



Finance Consultant Scope of Work

1. Purpose

Integrate Health seeks consultancy support from an individual with significant experience leading the finance function of a nonprofit organization. The selected consultant will work with CEO and country finance teams to ensure that Integrate Health has the finance systems, including personnel, procedures, reporting, and risk mitigation strategies to continue its rapid growth across multiple countries. We anticipate the work scope to be provided part-time over approximately 6-12 months.

2. About Integrate Health

Integrate Health's mission is to make quality primary healthcare accessible to all. Integrate Health works alongside governments and the local community to implement and study an integrated approach to strengthening primary healthcare delivery in order to achieve universal health coverage. Integrating professional community health workers with improved care in public clinics creates a patient-centered health system that is accountable to the community and dramatically reduces mortality in severely resource-limited settings. Today, Integrate Health directly serves more than 200,000 people in northern Togo and is launching programs this year to serve 113,000 people in Guinea. Integrate Health also provides financial and technical assistance to the governments of Togo and Guinea.

Building on its rich experience and the opportunity to expand impact, Integrate Health has developed an ambitious new five-year strategic plan for 2023-2028, *Accelerating Impact: Scaling Community-Led Innovation to Achieve Universal Health Coverage*. The strategic plan is built upon the following pillars:

1. Deliver innovations and demonstrate impact
2. Accompany national governments
3. Cultivate a catalytic global ecosystem for community health
4. Build a strong and equitable organization

As Integrate Health continues to transition from a single country to a regional West African and global presence, it will be critical that the organization have a strong and robust finance function. Building upon the fourth pillar of the strategy, this consultancy is intended to help Integrate Health assess and strengthen its finance personnel and systems.

3. Scope

1. Assessment:

Conduct an assessment of Integrate Health's Financial Management and Internal Control Systems & Administration and Procurement Systems across the Togo, Guinea, and Global Support teams using the [USAID Organizational Capacity Assessment \(OCA\) tool](#). Conduct a document review and interview key finance and senior leadership team members. Analyze the assessment results, identify capacity gaps, strengths, and areas for improvement.

2. Review Finance Procedures and Reports:

Conduct a detailed review of Integrate Health's finance procedures and reports based on the OCA assessment. Identify areas for improvement, alignment with best practices, and compliance with regulations, including those of USAID. Review standard operating procedures (SOPs), support drafting new SOPs, and revise as needed. Review financial reports, including Integrate Health's Monthly Financial Reporting Package and cashflow projections. Propose revisions if needed. Secure buy-in on revisions as needed from the Finance teams, senior leadership and finance committee of the board. Work with the Finance teams to create a training plan.

3. Review the structure of Integrate Health's Finance Teams

Review the structure of Integrate Health's Finance Team and provide recommendations for improvement to align with the organization's continued growth and desire to invest in West Africa-based positions. This review will include an analysis of the current Finance Team's composition, roles, and responsibilities and an assessment of the organizational needs and future strategic direction. The consultant will identify opportunities to optimize the Finance Team structure, considering factors such as workload distribution, regional presence, and the need for specialized expertise.

4. Develop Risk Matrix and review with Senior Leadership Team and Board:

Partner with Integrate Health's Business Analyst to develop a comprehensive risk matrix based on key stakeholder feedback and additional inputs, including landscape analysis. Review the risk matrix, including mitigation strategies, with the senior leadership team and board, seeking their input and feedback. Develop mitigation strategies and action plans to address identified risks. Incorporate feedback and get sign off on final version as well as a process for updates.

4. Deliverables

1. A powerpoint presentation or report detailing the findings of the assessment of Integrate Health's Financial Management and Internal Control Systems & Administration and Procurement Systems. The presentation or report should include an action plan to close identified gaps.
2. Presentation of findings and recommendations to improve finance structure, procedures, and reports English for Integrate Health's senior leadership team and Finance Committee. The presentation should include:
 - a. A proposed organizational chart for the Finance Team.
 - b. A clear and actionable implementation plan outlining the steps required to implement the recommended changes.
 - c. Recommendations for stakeholder engagement and communication strategies to facilitate smooth transitions and ensure buy-in from key team members and stakeholders.
3. Revised Finance Standard Operating Procedures and Reports and accompanying training plan.
4. Updated job descriptions new and existing positions.
5. Comprehensive risk matrix, including identified risks, likelihood, impact, owners and mitigation strategies.

All deliverables should be provided in both French and English

4. Project Details and Timeline

We anticipate the consultant being part-time for approximately 6-12 months. The budget will be determined based on the estimated duration and agreed-upon schedule, daily rate, and fixed fee. Please include your overall proposal cost in USD within your application materials, as well as expectations for payment timing.

The location is flexible, however, the selected consultant will need to work across Eastern US and West Africa Time Zones.

5. Specific Requirements

The ideal consultant for this engagement would possess the following qualifications and experience:

- Former CFO, Senior Finance Director, Comptroller or finance executive with a strong background in financial management, strategic planning, and risk management.
- Extensive experience working in the non-profit or international development sector, preferably with knowledge of USAID regulations and procedures.
- In-depth knowledge of financial management principles, budgeting, reporting, and compliance.
- Demonstrated experience in reviewing and updating financial, administration, and procurement procedures.
- Experience working with senior leadership teams and boards to review risks and develop action plans.
- Excellent coaching and mentoring skills, with the ability to work collaboratively and provide guidance to the Finance Team and CEO.
- Proven track record of supporting individuals and teams in building financial management capacity and driving organizational success.
- French and English B2 level or greater

6. Application Process

Proposals should include at a minimum:

- Overview of scope of work that demonstrates a clear understanding of the Terms of Reference
- Consultant profile(s)
- One or two examples of similar projects completed by the consultant
- Two to three client references who can speak to your relevant experience
- Budget for project including pricing in USD
- Time-bound work plan

Proposals should be no more than five pages in length and should be submitted as a single PDF inclusive of all supporting documents. Proposals can be submitted in either English or French. The deadline for submitting applications is **July 30th, 2023, 5pm EST**. Applications will be reviewed on a rolling basis. Only shortlisted applicants will be contacted.

Please submit applications to info@integratehealth.org with Finance Consultant in the subject line.

7. Consultant selection criteria

The proposals will be evaluated according to the following criteria:

- Technical proposal (40%/40 points),
- Demonstrated experience of consultant (20%/20 points)
- Financial proposal (40%/40 points)

8. Integrate Health Values

Integrate Health is committed to being an anti-racist, anti-sexist, anti-neocolonial, and pro-equity organization. We place a high value on diversity and the benefits that come from having employees and consultants with a wide variety of backgrounds and experiences. We do not discriminate on the basis of race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status. Applicants of color and women are strongly encouraged to apply.