

STRENGTHENING YOUR FINANCE FUNCTION

**THROUGH THE SUPPORT OF AN IN-PERSON
OR REMOTE AFID VOLUNTEER**

AfID Webinar, Thursday 29th September 2022
www.afid.org.uk/partners

HOUSEKEEPING

- Webinar will be recorded but only the panel can be seen.
- Please introduce yourself in the chat box adding the name of your organisation and your role.
- Add your questions to the Q&A box. We will address some of these at the end of the presentation or individually after the session.



AGENDA

- Welcome and brief history of AfID from Founder, Neil Jennings
- Introduction to our services, both in-person and remote support
- What type of volunteer service is right for me?
- What does an AfID volunteer actually do?
- What kind of finance professional will provide support?
- Ensuring a successful assignment
- Hear first hand from our partner Health Improvement Project Zanzibar
- Put your questions to the team



WELCOME

FROM AFID FOUNDER, NEIL JENNINGS



AfID supports a broad range of non-profit organisations & social enterprises globally, through the provision of highly qualified volunteer accountants.

Our partners are a broad mix of small grassroots charities, non-governmental organisations (NGOs), social enterprises and larger international charities & development agencies.

Overseas volunteer assignments from 2 weeks to 8 weeks form part of a longer term strategy to develop the financial management capacity of organisations and skills of local staff.



AfID support provided since 2009...

- 1500+ Overseas volunteer assignments
- 500+ Non-profit organisations in 60 countries
- 380k Pro bono hours
- £20M+ Est. value of professional services

COVID hits in early 2020...

- No 'in-person' overseas volunteer assignments for 2 years
- Refocus to provision 'remote' support (over 50 to date)

As we emerge from the pandemic...

- A mix of in-person & remote volunteer support, tailored to the needs and circumstances of individual organisations



OVERSEAS TECHNICAL ASSISTANCE (Pro bono)

In person one-to-one placements for qualified accountants to strengthen the finance function of local NGOs & social enterprises, strengthening the capacity of their finance, programmes and management staff.

REMOTE TECHNICAL ASSISTANCE (Pro bono)

A flexible programme of support designed to give charities access to qualified accounting expertise for up to 3 hours a week over a period of several weeks. e.g. 2 hours per week over 3 mths (c.25 hours total).

RECRUITMENT SERVICES (Remunerated)

After sourcing over 1,500 accountants for over 500 NGOs globally AfID is expertly positioned to assist our non profit partners with salaried recruitment needs by providing access to an exceptional & unique pool of talent.



WHAT SERVICE IS RIGHT FOR ME?

| | In-Person volunteers | Remote volunteer | Remunerated |
|--|--|---|--|
| Scope of work | Based on needs identified, focusing primarily on strengthening the local skills | Focusing on needs suited to remote interventions | Stand-alone projects & responsibilities where specialist skills are required |
| How much time can a volunteer offer? | Full time; typically 2 - 4 weeks in length | Part time e.g. 2 hrs a week over 3 mths. Typically in parallel to their day job | Job dependant |
| Sourcing turn-around time | 2 - 3 months | 2 - 3 weeks | Job dependant (days or weeks) |
| How much time do we need to allocate to the volunteer? | Up to 4 hours each day of the placement focused on training & mentoring | Weekly calls and availability to answer ad hoc queries | Job dependent |
| What are the volunteers working hours? | Local office hours | Flexible; to be arranged with the volunteer Please note, some will also be in full time or part time employment. | Employer dependent |
| Who covers the costs of the travel & accommodation? | Volunteers self-fund, any contribution increases chances of receiving timely support & specialist skills | Travel costs to the office (if required) to be covered by the partner | Role dependant (e.g. relocation costs & per diems) |
| What skills & experience will be available? | Typically industry & private sector accountants & auditors | Wider pool of experience and may include with charity experience & languages | As per the job specification |
| Can assignments be extended? | No, but follow up assignments can be arranged with another volunteer. | Yes, dependent of candidate availability or a follow up assignment arranged | Dependent of candidate availability |
| Does the volunteer produce an end of assignment report? | Yes with an action plan and recommendations for a next placement | Yes | Depending on outlined deliverables |
| Could the volunteer become our Treasurer?* | No, unless charity based in UK. | Yes, if charity based in the UK. | No. |

** Our team are happy to assist with the recruitment of a new Trustee or Treasurer from our network.*

WHAT WILL A VOLUNTEER DO?

Current
circumstances
of the
organisation

Resources
available

Local context

- Conducting a financial health check, identifying gaps and making recommendations
- Developing and strengthening internal controls
- Developing and strengthening daily accounting processes
- Developing cash control and cash management processes and systems
- Creating programmes budgets & budget monitoring (variance analysis) tools
- Creating the annual budget & budget monitoring (variance analysis) tools
- Developing cashflow forecasting and monitoring tools
- Developing reporting tools (internal reporting & grant reporting)
- Supporting in managing all the reporting requirements of donors
- Support in reviewing financial information & budgets for grants proposals
- Preparing year-end financial statements
- Preparing for audits (external audit & grant audits)
- Reviewing the use of the existing accounting software
- Supporting in implementing a new accounting software
- Training finance staff
- Coaching programmes staff in managing their budget lines, reporting to finance staff and understanding grant compliance requirements
- Coaching senior management staff in using financial information
- Support in preparing a 3-year or 5-year strategic plan



WHAT TYPE OF FINANCE PROFESSIONAL VOLUNTEERS?

- **Qualified accountants** with 5+ years post qualification experience from industry, practice & the public sector, ALL keen to give back.
- Some with **International Development &/ or the charity sector experience** with a knowledge of grant management, SORP and 501c regulations.
- Many are **retired** bringing a wealth of experience & flexible availability.
- Our network includes professionals from **over 50 countries** and therefore may allow assignments to be conducted in another language such as **French or Spanish**.
- Many have returned after **overseas volunteer assignments** and will understand the challenges, context and practicalities of both in-person & remote assignments.

Example volunteer profiles...

- **Rebecca - Supporting Rwandan partner 3 weeks (in-person)**. Experience in the not-for-profit (including INGOs) and private sectors (including Big 4). Highly skilled in leading donor audits & financial management incl. budget preparation & analysis , policies and procedures review.
- **Jim - Supporting partner in UK & Uganda 2hrs pw. over 3mths (remote)**: FCCA 5+ years Group FC level broad sector exposure incl. charities of different sizes. A versatile skill base such as financial reporting, cashflow management, business control, internal & external audit projects.



ENSURING A SUCCESSFUL ASSIGNMENT

- Understand the differences between volunteers & employees and plan your assignment, deliverables & engagement accordingly. Flexibility is key.
- Carefully review the AfID pre-assignment resources, suggested timetables, reporting templates & tripartite MoU that support all placements.
- Take the time to brief all employees & stakeholders that will be part of the assignment on the tasks set for the volunteer, providing introductions
- Commit to regular face to face meetings via MS Teams or Zoom etc
- Prepare for additional observations from the volunteer and the likelihood another skilled volunteer may be required
- It's very likely a volunteer won't be able to solve all your problems but if managed wisely they will definitely make a difference!



KEY BENEFITS

- Access to skills & experience otherwise inaccessible or unavailable
- Cost-effective option for limited budgets compared to use of paid consultants
- Hiring & training new staff is more expensive than investing in strengthening the capabilities of existing staff with a faster learning curve
- High staff satisfaction from specialist mentoring
- Access to a specialist financial management programme within the development sector (supporting a locally-led development approach)
- Improved transparency & accountability attractive for future funding

“We would have contracted a consultant locally but that would have been too expensive for the organisation”

Joseph Quaye Amoo, Operations Manager at Practical Education Network



NEXT STEPS

- One-to-one conversation to discuss:
 - Any unanswered questions
 - Your particular requirements, challenges, needs and set up
 - The type of service that would work best for your organisation and budget
 - AfID's new membership model and benefits
- Everyone in the panel will be happy to talk to you about any aspect of the presentation or services on offer.



OUR MEMBERS



HEALTH IMPROVEMENT PROJECT ZANZIBAR (HIPZ)

JESS PRICE, UK OPERATIONS AND DEVELOPMENT DIRECTOR



- Before joining HIPZ in 2019, Jess worked as Head of Fundraising at Street Child United.
- She has a whole host of non-profit sector experience, including time in Cambodia, Brazil and Tanzania.
- She oversees all the UK side of HIPZ's operation, including fundraising and partner communication.



HEALTH IMPROVEMENT PROJECT ZANZIBAR (HIPZ)

- HIPZ want the 1.5 million people living in Zanzibar to have access to safe healthcare.
- Their vision is healthy Zanzibari people by improving healthcare through the delivery of locally owned and long lasting improvements across services, developing people and improving infrastructure.
- Current key projects include; hospital improvements; mental health; maternal health; emergency medicine; dentistry; and anti-microbial resistance.



HEALTH IMPROVEMENT PROJECT ZANZIBAR (HIPZ)

REMOTE VOLUNTEER SUPPORT, JUNE 2020



- AfID volunteer, Julie, worked with HIPZ for a few hours at a time, 2 or 3 times a week over a couple of months.
- She used her experience to help them create a chart of accounts, and worked with the team in country and in the UK office to improve their financial processes & systems including the development of their Finance Manual.
- She successfully integrated their financial reporting spreadsheets, budgets and income forecasts.



HEALTH IMPROVEMENT PROJECT ZANZIBAR (HIPZ)

IN-PERSON VOLUNTEER SUPPORT, MAY 2022



- HIPZ had greatly improved their financial processes over the last two years but still required support to fully embed the new financial processes.
- In particular they had implemented Xero and needed help to develop appropriate reports, create linked pivot tables in Excel and provide training to staff in Zanzibar.
- There were also some system based changes that they think could improve the way they use Xero.



QUESTIONS?



For more information and/or to join our network of partners visit us:

www.afid.org.uk/partners

partners@afid.org.uk

