nor establish goals and objectives. As a religious NGO and part of the Camilo's congregation, it is focusing on helping the sick in a generous way, without expecting reciprocation.

Lastly, the recognition of Hogar San Camilo managers and directors by the people that receive their support is very positive. People diagnosed with HIV/AIDS who attend Hogar San Camilo therapies feel like they are at home, they feel that they are in an open environment where there is no stigma and they can share their doubts without restriction. Managers and heads of San Camilo programs are very active when the children and people in the shelter have an event. They usually engage in activities where people can create a positive environment and a sense of respect towards Hogar San Camilo managers.

4.1.2. Marketing and sales (M)

Until 2013 the Hogar San Camilo's logo changed every year. For this reason, people were unable to associate Hogar San Camilo with a specific brand and at times refrained themselves from donating because the logo was unfamiliar to them. In 2014 the Hogar created an official logo to be used in all the campaigns and increasing brand awareness. The logo shows a heart composed of two ribbons and a cross on top. As a result, donors and patients will recognize Hogar San Camilo's logo and be willing to collaborate and participate.

Figure 6 shows Hogar San Camilo's new logo.



Figure 6. Hogar San Camilo Logo.

Taken from "Bienvenidos al Hogar San Camilo, Ayuda al Prójimo" by Hogar San Camilo. (2015). Retrieved from <http://www.hogarsancamilo.org/>

Hogar San Camilo seeks to provide holistic wellbeing to people with HIV/AIDS who live in poverty. The segmentation for the Hogar's programs therefore follows two criteria. The first criterion is medical condition as it seeks to attend those who suffer from HIV/AIDS and the second criterion is socio economic level, as it aims to help those in poverty who cannot afford treatment. As a result, Hogar San Camilo's positioning is to be a provider of wellbeing for those in poverty that suffer from HIV/AIDS.

The different programs at Hogar San Camilo enable it to attend to patients throughout their lives. The Hogar has four programs that are targeted to specific age groups and two additional programs that are targeted at patients with HIV/AIDS.

The targeted programs are Alumbrando una vida, Camilos vida, Vida feliz, and Shelter. Alumbrando una vida helps pregnant women with HIV/AIDS deliver healthy babies. Camilos vida is a nursery program where children between zero and three years old are looked after. Camilo vida includes children born from women in the Alumbrando una vida program, independently if they were born with HIV or not, and other children who have HIV/AIDS. Once they turn three years old, children with HIV/AIDS can attend Vida feliz. Vida feliz is a program that helps children and teens with schoolwork who are between three and eighteen years old. These three programs have direct beneficiaries, patients enrolled in the program, and indirect beneficiaries, family members who also attend the program. These programs help patients and their families deal with the disease. They also allow them to enroll in arts and crafts classes aimed to help them develop skills to improve their economic situation.

The Shelter program is aimed at adult males with HIV/AIDS who do not have a home or are unwelcome elsewhere. This is the only program where the patient lives within Hogar San Camilo's premises. Patients in the program also attend classes and share the Hogar's daily chores.

The last two programs are HAART and In-house visits. In the HAART program, Hogar San Camilo provides patients with medicine to fight the disease. The medicine is provided by the MoH and each patient is carefully controlled. In-house visits enable Hogar San Camilo to reach patients who are too weak to attend the Hogar for checkups. The program was aimed to help those in the final stages of the disease.

Table 4 shows the monthly average of the direct and indirect beneficiaries of each of the Hogar San Camilo programs. Camilos vida, Vida feliz and HAART are the programs that benefit more patients.

Table 4

Hogar San Camilo Programs

Program	Target	Monthly average 2015	
		Direct Beneficiaries	Indirect Beneficiaries
Alumbrando una vida	Pregnant women carrying HIV/AIDS	8	16
Camilos vida	0 to 3 year old children	62	248
Vida feliz	4 to 18 year olds	54	216
Shelter	Adult male	7	0
HAART	People with HIV/AIDS	614	Does not apply
In-house visits	Patients with HIV/AIDS	215	Does not apply

Hogar San Camilo works in two marketing aspects: to convince donors to join their cause and get funding; and to treat as many people as its capacity can handle. It works in an empirical way, without a current marketing plan.

San Camilo sells the importance of caring for people with HIV/AIDS. The Hogar has a number of strategies it uses to creatively promote the importance of HIV/AIDS, spread knowledge and raise public donations. It does this typically by engaging with the greater community via hosting and attending trade shows, cause events and religious social gatherings. Additionally, San Camilo has forged strategic relationships with prominent

public figures such as Jimena Rumini Espinosa Vecco (Miss Universe Peru) who recently appeared at a promotional event for the Hogar at the popular Hard Rock Cafe. The organization also has an online social media presence. Currently, it is working in a project to renew the web page and to move into the social media field.

By changing the way people discover, read, collaborate and publish news and information, social media technologies are reducing barriers and allowing people to connect in the online world to form relationships: personal, political and business. This is of particular benefit to Hogar San Camilo as these tools allow it to creatively, efficiently and effectively conduct market research and measure the performance of its promotion efforts.

Hogar San Camilo representatives attend companies, schools and universities to spread knowledge about HIV/AIDS awareness. The Hogar also increases awareness during the house visits program, reaching patients and their families.

The religious background of Hogar San Camilo influences its marketing approach with respect to other NGOs. As the vision of the Camilos congregation is to help people no matter their background, social status, or gender, the Hogar does not target specific HIV/AIDS patients. Other NGOs focus on a certain task like research and development; and get funds from laboratories due to joint investigation. They could target certain patients that are more suitable to the activities and treatments that they provide.

4.1.3. Operations and logistics. Infrastructure (O)

To analyze operations, logistics and infrastructure, D'Alessio's process model (2012) will be used. The process model takes into consideration the inputs, the process itself which is subdivided into labour and infrastructure and plant, and the outputs. It is illustrated in Figure 7.

In the case of Hogar San Camilo the main input is individuals with HIV/AIDS. These are people who will attend Hogar's programs and activities. The admission

requirements are the same for all programs. Patients must present a psychological, social and medical evaluation from the hospital. The Hogar then evaluates the patients' and families' economic situation in order to accept the patients in the program or refer them to other institutions. The Hogar will start a record of the patient and his or her family with these documents. Depending on the program, patients will go to the Hogar once a month for monthly check ups, once or thrice a week or even remain there permanently in the Shelter program.

Hogar San Camilo has secondary inputs required to effectively run the Hogar such as materials, medicines and food. The Hogar may receive them as donations; if not, it will need to purchase them. For this reason, monthly purchases vary depending on the type and amount of the donations received. With respect to inventory, it is held in three main storage rooms. The storage room where the medicines are kept remains locked while the other two rooms, where groceries and other product are kept, usually remain unlocked. Hogar San Camilo follows an inventory system for the HAART medicine, as demanded by the MoH. Nonetheless, there is a need to implement an overall inventory system. The request of items in the inventory is made directly to Brother Jean who prepares a document of approval which means that the inventory is ready to take from the storage. There is no prior control of the request and there is no tracking and further control of inventory.

Hogar San Camilo has two processes. The main process is providing the programs Alumbrando una vida, Camilos vida, Vida feliz, Shelter, HAART and In-house visits. The activities for the day of the first four programs depend on attendance and interests that the attendees what to explore that day. Therefore, there is a need of an activity program design and schedule for the Hogar to follow.

A second type of process that takes place in Hogar San Camilo is the service provided by doctors and psychologists to the patient's families and other people who wish to be

attended at the Hogar's facilities. These activities include medical consultations (where doctors may perform minor surgeries), physical and rehabilitation therapy, dentists and psychological therapy.

In consequence, program directors and teachers are exclusive to labour in the first process while physical therapy and dentists are exclusive for the second process. The rest of the administrative staff is needed in both processes.

Regarding the plant, Hogar San Camilo has two centers that provide aid. The first is located in the Lima city center. It is a remodeled colonial house with ample rooms to conduct the various programs and activities. The Hogar has offices, classes, lecture halls, a kitchen and a dining facility. Four of these rooms are used for Shelter patients and can take a total of 22 patients. Since it is a shelter, the center is open every day but only allows access to Shelter patients and workers on Sundays. The other programs take place from Monday to Saturday. The second center finished construction in 2014 but is not running at present due to lack of resources. It is located in Chaclacayo, has the same amenities as the Lima center and can receive up to 40 Shelter patients.

The outputs of Hogar San Camilo are individuals with HIV/AIDS with an increased sense of wellbeing. Due to the nature of the disease, Hogar San Camilo does not cure its patients. The Hogar aids them to cope with the disease and strives to increase their physical and emotional wellbeing.

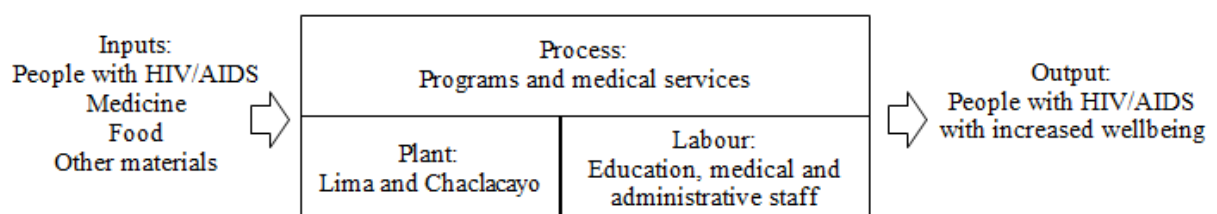


Figure 7. Hogar San Camilo Process Diagram.

Adapted from "Administración de las Operaciones Productivas" by D'Alessio, F. (2012)

4.1.4. Finance and accounting (F)

Hogar San Camilo has two main sources of income. The main source of income for Hogar San Camilo is the donations received from the MoH, companies and individuals. These donations can be financial donations as well as product or medicine donations. Hogar San Camilo received donations totaling S/. 457,877 during 2014, representing 80% of the income received in that year. Donations can vary every year but regularly. Therefore, the Hogar should find regular donors to maintain a minimum amount of annual donations.

The second source of income is the revenue from the Hogar activities. Hogar San Camilo charges those who are not patients that come to the Hogar for a medical or psychological consultation. In addition, Brother Jean holds conferences in hospitals, universities and schools where participants are asked to contribute with goods as payment for assisting the conference. During 2014 the Hogar received a total of S/. 115,576 for these activities, representing 20% of the total income for that year.

Within the medical facilities at San Camilo, prices are fixed according to the complexity of the service but the average price is S/.35 for an appointment. However, there is no clear cost structure for these services. In consequence, the Hogar may be losing money instead of making profits to finance the rest of the programs. Therefore, there is a need to correctly identify the resources and costs for these services and the regular activities and programs of the Hogar in order to make an efficient allocation of resources and budgets. In addition, the Hogar depends on the MoH to finance the HAART medicine. The monthly treatment per person costs US\$ 1,000 and the Hogar may not be able to function if required to fund the medicine itself.

Hogar San Camilo has a debt to asset ratio of 1.5%. This ratio is low because it finances its operations with donations or the Hogar's sales. Nonetheless, the Hogar's expenses are high. The profit to income ratio of Hogar San Camilo is 0.8%. This emphasizes

its critical financial situation as the income it received annually almost equals its expenses. Although the Hogar does not aim to make profit, it should strive to have a higher profit to income ratio in order for it to start operations the following year without problems.

As a religious entity and NGO, Hogar San Camilo is exempted of paying income taxes to the government but it does pay VAT for its purchases. Since activity sales represent only 20% of total income, the Hogar had a fiscal credit of S/.129,329 at the end of 2014. It can only take advantage of this credit by increasing medical services sales.

As stated in the sections above, the important financial decisions are made by the Board of Directors. Decisions regarding daily activities are made directly by brother Jean. With regards to internal reports, the Hogar has reports of major activities regarding the revenues and expenses incurred in said activities for the donating organizations. Also, donating entities are welcomed to the Hogar as a means of control regarding their donations. Hence, it is desirable that the Hogar have consolidated financial information.

4.1.5. Human resources (H)

Hogar San Camilo operates a variety of different functions and areas. It runs six diverse activity-based programs for people of all ages, provides home care, acts as a shelter, gives meals and provides access to counseling, medical, dental and spiritual for people living with HIV/AIDS. Therefore, the organization operates with both specialized and non-specialized staff, volunteer and paid positions, and part-time and full-time employees.

Hogar San Camilo operates with 35 workers and fifteen volunteers. Of the 35 workers, eight are hired as staff while the remaining 27 are hired as independent workers. The medical and pharmaceutical areas are well established and have a person in charge of the area. The other areas however do not have a person in charge and in consequence, most of the staffs report directly to the Director. The volunteers also report directly to the Director. In consequence, Brother Jean oversees almost all operations and supervises directly the

Hogar San Camilo workers. Currently, Hogar San Camilo does not have a formal organizational structure; however, according to its operation and discussion with Hogar San Camilo management, it was prepared an organizational chart as showed in Figure 8.

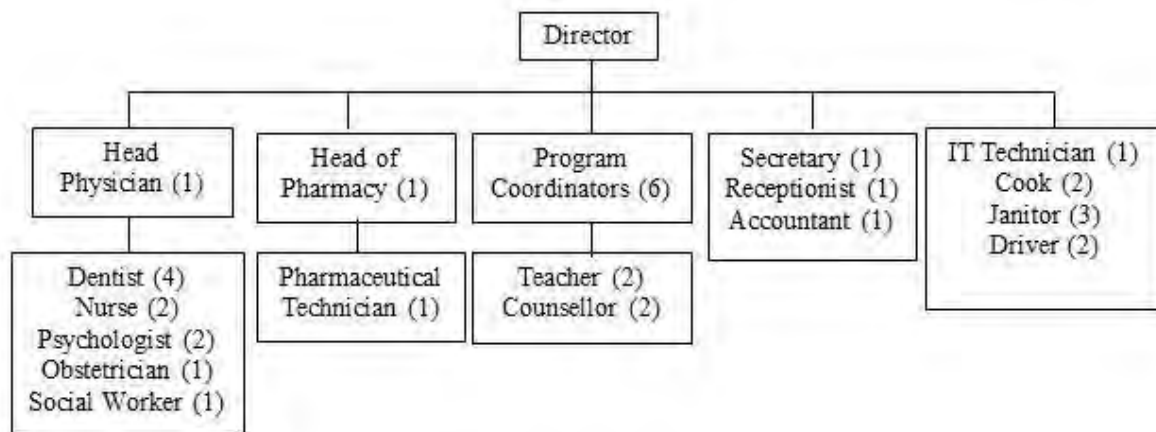


Figure 8. Organization Chart of Hogar San Camilo

There are varying working schedules for the Hogar San Camilo workers. Members of staff work daily Monday through Saturday while the rest of workers may go to the Hogar once or twice a week. Worker absenteeism in Hogar San Camilo is low. In addition, there is no clear incentive or retaining policies at Hogar San Camilo.

All staff operating in a professional service at Hogar San Camilo requires certifications or degrees. The Hogar now holds a selection process to hire workers. The jobs are first posted in the newspapers and Brother Jean selects the possible candidates according to the resume. Candidates are then given a psychological test and then interview. The final candidate is then selected.

The Hogar also holds a selection process for volunteers. All volunteers must attend four training sessions where they learn about HIV/AIDS, the spiritual approach of the Hogar and participate in integration activities. Volunteers are accepted at Hogar San Camilo after attending all four trainings.

4.1.6. Information and communication systems (I)

The information and communication systems at Hogar San Camilo are simple. Most information such as receipts, donation tracking and reports are saved and stored as hard copies in binders. There are separate hard copy blank forms which are also stored. These are later used to fill out pertinent information and are then filed in its corresponding binder. Although Hogar San Camilo has access to and uses computers, the organization's digital organizational systems are lacking. Therefore, the current set up of information systems are not user oriented, very time consuming and hard to access. Hence, there is a need to address and the information systems in Hogar San Camilo.

The organization has significantly increased its digital presence. Hogar San Camilo in June 2015 launched a new website, a Facebook group, Instagram account, Twitter account and Youtube page. By modernizing its marketing presence it has increased its ability to communicate information rapidly to the public, especially future donors. The IT technician is in charge of the social media presence.

4.1.7. Technology and research and development (T)

In terms of technology, Hogar San Camilo has the necessary equipment to provide diverse medical services such as: odontology, physical therapy and maternity. It has cauteriors, ultrasound equipment, ecographers, physiotherapy equipment, dental X-ray equipment and sterilizers amongst others. This equipment enables Hogar San Camilo to provide a complete set of healthcare treatment to people that suffer HIV/AIDS.

Hogar San Camilo focuses on researching new approaches to increase the service received in each of its programs. For this reason, the staff will conduct interviews with patients and their families in order to find improvement opportunities.

4.2. Internal Factors Evaluation Matrix (IFEM)

Table 5 identifies the key internal strengths and weaknesses of Hogar San Camilo. The strongest abilities of the organization are the holistic services that it offers (medical, counseling, religious and psychological) and the number of tailored programs it offers to include people of all ages with different experiences and needs related to HIV/AIDS. The main weaknesses of the organization are that it is financially dependent on donors, it lacks an efficient consolidation of its data, and most importantly that it fails to identify a long-term strategic position. The weighted average calculated by the weight multiplied by the value resulted in a weight average of 2.4. Companies should have a minimum of two as a score; this indicates that it has more strengths than weaknesses. Table 5 indicates that the internal situation could be improved upon by Hogar San Camilo by focusing on its strengths and developing its weaknesses

Table 5

Internal Factors Evaluation Matrix

Key internal factors	Weight	Value	Weight Average
Strengths: S			
1 Holistic services	0.15	4	0.60
2 Awareness programs	0.10	3	0.30
3 Number of tailored programs	0.15	4	0.60
4 Experience in the industry	0.05	3	0.15
5 Skilled workforce	0.05	4	0.20
	0.50		1.85
Weaknesses: W			
1 High financial dependency	0.10	1	0.10
2 No consolidated data	0.10	1	0.10
3 Lack of strategic vision	0.20	1	0.20
4 Low brand recognition	0.05	2	0.10
5 Poor leadership	0.05	1	0.05
	0.50		0.55
Total	1.00		2.40

Note. Value: 4= Major strength, 3= Minor strength, 2 = Minor weakness, 1= Major weakness.

4.3. Conclusions

As analyzed in the AMOFHIT, Hogar San Camilo has several internal strengths and weakness. The Hogar has simple administration, marketing, operations, finance and human resources structure and activities. There is a need to alter these areas to allow Hogar San Camilo to effectively map the activities and allocate its resources more efficiently.

The five main strengths are holistic services, awareness programs, number of tailored programs, experience in the industry and the skilled workforce. Nonetheless, Hogar San Camilo is not taking advantage of all its key internal strengths. The Hogar still needs to work on its spreading awareness campaigns in order to increase HIV/AIDS awareness and thus attract more funding from donors. The tailored programs set Hogar San Camilo aside from the rest of the NGOs as it provides holistic wellbeing programs for all ages, enabling HIV/AIDS patients to attend the programs in Hogar San Camilo from birth until adulthood. Moreover, the variety of programs enables families that have HIV/AIDS to go to the Hogar together and attend different programs.

The five main weaknesses are high financial dependency, no consolidated data, lack of strategic vision, low brand recognition and poor leadership. The Hogar is financially dependent on donations from other entities but regularly applies to international aid programs. Moreover, San Camilo hires professionals that demand high wages. Hence, a significant part of San Camilo's operating expenses goes to paying the doctors, dentists, nurses and psychologists. San Camilo is in need of a strategic vision and consolidated information for decision making. The Hogar is focused in the daily activities but lacks a clear vision of where it wants to be in future.

Chapter V: Interests of the Organization and long-term objectives

This chapter will address the main interests of Hogar San Camilo as a religious NGO, the potential of the organization, and the four cardinal principles of the organization. This information will help identify the long-term objectives for Hogar San Camilo. The long-term objectives will guide Hogar San Camilo to reach the vision that it planned and this will be accomplished by a proper identification of the strategies.

5.1. Interests of the Organization

The organizational interests are the key benefits that Hogar San Camilo as a religious NGO wants to accomplish (D'Alessio, 2014). Considering the vision of Hogar San Camilo and the internal and external evaluation, the following seven interests are identified:

- Sustainably help marginalized people of Peru living with HIV/AIDS by giving them holistic services. Hogar San Camilo seeks to ensure the psychological and physical welfare of its patients.
- Increase funding in order to finance its operations, grow in the future and best assist its patients. This is particularly important because Hogar San Camilo depends on funding.
- Create more facilities and increase capacity to provide services to more patients.

Specially targeting the regions and cities of Peru where the impact of the HIV/AIDS is higher. In 2013 Hogar San Camilo purchased another building in Chaclacayo to operate similarly to its central Lima location. However, Hogar San Camilo currently does not have enough capital to finance this additional center.

- Gain brand recognition among stakeholders and increase the awareness of Hogar San Camilo's activities in other organizations. Through increased marketing, Hogar San Camilo will have more brand awareness which will increase the likelihood of donors noticing and trusting the organization. This will result in increased donations.

- Gather more sustainable volunteers that can commit to Hogar San Camilo values and be a support to the patients. More knowledgeable volunteers would allow the organization to run smoothly and offer assistance in areas which require more manpower.
- Consolidate data efficiently in order to increase the tools needed to request funding. By understanding where its capital is allocated and which areas of the organization are in need of more funds will allow Hogar San Camilo to justify to current and future donors where donations will be spent.
- Make the new medical center focused on physical treatments a profitable and sustainable operation. In order for the Chaclacayo center to assist more people and to be a long-term facility, it should be designed to operate at a profit through funding and service fees for those able to pay.

The interests of Hogar San Camilo should be compared also to the interests of the stakeholders in order to identify common and opposite interests. Having stakeholders with common interests is the basis to contemplate further alliances, partnerships or joint ventures as a potential strategy.

5.2. Potential of the Organization

In order to analyze the potential of the organization, it is essential to identify its core competencies. These factors are unique to San Hogar Camilo and provide the organization with the ability to be competitive. The mentioned factors should be able to adapt and evolve with the needs of the organization. Internal factors analyzed through AMOFHIT indicate where Hogar San Camilo's strengths lay. The two key factors of Hogar San Camilo which are unique leverage tools and direct the potential of the organization are the holistic nature of its services and programs as well as its open door services.

Firstly, holistic services and programs refer to Hogar San Camilo's focus on delivering not only medical care to HIV/AIDS patients but also psychological, religious guidance, counseling, shelter, food programs and activities. This allows patients to access a variety of services developed through six unique programs in order to better combat the disease and its side effects such as depression. The holistic programs are also designed to assist the patient throughout the entirety of their lives. They range from providing basic to intensive programming. A patient can change their involvement in the programs depending on what stage of the disease they are in, their age or their ability to provide for themselves. The Shelter program exists for men suffering with the disease who do not have secured housing.

The second key factor is Hogar San Camilo's open door service which indicates that anyone who is affected by HIV/AIDS regardless of their age, gender, sexual orientation or connection to the disease is accepted to apply. The organization does not discriminate against people requiring their services and seeks to assist as many marginalized people living with HIV/AIDS in Lima as it can sustainably accomplish.

5.3. Cardinal Principles of the Organization

According to D'Alessio (2014), cardinal principles identify opportunities and threats and are important in determining long-term goals. The four principles are:

Influence of third parties. Public and private institutions influence NGOs' operations in Lima. The most important parties that affect Hogar San Camilo's operations, strategic planning and determination of long-term objectives are the MoH and donors. The MoH acts as an extension of the government and provides the majority of San Camilo's funds and essential resources needed to keep operations running. Additionally, the MoH has the authority to implement various regulations and industry practices that can significantly affect NGOs' operations. While the government's support is very important to Hogar San Camilo,

it alone does not provide enough financial capital to allow San Camilo to operate at maximum capacity and achieve its strategic goals. For example, the government has a key role in controlling the production of drugs, allowing it to achieve high quality products at an affordable price and it has the authority to distribute them to entities.

Therefore, the government can decide to both extend and limit its pharmaceutical and financial support to both Hogar San Camilo and other NGOs with similar objectives. Consequently, the Hogar must acquire additional monetary resources from private donors. The organization achieves this additional capital by accepting funds from contributors and hosting promotional events aimed at increasing awareness for HIV/AIDS. However, the general public and the city have a significant influence on how Hogar San Camilo orchestrates its promotions. For example, the city of Lima is divided into multiple districts that encompass different socio economic demographics and Hogar San Camilo must plan its events in specific districts where it can implement push factors, such as marketing events, in regions of the city that are more likely to grant it greater donations and awareness to its cause. Ultimately, San Camilo's promotional and financial success is greatly affected by the location of specific socio-economic sectors.

Present and past ties. Since its inception, Hogar San Camilo has always been committed to helping the sick. Other than the government, it was the first institution that was granted clearance to provide medicine to HIV/AIDS patients. HAART decreases patients' total HIV/AIDS burden, maintains function of the immune system, and prevents opportunistic infections that often lead to death. Given Hogar San Camilo's experience prescribing these medications to patients, the organization has gained extensive influence in the social sector as well as important knowledge regarding patient treatment.

During this time, the HIV/AIDS relief sector's growth has boosted the inflow of donations from the government as well as from private donors. Simultaneously, competition

among NGOs has become more prevalent which has had both indirect and direct effects on Hogar San Camilo's presence. However, despite remaining relevant in this social sector, Hogar San Camilo has not progressed out from its historical circumstances. For example, since its previous milestones of building its central compound which was made possible by Zeffirino Mortin, the Hogar has remained disorganized with respect to its operational affairs. Additionally, its vision has not adequately evolved enough to address the several present challenges that it did not face in the past. Furthermore, the organization maintains a significant reliance on government funding, which is problematic considering Hogar San Camilo could be negatively affected if a new political party is elected or any other severe micro environmental situation arises.

Counterbalance of interests. Despite its dedication to the wellbeing of HIV/AIDS affected population, Hogar San Camilo faces several situations where its strategic agenda is at odds with various interests of third parties. For example, treating a great amount of Lima's marginalized population living with the virus is within San Camilo's set of priorities. However, this venture is very costly and can have indirect effects on the organization's operations. To illustrate, one must consider the cost of medicine required to give to patients from other medical institutions such as national hospitals. These care centers can often send patients to Hogar San Camilo if unable to treat patients with their own devices. Consequently, in such an event, San Camilo is obligated to make decisions regarding helping additional people. Given its Camillian values, the organization is likely to accept additional patients even if it is without the necessary resources.

Conservation of enemies. Hogar San Camilo does not have enemies in a traditional context. Instead, its enemies can be identified as a byproduct of society's views regarding people who live with HIV/AIDS. For example, Hogar San Camilo views the idea of people being discriminated against as a larger enemy than any one or group of competitors. It is

important to consider that this stigma of HIV/AIDS causes many infected individuals to not seek care out of fear that they will face additional intolerance from the greater community. Consequently, this poses additional problems for Hogar San Camilo and therefore is the primary reason the organization is trying to combat stigma through education and confidentiality. Undoubtedly, other NGOs with similar causes operate in Lima and can potentially interfere with San Camilo's funding by targeting the same demographics and accepting financial aid from the MoH. However, despite this seemingly less-competitive relationship between San Camilo and other NGOs, the competition to acquire additional funds from donors acts as a catalyst of organization's excellence and incentivizes San Camilo to innovate new ideas to better promote itself with the goal to acquire more resources.

Nonetheless, despite competing for resources to support their own operations, HIV/AIDS NGOs need to work together to get funds and need to understand each other better in order to innovate and change. Since it is very difficult for one NGO to sustainably help all or the majority of HIV/AIDS patients, due to limited resources and capital, multiple NGOs ought to collaborate together and systemize strategies to maximize the amount of people that can be helped. This is of particular benefit to Hogar San Camilo and other NGOs because many patients become dependent on Hogar San Camilo's aid and it is without an optimal amount of resources to adequately support so patients. Therefore, collaboration among NGOs would help divide this care.

5.4. Organizational Interests Matrix (OIM)

Hogar San Camilo is focused on developing and defending its interests. Each of these interests intersects with those interests of its stakeholders. For some stakeholders the interests are vital, important or peripheral to them and affect them both negatively and positively. The main stakeholders identified are People living with HIV (PLHIV) in Lima, public hospitals, families of PLHIV, Peruvian government, other NGOs, donors, PLHIV on

the outskirts of Lima, PLHIV using Hogar San Camilo (HSC) services, other HIV/AIDS NGOs, community of Lima, Camillian organization and pharmaceutical companies. The relationship between Hogar San Camilo's interests and that of its stakeholders can be appreciated in Table 6.

It is evident from Table 6 that the interests of Hogar San Camilo have a negative impact on other NGOs especially those focused on HIV/AIDS services in Lima. This is due to the competition between these organizations in securing funds and donors. In addition, it reveals that many of the interests of Hogar San Camilo are aligned with its mission to sustainable help as many marginalized people living with HIV/AIDS.

5.5. Long-term objectives

The long-term objectives are the outcomes that Hogar San Camilo should accomplish by properly applying a set of external and internal strategies. According to D'Alessio (2014), the long-term objectives should have the following characteristics: (a) quantitative, (b) measurable, (c) realistic, (d) comprehensible, (e) challenging, (f) hierarchical, (g) reachable, (h) congruent among the organization, and (i) defined in a certain time horizon.

The long-term objectives should also be aligned with Hogar San Camilo's vision: To be recognized by 2020 as a reference in Peru and Latin American regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life. By accomplishing the long-term objectives, Hogar San Camilo will be guided towards complying with the vision previously defined. The following long-term objectives were defined considering the main interests and the potential that Hogar San Camilo have nowadays. They will consider also the stakeholders interests analyzed in the cardinal points.

Table 6

Organizational Interests Matrix

	Organizational Interest	Vital	Important	Peripheral
1	Sustainably help marginalized people of Lima living with HIV/AIDS by providing them holistic services.	PLHIV ^o using HSC services PLHIV not already using services Public hospitals	Families of PLHIV	Peruvian government
2	Maintain an adequate flow of funding that will enable Hogar San Camilo to operate and grow.	Other NGOs*	Donors	PLHIV using HSC services Families of PLHIV
3	Create more facilities and increase capacity to provide their services to more patients. Specially targeting in the regions and cities of Peru where the impact of the HIV is higher.	Families of PLHIV PLHIV outskirts of Lima	Other HIV/AIDS NGOs* Public hospitals	
4	Gain brand recognition among stakeholders and increase the awareness of Hogar San Camilo's activities in other organizations.	Other NGOs*	Donors PLHIV not already using HSC services	Community of Lima
5	Gather more sustainable volunteers that can commit to Hogar San Camilo values and be a support of the patients.	People using HSC services		Camillian organization
6	Consolidate data more efficiently in order to further increase the tools needed to request funding.	Donors	Other NGOs*	PLHIV/families using HSC services
7	Make the new medical center focused on physical treatments a profitable and sustainable operation.	PLHIV not already using HSC services PLHIV using HSC service	Other HIV/AIDS NGOs* Public hospitals	Pharmaceutical companies

* The interests of Hogar San Camilo will have a negative impact on these stakeholders / ^o People Living with HIV (PLHIV)

First long-term objective (LTO1): 40% of accepted proposals in Multi Sectorial Strategic Plan 2020 - By 2020, to be a recognized contributor of ideas and plans in the development of the Multi Sectorial Strategic Plan for the prevention and control of HIV/AIDS led by the government. Be the referent of HIV/AIDS treatment in people who live in extreme poverty by having 40% of its proposed ideas accepted in the Multi Sectorial document.

Second long-term objective (LTO2): Credibility and financial information 2020 - By 2020, to be one of the NGOs focused in HIV/AIDS capable to submit information of credibility such as balance statements, financial and social results of each program and positive social impact for potential donors. This will be achieved by having the data yearly prepared since 2016 in books and uploaded in the web page.

Third long-term objective (LTO3): Sustainable operation by funding and volunteering 2020 - By 2020, to sustainably run Hogar San Camilo programs by having the monthly support of two sponsors and twenty permanent volunteer positions. Currently, Hogar San Camilo receives the support from the Camillian congregation and receives help from fifteen volunteers.

Fourth long-term objective (LTO4): Creation of synergy among Hogar San Camilo operations 2020 - By 2020, to have synergies in the activities and operations of Lima, Callao, Chaclacayo, Arequipa and Huancayo. Accomplished by giving seminars of HIV awareness twice a month in each region and receiving the people that will be in need of support.

Fifth long-term objective (LTO5): Awareness international recognition 2020 - By 2020, increase the awareness of Hogar San Camilo activities at a Latin America level by providing two international seminars each year about the HIV follow up and Camillian support to this disease.

The five long-term objectives established have a time horizon related to the specialized industry of NGOs. Currently, HIV/AIDS is concentrated in men that have sex with other men and transgender women (Benites, 2013). The government is targeting these people by monitoring, spreading awareness and periodically executing a program called Sentinel Vigilance which consist in a wide variety of activities to monitor the significant health events in the general population and subgroups that are more affected by HIV/AIDS (Dirección General de Epidemiología, 2015).

5.6. Conclusions

Hogar San Camilo's vision is to be referenced as a leading Latin American NGO by 2020. Additionally, its goal is to maintain and enhance its holistic wellbeing programs. By sustainably helping as many marginalized people living with HIV/ AIDS, Hogar San Camilo will maximize its social output while simultaneously maintaining adequate funding that will enable the NGO to operate and continuously grow awareness.

Hogar San Camilo has seven organizational interests that it is willing to accomplish. All these interests are aligned with the mission and vision of the institution. In addition, to achieve these interests the Hogar has two main core competencies. The first is the holistic services and programs offered and the second is its open door services, enabling anyone who is affected by HIV/AIDS regardless of their age, gender, sexual orientation or connection to the disease to join the programs.

In consequence, Hogar San Camilo has five long-term objectives. These long-term objectives will allow the Hogar to reach its vision by 2020 while reaching its interests and that of its stakeholders such as people living with HIV and their families, the San Camilo religious organization, the Ministry of Health and other NGOs. These long-term objectives are (a) to be a recognized contributor of ideas and plans in the development of the Multi Sectorial Strategic Plan, (b) to be one of the NGOs focused in HIV/AIDS capable to submit

information of credibility, (c) to sustainably run programs by having monthly support of two sponsors/donors and twenty permanent volunteer positions, (d) to have synergy among all four Hogar San Camilo sites, and (e) to increase the awareness of Hogar San Camilo activities at a Latin America level.



Chapter VI: The Strategic Process

This chapter seeks to develop Hogar San Camilo's strategies using an array of matrixes as well as quantitative and qualitative analysis. There are two types of strategies. The first is a generic strategy which takes into consideration market size and if the company focuses on differentiation or cost leadership. The generic strategy is an a priori strategy to the following strategies that shall be developed in this chapter.

Hogar San Camilo is currently trying to aid HIV/AIDS patients by providing a differentiated service but with a limited budget. In consequence, it is trying to achieve the two generic strategies at the same time. Hogar San Camilo should follow a cost leadership strategy in a niche market because it is trying to help as many patients as possible with a limited budget. By controlling costs, it will be able to provide services to more patients. Moreover, HIV/AIDS is a concentrated epidemic in Peru with 1983, 83,647 cases reported to the MoH since 1983 (UNAIDS, 2014). In 2012, 0.4% of the Peruvian population were estimated to have the disease (Vargas, 2015). Hence, Hogar San Camilo targets a niche market.

The second type of strategies is alternative strategies. These strategies action strategies and are divided into four categories. The categories are integration strategies, intensive strategies, diversification strategies and defensive strategies. The best alternative strategies that best fit Hogar San Camilo shall be identified within this chapter and shall follow the generic strategy suggested above.

6.1. Strengths, Weaknesses, Opportunities and Threats Matrix (SWOTM)

The EFEM and IFEM tables in the sections above provided the external opportunities and threats as well as Hogar San Camilo's internal strengths and weakness. This information is the key input for the SWOT matrix analysis in order to create the Hogar's strategies for the

quadrants strengths and opportunities (SO), weakness and opportunities (WO), strengths and threats (ST) and weakness and threats (WT) (D'Alessio, 2014).

Strengths and Opportunities (SO): The following strategies were developed to maximize strengths and take advantage of the opportunities:

1. Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will increase funding as companies will be helping patients that correspond to the age of their target consumers. (S3, S5 and O6)
2. Product development by offering programs online, such as counseling and household control visits, by improving the present services and thus increasing the number of people reached. This will allow Hogar San Camilo to reach patients that are outside of Lima or unable to leave their homes. (S3 and O4)
3. Follow a backwards vertical integration using a strategic alliance with the Ministry of Health and other HIV/AIDS related NGOs to carry out awareness and prevention programs. This will enable Hogar San Camilo to make more people aware of HIV/AIDS and about the Hogar itself. (S2, S4 and O3)

Weakness and Opportunities (WO): The following strategies were developed to improve weakness and take advantage of the opportunities:

1. Follow a vertical integration strategy by creating an online sales platform for the arts and crafts created by patients and their families, thus reaching buyers directly. This will allow Hogar San Camilo to have control over the distribution channel and reach more possible buyers. (W1, W4 and O4)
2. Develop an internal culture strategy focused on empowering employees and delegating them more tasks such as managing the awareness campaigns. This will

help employees feel more comfortable at work, trusted by their superiors and feel positive by acknowledging their hard work and responsibility. (W5 and O3).

Strengths and Threats (ST): The following strategies were developed to maximize strengths and combat the threats:

1. Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale. (S2 and T5)
2. Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient. (S1, S3 and T3)

Weakness and Threats (WT): The following strategies were developed to improve weakness and combat the threats:

1. Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors. (W2, W3 and T2).
2. Market penetration by increasing marketing efforts to address and decrease the HIV/AIDS stigma that will in turn increase brand awareness. This will allow Hogar San Camilo to help create a less negative image of the disease and enable more people to associate the brand with a positive ideal. (W2, W3 and T2).

Table 7

Strengths, Weaknesses, Opportunities and Threats Matrix

		Strengths:	S	Weaknesses:	W
		1 Holistic services	(S1)	1 High financial dependency	(W1)
		2 Awareness programs	(S2)	2 No consolidated data	(W2)
		3 Number of tailored programs	(S3)	3 Lack of strategic vision	(W3)
		4 Experience in the industry	(S4)	4 Low brand recognition	(W4)
		5 Skilled workforce	(S5)	5 Poor leadership	(W5)
		<hr/>			
		Strengths and Opportunities	SO	Weakness and Opportunities	WO
Opportunities:	O	1. Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	(S3, S5, O6)	1. Follow a vertical integration strategy by creating an online sales platform for the arts and crafts created by patients and their families, and reach buyers directly.	(W1, W4, O4)
1 Legal benefits for NGOs	(O1)				
2 Decrease in poverty rates	(O2)				
3 Increase awareness of HIV	(O3)				
4 Access to internet and telecommunications	(O4)	2. Product development by offering programs online and thus increase the number of people reached by improving the present services.	(S3, O4)	2. Develop an internal culture strategy focused on empowering employees and delegating more tasks to them such as the awareness campaigns.	(W5, O3)
5 Increase of local funding	(O5)				
6 Increase of CSR policies in companies	(O6)	3. Follow a backwards vertical integration using a strategic alliance with the Ministry of Health and other HIV/AIDS related NGOs to carry out awareness and prevention programs.	(S2, S4, O3)		
		<hr/>			
Threats:	T	Strengths and Threats	ST	Weakness and Threats	WT
1 Political and economic uncertainty	(T1)	1. Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	(S2, T5)	1. Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	(W2, W3 and T2)
2 Decreasing available international funding	(T2)				
3 Decreasing HIV/AIDS rates	(T3)	2. Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	(S1, S3, T3)	2. Market penetration by increasing marketing efforts to address and decrease the HIV/AIDS stigma that will in turn increase brand recognition.	(W2, W3, T2)
4 Unhealthy environment	(T4)				
5 Stigma of the disease	(T5)				
		<hr/>			

6.2. Strategic Position and Action Evaluation Matrix (SPACEM)

The external and internal strategic factors featured in the SPACE matrix help to determine the appropriate strategic position of a company or a business unit (D'Alessio, 2014). The external strategic factors refer to the industry strength and the environment stability. On the other hand, the internal strategic factors refer to the financial strength and comparative advantage of the company. The value of each factor was determined according to the information provided by Hogar San Camilo and additional industry research. The strategic factors of Hogar San Camilo can be seen in Tables 8 through Table 11.

The average value for each strategic factor was placed in the SPACE matrix. As can be seen in Table 11, the average value for each in absolute terms lies between 2.67 and 3.44. By adding the vertical and horizontal axis, Hogar San Camilo's strategic posture has the coordinates (-0.11, -0.71). In consequence, Hogar San Camilo is in the defensive quadrant and requires a defense posture strategy as can be seen in Figure 9.

External Strategic Factors

Table 8

Industry Strength Determining Factors

		Industry Strength Determining Factors							
Growth potential	Low	0	1	2	3	4	5	6	High
Profit potential	Low	0	1	2	3	4	5	6	High
Financial stability	Low	0	1	2	3	4	5	6	High
Technological knowledge	Simple	0	1	2	3	4	5	6	Complex
Resource usage	Inefficient	0	1	2	3	4	5	6	Efficient
Capital intensity	Low	0	1	2	3	4	5	6	High
Easiness of market entry	Easy	0	1	2	3	4	5	6	Difficult
Productivity/capital usage	Low	0	1	2	3	4	5	6	High
Negotiating power of producers	Low	0	1	2	3	4	5	6	High
		Average: 3.33							

Table 9

Environment Stability Determining Factors

Environment Stability Determining Factors									
Technology changes	Many	0	1	2	3	4	5	6	Few
Inflation rate	High	0	1	2	3	4	5	6	Low
Demand variability	Large	0	1	2	3	4	5	6	Small
Price range of competing products	Broad	0	1	2	3	4	5	6	Narrow
Market entry barriers	Few	0	1	2	3	4	5	6	Many
Competitive rivalry/pressure	High	0	1	2	3	4	5	6	Low
Price elasticity of demand	Elastic	0	1	2	3	4	5	6	Inelastic
Pressure of substitutes	High	0	1	2	3	4	5	6	Low
Average -6: -3.38									

Internal Strategic Factors

Table 10

Financial Strength Determining Factors

Financial Strength Determining Factors									
Return over investment	Low	0	1	2	3	4	5	6	High
Leverage	Unbalanced	0	1	2	3	4	5	6	Balanced
Liquidity	Unbalanced	0	1	2	3	4	5	6	Solid
Capital required versus capital available	High	0	1	2	3	4	5	6	Low
Cash flow	Low	0	1	2	3	4	5	6	High
Easiness of market exit	Difficult	0	1	2	3	4	5	6	Easy
Business risk	High	0	1	2	3	4	5	6	Low
Inventory turnover	Slow	0	1	2	3	4	5	6	Fast
Economies of scale and experience	Low	0	1	2	3	4	5	6	High
Average: 2.67									

The defense posture strategy indicates low environment stability and low competitive advantage. This posture is aligned with the strategies indicated in the SWOT matrix. Under a defensive position, Hogar San Camilo should focus on survival and emerging from the present critical situation it is in. Hogar San Camilo should therefore analyze the programs it offers in order to keep, discontinue or merge them. Moreover, it should emphasize cost reduction and control and strive to make changes to make the NGO more efficient.

Table 11

Competitive Advantage Determining Factors

Competitive Advantage Determining Factors									
Market share	Small	0	1	2	3	4	5	6	Large
Product quality	Inferior	0	1	2	3	4	5	6	Superior
Product life cycle	Advanced	0	1	2	3	4	5	6	Early
Product replacement cycle	Variable	0	1	2	3	4	5	6	Fixed
Consumer loyalty	Low	0	1	2	3	4	5	6	High
Competitor capacity usage	Low	0	1	2	3	4	5	6	High
Technological knowledge	Low	0	1	2	3	4	5	6	High
Vertical integration	Low	0	1	2	3	4	5	6	High
Speed of new product development	Slow	0	1	2	3	4	5	6	Fast
Average – 6:		-3.44							

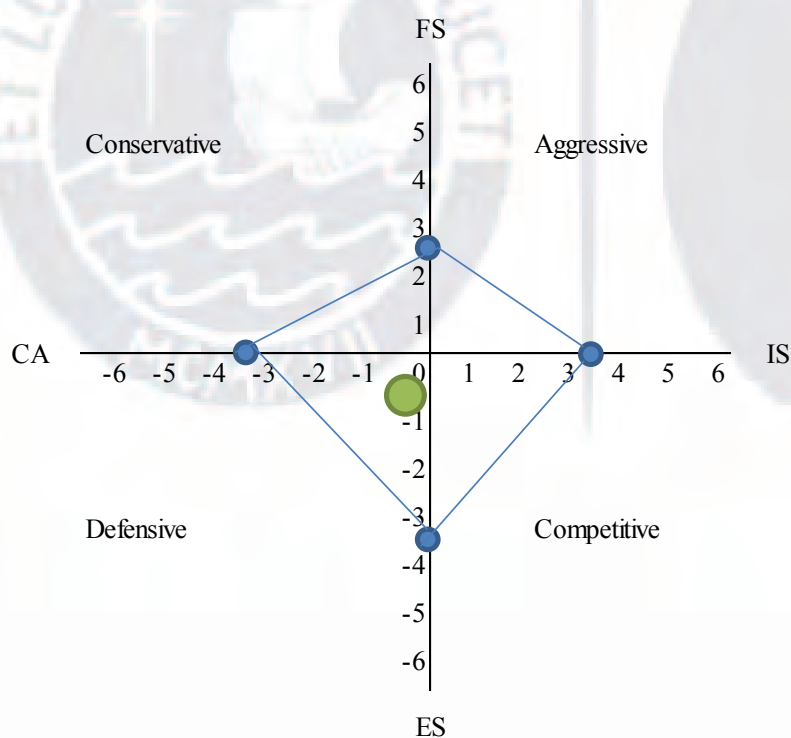


Figure 9. Strategic Position and Action Evaluation Matrix of Hogar San Camilo.

In consequence, the defense strategies that Hogar San Camilo should follow are:

- Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will

increase funding as companies will be helping patients that correspond to the age of their target consumers.

- Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale.
- Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.
- Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process, enabling it to increase funding from present and new donors.

6.3. Boston Consulting Group Matrix (BCGM)

The Boston Consulting Group Matrix is designed for companies that are profit motivated. The BCG matrix compares the cash flow generation versus the sales increase of each product, allowing management to allocate the company's goods and services with respect to the two variables. As a result, management will be able to understand the strategic positions of the company's goods and services and develop strategies accordingly (D'Alessio, 2014).

Hogar San Camilo is a religious non-profit organization. Therefore, the BCG matrix as it is cannot be used. An NGO like Hogar San Camilo is not looking for cash revenue in its operations; they work to provide a social impact in the society by providing aid to people living with HIV/AIDS. The social impact of a NGO is a difficult metric to identify and it is a

highly debated topic because many organizations have a particular procedure to do it. Professor Alnoor Ebrahim from Harvard Business School researched about the different ways to measure the social impact for NGOs. In his study, he suggested to focus on the accountability of the main activities that the NGO offer. Assessing an organization's impact on a large scale societal issue like eliminate HIV is complex since there are external participants that would influence in this measurement (Hanna, 2010). Consequently, the social impact for Hogar San Camilo can be assessed in the beginning by considering the quantity of people that receive its services – enrolment vs. the industry growth which is basically the field of HIV/AIDS.

HIV/AIDS rates in Peru are decreasing and enrolment in the Hogar's programs and activities is decreasing as well. Figure 10 shows the adapted BCG matrix for Hogar San Camilo. Shelter, In-house visits, Vida feliz, Camilos vida and Alumbrando una vida have low enrolment in an industry that is growing very little. For this reason, these programs are placed in the fourth quadrant or the Dog quadrant. This suggests that the NGO's internal and external competitive position is very weak and should follow three strategies (a) liquidating assets, (b) disinvestment or (c) reducing the size of the company. Only HAART is placed in the cow quadrant because it has medium enrolment and medium industry growth. In consequence, the strategies Hogar San Camilo should follow are the following defensive strategies:

- To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale.

- Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.
- Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.

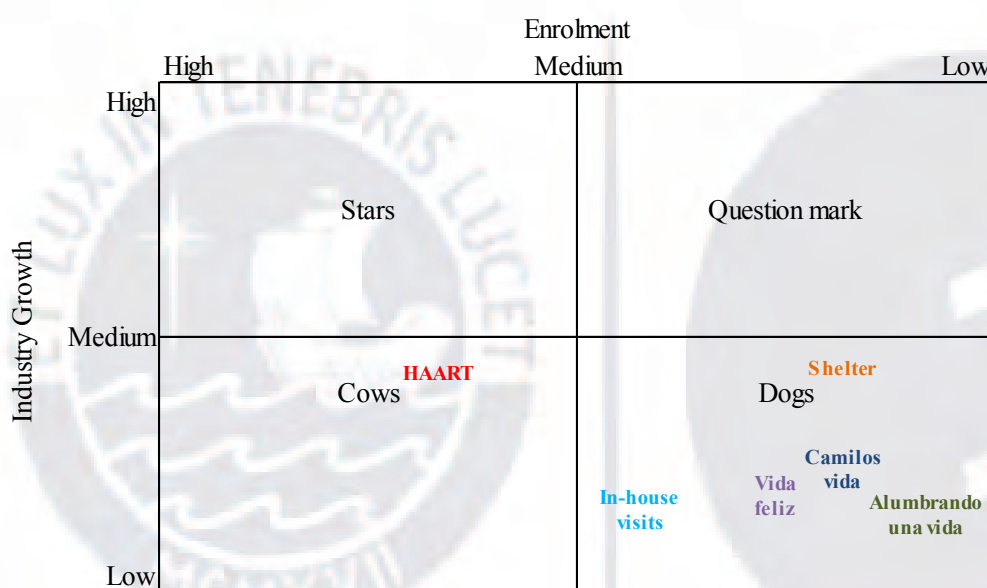


Figure 10. Boston Consulting Group Matrix (BCGM).

6.4. Internal-External Matrix (IEM)

The Internal – External matrix shows the weight average value of the internal factors and the external factors. By comparing both weighted averages, the matrix allows management to distinguish in which quadrant the company or product is located and to understand the company's or product's strategic position and then create the possible strategies (D'Alessio, 2014).

Hogar San Camilo has an internal factor evaluation weight average of 2.40 and an external factor evaluation average of 1.95. The weight averages can be considered average and weak respectively. Hence, Hogar San Camilo is placed in quadrant VIII in Figure 11.

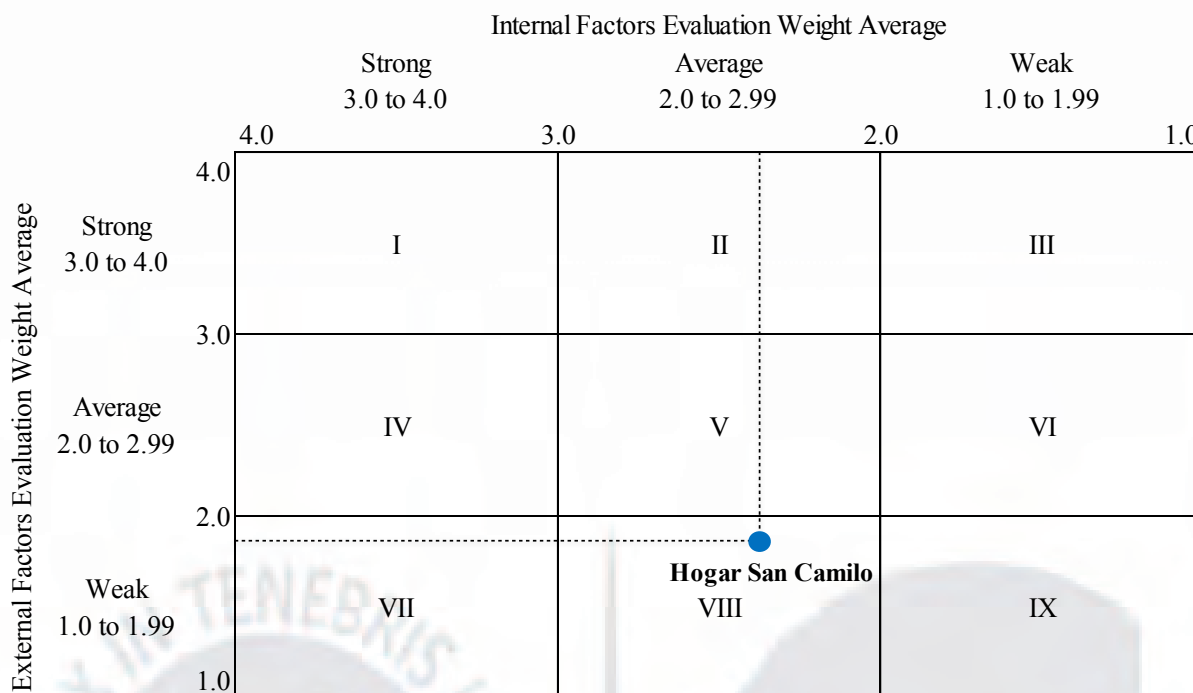


Figure 11. Internal – External Matrix (IEM)

The strategies for quadrant VIII is harvest. In this sense, Hogar San Camilo should follow the following strategies:

- Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will increase funding as companies will be helping patients that correspond to the age of their target consumers.
- Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale.
- Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar to have control over costs and become more efficient.

- Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.

6.5. Grand Strategy Matrix (GSM)

The Grand Strategy matrix compares market growth with the company's competitive position. Market growth can be rapid or slow while the competitive position can be weak or strong, thus creating four different quadrants. Hogar San Camilo shows a slow market growth and holds a weak competitive position because HIV/AIDS rates are decreasing and at the same time, the Hogar has less enrolled patients and is receiving less funding to support its programs and activities. Hogar San Camilo is thus found in the third quadrant in Figure 12.

Companies in the third quadrant are advised to do drastic changes to avoid being in a worse position than they are at present. Moreover, companies should follow retrenchment strategies and cost reduction strategies in order to make the operations more efficient (D'Alessio, 2014).

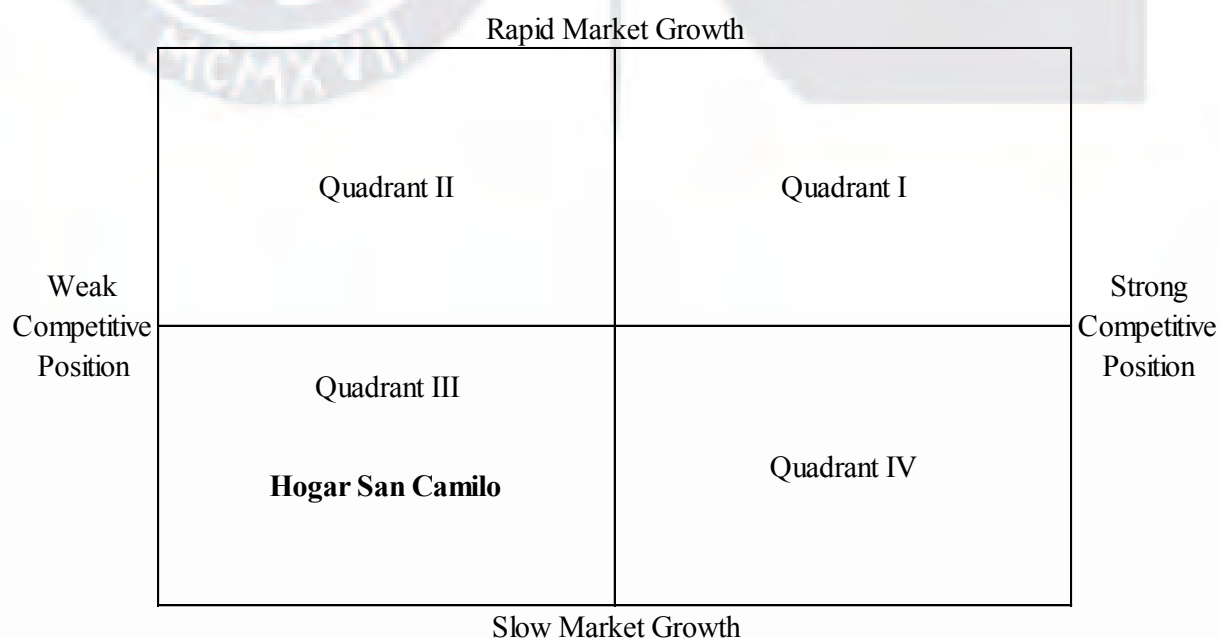


Figure 12. Grand Strategy Matrix (GSM)

In this sense, the strategies that Hogar San Camilo should follow are:

- Product development by offering programs online, such as counseling and household control visits, by improving the present services and thus increasing the number of people reached. This will allow Hogar San Camilo to reach patients that are outside of Lima or unable to leave their homes.
- Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.
- Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.

6.6. Strategic Decision Matrix (SDM)

In the Strategic Decision matrix, the specific strategies are displayed to show if they are suggested strategies according to the SWOT, SPACEM, BCGM, IR and GSM. As can be seen in Table 12, out of nine suggested strategies, only four are strategic for Hogar San Camilo. As a result, the four strategies that Hogar San Camilo should follow are:

- Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will increase funding as companies will be helping patients that correspond to the age of their target consumers.
- To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three

cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale.

- Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.
- Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.

6.7. Quantitative Strategic Planning Matrix (QSPM)

The Quantitative Strategic Planning matrix enables management to prioritize the chosen strategies according to the opportunities and threats of the environment as well as the strengths and weaknesses of the company. Strategies with higher weight averages should be prioritized while strategies with weight averages lower than five should be discarded (D'Alessio, 2014).

As can be seen in Table 13, all four of Hogar San Camilo's strategies have a weight average above five and should therefore be maintained. Two of them have a weight averages above seven, this suggest these are highly attractive strategies. The values were determined according to the priorities mentioned by Hogar San Camilo management. In this sense, the four strategies are ranked as follows:

- 1) Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.
- 2) Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will

increase funding as companies will be helping patients that correspond to the age of their target consumers.

- 3) Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.

6.8. Rumelt's Matrix (RM)

Rumelt's matrix analyzes if the proposed strategies follow four critical criteria: consistency, consonance, feasibility and offer a strategic advantage. A strategy should follow all four criteria to be kept as a key strategy in the company. As can be seen in Table 14, the four strategies of Hogar San Camilo follow Rumelt's four criteria. Therefore, all four strategies should be kept.

Table 14

Rumelt's Matrix

	Specific Strategies	Consistency	Consonance	Feasibility	Advantage	Accept Strategy
1	Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	X	X	X	X	Yes
2	To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	X	X	X	X	Yes
3	Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	X	X	X	X	Yes
4	Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	X	X	X	X	Yes

Table 12

Strategic Decision Matrix

	Alternative Strategies	Specific Strategies	SWOT	SPACE	BCG	IE	GS	Total
1	Market Penetration	Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	X	X		X		3
2	Product Development	Product development by offering programs online and thus increases the number of people reached by improving the present services.	X				X	2
3	Backwards Vertical Integration	Follow a backwards vertical integration using a strategic alliance with the Ministry of Health and other HIV/AIDS related NGOs to carry out awareness and prevention programs.	X					1
4	Forward Vertical Integration	Follow a forward vertical integration strategy by creating an online sales platform for the arts and crafts created by patients and their families, and reach buyers directly.	X					1
5	Internal (Culture)	Develop an internal culture strategy focused on empowering employees and delegating more tasks to them such as the awareness campaigns.	X					1
6	Horizontal Integration	To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	X	X	X	X		4
7	Retrenchment	Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs	X	X	X	X	X	5
8	Internal (Process Management)	Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	X	X	X	X	X	5
9	Market Penetration	Market penetration by increasing marketing efforts to address and decrease the HIV/AIDS stigma that will in turn increase brand recognition.	X					1

Table 13

Quantitative Strategic Planning Matrix

Specific Retained Strategies												
Market Penetration			Horizontal Integration			Retrenchment			Internal (Process Management)			
Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.			To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.			Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs			Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.			
	Weight	Value	Weight Average	Weight	Value	Weight Average	Weight	Value	Weight Average	Weight	Value	Weight Average
Opportunities												
1	0.15	1	0.15	0.15	2	0.30	0.15	1	0.15	0.15	4	0.60
2	0.05	1	0.05	0.05	2	0.10	0.05	1	0.05	0.05	3	0.15
3	0.10	2	0.20	0.10	3	0.30	0.10	2	0.20	0.10	3	0.30
4	0.05	1	0.05	0.05	3	0.15	0.05	1	0.05	0.05	4	0.20
5	0.10	3	0.30	0.10	4	0.40	0.10	2	0.20	0.10	4	0.40
6	0.05	4	0.20	0.05	4	0.20	0.05	2	0.10	0.05	4	0.20
Threats												
1	0.05	4	0.20	0.05	4	0.20	0.05	3	0.15	0.05	3	0.15
2	0.20	4	0.80	0.20	3	0.60	0.20	3	0.60	0.20	4	0.80
3	0.10	3	0.30	0.10	4	0.40	0.10	4	0.40	0.10	4	0.40
4	0.05	1	0.05	0.05	2	0.10	0.05	1	0.05	0.05	1	0.05
5	0.10	1	0.10	0.10	3	0.30	0.10	1	0.10	0.10	3	0.30
Strengths												
1	0.15	4	0.60	0.15	4	0.60	0.15	4	0.60	0.15	4	0.60
2	0.10	3	0.30	0.10	4	0.40	0.10	3	0.30	0.10	4	0.40
3	0.15	4	0.60	0.15	4	0.60	0.15	4	0.60	0.15	4	0.60
4	0.05	2	0.10	0.05	3	0.15	0.05	3	0.15	0.05	4	0.20
5	0.05	2	0.10	0.05	4	0.20	0.05	4	0.20	0.05	4	0.20
Weakness												
1	0.10	4	0.40	0.10	4	0.40	0.10	4	0.40	0.10	4	0.40
2	0.10	4	0.40	0.10	4	0.40	0.10	4	0.40	0.10	4	0.40
3	0.20	4	0.80	0.20	4	0.80	0.20	4	0.80	0.20	4	0.80
4	0.05	4	0.20	0.05	4	0.20	0.05	4	0.20	0.05	4	0.20
5	0.05	2	0.10	0.05	4	0.20	0.05	4	0.20	0.05	4	0.20
Total	2.00		6.00	2.00		7.00	2.00		5.90	2.00		7.55

6.9. Ethical Matrix (EM)

The ethical matrix compares the strategies to human rights, justice and utilitarianism criteria. The matrix allows management to understand the impact or influence that each of the strategies will have in each criteria. Only strategies that follow all criteria may be accepted as company strategies.

As can be seen in Table 15, the four proposed strategies follow the ethical criteria and should therefore be maintained as company strategies.

6.10. Retained and Contingency Strategies

Given the analysis conducted in the previous sections, Hogar San Camilo has four retained strategies and five contingency strategies.

Retained strategies

- 1) Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to have a better decision process frame, enabling it to increase funding from present and new donors.
- 2) To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. They provide the same care to patients but function independently at present. This will allow the Hogar to conduct campaigns in the three cities at the same time and in consequence reach more patients with a single campaign and benefit from economies of scale.
- 3) Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. This will increase funding as companies will be helping patients that correspond to the age of their target consumers.

Table 15

Ethical Matrix

Strategies	Rights							Justice		Utilitarianism			Accept Strategy
	Impact on the right to life.	Impact on the right to own property.	Impact on freedom of thought.	Impact on freedom from the interference with privacy.	Impact on freedom of conscience.	Impact on freedom of speech.	Impact on right to a fair trial.	Impact on distribution.	Equity in management.	Compensation norms.	Strategic objectives and results.	Strategic tools used.	
1 Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	P	N	P	N	P	P	N	J	J	N	E	E	Yes
2 To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	P	N	P	P	P	P	N	J	J	J	E	E	Yes
3 Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	P	N	P	P	P	P	N	J	J	N	E	E	Yes
4 Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	P	N	P	P	P	P	N	J	J	J	E	E	Yes

Note: For Rights: "P"= Promotes, "N" = Neutral and "V" = Violates. For Justice: "J" = Just, "N" = Neutral and "U" = Unjust. For Utilitarianism: "E" = Excellent, "N" = Neutral and "H" = Harmful.

- 4) Follow a retrenchment strategy concerning the present programs and activities offered in order to keep the best programs, eliminate those that are not as helpful to patients or merge some of the programs. This will help the Hogar have control over costs and become more efficient.

Contingency strategies

- Product development by offering programs online, such as counseling and household control visits, by improving the present services and thus increasing the number of people reached. This will allow Hogar San Camilo to reach patients that are outside of Lima or unable to leave their homes.
- Follow a backwards vertical integration using a strategic alliance with the MoH and other HIV/AIDS related NGOs to carry out awareness and prevention programs. This will enable Hogar San Camilo to render more people aware of HIV/AIDS and about the Hogar itself.
- Follow a forward vertical integration strategy by creating an online sales platform for the arts and crafts created by patients and their families, thus reaching buyers directly. This will allow Hogar San Camilo to have control over the distribution channel and reach more possible buyers.
- Develop an internal culture strategy focused on empowering employees and delegating more tasks to them such as managing the awareness campaigns. This will help employees feel more comfortable at work, be trusted by their superiors and feel positive by acknowledging their hard work and responsibility.
- Market penetration by increasing marketing efforts to address and decrease the HIV/AIDS stigma that will in turn increase brand awareness. This will allow Hogar San Camilo to help create a less negative image of the disease and enable more people to associate the brand with a positive ideal.

6.11. Long-term Strategies vs. Objectives Matrix

The long-term strategies versus objectives matrix allows management to analyze the relationship that the retained strategies have with the Hogar San Camilo's long-term objectives (D'Alessio, 2014). As can be seen in Table 16, one contained strategy is aligned with all five long-term objectives, two other strategies with four long-term goals and the remaining strategy with two long-term objectives.

In this sense, the retained strategies are clearly aligned with the long-term goals of Hogar San Camilo. In consequence, Hogar San Camilo will be able to reach all five long-term objectives by 2020 by following the four selected strategies.

6.12. Competitive Possibilities Matrix

The Competitive Possibilities Matrix evaluates potential reactions of competitors, substitutes or new entrants in relation to the proposed strategies for Hogar San Camilo. As introduced in the competitive analysis in Chapter 3, Hogar San Camilo's competitors are the local NGOs working on the HIV/AIDS field such as Inppares, AID for AIDS Peru and Impacta. As substitutes, Hogar San Camilo faces the threat that other NGOs not related to HIV/AIDS can attract the attention of potential donors. To list some of the substitutes NGOs: Enseña Peru (education), Fondo Verde (environment), Crea+ (education) and Techo Peru (reduce poverty). Finally the new entrants are the NGOs that would like to provide services in HIV/AIDS.

6.13. Conclusions

The strategic process demands the analysis of eleven matrixes in order to obtain the best strategies for the company as well as identifying if they are aligned with the company's vision. A generic strategy that acts as the basis for the strategies identified is one that focuses on cost leadership in a niche market size. Lower costs are essential for Hogar San Camilo's

Table 16

Long-Term Strategies vs. Objectives Matrix

		LTO1	LTO2	LTO3	LTO4	LTO5
<p>Vision:</p> <p>To be recognized by 2020 as a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life.</p>		40% of accepted proposals in Multi Sectorial Strategic Plan 2020	Credibility and financial information 2020	Sustainable operation by funding and volunteering 2020	Creation of synergy among Hogar San Camilo operations 2020	Awareness international recognition 2020
Strategies	1 Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.		X	X	X	X
	2 Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	X	X	X	X	X
	3 Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	X	X	X		X
	4 Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.		X	X		

operations in order to support as many people living with HIV/AIDS as they sustainably can. This generic strategy is aligned with the mission, vision, and long-term objectives of Hogar San Camilo. The strategic process to obtain Hogar San Camilo's strategies has been consistent throughout the matrixes.

The SWOT matrix identified the strategies according to the strengths, weaknesses, opportunities and threats of the organization in order to develop strategies that combine these factors. This resulted in nine strategies in order to address the combination of strengths and weaknesses with opportunities and threats.

The SPACE matrix placed Hogar San Camilo in a defensive quadrant based on the internal and external determining factors where the values were defined through a joint analysis with the organization.

The BCG matrix was adapted to understand Hogar San Camilo's operations in regards to social impact and the accountability of its main activities. The access used was therefore enrolment of patients treated and industry growth related to people with HIV/AIDS. The result was Hogar San Camilo being identified as a dog as there is low enrolment and low industry growth.

The IEM further supports the use of defensive strategies as it shows the weight value of internal and external factors. Hogar San Camilo was placed in quadrant 8 because of its average internal factor weight average and a weak external factor weight average through the EFM and IFM previously defined in Chapter 3 and 4. This suggested that Hogar San Camilo should use harvesting strategies.

The GSM compares market growth with the company's competitive position and identified Hogar San Camilo in quadrant 3 as it has a weak competitive position in a market with slow growth. Companies within this quadrant are advised to implement drastic changes to improve their competitive position.

Table 17

Competitive Possibilities Matrix

	Retained strategies for Hogar San Camilo / Competitors	HIV/AIDS NGOs	NGOs non related to HIV/AIDS	New HIV/AIDS NGOs
1	Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	Copy the strategy of Hogar San Camilo by highlighting its value proposition	Promote its services highlighting the importance of the social impact for Peru for the future years.	Product development by creating new programs that donors can value.
2	To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	Improve the cohesion of the network of NGOs: Red SIDA Peru	No way to counteract	No way to counteract
3	Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	Increase the programs they offer. Market development.	Increase the programs they offer. Market development.	Increase the programs they offer. Market development.
4	Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	Copy the strategy of Hogar San Camilo by improving its credibility in order to increase funding	Copy the strategy of Hogar San Camilo by improving its credibility in order to increase funding	Copy the strategy of Hogar San Camilo by improving its credibility in order to increase funding

Together the matrixes suggest that the Hogar should follow the alternative strategy that focuses on defensive actions. In this sense, the four retained strategies are defense strategies for Hogar San Camilo. The Hogar should make changes to the present operations, follow cost control, retrenchment and consolidate present donors.

The four retained strategies proposed for San Camilo are feasible and consistent with the Hogar's ethics and resources. In addition, the strategies are ethically accepted and are aligned with the Hogar's long-term objectives for 2020. By following the four proposed strategies, Hogar San Camilo should be able to reach its vision by 2020.



Chapter VII: Strategic Implementation

7.1. Short-term Objectives

In order to achieve its long-term objectives, Hogar San Camilo must firstly set and achieve short-term objectives. These short-term objectives (STO) will prime the organization to better obtain its long-term objectives. Short-term objectives should be: (a) quantitative, (b) realistic, (c) measurable, (d) challenging, (e) understandable, (f) hierarchical, (g) reachable, (h) congruent and (i) defined in a certain time horizon (D'Alessio, 2014).

- *LTO 1*: 40% of accepted proposals in Multi Sectorial Strategic Plan 2020 - By 2020, to be a recognized contributor of ideas and plans in the development of the Multi Sectorial Strategic Plan for the prevention and control of HIV and AIDS led by the government. Be the reference of HIV/AIDS treatment in people who live in extreme poverty by having 40% of its proposed ideas accepted in the Multi Sectorial document.
- *STO 1.1*: Pilot Programs 2017 - Hogar San Camilo must establish its reputation as a leader in providing HIV/AIDS holistic treatment to marginalized people and gain prestige with the already active members in developing the Multi Sectorial Strategic Plan. To do so, Hogar San Camilo should initiate 'pilot programs' throughout other Hogar San Camilo sites in Peru by 2017. By implementing some of its successful programs in other locations, Hogar San Camilo will be able to see the success of its programs and adapt them to a new environment. The programs that are most well received will act as the basis for Hogar San Camilo to develop, proposing them to the Multi Sectorial Strategic Plan by 2020.
- *STO 1.2*: Increased communication with Multi Sectorial members from 2016 - Hogar San Camilo should begin to reach out to the participating members of the Multi Sectorial Strategic Plan to make it noticed and gain trust with the other

members. By December 2016, Hogar San Camilo should start increasing their communication with these members and find key contacts to work with. By 2017 Hogar San Camilo should attend and actively participate in meetings.

- *STO 1.3: Programs for Multi Sectorial Members 2018* - By 2018, Hogar San Camilo should develop programs that it can execute in conjunction with members of the Multi Sectorial Strategic Plan. For example, Hogar San Camilo should work with the Ministry of Justice to bring some of its services, such as counselling, to inmates at prisons who live with HIV/AIDS or to give awareness sessions and workshops for other incarcerated people.
 - o *LTO 2: Credibility and financial information 2020* - By 2020, to be one of the NGOs focused in HIV/AIDS capable to submit information of credibility such as balance statements, financial and social results of each program and positive social impact for potential donors. To achieve this by having the data yearly prepared since 2016 in books and uploaded in the web page.
- *STO 2.1: Data management system 2015* - Hogar San Camilo must identify and choose a data management system which best meets its needs. By the end of 2015, the organization should have it selected and ready to implement by early 2016.
- *STO 2.2: Training on consolidated data 2016* - In order to equip key management staff with basic accounting and data management knowledge, training sessions must be executed by early 2016. Hogar San Camilo can either hire outside training or have its accountant administer basic training. It is essential that the data management system, the data itself and the expectations of future book keeping are translated to the pertinent staff.

- *LTO 3: Sustainable operation by funding and volunteering 2020* - By 2020, to sustainably run Hogar San Camilo programs by having the monthly support of two sponsors and twenty permanent volunteer positions. Currently, Hogar San Camilo receives the support from the Camillian congregation and receives help from fifteen volunteers.
- *STO 3.1: Consolidated donor information 2016* - To identify potential donors, Hogar San Camilo should have consolidated data on past and present sponsorship by 2016. Similar to developing Customer Relationship Management, this short-term objective will seek to assess potential donors and develop early-stage relationships with them.
- *STO 3.2: Adoption incentive program 2018* - By 2018, Hogar San Camilo should develop an adoption or sponsorship program where donors may adopt a participant of Hogar San Camilo. Information and identities would be kept confidential but the donor would receive an authentic certificate indicating its sponsorship that it could display. This would incentivise donations, help donors achieve a positive image and market Hogar San Camilo in a variety of locations.
- *STO 3.3: Sustainable volunteer positions 2019* - To achieve twenty sustainable volunteer positions by 2020 from its current fifteen positions. Hogar San Camilo needs to identify by 2019 which areas of operations require increased volunteers, develop a job description for that position and have clearly defined projects and goals for the volunteer to achieve. People in the volunteer positions may change but the position will remain constant. Hogar San Camilo also needs to restructure its volunteer training days making them more interactive and shortening the amount of training days as current volunteers have voiced concerns about the their time consuming nature.

- *LTO 4: Creation of synergy among Hogar San Camilo operations 2020* - By 2020, to have synergies in the activities and operations of Lima, Callao, Chaclacayo, Arequipa and Huancayo. Accomplished by giving seminars of HIV awareness twice a month in each region and receiving the people that will be in need of support.
- *STO 4.1: Overarching organizational chart 2017* - Hogar San Camilo needs to develop an organizational chart of all operations and employees throughout Hogar San Camilo locations in Peru by the end of 2017. This will allow each organization to understand how the others' operations work.
- *STO 4.2: Increased communications with other Hogar San Camilo sites 2016* - By 2016 all leadership positions should have the direct contact information of their counterpart in other Hogar San Camilo sites in Peru. Brother Jean must increase communications and try to implement meetings where all Directors are present once every three months whether in person or virtually.
- *STO 4.3: Information sharing 2019* - By 2019 Hogar San Camilo should develop a platform where all locations are able to share best practices, activities programs, and concerns. This platform would also be a place for organizations to ask assistance or questions of one another.
- *LTO 5: Awareness international recognition 2020* - By 2020, increase the awareness of Hogar San Camilo activities at a Latin America level by providing two international seminars each year about the HIV follow up and Camillian support to this disease.
- *STO 5.1: Strategic alliances with NGOs 2018* - In 2018, Hogar San Camilo should begin developing strategic alliances with other HIV/AIDS NGOs in other Latin American countries as well as the other Camillian organizations operating outside

Lima. Hogar San Camilo should provide information about its operations and seek a key contact from efficient and successful NGOs.

- *STO 5.2*: Larger organizational membership 2016 - By 2016, Hogar San Camilo should seek to join larger HIV/AIDS associations such as Red SIDA Peru. This will allow Hogar San Camilo to access more resources, people and information as well as discover the best practices of other NGOs already involved in the Red SIDA Peru initiative.

7.2. Resources allocated to short-term objectives

Resources allocation is required to properly implement the strategies and reach the short-term objectives and long-term objectives. The resources are divided into three groups: (a) tangible assets: machinery, financial assets, materials and processes; (b) intangible assets: technology, reputation, and organizational behavior; and (c) human resources: leadership, knowledge, communication and interactive skills, and motivation (D'Alessio, 2014). Table 18 describes the resources needed for each short-term objective.

7.3. Policies for each Strategy

The policies define the path that strategies follow to achieve the proposed vision. Policies must be aligned with the values of the sector established in the planning process. Moreover, policies are subject to the principles of ethics, law, and social responsibility (D'Alessio, 2014).

- a) Promote transparency, collaboration, good practices and sustainable management.
- b) To ensure the economic and financial health of the Hogar's programs and both diversify and optimize funding sources.
- c) Promote communication and collaboration between the main actors in the health sector.
- d) Promote teamwork.

Table 18

Resources allocated to long-term objectives

STO	Short-Term Objectives	Tangible Resources	Intangible Resources	Human Resources
LTO1	40% of accepted proposals in Multi Sectorial Strategic Plan 2020			
1.1	Pilot Programs 2017	S/. 500 monthly Marketing process	Communications	Marketing PIC
1.2	Increased communication with Multi Sectorial members from 2016	Marketing process	Communications	Marketing PIC
1.3	Programs for Multi Sectorial Members 2018	S/. 800 monthly Transportation	Internet	Marketing PIC, Head of Administration
LTO2	Credibility and financial information 2020			
2.1	Data management system 2015	S/. 800 (licenses) IT process	Internet	IT PIC
2.2	Training on consolidated data 2016	Computers IT process	Internet	IT PIC
LTO3	Sustainable operation by funding and volunteering 2020			
3.1	Consolidated donor information 2016	IT process Finance process Finance books	Internet	IT PIC, Head of Administration, Accountant
3.2	Adoption incentive program 2018	S/. 800 per year (promotion) Marketing process	Reputation	Marketing PIC
3.3	Sustainable volunteer positions 2019	S/. 500 monthly (incentives to volunteers)	Reputation	Marketing PIC, Head of Programs
LTO4	Creation of synergy among Hogar San Camilo operations 2020			
4.1	Overarching organizational chart 2017	-	Organizational culture	Head of Administration
4.2	Increased communications with other HSC sites 2016	-	Organizational culture	Head of Administration
4.3	Information sharing 2019	S/. 800 (licenses) IT process	Internet	IT PIC
LTO5	Awareness international recognition 2020			
5.1	Strategic alliances with NGOs 2016	Marketing process	Reputation	Marketing PIC, Head of Administration
5.2	Larger organizational membership 2018	Marketing process	Reputation	Marketing PIC, Head of Administration

- e) Promote respect for the environment via the proper disposal waste industry.
- f) Recruit qualified personnel for important positions.
- g) Keep patient information confidential and maintain an environment of trust.
- h) Keep communication channels open with the government, strategic alliances with the public sector and donors.
- i) Encourage the consolidated organizational data to facilitate decision making.
- j) Periodically train staff to achieve professional development
- k) Encourage organizational alliances with other NGOs, universities and the government to more effectively help the AIDS-affected population and receive talented, passionate volunteers and employees that can make a difference at the Hogar
- l) Maintain the highest safety standards for the protection of patients.

These policies are associated with raised strategies as showed in Table 19

Table 19

Policies for each strategy

	Specific Strategies	Policies
1	Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs.	(b), (c), (h) and (k)
2	To follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo.	(d), (i) and (j)
3	Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs.	(f) and (l)
4	Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	(a), (e) and (g)

7.4. Organizational Structure

To develop a clear strategy, a new structure should also be developed. The organizational structure configuration of Hogar San Camilo is an entrepreneurial organization with the coordinating mechanism as direct supervision (Mintzberg, 1989). Brother Jean acts as the

direct supervisor who issues orders and instructions to a variety of workers in differing positions but whose work intersects. The key to its structure is the power of management, specifically the Director, in determining the day-to-day operations as well as future of the organization.

This structure can be time consuming for Brother Jean and burdens him with many issues and concerns which could be relayed onto someone closer to the situation. Hogar San Camilo should seek to empower and train its Heads of Programs so that they can respond to, and better manage their specific areas. Meetings should be scheduled where information can be relayed onto Brother Jean but that he is not the only decision maker. This process would allow Brother Jean to use his time to develop the presence of Hogar San Camilo.

The organization's structure follows the company's strategy. For this reason, Hogar San Camilo should change its organization structure in order to follow the proposed strategies. The organization's future structure should remain an entrepreneurial organization with direct supervision as the coordinating mechanism but with trained middle management. This will allow management to delegate tasks to supervisors while still maintaining a vertical direct supervision.

7.5. Environment, Ecology, and Social Responsibility

HIV/AIDS affected individuals require a healthy, clean and supportive atmosphere to maximize the effectiveness of their treatment at the Hogar. People living with HIV/AIDS have significantly weaker immune systems than the average human being. Therefore, they are more likely to catch additional sicknesses by living in densely polluted areas. With limited use of sustainable waste management practices in Lima, Hogar San Camilo will make an effort to contribute to the wellbeing of its patients and the greater community by recycling as much as possible, composting and limiting its use of unnecessary plastic. Doing so will allow Hogar San Camilo to contribute to the sustainable care of the environment and allow

other NGOs, corporations and individuals to take into greater consideration environmental concerns.

7.6. Human Resources and Motivation

In order to develop the Hogar San Camilo organization, human resources must be redeveloped. Three departments should be developed. The first is the medical and pharmaceutical department, where a head of department will supervise the work of all the medical and pharmaceutical staff. The second will be a programs department, where program coordinators will report to a head program coordinator. The third will be the administrative department, where a head will supervise daily activities of Hogar San Camilo. These activities would range from marketing and finance to kitchen supervision. The proposed new organization chart is shown in Figure 13.

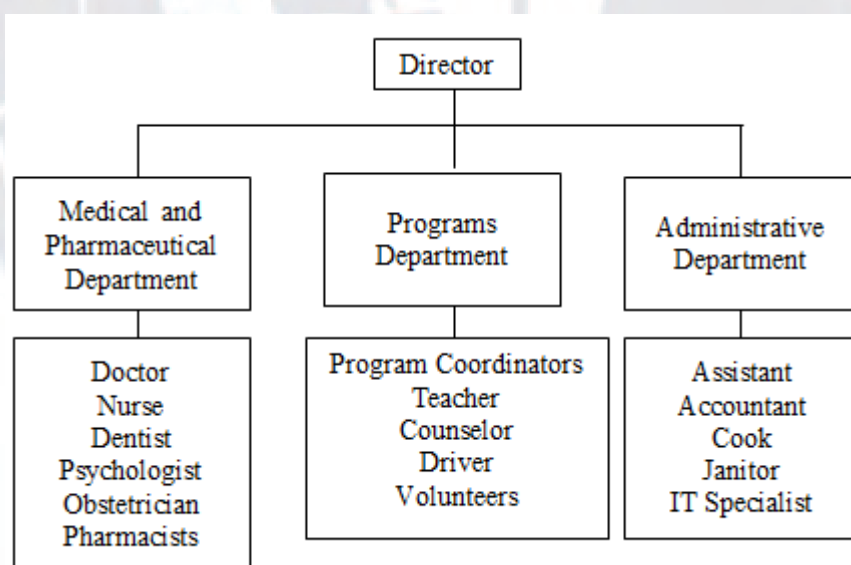


Figure 13. New Organization Chart for Hogar San Camilo

To ensure a successful organization structure change, job positions need to be defined and workers must be trained. Each job position needs to be outlined with requirements and qualifications as well as a realistic understanding of the position. By hiring people with previous experience combined with training will allow them to better make decisions rather than having to involve Brother Jean.

Hogar San Camilo should also seek to empower its employees by training them according to their strengths. This would enhance the motivation of its employees to work towards developing Hogar San Camilo.

7.7. Change Management

Minimizing the amount of resistance to change is key to making the process of implementing a strategic plan successful. It is essential to establish an educational strategy that helps to change and to control feelings of anxiety and fear among the staff. Simultaneously, it must develop a rational strategy to exert change, encourage self-interest via new labor and professional experiences. Therefore, it is important to have strong leadership of the Hogar and adequate management of programs. These should promote change, support strategies and action plans established to manage the impact of alterations in the sector.

Additionally, the implementation process generates structural and cultural changes that require adequate development in the following actions: (a) strategize for change; (b) create a sense of urgency; (c) creating a vision of change; (d) communicating the vision; (e) empowerment, using relevant information technology and communication; and (f) plan for results and success.

According to D'Alessio (2014), an organization must examine the market and its competition, identify and evaluate current and potential crises, and identify opportunities. This strategic planning has identified critical success factors for Hogar San Camilo as well as the strengths, weaknesses, threats and opportunities to achieve long-term goals that will lead to success. Management must have these in mind when initiating new changes.

Moreover, it is the responsibility of Hogar San Camilo's leaders to follow the proposed vision and the need for change that will cause other NGOs players to follow suit. Strategies and policies must be issued and the Hogar ought to encourage their dissemination.

Hogar San Camilo should facilitate communication, management of patient records, the development of treatment and diagnosis as well as being a tool for remote treatment. Additionally, having all relevant information consolidated in a central hub that is easy to access by management will facilitate decision making by granting the monitoring progress of decisions and policies adopted.

7.8. Conclusions

This chapter identifies how the organization can effectively implement a new strategy. In order for Hogar San Camilo to accomplish its vision to be referenced as a leading Latin American NGO by 2020, it needs to take in consideration short-term objectives, its resources and capabilities, and policies to be followed for every strategy. It also must understand how the current organizational structure, environment and human resources of Hogar San Camilo would need to be developed or changed in order to successfully implement a new strategy.

The short-term objectives outlined act as incremental steps in order for the organization to achieve the long-term objectives discussed in Chapter 5. For each of the five long-term objectives there are two or three short-term objectives which build on one another to ensure that the first will be attainable and achievable. Short-term objectives also will keep Hogar San Camilo focused and committed to its long-term objectives and will incrementally implement changes making it more likely that the final strategies are accepted throughout the organization.

However, in order to implement short-term objectives, the resources to do so must be evaluated. The resources required to implement each of them is divided into three groups: tangible assets, intangible assets and human resources. It is essential to take into consideration the size and availability of the organization's resources in order to ensure that these objectives are achievable.

The policies developed ensure that the strategies are guided by ethics, are lawful and socially responsible and follow the procedures and rules that are required of NGOs in Lima.

To be able to implement a new strategy the current organizational structure was evaluated and it was evident that managers and program directors will be required to take on more responsibilities as it will be very difficult and inefficient if Brother Jean is responsible for implementing all changes. In order to implement these strategies, the organization will also have to train its employees and volunteers and motivate them in order to create acceptance of the changes. Lastly, Hogar San Camilo should follow the mentioned aspects of change management so its strategy will be more widely accepted and in turn easier to implement.

The organization needs to focus its attention on implementing short-term objectives, abiding by policies, and is willing to make necessary changes within its organization. This will result in a new strategy that is well-developed and prepared with enhanced support from Hogar San Camilo's employees.

Chapter VIII: Strategic Evaluation

The strategic evaluation is the stage that is present throughout the strategic planning process. The objectives and strategies defined in the strategic planning stage must be constantly evaluated in order to minimize risks that affect the implementation of the activities. D'Alessio (2014) stated that the evaluation is constant because of the intensity and frequency of changes in the environment, the competition, and demand. The Balance Scorecard will be useful to monitor Hogar San Camilo's strategies and objectives development.

8.1. Control Perspectives

The Balance Scorecard is composed by four perspectives: (a) internal learning, (b) processes, (c) clients; and (d) financial. Productive processes are easier to achieve by having motivated and prepared staff. In addition, by applying productive processes clients will feel happy and shareholders will be satisfied.

8.1.1. Internal learning

The perspective of internal learning analyzes human resources. Some key indicators are: (a) the satisfaction of the workforce, (b) retention of the workforce, (c) productivity of the labor force, (d) systems capabilities information, and (e) capacity of the enabling systems (D'Alessio, 2014).

8.1.2. Processes

The perspective of processes evaluates any type of processes that an organization can have. In the case of Hogar San Camilo, the process that will be measured is the IT process. Some key indicators for this perspective are the following: (a) innovation; (b) after-sales service; (c) operational efficiency; (d) quality measures, production, and waste; and (e) cycle times (D'Alessio, 2014).

8.1.3. Clients

The perspective of clients evaluates: (a) market share, (b) retaining customers and consumers, (c) attracting new customers and consumers, and (d) the profitability per customer and consumers (D'Alessio, 2014). For the case of Hogar San Camilo, the increase of networking and reputation is also valued at this stage.

8.1.4. Financial

The financial perspective analyzes return on investments and the value added of the organization. Each short-term objective that requires a considerably investment can be measured in the financial aspect.

In case of Hogar San Camilo, since the position of the NGO in the industry forces the organization to apply defensive strategies to reduce costs and be efficient. The short-term objectives stated in this plan are related to attract funds, get recognition and improve its processes. Nonetheless, the short-term objectives are related to acquiring funding.

8.2. Balanced Scorecard

The short-term objectives measured by the four perspectives are aligned with the vision, mission, values, code of ethics, industry interests, cardinal principles, strategies and policies to achieve the long-term objectives. The Integrated Control Panel is obtained from the union of the tables and can be appreciated in Table 20.

8.3. Conclusions

The Balance Scorecard is a useful tool for monitoring the proper implementation of the short-term objectives and long-term objectives. By properly measuring the objectives, Hogar San Camilo can validate if the strategies defined were successful or not. It identifies each short-term objective in one of four perspectives: internal learning, processes and client perspectives.

Table 20

Balance Scorecard

Perspective	Short-term objectives	Actions	Indicator	Goal	Way to measure	
Internal Learning	STO 2.2	Training on consolidated data 2016	Develop training agenda Identify staff to be trained Record the attendance to the training.	Number of hours attended to training per worker (accumulative)	40 hours of training per worker and per semester	Assistance control in each training
	STO 3.3	Sustainable volunteer positions 2019	Develop a targeting and positioning for the volunteers Develop a attraction campaign	Volunteers in each Volunteering position created. Monthly evaluation.	Twenty volunteer positions occupied by enthusiastic volunteers	Monthly reports of volunteering team members
	STO 4.1	Overarching organizational chart 2017	Meetings to discuss the strategic plan among functional head of operations Meetings to discuss the strategic plan with Board of Directors	Organizational Chart up to date yearly Reports of operations every six months to main administration and Board of Directors	Organizational chart approved and up to date by management every semester	Presentation of approved organizational chart
	STO 4.2	Increased communications with other HSC sites 2016	Develop group meetings among the HSC sites administrators Prepare joint projects	Reports on results of joint projects (every semester)	Three joint successful projects per semester	Submission of projects' reports
	STO 4.3	Information sharing 2019	Develop IT project to create the platform Get the funds and develop a finance plan Organization of workshops to show the importance of the tool for the NGO	Number of uploaded documents	Four documents uploaded per year	Accessing platform logs
	STO 5.2	Larger organizational membership 2018	Target national and international organizations	Number of association which HSC is member - yearly evaluation	One larger organization membership per year	Documents of membership acceptance
Processes	STO 2.1	Data management system 2015	Search for available Cloud Computing services Get quotations for service providers Evaluate and select a proposal for implementation	Cost reduction by enablement of data management system	Reduction in 20% of administrative costs	Financial statements and project reports
	STO 5.1	Strategic alliances with NGOs 2016	Targeting potential organizations Finance and Business Plan development for the strategic alliance	Cost reduction by strategic alliance operation	Reduction in 15% of sales and marketing costs	Comparison of sales and marketing budget yearly
Clients	STO 1.1	Pilot Programs 2017	Develop pilot programs Develop finance plan	Number of programs implemented	One sponsor per program implemented	Name and contribution of donors
	STO 1.2	Increased communication with Multi Sectorial members from 2016	Participate in meetings, workshops and events Prepare finance plan for attending periodically events	Key contacts of Multi Sectorial team up to date in database	One key contact per Multi Sectorial team member up to date	Business cards, LinkedIn and Email contacts
	STO 1.3	Programs for Multi Sectorial Members 2018	Develop of joint programs	Number of programs executed	Two joint programs per year	Report of programs results
Financial	STO 3.1	Consolidated donor information 2016	Develop a database to track current and future donors Update monthly the database with latest information Update interaction and reports for donors	Quantity of donors Quantity of new donors	One new donor each year	Name and contribution of donors
	STO 3.2	Adoption incentive program 2018	Develop the adoption program Targeting the potential donors Promote the program	Number of donor adoptions / Number of possible adoptions	50% adoption ratio every year	Name and contribution of donors

The activities that should be taken by the organization in order to successfully implement the STOs are identified as well as the indicators that will show the results of these actions. Goals are also identified and the way in which they will be measured. Since the monitoring of the Balance Scorecard is a constant procedure, it is possible to identify and modify a course of action of Hogar San Camilo if the results are not as positive as expected.



Chapter IX: Conclusions and Recommendations

9.1. Comprehensive Strategic Plan

A strategy is necessary for Hogar San Camilo in order to understand where the company is going and how it will get there. In order to develop a strategy that fits best with the organization it is essential to follow Mintzberg's 5Ps: Pattern, Perspective, Plan, Position, and Ploy (Mintzberg, 1989).

Hogar San Camilo must firstly analyze a pattern by looking to its past to identify a pattern of errors or successes to adapt or adopt. The organization must then strive to identify a perspective by focusing on achieving its vision: To be recognized by 2020 as a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life. It must begin to implement a plan by focusing on its short and long-term objectives and use its position as an organization providing holistic services with an open-door policy as a unique trait. Lastly, Hogar San Camilo must be ready to defend its organization by creating ploys to better distinguish itself from its competitors.

If the organization is able to identify these 5 Ps, it will be able to adopt a more effective strategy with the greatest and most realistic probability of success. In Table 21 is presented the comprehensive strategy plan for Hogar San Camilo.

9.2. Concluding Remarks

- Hogar San Camilo is dedicated to helping Lima's people and families with HIV/AIDS by providing medical, psychological, counseling and religious services. The Hogar follows the Camillian congregation doctrine which helps impoverished and marginalized people living with diseases.

Table 21

Comprehensive Strategic Plan

Mission: To provide wellbeing to people with HIV/AIDS in Peru and their families, so they can live a dignified, happy and healthy life. This will be achieved by providing a holistic support model to the patients and their families that follows Hogar San Camilo's values of honesty, trust, respect and community.

Vision: To be recognized by 2020 as a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS and their families, allowing them the opportunity to live a dignified, happy and healthy life							
Organizational interests	Long-term objectives		Cardinal Principles		Values		
1. Sustainably help marginalized people of Lima living with HIV/AIDS by giving them holistic services. 2. Increase the flow of funding in order to finance its operations, grow in the future and best assist its patients. 3. Create more facilities and increase capacity to provide services to more patients. Specially targeting the regions and cities of Peru where the impact of the HIV/AIDS is higher. 4. Gain brand recognition among stakeholders and increase the awareness of Hogar San Camilo's activities in other organizations through increased marketing activities resulting in increased donations. 5. Gather more sustainable volunteers that can commit to Hogar San Camilo values and be a support to the patients. 6. Consolidate data more efficiently in order to further increase the tools needed to request funding. 7. Make the new medical center focused on physical treatments a profitable and sustainable operation.	LTO1: 40% of accepted proposals in Multi Sectorial Strategic Plan 2020	LTO2: Credibility and financial information 2020	LTO3: Sustainable operation by funding and volunteering 2020	LTO4: Creation of synergy among Hogar San Camilo operations 2020	LTO5: Awareness international recognition 2020	1. Influence of third parties 2. Past and present ties 3. Counterbalance of interests 4. Conservation of enemies	1. Honesty 2. Trust 3. Respect 4. Community
Strategies	Policies		Code of Ethics				
1. Market penetration by targeting specific Peruvian companies that presently donate to Hogar San Camilo by requesting funds for specific actual programs. 2. Follow a horizontal integration by merging the Hogar San Camilos from Lima, Arequipa and Huancayo. 3. Follow a retrenchment strategy concerning the present programs and activities offered in order to keep, eliminate or merge programs. 4. Develop an internal process management strategy by developing a strategic vision for Hogar San Camilo that will enable it to increase funding from donors.	X	X	X	X	a) Promote transparency, collaboration, good practices and sustainable management b) To ensure the economic and financial health of the Hogar's programs and both diversify and optimize funding sources. c) Promote communication and collaboration between the main actors the health sector. d) Promote teamwork. e) Promote respect for the environment via the proper disposal waste industry. f) Recruit qualified personnel for important positions g) Keeping patient information confidential and maintaining an environment of trust. h) Keep communication channels open with the government, strategic alliances with the public sector and donors. i) Encourage the consolidation organizational data to facilitate decision making. j) Constantly train staff to achieve professional development k) Encourage organizational alliances in the social sector in Lima with other NGOs, universities and the government. l) Maintain the highest safety standards for the protection of patients.	1. Respecting the law 2. Confidentiality of patient information 3. Commitment to values 4. Transparency 5. Commitment to the environment	
Balance Scorecard	Short-term objectives						
Internal Learning Perspective STO 2.2 Indicator: Number of hours attended to training per worker (accumulative) STO 3.3 Indicator: Volunteers in each Volunteering position created. Monthly evaluation STO 4.1. Indicator: Organizational Chart up to date yearly reports of operations every six months to main administration and Board of Directors STO 4.2 Indicator: Reports on results of joint projects (every semester) STO 4.3. Indicator: Reports of activity of the platform STO 5.2. Indicator: Number of association which HSC is member - yearly evaluation Process Learning Perspective STO 2.1. Indicator: Number of modules (marketing, finances, projects) used by the Hogar STO 5.1. Indicator: Cost reduction by strategic alliance operation Clients Learning Perspective STO 1.1. Indicator: Number of programs implemented STO 1.2. Indicator: Key contacts of Multi Sectorial team up to date in database STO 1.3. Indicator: Number of programs executed Financial Perspective STO 3.1. Indicator: Key persons contact of each donors up to date Satisfaction survey of current donors STO 3.2. Indicator: Number of donors adopting / Number of adoption or sponsorships	STO 1.1: Pilot Programs 2017 STO 1.2: Increased communication with Multi Sectorial members from 2016 STO 1.3: Programs for Multi Sectorial Members 2018	STO 2.1: Data management system 2015 STO 2.2: Training on consolidated data 2016 STO 3.1: Consolidated donor information 2016 STO 3.2: Adoption incentive program 2018 STO 3.3: Sustainable volunteer positions 2019	STO 4.1: Overarching organizational chart 2017 STO 4.2: Increased communications with other HSC sites 2016 STO 4.3: Information sharing 2019	STO 5.1: Strategic alliances with NGOs 2016 STO 5.2: Larger organizational membership 2018			
Resources							
Organizational Structure							
Operational Plans							

- Due to increased education, economic stability and government support, HIV/AIDS rates are declining in Peru. This decrease in HIV/AIDS is in line with Hogar San Camilo's goals. However, it also limits Hogar San Camilo's relevance regarding future funding. Despite the disease's eradication being unlikely, its decline minimizes the disease's urgency with respect to viruses and could potentially cause donors to contribute to other causes. Additionally, Hogar San Camilo competes for funding with many other NGOs throughout Peru.
- The proposed vision for Hogar San Camilo is its announcement and commitment to transform itself and become a leading referenced NGO in the future. To make this transformation, the organization will stay dedicated to the commitment, the quality care of patients and families living with HIV/AIDS, wellbeing of the greater community, effective management of both information and administrative duties and the maximization of internal efficiency. The organization's mission is focused on the main drivers of change that affect future policy and help it accomplish its goals.
- With respect to the importance of organizational guidance, there are several factors related to uncertainty that are important for an organization to cope with. The present atmosphere reveals that Hogar San Camilo's affairs are influenced by a number of macro-environmental factors. Specifically, the political situation in Peru could have profound effects on the Hogar's operations.
- San Camilo has five internal strengths and weaknesses. The strengths are holistic services, its spreading awareness programs, its number of tailored programs, its experience in the industry and its skilled workforce. The organization's weaknesses are high financial dependency, no consolidated data, lack of strategic vision, low brand recognition and poor leadership.

- Hogar San Camilo has seven organizational interests that it is willing to accomplish. All these interests are aligned with the mission and vision of the institution. Its two core competencies are (a) the holistic services and programs offered, enabling it to reach people from all ages and (b) its open door services, enabling it to help anyone who is affected by HIV/AIDS regardless of their age, gender, sexual orientation or connection to the disease.
- Hogar San Camilo has five long-term objectives. These long-term objectives will allow the Hogar to reach its vision by 2020 while reaching its interests and that of its stakeholders. The long-term objectives are (a) to be a recognized contributor of ideas and plans in the development of the Multi Sectorial Strategic Plan, (b) to be one of the NGOs focused in HIV/AIDS capable to submit information of credibility, (c) to sustainably run programs by having monthly support of two sponsors/donors and twenty permanent volunteer positions, (d) to create synergy among all four Hogar San Camilo sites, and (e) to increase the awareness of Hogar San Camilo activities at a Latin America level.
- The four retained strategies proposed for Hogar San Camilo are defense strategies. They are feasible and consistent with the Hogar's ethics and resources as well as ethically accepted and aligned with the Hogar's long-term objectives for 2020. By following the four proposed strategies, Hogar San Camilo should be able to reach its vision by 2020.
- Hogar San Camilo's short-term objectives are aligned with its long-term objectives. The short-term objectives include (a) creating pilot programs, (b) increased communication with stakeholders, (c) installing a data management system, (d) creating a sustainable volunteer program, and (e) increasing its membership to other HIV/AIDS associations. In order to achieve this, Hogar San Camilo will follow the

organization policies for each strategy, respect the environment, promote social responsibility and effectively manage change.

- The Balance Scorecard is a useful tool for monitoring the proper accomplishing of the short-term objectives and long-term objectives. Since Hogar San Camilo is focusing on defensive strategies, the activities and objectives are related to cost reduction and increasing funding rather than increasing return on investment.

9.3. Final Recommendations

In order for Hogar San Camilo to achieve its vision, the organization must be committed to achieving the strategic plan and implementing the short and long-term objectives outlined. The final recommendations proposed have not been suggested previously in the document and therefore could also assist Hogar San Camilo in achieving its vision.

Firstly, the Peruvian government, represented by the Minister of Transport and Communications, should seek to improve the transport system through Lima and its outskirts. Low-income patients have trouble accessing Hogar San Camilo's facilities because of the inefficient and time-consuming nature of public transportation. In order for those who are in need of treatment and support to reach Hogar San Camilo, it is urgent that transportation routes become more efficient.

Secondly, management of Hogar San Camilo should align the organization with companies and organizations focused in HIV/AIDS research and development (R&D) such as projects and studies being developed by other NGOs, the MoH and pharmaceutical companies. This will give the organization access to new information and potentially allow it to have first access to new drugs, although, will not require a major increase in funding or new department to execute R&D.

Lastly, the HIV/AIDS field is dynamic and depends of discoveries and R&D results from pharmaceutical companies and laboratories. In consequence, Hogar San Camilo management should consider the external factors that can influence this field and periodically evaluate the appliance of the proposed strategic plan.

9.4. Future of the Organization

By 2020, Hogar San Camilo will be a reference in Peru and Latin America regarding holistic wellbeing support to people affected with HIV/AIDS and their families. It will be articulated with MoH and NGOs focused in HIV/AIDS in order to help the people in need, spread awareness about the virus and work towards the eradication of HIV/AIDS.

Hogar San Camilo should have met successfully the following objectives: (a) have 40% of its proposed ideas accepted for the Multi Sectorial Strategic Plan, (b) submit all financial information to increase credibility, (c) have two permanent sponsors and twenty permanent volunteer positions, (d) created synergy among all four Hogar San Camilo sites, and (e) have international recognition by participating in two international seminars each year.

The strategic plan has developed the required objectives and strategies that Hogar San Camilo can use as a guide to achieve the results. The organization will work constantly keeping in mind its stakeholders and, by working in coordination with the government and other NGOs, can reach the vision stated.

The organization is expected to increase its growth if certain factors related to PESTE analysis; internal core competencies and change management remain constant. Important factors in relation to the external environment related to a stable political environment, continued local funding and laws which support the organization's operations such as tax exemption. If these factors do change, Hogar San Camilo should be flexible to adjust their

own operations and to address the changing environment. It needs to recognize that its core competencies can evolve and develop as necessary.

There are still people affected by HIV/AIDS in Peru that require assistance and support that cannot currently reach Hogar San Camilo's services. The organization is determined to assist those in need and once Hogar San Camilo develops a strategic plan and adopts short and long-term objectives, it will be able to clearly identify the potential of its organization. Development of its Chacacayo site and expansion into other geographical areas that have high levels of HIV/AIDS and little to no support, such as the jungle regions of Peru, are areas in which Hogar San Camilo has potential.

If Hogar San Camilo adopts necessary changes and strives to become an influential NGO assisting HIV/AIDS patients, it has the ability to increase its presence, funding, relationships, and growth while reaching out to, supporting and assisting as many people affected by HIV/AIDS that is possible.

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