

# Solidarity Bankers Mission

## – Terms of reference –

### Team management and leadership

**Location:** Timișoara

**Duration and date:** 20 days-mission (10 days in the field)

**Institution:** VITAS, Romania

**Topic:** Human Resources

#### CONTEXT

The inclusive finance sector aims at providing access to financial services to people excluded from the mainstream financial system, thus giving them the opportunity to finance their needs, in particular their income-generating activities. A recognised player in the sector, the Grameen Crédit Agricole Foundation works in countries where poverty and financial exclusion are the strongest. Investor, lender, technical assistance coordinator and Fund advisor, the Foundation finances and supports microfinance institutions, institutions and projects that promote inclusive finance and the development of rural economies. The Foundation currently supports 80 partners in 37 countries with a portfolio of over €90 million.

Vitas is a microfinance institution launched in 1996 that aims at providing financial products and services that meet the needs of its customers and support their personal, business and community development. Indeed, the institution believes that all those who wish and have the ability to improve their quality of life should have access to the financial services necessary to develop their potential, thus becoming socially and economically active.

The institution is among the pioneers in facilitating the access of small entrepreneurs to financing in Romania based on the analysis of capacity and potential and not on the possibility of coverage with real estate guarantees. It is a company of Global Communities, an American non-governmental organisation active worldwide for over 60 years (since 1952). Global Communities works closely with communities around the world to bring about lasting change to improve the lives of vulnerable people.

During the two decades of operation, Vitas Romania has carried out various projects financed by the Government of Romania and the World Bank, such as the microfinancing programme in mining areas and rural areas. As of today, the institution has around 2 000 active borrowers, all of them legal entities, from which around 45% are run by women and 45% are located in rural areas.

#### OBJECTIVES OF THE MISSION

As part of its operational organisation, Vitas' team leaders have to coordinate teams across different regions (front office). The institution has identified the need to implement a team management and leadership policy in order for Team Leaders to increase their capabilities to coordinate colleagues from the Front Office. Therefore, Vitas Romania would like to receive support from the Grameen Credit Agricole Foundation to develop a Team management and Leadership strategy, in line with its needs. The objectives and scope of the mission of the Solidarity Bankers listed below can be adjusted according to the profile of the expert and his / her recommendations on how to obtain the best results.

The Solidarity Banker will carry out the following actions:

### **ACTION 1: Audit on the actual Human Resources' tools, policies and processes**

In order to better understand how Vitas works as a whole, the Solidarity Banker will first meet with the Human Resources Manager and various staff, including Team Leaders at the Head Office.

#### **Deliverables:**

- Diagnosis of the existing human resources strategy and policy, including its strengths and weaknesses in the context of the microfinance market in Romania.

### **ACTION 2: Analysis of the existing team management strategy**

- Define the bases of a solid team management strategy, with a strong emphasis on tools and solutions
- Recommend tools and processes for effective implementation
- Determine what are the team management training needs

#### **Deliverables:**

- Recommendations on processes and tools to improve the team management strategy (calendar, management solutions, tool to host resources, appropriate communication tools, ...)
- Recommendations on the implementation of a collaborative calendar for time management
- Roadmap for the implementation of the new team management strategy and tools (priorities, operational plan, organisation, tools)

### **ACTION 3: Support Team Leaders on leadership issues**

- Determine what are the leadership training needs

#### **Deliverables:**

- Recommendations on the Leadership strategy to be implemented
- Recommendations on training courses to be followed to develop the leadership skills of the staff involved

## **LOGISTICS AND CALENDAR**

### **DURATION OF THE MISSION**

- **20 days** distributed as follows:
  - Preparation: 5 days to prepare the mission
  - Mission: 10 days on the field.
  - Post-mission: 5 days to finalise the deliverables, spread over a two to three-week period following the end of the field mission
- **The mission can take place during the working time of the Solidarity Banker (skills sponsorship) AND/OR during the employee's vacation (skills volunteering). A mix of both solutions is also possible**

### **CALENDAR**

- **SELECTION PROCESS (December 2022 / January 2023)**
  - Publication of the Terms of Reference
  - Selection of the volunteer by Crédit Agricole SA and the Grameen Crédit Agricole Foundation
- **SIGNATURE OF THE AGREEMENT AND PREPARATION OF THE MISSION (around 1 month)**
  - An agreement is signed between the beneficiary institution, the Solidarity Banker, the Foundation and the Solidarity Banker employer.

- **PREPARATION OF THE MISSION (March / April 2023)**
  - Signature of the agreement and preparation of the mission (calls to be planned with the organisation, documents to be sent and read before the beginning of the mission).
  - Preparation of the mission by the Solidarity Banker, VITAS and the Grameen Crédit Agricole Foundation (5 days spread over a two-week period). The selected candidate and VITAS' managers will discuss the terms of reference and adjust them together in order to best prepare the mission.
- **FIELD MISSION (May / June 2023)**
  - Field mission by the Solidarity Banker (10 days).
- **DELIVERABLES OF THE MISSION**
  - Sending of the mission deliverables by the Solidarity Banker within two to three weeks after the field mission.

### LOGISTICS, MISSION COSTS AND INSURANCE

- The training prior to the mission and the logistical coordination of the mission are provided by the Grameen Crédit Agricole Foundation.
- The cost of plane tickets to Romania and insurance are covered by Crédit Agricole SA.
- Accommodation, local transport and catering costs are borne by the beneficiary organisation in the event that the mission can be carried out in the field.
- All other expenses are the responsibility of the Solidarity Banker

### LOCATION

- The field mission will take place mainly in Timisoara, Romania. Travels outside Timisoara might be required to meet other Vitas' staff.

### PROFILE OF THE EXPERT

- Strong experience in Human Resources management
- Experience in training and coaching in the field of Human Resources and team management
- Interest for inclusive / sustainable finance, with increased curiosity for the specificities of the sector
- Knowledge / experience in the microfinance sector is a plus
- English is mandatory, Romanian would be highly appreciated
- Ability to listen to others
- To be a force for bringing forward proposals
- Pragmatic and rigorous

### CONTACT

For more information on the [Solidarity Bankers Programme](#) or on the mission, please contact:

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