

**Farmer to Farmer East Africa**

**Volunteer Assignment Scope of Work**

**NOTE: THIS SCOPE OF WORK IS A DRAFT AWAITING EDITS**

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| **Summary Information** | |
| Assignment Code: | KE64 |
| Country: | Kenya |
| Country Project: | Horticulture |
| Host organization: | Kabondo Sweet Potatoes Marketing Cooperative Society |
| Assignment Title: | Cooperative Financial literacy and Record Management Training |
| Type of Volunteer Assistance: | Organizational Development (O) |
| Type of Value Chain Activity: | Information and Input support services (S) |
| Preferred assignment dates: | Flexible (December 2015 – February 2016) |
| Objective: | To build capacity of Kabondo Sweet Potatoes Marketing Cooperative Society board on financial literacy to improve business and achieve organization goals  To facilitate record keeping training and development of basic formats for record keeping. |
| Desirable Volunteer Knowledge and Skills: | Finance management specialist with experience in farmers’ cooperative business management. |

1. **BACKGROUND**

The Farmer-to-Farmer (F2F) East Africa program leverages US volunteer’s expertise to assist small holder farmers and small scale processors in East Africa to improve their business practices through volunteer assignments conducted with host organizations. Through F2F CRS will improve the livelihoods and nutritional status of significant numbers of low income households by: i) broadening their participation in established commodity value chains as producers and service providers; ii) strengthening community resilience to shocks such as droughts, that adversely affect livelihoods; and iii) preserving/enhancing natural resources upon which most rural communities depend. As an important corollary result, through the program CRS will also increase the American public’s understanding of international development programs and foster increased cross-cultural understanding between host countries and US volunteers.

Kabondo area in Homa Bay County is the leading producer of sweet potatoes consumed in Kenya, contributing over 60% of the national consumption, which translates into more than $37.5 million Ksh farm-gate value. Over 7,000 farmers are involved in production activities with at least an average of 0.5 acres each committed to the crop. Other than the traditional varieties, farmers have been introduced to high yielding orange-fleshed sweet potato (OFSP) varieties which are favoured for their high nutritional value, disease tolerance, early maturation period and diverse value addition opportunities. However, there exist challenges of low productivity per unit area primarily driven by use of recycled and unclean planting material; poor agronomic practices; over-reliance on rain-fed production; inadequate investment in research on new and improved varieties as well as unsustainable marketing structures.

Kabondo Sweet Potatoes Marketing Cooperative Society is registered under Coop society act 2008 cap 490 and is mandated to facilitate marketing of sweet potatoes to member farmers in Homabay County. The Kabondo Sweet Potato Marketing and Cooperative Society (KSPMCS) is the only known sweet potato cooperative in the country. The cooperative’s main goal is to ensure the member farmers improve their economic livelihood levels through competitive marketing of their products. Through CRS Farmer to Farmer program, the cooperative received a volunteer who trained board members on leadership and governance; as a result, the cooperative has been able to recruit over 300 new active members within a period of three months mainly, due to increased cohesion and confidence on the board leadership; moreover, the society has been developing networks with key stakeholders as recommended by the F2F volunteer. However, with this noticeable progress, the cooperative board is facing some management challenges due to lack of adequate knowledge and skills on financial and record management. Therefore Kabondo cooperative board has requested for technical assistance from CRS Farmer to Farmer to build financial and record management capacity of the society board and management.

**B: ISSUE DESCRIPTION**

Whereas Kabondo Sweet Potato Marketing Cooperative Society is operating on sound cooperative principles after the leadership and governance training by Farmer to Farmer volunteer; there is still need to strengthen the organization in the area of financial planning, record keeping and management. With increased networking with other key stakeholders, Kabondo cooperative is becoming very dynamic with a lot of activities; furthermore this increased operation of day to- day activities involves finances, nevertheless this is an area with limited or no training at all for the board and management in planning and managing these finances. Discussion with Kabondo Cooperative managements and boards revealed that they lack the necessary skills in what kind of financial records to keep at the cooperative level, how to analyse expenses and revenues and then plan for future activities keeping in mind allocation of the limited resources to conduct farm production activities for its members.

Therefore, the cooperative has requested for CRS’s Farmer to Farmer technical assistance in the area of financial resource planning, record keeping and management geared towards achieving organisation goals and objectives. The technical assistance will help streamline financial processes and procedures, strengthen the cooperative board and management in record keeping and financial management operations skills.

1. **SPECIFIC OBJECTIVES OF THE ASSIGNMENT**

The main objective of this volunteer assignment is to build capacity of Kabondo Sweet Potatoes Marketing Cooperative Society board on financial literacy to improve business and achieve organization goals. The F2F volunteer will train the board and management of Kabondo cooperative who will in-turn train other selected members of the society to enhance sustainability.

Major topics of the training will include but not be limited to;

* Review of Kabondo cooperative board’s knowledge and skills in financial and record management
* Concepts and importance of financial management, and financial record keeping
* Budget preparation for financial year planning i.e. budget preparation
* Preparation and review of financial statements at the organisation level: Income statements, Balance sheets & Cash flow statement
* Financial analysis and determining the financial health of the organisation
* Development of a cooperative financial management plan
* Financial accountability and ethical conduct in handling and managing finances
* Record keeping and development basic formats for record keeping.

In addition, the Volunteer will develop guides for Training of Trainers (TOT) on financial resource planning and record keeping and management for future refresher trainings.

**Host contribution** – Kabondo Sweet Potato Marketing Cooperative Society has committed to mobilize the board members to attend the training. The cooperative will also avail key personnel to work closely with the volunteer, during the preparations and actual trainings, to ensure that key staff are trained and will continue training other members even after the assignment is completed. Cases where translation is required, the host will avail one or two board members(s).

1. **ANTICIPATED RESULTS FROM THE ASSIGNMENT**

The anticipated deliverables include:

* Trainings conducted and people trained
* Assignment related photos
* Developed guidelines on financial planning and record keeping templates
* PowerPoint presentation to Kabondo cooperative stakeholders/ Homabay County
* Debriefing with USAID and in country group presentations after assignment
* Field trip report
* Outreach activity, press release or a media event back in US

1. **SCHEDULE OF VOLUNTEER ACTIVITIES IN KENYA**

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| Day | Activity |
| Day 1 | Travel from home to US international airport |
| 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 **AACC guesthouse in the Westlands** suburbs of Nairobi City or any other hotel to be communicated prior to arrival |
| Day 3 | Introductions and briefing including; scope of work review, finalize with logistics, assignment expectations and anticipated outcomes. Any training material that the volunteer wishes to carry along to the field will be printed/photocopied at CRS offices. |
| Day 4 | Travel to Kabondo – Homabay County |
| Day 5 | In the morning CRS introduces the volunteer to Kabondo cooperative society board and management.  Together with CRS and the management, the volunteer will review the scope of work and develop an action plan. |
| Days 6 | Review of Kabondo cooperative knowledge and skills in financial and record keeping management and determination of relevant training needs |
| Day 7 | Rest day |
| Day 8 – 9 | Training on the concepts and importance of financial management, and financial record keeping  Budget preparation for financial year planning i.e. budget preparation |
| Day 10 - 11 | Preparation and review of financial statements at the organisation level: Income statements, Balance sheets & Cash flow statement  Financial analysis and determining the financial health of the organisation  Developing a cooperative financial management plan |
| Day 12 - 13 | Financial accountability and ethical conduct in handling and managing finances  Record keeping and development of basic formats for record keeping. |
| Day 14 | Rest Day |
| Days 15 - 16 | Development of guides for Training of Trainers (TOT) on financial resource planning and record keeping and management |
| Day 17 | Wrap up meetings, whilst emphasizing key concepts of the assignment. Participants evaluate the training and together with the volunteer discuss final report recommendations.  End of assignment presentation |
| Day 18 | Travel back to Nairobi |
| Day 19 | Debriefing at CRS office with USAID Mission and CRS staff.  Volunteer will finalize his/her reporting at CRS office and fill out all necessary M&E forms  Travel back to the US |
| TBD | Outreach event back in the US. |

# F: DESIRABLE VOLUNTEER SKILLS

The volunteer will have the following qualifications and competencies:

* Finance management specialist with experience in farmers’ cooperative business management
* Good writing and analytical skills, interpersonal communication and presentation skills (adult education skills).
* Experience working in African environment, especially in rural areas.
* An excellent hands-on training skill to an adult audience is necessary
* Good writing and analytical skill as well as good communication skill.

**G: ACCOMODATION AND OTHER IN-COUNTRY LOGISTICS**

While in Nairobi, the volunteer will stay at the AACC guest house is located along Wayaki Way, Westlands area of Nairobi. <http://aacc-guesthouse.com/> Tel: 254 20 4440224, 4442215 Mobile: 254 710 734728. or any other hotel identified by CRS and communicated to the volunteer prior to arrival. While in Kabondo, the volunteer will stay at Diakonia hotel near the cooperative office.

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 liquidated before departing Kenya. For more information, please refer to country information that will be provided.

**H: RECOMMENDED ASSIGNMENT PREPARATION**

* 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. Depending on the training venue the volunteer may use a laptop and projector for power point presentations. But if the training venue is in the community, it will be difficult to use PowerPoint.
* CRS strongly recommends that the volunteer become familiar with CRS programs in Kenya, the horticulture project description, other information in the briefing pack before arrival to Kenya.

1. **KEY CONTACTS**

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