



**Fonkoze**  
fondasyon kole zepòl

119, Avenue Christophe  
Port-au-Prince, Haïti  
Tel : (509) 4801-2020

*Ann Kreve richès pou lavi miyò*

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## **Terms of Reference Technical Advisor: Improving Financial Control**

### *Introduction*

Fondation Kole Zepòl, or Fonkoze, is a Haitian non-profit foundation founded in the mid 1990s by a group of Haitian community activists led by Father Joseph Philippe. It eventually became part of a family of three organizations, whose joint mission is to "work together to provide the financial and non-financial services to empower Haitians—primarily women—to lift their families out of poverty." Its sister organization in Haiti, Sèvis Finansye Fonkoze (SFF), is the country's largest microfinance institution, with over 50,000 borrowers served by 45 branches located in all parts of Haiti. Both the Haitian organizations work with an American 501(c)3, Fonkoze USA, which raises funds, increases awareness of Haiti in the States, and supports the two Haitian institutions in various other ways. (See: [www.fonkoze.org](http://www.fonkoze.org).)

The Foundation has been growing. Its budget for 2022 is about \$8.5 million. Almost all of its funding has typically been raised from institutional donors who agree to fund one of the Foundation's program teams for specific work. It currently has 153 employees focusing on several areas. It has programs that aim at supporting better health, programs in literacy and other adult education, and others aiming to facilitate improved economic opportunities, but its largest program right now is Chemen Lavi Miyò, its program for families in extreme poverty. Together, its program teams are currently executing approximately 20 different contracts. The institution also has its own monitoring and evaluation unit.

The team responsible for financial reporting has seven staff members. In addition to its department head, it employs a program manager with two assistants and a head accountant, also with two assistants. It is currently in the process of recruiting an additional accountant. It uses Sage 300 as its financial management software. The team has developed a finance manual that describes the various processes it uses to manage the project funds and the overall financial situation of the Foundation. The manual also describes the chart of accounts and the coding system that allows the finance team to code each expense to a specific project.

### *The Challenge*

With so many different contracts to execute in widely dispersed regions of Haiti, Fonkoze struggles to ensure accurate and timely reporting of expenses. Different types of field work involve different types of expenses, sometimes in large lump sums but often in multiple smaller amounts as well. Collecting and organizing appropriate receipts and then getting them into Fonkoze's central office so that the finance team can verify reported expenses, charge them to the correct budget lines, and draft financial reports is a slow, cumbersome process. Though the institution has an excellent record of successful [external audits](#), the amount of work its finance department requires for regular reporting seems excessive, and reports are sometimes delayed.



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Like many non-profit organizations in Haiti, the Foundation is struggling to cover its overhead costs, even if these costs are relatively small at 10% of the total budget. While some systems exist to allocate these costs to projects, not all the central office costs are covered by the projects, which makes the Foundation very dependent on Fonkoze USA's capacity to raise unrestricted donations, an endeavor that is more and more difficult.

The Foundation is seeking a consultation that will help it revise its system of financial management. An improved system should help it achieve two distinct goals:

1. To make the production of accurate financial reports quicker and more efficient, while respecting best practices in terms of documentation and reporting.
2. To improve the degree to which individual project financing is covering its central office costs.

The work should lead to a revision of the Foundation's finance manual.

#### *Candidate Profile*

The Foundation is looking for a consultant with the following qualifications:

- At least ten years of experience in financial management of a non-profit in Haiti or another developing nation,
- Experience at establishing financial management systems for non-profits,
- A good understanding of the reporting requirements of major donor agencies,
- Fluency in French or Haitian Creole, and
- Either a willingness to travel to and around Haiti or a local partner capable to undertaking the field work necessary fully understand Fonkoze's working environment and reporting constrains.

Interested candidates should send a CV of all key personnel with a cover letter, an estimated budget, and a proposed work plan to:

Steven Werlin  
Fonkoze  
[swerlin@fonkoze.org](mailto:swerlin@fonkoze.org)

The deadline for submission is March 15<sup>th</sup>.