 

**Farmer to Farmer East Africa**

**Volunteer Assignment Scope of Work**

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| **Summary Information** | |
| Country | Kenya |
| Assignment Code | KE35 |
| Country Project | Horticulture Country Project |
| Host Organization | INADES Formation Kenya - Kauma solidarity fund for rural development (SOFDEV) – Kitui County |
| Assignment Title | Marketing plan development and training on marketing basics for Kauma SOFDEV in Kitui |
| Assignment preferred dates | February – May 2016 |
| Assignment Objective | Development of a marketing plan for Kauma SOFDEV and training of the committee members on marketing basics. |
| Skills Summary | Marketing expert with experience in marketing plan development for rural financial institutions. |

1. **Background**

Kauma Solidarity Fund for Rural Development (SOFDEV) is community based self-help financial intermediary initiated, owned and managed by the rural community. It was initiated by INADES formation Kenya (an NGO based in Machakos Kenya) in October 2010 and is involved in rural micro-financing to farmers of Kauma Sub-county of Kitui County. Kauma SOFDEV currently has a membership base of 536 members (of which 340 are women), mostly small scale horticulture farmers. Last financial year, the organization disabused 336 loans with a value of $ 9,644. For the first three months of this financial year July – October 2014 they disbursed $ 16,000. Profits realized from loan interests and other fees are invested back with a part paid to members as dividends. This initiative was introduced in Kauma Sub-County by INADES Formation Kenya with the aim of facilitating access to reliable and affordable financial services to promote self-help initiatives at individual and group levels. This initiative has since been replicated in three other counties and is serving more than 2000 members, most of whom are smallholder farmers. Women account for over 70 percent of all members.

The main activities of Kauma SOFDEV are;

* Outreach and community sensitization on the importance of saving and borrowing wisely
* Resource mobilization
* Trainings on entrepreneurship, personal financial management and basic business skills
* Loan processing, disbursement and follow ups
* Investment of surplus funds

The organization is managed by 23 committee members elected to the committee by the members during annual general meetings. The committee is divided into five sub-committees; coordination, finance treasurers, loans, supervisory and education committees. The first four committees have three members each; except for the education committee that has 11 members. These sub-committees work on voluntary basis. The general members are the policy makers through annual general assembly meetings, while the committees are the technical arm of the initiative, managing the day to day operations. The education sub-committee is of importance to this assignment as it is mandated to educate existing members as well as recruit new ones. The expert volunteer will therefore work closely with this sub-committee as well as the executive subcommittee on the basics of marketing so as to encounter the stiff competition they are facing from other profit oriented micro-finance organizations in the area.

**ISSUE DESCRIPTION**

Kauma SOFDEV is a membership based organization with a membership base of 536 members, mostly smallholder horticulture farmers. It was started by INADES Formation Kenya in October 2010 for the purpose of providing rural microfinance services to farmers of Kauma sub-county, Kitui County. The SOFDEV has no permanent employee and the committee members do all the work including marketing on voluntary bases. The education sub-committee has specifically been mandated with this important duty of marketing the organisation. The SOFDEV is facing the following challenges;

***Limited marketing skills and lack of market information***: The organization lacks marketing skills to promote the SACCO products to the target communities in Kauma sub-county. This being a community based organisation has the advantage of the community having a sense of ownership (the committee members come from the area and the organisations mandate is to operate in the area) and also the profits are always ploughed back to the community.

***Lack of marketing plan:*** Kauma SOFDEV lacks a clear marketing plan that they can use to propel their marketing agenda. Currently the education committee members market the organisation without a clear plan or set targets, the SOFDEV also has no marketing budget which makes the whole process very difficult for the members.

This assignment is expected to train and emphasize the role and importance of a marketing budget for the SOFDEV. It is against the above background that the management of Kauma SOFDEV has requested for CRS F2F volunteer expert. The expert volunteer will therefore be expected to facilitate the development of a marketing plan that will have a clear timeline, achievable targets and a realistic budget.

**Host contribution:** INADES formation Kenya and Kauma Solidarity Fund for rural Development (SOFDEV) leadership will provide the necessary information to facilitate the development of the marketing plan by the expert volunteer. The committee members will also avail themselves for the trainings on a timely manner. They will also assist in organizing for a presentation by the volunteer to INADES Formation and SOFDEV selected stakeholders in Kitui County.

1. **Assignment Objectives**

The objectives for this F2F volunteer assignment are:

* Develop a marketing plan for Kauma SOFDEV with a clear timeline, achievable targets and a realistic budget
* Facilitate the development of a clear value preposition (tagline) for the purposes of visibility and marketing the organization
* Train Kauma SOFDEV committee members on the basics of marketing for a rural financial institution

Specifically, the F2F volunteer will carry out the following activities:

1. ***Develop a marketing plan for Kauma SOFDEV with a clear timeline, achievable targets and a realistic budget:*** this will among other things involve the following;

* Analyzing the financial market of the sub-county with a clear understanding of the total size of the market and current demand & supply.
* Identifying the financial market trends in the target market, i.e. Kauma sub-county
* Evaluating marketing techniques used by Kauma SOFDEV as well as their competitors in the region
* Together with the committee, establish and set targets for the education sub-committee
* Emphasizing on the importance of a marketing budget and together with the committee coming up with a realistic Kauma SOFDEV marketing budget.

1. ***Facilitate the development of a clear value preposition for the purposes of visibility and marketing the organization.*** Assist the organization come up with a simple marketing “tagline” based on the value they intend to offer to the community. The committee will then translate this to the local language and use it for their visibility and marketing purposes.
2. ***Train Kauma SOFDEV committee members on the basics of marketing for a rural financial institution***: the expert volunteer will among other topics train on the following:

* The laws of demand and supply in relation to financial services
* The “four Ps” of marketing and the marketing mix
* Marketing costs and the importance of having and properly managing a marketing budget.
* The importance of advertising and the different channels that can be used in that context
* The basics of customer care

1. **Anticipated Results**

The main outputs from this assignment will be:

* A marketing plan is developed
* A clear value preposition to be used by Kauma SOFDEV
* Committee members of Kauma SOFDEV trained on the basics of marketing

Other deliverables will include;

* PowerPoint presentation at the end of the assignment to the SOFDEV management, INADES formation and other key stakeholders
* Debriefing with USAID mission in Nairobi
* Volunteer feedback on the assignment
* Field trip report and expense report
* Outreach activity, a press release or a media event

1. **Schedule of Volunteer Activities in Kenya**

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| Day | Activity |
| Day 1 | Leave US |
| Day 2 | Arrival into Kenya. The volunteer shall be met by a cab driver, who will have a placard bearing **CRS logo**, and who will wait at the arrivals section with the placard displaying the volunteer name. The volunteer will be driven to a hotel in the Westlands suburbs of Nairobi City which will be communicated prior to arrival. |
| Day 3 | Briefing meeting at CRS offices with CRS F2F staff and become fully briefed on logistics and itinerary of trip. Discuss anticipated outcomes and work plan, |
| Day 4 | * Travel to Machakos. Meet the INADES formation management; discuss challenges facing SOFDEV, concerns and plans for the future. Review the main objectives of the assignment and adjust the agenda for the coming days. * Travel to Kitui * Courtesy call at Kitui County offices |
| Day 5 | Visit SOFDEV and meet with the committee members to discuss the assignment and assign responsibilities and logistics of information sharing and look at the training schedule. |
| Day 6 | Day off |
| Day 7,8&9 | Training on the basics of marketing including:   * The laws of demand and supply in relation to financial services * The “four Ps” of marketing and the marketing mix * Marketing costs and the importance of having and properly managing a marketing budget. * • The importance of advertising and the different Channels that can be used in that context * Customer care |
| Day10 | * Meeting with committee members to discuss the value preposition and come up with a “tagline” for SOFDEV’s visibility and marketing purposes * Discuss and develop a marketing Budget for the SOFDEV * Set targets for the education / marketing sub-committee |
| Day 11 | Primary and secondary data collection on the kauma market in relation to financial services, the trends and the techniques used by SOFDEV’s competitors |
| Day 12- 15 | Compiling, packaging and finalizing the Marketing plan |
| Day 16 | * Closing session with SOFDEV and INADES formation Kenya staff, share the main findings of the assignment, provide conclusions and recommendations. * PowerPoint Presentation on highlights of the developed market Plan to INADES and kauma SOFDEV * Presentation of the markets plan to Kauma SOFDEV * Exit meeting and travel to Nairobi |
| Day 17 | * Debriefing at CRS office with USAID Mission and CRS staff. * Complete Trip Report (TR), Complete out feedback from, Travel expense report (TEV) and submit CRS office. Depart for the US |

# Desirable Volunteer Skills and Qualifations

The volunteer must have the following qualifications and competencies:

* Formal qualification in Business management and especially marketing.
* Experience in sales and marketing in a financial institution, especially in rural based organizations.

1. **Accommodation and other In-Country Logistics**

While in Nairobi, the volunteer will be accommodated in a hotel in the Westlands suburbs of Nairobi City which will be communicated prior to arrival. In Kitui, the volunteer will stay at the Kitui cottages hotel. The hotels have self-contained rooms with hot water, electricity and internet connection. Internet is also accessible in the many internet cafes in town.

CRS will pay for hotel accommodation, and provide volunteer with per diems to cater for meals and other incidentals. The volunteer may get an advance which has to be cleared before departing Kenya. For more information, please refer to country information that will be provided.

1. **Recommended Assignment Preparations**

CRS-F2F designs assignments with the assumption of some pre-departure preparation by the volunteer. Actual preparation time will vary based on the experience of the volunteer, as well as informational or training resources the volunteer has readily available. CRS relies on the volunteer to assess the tasks outlined in this SOW and to make his or her own judgment about how much and what kind of preparation is needed prior to arriving in Kenya.

* The volunteer should prepare materials for hand out which can be printed at CRS office in Nairobi before commencement of the assignment. Flip charts, markers, masking tapes can be obtained at CRS offices.
* CRS strongly recommends that the volunteer become familiar with CRS programs in Kenya, the horticulture project description, issues facing rural financing in Kenya as well as other information in the briefing pack before arrival to Kenya

1. **Key Contacts**

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