



VOLUNTEER REPORT FORMAT

To be submitted to CRS at the end of volunteer assignment and shared with the Host

1.1 Assignment information

- a) Volunteer Name: Elaine Berndes
- b) Host Organization: Jenga Kenya
- c) Assignment: KE101
- d) Dates of Assignment: 1/20/2017 – 2/10/2017
- e) Number of days worked:
 - a. 4 travel days to/from US and Nairobi to Meru
 - b. Half Day in CRS Nairobi Office
 - c. 2 days in the field and office gaining context of the organization, the team, its strategies and priorities,
 - d. 5 whole day sessions with whole group presenting and facilitating
 - e. 4 half day sessions with the whole group presenting and facilitating
 - f. 1 half day site visit to Lewa Conservancy to meet with leaders re: mission, vision, values and strategies
 - g. 1 whole day team outing to Meru National Park
 - h. When I was not working with entire leadership team as a whole, I was meeting with Wilfred individually on half days as well as after hours and weekends to coach him and reflect on the team's performance and impact of the sessions. Wilfred invested much time to ensure he maximized the resources provided.

1.2.1 Objective 1 in your SOW: Mentor Jenga Kenya leadership team to create a well-equipped and responsive team.

- a) Progress with the objective: In the context of our time together, creating a well-equipped and responsive team centered on several things:
 - a. Identification of Leadership Qualities and Attributes: Our sessions started with facilitator sharing her leadership story, modeling for the group and then team member telling their own leadership stories, their professional history. From these stories we identified traits and responsibilities associated with leaders. We then compared these with traits identified by farmer groups in the field and competencies identified in a Harvard Business Review article read by the group. We did a site visit to Lewa Conservancy where the leaders of the education group shared their leadership stories along with the MVV of the organization. The group had prepared questions related to leadership, along with MVV and strategies to achieve the mission (i.e., good leaders constantly seek new knowledge). We concurred strong leadership cuts across all contexts. Participants were able to repeatedly reflect on and articulate their leadership strengths and growth areas in order to identify ways to leverage their strengths and practice strategies to support growth in areas that are not strong.
 - b. Understanding leadership presence and its importance: Facilitator presented work of Marlene Green who says "**Leaders declare futures that other people commit to through conversations. It is the conversations that create action and it requires skill in producing certain reactions in others.**" In other words, leadership is all about communication, both verbal and non-verbal and our skill in communicating are the greatest we have to



motivate, inspire and build buy-in. Participants established criteria reflective of a strong leadership presence and each time and individual presented as part of the sessions, we provided feedback on leadership presence.

- c. **Creating Alignment:** I became apparent rather quickly that after 12 years of growing organically, there was not clear alignment and understanding among the leadership team when it came to the future of the organization and the way of operating. After interviewing the leadership team individually, it was found there were gaps in communication, gaps in understanding strategic initiatives, gaps in planning, etc. This is not uncommon, but we had a real opportunity to create clarity, common language and understanding among the leadership team in order they could go out to all stakeholders, including their own team members, with a consistent message. When there is alignment, all teams are able to move further faster. Using Patrick Lencioni's framework from *The Advantage*, we explored the importance of leaders to create and communicate clarity among the leadership team in order that there is alignment which would mobilize the company to move further, faster. If the leaders are not on the same page, clear about where the company is headed and what needs to be done to accomplish it, they cannot manage their teams to the goals and strategies. In order to establish this clarity among the leaders, the team created common language and clarity for Lencioni's 6 critical questions. Lencioni asks: 1, Why do we exist? (vision) 2, How do we behave (what values determine our actions and decisions) 3, What do we do? (what is our mission) 4, How will we succeed? (what strategies will achieve our goals) 5) What's most important right now? (what is a temporary, singular top priority for leadership team) and 6) Who must do what? (right people, roles and responsibilities)
- b) **Expected impacts/results**
- a. **Leadership Qualities and Attributes:** The team identified and agreed upon leadership qualities and attributes to use for reflection and feedback. These qualities, along with the values of the organization will be used for informal and formal coaching and evaluation sessions (see attached).
 - b. **Leadership Presence:** Team was given opportunities multiple times a day to present formally and informally to the group. Each time, as a group we provided feedback on leadership presence. These exercises began with a simple story of their leadership, practicing a handshake and self-introduction and culminated in a presentation to the group on the last day. Each participant was required to introduce themselves, role in the organization, the MVV of Jenga Kenya and the lessons learned throughout our time together. Based on our criteria, 2/5 exhibited leadership presence from day one, others took more practice. In the end, I witnessed continued growth in those two individuals, SIGNIFICANT growth in one team member, average to better than average growth in another and minimal growth in the fifth team member.



c. Creation of alignment:

- i. Clarify company vision, mission and values: After reflecting on Lencioni's questions, the group felt it was not their sole purpose to be the leading MFI in Kenya, they agreed their aspirational vision needed to be more inspirational. Upon further reflection, we slightly refined the mission and we developed explicit values with descriptions of how those values are lived at Jenga Kenya. The leadership team agreed making these explicit would provide motivation for the team who could be recognized not only for their contribution to the bottom line, but to the organization's culture. After all **"Our mission and core values drive our culture and are the foundation of our practice. We measure each decision against these standards."** And.. **"Your personal core values define who you are, and a company's core values ultimately define the company's character and brand. For individuals, character is destiny. For organizations, culture is destiny"** (see MVV attached)
- ii. Establishing SMART goals with aligned strategies: As a leadership team, we were able to conduct a SWOT, holding up the mirror to the organization to gain better insight of what was working, what isn't and where there are opportunities. (attached). This SWOT was used to inform our goal setting and strategy. Goal-setting was a big growth area for the team. To date there have not been SMART goals and it seems the team was trying to hit a moving target. We spent a session attempting to set goals based on historical data, to make future projections. We had limited time to sift through the data to set goals that were specific, measureable, attainable, realistic and tied to a timeframe.

c) Recommendations¹

- i. In order to ensure the leadership team has internalized the learnings and continues to grow, Wilfred will need to have a follow up 1:1 with each leadership team member. As part of that meeting Wilfred will want to gain insights to ensure what we have been learning has been comprehended and each is able to articulate what the leadership training has provided. Additionally, using the 18 Leadership questions for reflection, just as we did in a session, each member should identify 2 strengths which they can leverage in specific ways with their own team members and for the organization. They should identify 2 areas of growth, along with opportunities to practice. Through regular 1:1 team and staff meetings, Wilfred and the team will be able to monitor growth and provide specific feedback.

¹ **Note:** Only make not more than 6 recommendations. The most useful recommendations for hosts are ones that they can implement themselves with minimal expense. For example, a cooperative might change its financial reporting procedures or hold more regular meetings of its board. Broad recommendations on tax or credit reform, changes in government policy, or investment in large-scale equipment, are usually not within the host organization's reach.



- j. Now that the leadership team has alignment on the MVV of the organization, it is necessary for the leadership team to engage the entire staff to gain alignment at that level. Anyone within the organization at any given time should be able to present an elevator pitch to any stakeholder whether a prospective client or a government employee. The leadership team should use our sessions on this topic as a model, encouraging the team to identify their personal mission vision and values as a foundation for this topic. Once they have completed a personal MVV, they can demonstrate how those are aligned to the company and gain buy-in. It's also important the team understand how the MVV influence company strategy and decision making. "The CEO is
- k. It became apparent during our time, that the team that is in place now, may not be the team for the future of Jenga Kenya, or perhaps there are not the right people in the right seats. As the organization moves towards a significant growth phase, it's important to ensure that the skills of the team are being used optimally and that the organizational structure doesn't simply reflect the way it has organically grown to date, it must be structured to achieve its future. Wilfred and I had many discussions about team member strengths and growth areas, along with lessons learned from both of our experiences. Wilfred may need support in restructuring and ensuring the right team is in place, whether it be advise from the board or peers with similar experiences.
- l. The Jenga leadership team, led by Wilfred needs to establish SMART goals grounded in data, based in reality and not assumptions. While the team understands they need to achieve 19M Ksh but the end of the year, the number needs to be broken out into benchmarks aligned to strategy. The team attempted to set a goal of 51M disbursement by June 30 in order to meet the revenue target, with no clear goals for Q3 and Q4. Yet, if you look at historical data, their loan disbursement was distributed evenly among quarters. They need to take a deeper dive at the financial data in order to set goals. This should take place IMMEDIATELY. The team is nearly wrapped up Q1 and has NO clear goals.
- m. Once goals are set a system for performance management must be established for all team members. This system should include development of tools for informal and formal evaluations, systems and processes for meeting 1:1 as well as leadership team meetings and all staff. This will create efficiencies in operations as currently there is no way to purposefully monitor and measure progress companywide as well as individually.

B 1.2.2 Objective 2 in your SOW: Create a leadership development program for Jenga Kenya to be followed in equipping new leaders.

- a)Progress with the objective: Given the strengths and challenges of the group, Wilfred and I felt it was important to focus on the development and alignment of the leadership team. The team as not ready to pick up a leadership program and execute on it. I identified some real gaps in the team that needed to be addressed before a leadership program could be developed and implemented more widely. We did do numerous sessions on hiring and performance management based on the writings of Jack Welch. These sessions focused on hiring and retaining staff that have high performance and high cultural fit vs. simply high performance. We had a session on situational leadership/management which focused on differentiating your



management style according to the needs of your staff members. These four styles include directing, coaching, supporting and delegating.

- b) Expected impacts/results: Given the chance for reflection, the team was able to identify previous mistakes in hiring and management. Given the new knowledge and approaches, we discussed what could have been done differently. The desire of the leadership team to get feedback about performance and provide feedback has been bolstered. The team has a clear understanding of WHY real time candid, specific feedback is important
- c) Recommendations: Assess the current leadership team in order to ensure the right people are in place. Firstly, continue to focus on the leadership team, setting expectations that the team, over time, implement some of the lessons learned as part of this assignment. As for a broader reaching leadership program, revisit in 6-12 months.

1.3 Action Plan

Recommendation	Specific Action	Responsible person	By when
1. Establish SMART goals based on historical data and projections. and strategy outline, finalize the strategic plan	Use historical data to accurately forecast revenue by quarter. Using goals as the guidepost, use the strategies we outlined to develop a strategic plan with tactics, timeframe and assigned responsibilities.	Wilfred with leadership team.	Within 2 weeks
2. Engage entire staff in M, V, Values buy in.	Training sessions on personal MVV and presentation on company MVV along with expectations for actions	Wilfred and leadership team.	Within 2 weeks.
3. Facilitate follow up with leadership team to do a training autopsy. What stuck, what didn't but should? Assess current team members for viability moving forward.	1:1 Meetings with each leadership team member. Assess growth to date and leadership growth expected moving forward. Engage in candid conversations about performance.	Wilfred	IMMEDIATE
4. Establish staff evaluation criteria and process based on values and professional goals	Using sample templates and sample systems. Create a formal evaluation unique to Jenga Kenya and informal "check-in" process to ensure	Wilfred	Within 6 weeks



	consistent candid feedback.		
5. Identify implications of core banking system and build specific plan for implementation	Finalize the core banking system ensuring function will be user friendly and also administrator friendly. George and Wilfred to train team on system. Develop communication plan for sharing system with clients. Identify potential potholes/ditches and build contingencies.	Wilfred, George and leadership team.	IMMEDIATE
6. Restructure for the future	Once a strategic plan is finalized, assess whether the current structure fits the future needs of the organization. Restructure accordingly	Wilfred with support from board and perhaps mentors	Within 6 months

1.4 Number of people Assisted

- a) Through formal training
- b) Through direct technical assistance (Do not double count)
- c) Out of these above, number of host staffs
- d) Training/assistance by field

Category	Total	Males	Females
Members/ owners			
Employees			
Clients/ Suppliers			
Family Members			
Total			

1.5 Gender

- a) What gender roles did you recognize in your host community? Did these roles play a part in your assignment? How? Perhaps it was the nature of the assignment or the group with which I worked, but I saw women as leaders throughout my time in Kenya. Whether it was as part of the leadership team at Jenga Kenya, or as entrepreneurial farming groups, women’s skills and leadership shined. I noticed this throughout my stay at hotels and restaurants, in shops and schools, etc.
- b) How might CRS or the host organization improve opportunities for the women in this host or host community?

1.6 Value of volunteer contribution in \$

- a. Hours volunteer spent preparing for assignment: 60 hours



- b. Estimated value of all material contributions volunteer contributed to host during assignment: Similar high quality leadership programs in US cost approximately 10,000-15,000USD per person including follow up coaching. Because I felt strongly that the training be held off site to ensure team is present and engaged, I agreed to cover lunch costs for the full group while off site for full days.

1.7 Value of hosts' contribution in \$ (Please consult the host as well)

- a) Meals
- b) Transportation
- c) Lodging
- d) Translation
- e) Other (Specify)

1.8 Host Profile Data:

Did you obtain any data that supplements or corrects the data in the existing host information as detailed in the SOW? Please list it.

1.9 Recommendations for CRS:

1.10 Press Release

FOR IMMEDIATE RELEASE

VOLUNTEER CONTACT: [Name]

[Title]
[Phone]
[E-mail]

Chicago Area Volunteer Travels to Kenya to Share Skills with Local Farmers

Farmer to Farmer program promotes economic growth and agricultural development in East Africa

FOR IMMEDIATE RELEASE

CONTACT: [Name]

[Title]
[Phone]
[E-mail]

Chicago Area Volunteer Travels to Kenya to Share Skills with Local Farmers

Farmer to Farmer program promotes economic growth and



Agricultural development in East Africa

Elaine Berndes, a leadership and management consultant from Chicago, Illinois travelled to **Kenya** for **3** weeks to share his/her technical skills and expertise with local farmers. Elaine's assignment is part of Catholic Relief Services' Farmer-to-Farmer (FTF) program that promotes economic growth, food security, and agricultural development in East Africa.

“To teach or volunteer when participants are completely invested and immediate impact is visible is a rewarding experience everyone should be fortunate to have. While I was here to facilitate learning for Jenga Kenya, it is I who learned the most, not only about the role microfinance plays in growing an economy, but common perspectives on leadership. When asked about leadership attributes and responsibilities, both farmers and the team at Jenga Kenya identified all those named in a recent Harvard Business Review article. Strong leadership is instantly recognizable, whether you are a corporate CEO in the US, a microfinance entrepreneur or a farmer in a Kenyan field” said Ms. Berndes.

Funded by the U.S. Agency for International Development (USAID), the five-year program matches the technical assistance of U.S. farmers, agribusinesses, cooperatives, and universities to help farmers in developing countries improve agricultural productivity, access new markets, and increase their incomes.

In **Meru, Kenya**, Elaine worked with **Jenga Kenya** in **leadership and management** training and giving technical assistance to **its leadership team** to enable them to **mentor the team to be better-equipped and more responsive while creating a leadership development program of their own**. Up to 3,100 beneficiaries were reached.

Elaine's volunteer assignment is one of nearly 500 assignments that focus on agriculture, food security and nutrition in Ethiopia, Tanzania, Kenya and Uganda. This is the first time CRS has been involved in the 28-year-old Farmer-to-Farmer Program funded by the U.S. government.

CRS is partnering with five U.S. institutions to tap into the rich diversity of the U.S. agriculture community: the National Catholic Rural Life Conference, Foods Resource Bank, National Association of Agricultural Educators, American Agri-Women, and the University of Illinois' College of Agricultural, Consumer and Environmental Sciences.

The U.S. volunteers will travel to East Africa for anywhere from one to six weeks, their expenses covered by USAID.

“One thing we are certain of is that this program will be beneficial not just to the farmers in East Africa, but also to the volunteers from America,” said Bruce White, CRS' director for the program. “It's going to make the world a little bit smaller for everyone involved.”

For more information, visit farmertofarmer.crs.org



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Catholic Relief Services is the official international humanitarian agency of the Catholic community in the United States. The agency alleviates suffering and provides assistance to people in need in nearly 100 countries, without regard to race, religion or nationality. For more information, please visit crs.org or crsespanol.org.

ATTACHMENT 1: Leadership Qualities and Attributes

JENGA KENYA FARMER GROUP	HARVARD BUSINESS REVIEW	THE LEADER OF THE FUTURE	JENGA KENYA
<ul style="list-style-type: none"> • Role Model • Time Keeper • Communicator • Transparent • Faithful • Active • Responsible • Honest • Has vision • Listens 	<ul style="list-style-type: none"> • Strong Ethics and Safety - ethical • Self Organizing – provides goals and clear expectations • Efficient Learning – flexible in opinions • Nurtures Growth-committed to ongoing training • Connection and Belonging-communicates openly, creates a feeling of success together, creates room for error 	<ul style="list-style-type: none"> • Has followers • Gets results • Set Example • Responsible • Constantly reminds oneself of mission and goals • Tolerant of Diversity • Surround themselves with other strong leaders • Reflective 	<ul style="list-style-type: none"> • Self-motivated • Motivates others • Self-disciplined • Takes initiative • Doesn't quit • Decision maker • Competitive • Develops Others • Confident...in what s/he knows • Responsive



Attachment 2:

VISION:

To transform Kenyan livelihoods through financial empowerment.

MISSION:

Jenga Kenya is a reliable microfinance partner who provides quality and affordable financial and business development services to small and micro-entrepreneurs.

VALUES:

HONESTY

We have candid and open conversations among our team.

We communicate clearly and accurately about our products and services to our clients.

We have zero tolerance for fraud and forgery both internally and externally.

We keep accurate and timely books.

We have no hidden fees.

GROWTH

We constantly strive for continuous improvement both personally and professionally.

We provide training for our clients in order they Prosper financially....

We focus on strategic expansion in order to increase profitability.

We set specific short and long-term goals which we review regularly to ensure we are on track to achieve.

We expand our offering of products and services to generate revenue.

TEAMWORK

We cultivate positive relationships among all team members, partners and stakeholders.

We set clear expectations for individual roles and responsibilities.

We hold ourselves and our teams accountable for achieving results.

We have systems and structures in place that help us communicate and work efficiently.

CLIENT FOCUS

We purposefully identify prospective clients who are aligned to our products and services.

We endeavor to resolve customer concerns in a timely, respectful manner.

We have multiple open channels of communication with our clients to ensure we understand their needs and challenges.

We develop products and services with the client in mind.

INNOVATION

We encourage diversity of ideas in good faith.

We research and implement cutting-edge solutions that address our company and client needs.

We see unconventional partners as opportunity to grow.



ATTACHMENT 3: SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Team commitment: invested in the mission and vision • Knowledge of loan appraisals • Reputable brand • Client retention over time • Group lending strategy • Ability to communicate current processes to clients • Training/education program for clients • Actions of the team reflect the values of the organization 	<ul style="list-style-type: none"> • Marketing • Inefficient operations: loan processing, planning, communication, transportation • Lack of focus; lack of alignment of goals and strategies • Customer service • Data management • Organizational management (are all the right people in the right places?)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Leveraging technology to create efficiencies • Creation of clarity among the team re: M,V,V goals and strategies • Establishing marketing strategy with clear goals and benchmarks • Implementation of core banking system • Conversion of current clients to larger loans • Strategic partnership development (piggy back on what exists, i.e., Hello Tracker, Lewa Education Programme) • Diversification of loans to include quick loans, individual loans, more asset-based loans 	<ul style="list-style-type: none"> • Data management: Inability to, without much time and focus, identify previous year's revenue goals and outcomes per quarter. Leadership is not clear on quarter loan disbursement, earned interest, etc. If you don't know where you've been, how do you know where you need to go to achieve desired outcomes. • This team has a real challenge when it comes to managing their time, being on time, etc. This affects every aspect of the business. While I understand this is partly a reflection of the culture, for a team that wants to win, to achieve greatness, that is no excuse. If another company comes along with a greater sense of urgency, this business could be wiped out. • Cyber insecurity • Transition from paper processing and client handholding to mobile based platform • Competition