

How might we advance financial inclusion in Haiti?

The US Agency for International Development solicited responses to re-envision their strategy.

role	scope
Proposal manager	Design research (interviews & surveys)
Writer	Facilitating process
UI	Writing/ Editing
	Budget management

the challenge

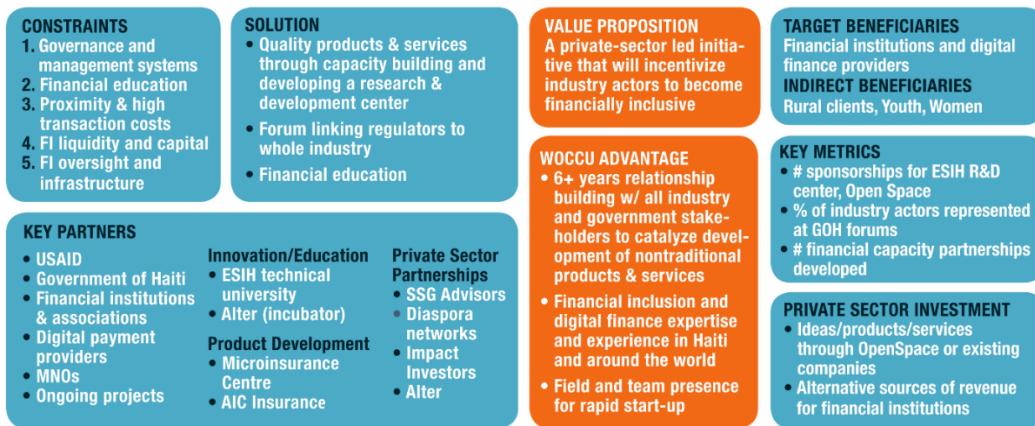
With vague parameters, USAID asked us and competitors to re-envision the US government's strategy to advance financial inclusion in Haiti.

the solution

We signed a 3-year, \$5 million contract to work with existing savings groups on financial education, mobile money, and linking them to the formal financial sector, using a field officer banking methodology.

the competition

The competition was rough. Eleven firms were short-listed, including the largest USAID-contractors (\$300m+ annual revenues) and well-known Haitian organizations. Although we were much smaller, we were the incumbents, meaning we had more knowledge of current affairs and had already-established relationships with key stakeholders.



Proposal Model Canvas / designed & used for this proposal.

the research

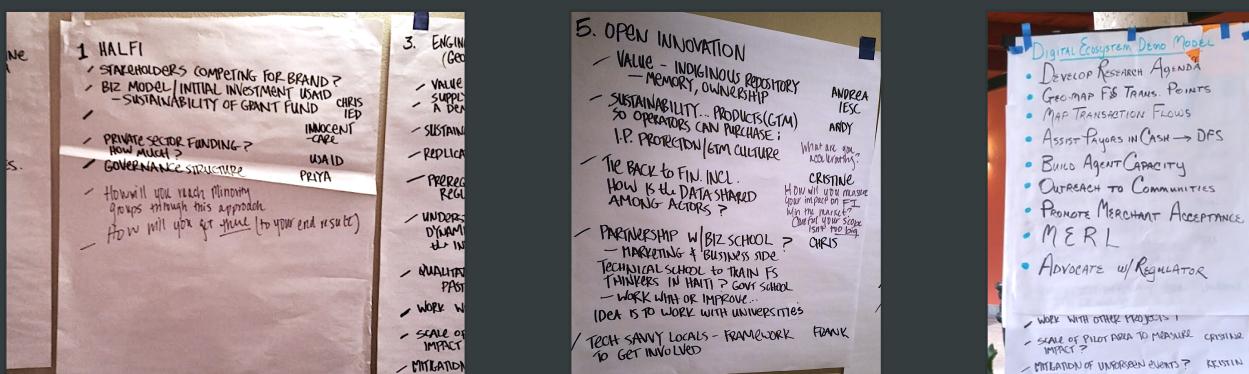
Based on our 8 years of presence in Haiti, we wanted to create a program that addressed issues we encountered within the 9 years we were working in the sector. The first step was to ensure we understood our client, stakeholders, and beneficiaries before we just focused on our current and past programs. I conducted an extensive literature review and traveled to Haiti to interview our client, government officials, bankers, telecom operators, and fintech companies.

the designing

Due to limited personnel, I held one-to-one brainstorming sessions with program managers and stakeholders, oftentimes while in my hotel room. These culminated into ideas that ranged from 1) how regulations limited the spread of mobile money, 2) financial illiteracy, and 3) the lack of competition, and thus innovation, in the Haitian financial sector.

the co-creating

Over 18 months, I wrote multiple drafts of our program design that went through four different versions with our client, including participation in a co-creation workshop in Haiti. The workshop was similar to a trade fair: Each competitor had an easel pad and five minutes to showcase their ideas. Then the client and competitors perused the presentations and asked questions. At this stage, I joined forces with our biggest competitor to create sister programs that complemented one another.



Workshop easel pads.

the launch & key takeaways

We launched the program soon after signing our award. I continually monitored its progress, taking note of the tweaks program managers made in order to add improvements to the design process.

This experience taught me a lot about myself and how I lead proposal teams. Usually, clients give us budgetary and outcome constraints, which create limitations for our proposal design. Without restrictions, I lost sight of what we could achieve and confined our activities to specific issues. Next time, I plan to think big and add more perspectives during ideation to discuss multiple viewpoints and reach better conclusions.