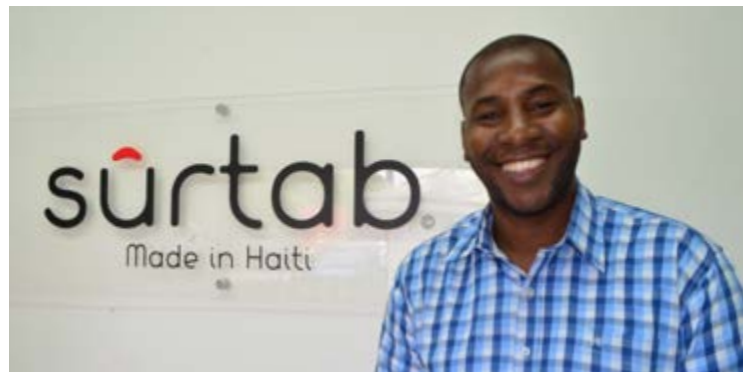




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FROM THE AMERICAN PEOPLE

**LEAD**  
LEVERAGING EFFECTIVE APPLICATION  
OF DIRECT INVESTMENTS

 **PADF**  
PAN AMERICAN DEVELOPMENT FOUNDATION



# LEVERAGING EFFECTIVE APPLICATIONS OF DIRECT (LEAD) INVESTMENTS 2011 - 2017 FINAL REPORT

# LEVERAGING EFFECTIVE APPLICATIONS OF DIRECT (LEAD) INVESTMENTS

## FINAL REPORT

JULY 25, 2011 – DECEMBER 30, 2017

COOPERATIVE AGREEMENT NO. 521-A-00-11-000010-00

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Prepared by  
Pan American Development Foundation (PADF)

Submitted: APRIL 15, 2018

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THIS PUBLICATION WAS PRODUCED BY THE PAN AMERICAN DEVELOPMENT FOUNDATION (PADF)  
FOR REVIEW BY THE UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT (USAID)

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### DISCLAIMER

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## Dear Friends,

The Leveraging Effective Application of Direct Investments (**LEAD**) project was conceived at a critical juncture in Haiti's development. The premise was that supporting promising small- and medium-sized enterprises (SMEs) with capital and technical assistance, and tapping into critical diaspora resources would create jobs, stimulate economic growth, unlock private capital and send a strong signal to key actors that Haitian businesses could play a vital role in the country's recovery after the devastating earthquake of 2010.

Beginning in 2011 and running through 2017, the **LEAD** project ran several iterations of its renowned Business Plan Competition to identify and support those SMEs which showed the most promise to create jobs, increase domestic production, and would continue to grow in years to come. To encourage decentralization of the economy, the project focused on the Saint Marc and Cap Haitian corridors alongside Port-au-Prince. The project also worked with various diaspora groups to promote diaspora engagement, in the Haitian economy.

Today, we are proud to shine the spotlight on our enterprises, social development fund projects, and partnerships with diaspora groups. These successful entrepreneurs have created over 18,000 jobs and generated more than \$33 million in sales while leveraging the project's capital contributions with private equity, business assets, and debt funds of over \$10million. By supporting SMEs and promoting impactful diaspora engagement the project has meaningfully contributed to Haiti's recovery and economic growth. The 45 businesses represent a breadth of sectors and geographic regions, which is a testament to the fact that the future of Haiti's growth rests on a strong and diverse base of SMEs. The **LEAD** model, which provides the right combination of capital and technical assistance, can spur the creation of entire clusters of private enterprise in key value-chains and industrial hubs. This in turn will create more jobs, boost domestic production, enhance Haiti's competitiveness in the global economy, and generate exports. In short, if more enterprises can be supported using the **LEAD** model then there will be a transformative effect on the Haitian economy.

Much of **LEAD's** success has been due to the tireless efforts of partner organizations and key stakeholders. I would like to thank the Government of Haiti, particularly the Ministries of Finance, Commerce & Industry, and Haitians Living Abroad and the Center for Facilitation of Investments for their support and collaboration and the belief in the project, and its entrepreneurs. Our many private sector partners including AMCHAM-Haiti, and the Chambers of Commerce of the North and North East have my gratitude for their support. My sincere thanks also go to organizations such as FAVACA, CSL, Zafen, Yunus Social Business, EGI and SOFIHDES for helping us deliver timely and exceptional technical assistance to our entrepreneurs. Our enterprises also benefited greatly from the network of exceptional Business Development Service providers throughout Haiti, who worked tirelessly to help address business challenges. I remain confident that the strengthened SME ecosystem will nurture future enterprises for many years to come.

The Haitian Diaspora's commitment to Haiti is unwavering. Their deep love for Haiti and their passion for its development was evident across the multiple activities we engaged in together during the course of **LEAD**. I would like to thank in particular the teams at GRAHN-USA, HHTARG, HRA, NAAHP, EDEM Foundation, and the Society for Haitian Research Inc. for their commitment to **LEAD**. Diaspora capital, know-how and passion remains a powerful force in support of the economic and social development of Haiti.

I would also like to extend my deepest gratitude to the many volunteers drawn from the echelons of the business and public sectors in Haiti, who believed in the project from its conception and generously provided their time by reviewing business plans, sharing their sector expertise, serving on jury panels, mentoring entrepreneurs, and participating in our events. Members of the Board of Directors of PADF from Haiti provided advice on successfully engaging the Haitian private sector. Your pro-bono support was invaluable and I cannot thank you enough for your contribution to the project.

**LEAD** received exceptional support from the USAID Haiti mission. I would like to thank the **LEAD** AOR Mr. Isaac Michel and the team within the Economic Growth office in particular for their guidance, knowledge of the economy and marketplace, and their continued support.

I would like to extend my deepest gratitude to the **LEAD** team; your dedication, professionalism, passion, enthusiasm and ethics were remarkable and I am proud of everything we've accomplished together. My thanks also go to the PADF staff in both Haiti and Washington D.C. for their unwavering support.

Finally, I want to bring the attention back to the **LEAD** project participants – entrepreneurs, private sector stakeholders, and diaspora members. What they all share in common is the ability to see opportunity amidst challenge, and a can-do spirit that turns dreams into reality. I am proud to know them and I invite you to join us as we celebrate their success and imagine a bright future for this beautiful country and its amazing people.

Sincerely,



**Nadia Cherrouk**

Chief of Party, **LEAD** & Country Director, PADF-Haiti

# Acronyms

<b>ADIH</b>	Association des Industries d'Haïti	<b>IDB</b>	Inter-American Development Bank
<b>AMCHAM</b>	American Chamber of Commerce	<b>IPTT</b>	Indicator Performance Tracking Table
<b>ASFAPPR</b>	Association Fanm Plantez Préval Renal	<b>IFC</b>	International Finance Corporation (part of the World Bank)
<b>BDS</b>	Business Development Services	<b>IS</b>	Informational Systems
<b>BPC</b>	Business Plan Competition	<b>IT</b>	Information Technology
<b>CAP</b>	Cap-Haitian	<b>LMS</b>	LEAD Management System
<b>CCIH</b>	Chambre de Commerce d'Industrie Haïti	<b>LOP</b>	Life of Program/Project
<b>CCIPN</b>	Chambre de Commerce d'Industrie et des Professions du Nord	<b>MCI</b>	Ministry of Commerce / Ministère du Commerce
<b>CCIPNE</b>	Chambre de Commerce d'Industrie et des Professions du Nord Est	<b>M&amp;E</b>	Monitoring & Evaluation
<b>CECI</b>	Centre d'Etude et de Coopération Internationale	<b>MEAL</b>	Monitoring Evaluation Accountability Learning
<b>CFI</b>	Centre de Facilitation des Investissements	<b>MEF</b>	Ministry of Finance / Ministères des Finances
<b>CSL</b>	Centre Spécialisé de Leadership	<b>MIF</b>	Multilateral Investment Fund
<b>CSR</b>	Corporate Social Responsibility	<b>MHAVE</b>	Ministry of Haitians Living Abroad / Ministère des Haitians Vivant à l'Etranger
<b>DCF</b>	Diaspora Challenge Fund	<b>NAAHP</b>	National Alliance for the Advancement of Haitian Professionals
<b>DCI</b>	Diaspora Challenge Initiative	<b>NUPAS</b>	Non US Organization Pre Award Survey
<b>EDEM</b>	Space for the Development and Emancipation of the Masses / Espace de Développement pour l'Emancipation des Masses	<b>OCAT</b>	Organizational Capacity Assessment Tool
<b>EGI</b>	Economic Growth Institute	<b>OPIC</b>	Overseas Private Investment Corporation
<b>EMPR</b>	Environmental Management Performance Report	<b>OSHA</b>	Occupational Safety and Health Administration
<b>ERRM</b>	Economic Recovery and Road Map, Government of Haiti	<b>PAP</b>	Port-au-Prince, Haiti
<b>EXCITE</b>	Entrepreneurship, X-Factor, Credibility, Innovation, Transparency, Exit in View	<b>PADF</b>	Pan American Development Foundation
<b>FAVACA</b>	Florida Association for Volunteer Action in the Caribbean and the Americas, Inc.	<b>PIRS</b>	Performance Indicator Reference Sheet
<b>FDI</b>	Fonds de Développement Industriel	<b>PMP</b>	Performance Measurement Plan
<b>FTE</b>	Full-time equivalent	<b>PPP</b>	Public-Private Partnerships
<b>GOH</b>	Gouvernement of Haiti	<b>RDI</b>	Remittance Development Impact initiatives
<b>GRAHN</b>	Groupe de Réflexion et d'Action pour une Haïti Nouvelle	<b>REP</b>	Remittance Enhancement Program
<b>GWU</b>	George Washington University	<b>SDF</b>	Social Development Fund
<b>HABNET</b>	Haitian-American Business Network	<b>SE</b>	Social Enterprise
<b>HACCP</b>	Hazard Analysis and Critical Control Point	<b>SHR</b>	Society for Haitian Research
<b>HELP</b>	Haiti Economic Lift Program	<b>SM</b>	Saint-Marc
<b>HHTARG</b>	Haitian Hometown Association Resource Group	<b>SME</b>	Small and Medium Enterprises
<b>HERO</b>	Haiti Economic Recovery and Opportunity Act	<b>SOFIHDES</b>	Société Financière Haïtienne de Développement S.A
<b>HIN</b>	Haiti Investment Navigator	<b>T.A.</b>	Technical Assistance
<b>HOPE</b>	Haiti Hemispheric Opportunity through Partnership Encouragement Act	<b>UEMPR</b>	Umbrella Environmental Management Performance Report
<b>HRA</b>	Haiti Renewal Alliance	<b>USAID</b>	U.S. Agency for International Development
<b>HTA</b>	Hometown Associations	<b>WB</b>	World Bank
		<b>YSB</b>	Yunus Social Business, formerly Grameen Creative Lab



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## EXECUTIVE SUMMARY

Over a six-year period (July 2011 to December 2017), the Leveraging Effective Application of Direct Investments (**LEAD**) program provided access to capital and technical assistance to Haitian small- and medium-sized enterprises, strengthened the eco-system for private sector development in Haiti, and engaged the Haitian Diaspora to increase the development impact of remittance flows.

**3**  
geographic  
CORRIDORS

**6**  
year  
PROGRAM

**\$16.96**  
million  
FUNDING

Small- and medium-sized enterprises (SMEs) play a major role in most economies, particularly in developing countries. Per data collected by the World Bank Group<sup>1</sup>, formal SMEs contribute up to 60 percent of total employment and up to 40 percent of national income (GDP) in emerging economies. These numbers are even higher when informal SMEs are included.

Overall, small firms have lower productivity growth compared to large firms<sup>2</sup>. Throughout the world, the single biggest constraint to growth for SMEs is access to finance - SMEs are less likely to be able to secure bank loans than large firms; instead, they rely on internal or "personal" funds to launch and initially run their enterprises<sup>3</sup>. Another constraint to growth for this sector is access to business development services resources that can help enterprises address important issues that limit their access to capital or ability to grow. These resources are often needed to address common SME needs such as improved financial management systems, installation of sound accounting systems, business plan drafting and revision, market and feasibility studies, and support to improve general operations.

In Haiti, the impact of such global factors that limit SME growth is compounded by country-specific constraints. Haiti is ranked as a low-income country with a population of 10.8 million and a GNI per capita of US\$ 780. Haiti ranks 181 out of a possible 190 on the Global Doing Business Index (DB) published by the World Bank. Haiti also has a Distance to Frontier (DTF) measure of 38.24. An economy's DTF is reflected on a scale from 0 to 100, where 0 represents the lowest performance and 100 represents the frontier. Haiti's DTF compares unfavorably with the regional average for Latin America & the Caribbean of 58.66 and is considerably less than that of geographical neighbor Dominican Republic's DTF of 60.93.<sup>4</sup>

Haiti's poor ranking is a direct reflection of the extraordinary challenges faced by SMEs in the country including significant challenges in starting a business (DB rank of 189 out of 190), unreliable access to power (DB rank of 138 out of 190), difficulties in registering property (DB rank of 180 out of 190), getting access to credit (DB rank of 177 out of 190) and protecting minority investors (DB rank of 188 out of 190). These policy, infrastructure, legal and capital constraints are compounded by the fact that Haiti remains highly prone to natural disasters due to its geographical position that is subject to catastrophic hurricanes and earthquakes. Haiti ranked #1<sup>5</sup> in the world on the Global Climate Risk Index, reflective of the devastating impacts of the earthquake of 2010 and Hurricane Matthew in 2016.

The **LEAD** project, conceived as part of the post-earthquake U.S. Government's Haiti strategy, focused on supporting economic growth in the three development corridors of Port-au-Prince, Saint Marc and Cap Haitien with a two-pronged approach: 1) create jobs and increase sales through sustainable business and social enterprise development, and 2) utilize innovative mechanisms to engage the Haitian Diaspora and increase the development impact of remittances.

**LEAD** utilized a Business Plan Competition (BPC) to identify promising Haitian SMEs and social enterprises in the three corridors. The project's "matching grant" model of investment unlocked private investment capital and encouraged the active participation of key financial institutions in economic growth activity. Grant capital was complemented by technical assistance to support and strengthen the SMEs. Finally, recognizing that remittances would play a key role in supporting the Haitian economy, the project actively engaged the Haitian Diaspora to increase the development impact of diaspora activities and capital.

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1 World Bank Group, SME Finance: Improving SMEs' access to finance and finding innovative solutions to unlock sources of capital.

2 Ayyagari, Demirgüç-Kunt and Maksimovic (2014)

3 World Bank Group, <http://www.doingbusiness.org/data/exploreeconomies/haiti>

4 Insert reference to World Bank Doing Business Index, Distance to Frontier

5 David Eckstein, Vera Künzel and Laura Schäfer, 2018, GLOBAL CLIMATE RISK INDEX 2018 Who Suffers Most From Extreme Weather Events? Weather-related Loss Events in 2016 and 1997 to 2016.



**Business Plan Competition:** LEAD completed four editions of its renowned BPC that attracted nearly 500 applicants from the three corridors. Each edition of the BPC involved multiple stages, including review by sector experts, due diligence visits by financial representatives, and presentations to an independent jury. 45 winning entrepreneurs were selected across all four editions. **A total of \$6.7 million in LEAD grant capital leveraged over \$10 million in private matching funds/investments.** These 45 enterprises have collectively created 18,123 jobs, generated \$33 million in sales, and represent various productive sectors such as agribusiness, manufacturing, water and sanitation, food services, technology, textiles, tourism and hospitality, and recycling.

**Promoting Decentralization:** LEAD promoted decentralization of the Haitian economy by promoting the BPC heavily in Saint Marc and Cap Haitian, organizing special technical assistance activities for enterprises in those corridors, and supporting the development of the relatively underdeveloped SME ecosystem in these areas. The emphasis on these corridors resulted in a geographic diversity in LEAD's portfolio with six enterprises from Saint-Marc, and 12 enterprises from Cap-Haitian receiving support.



**Women and Entrepreneurship:** LEAD worked to address the specific economic constraints faced by women entrepreneurs by tailoring its outreach activities and technical assistance to their articulated needs. As a result, women entrepreneurs make up 45 % of the total portfolio and received grant capital of \$3 million which unlocked private investment capital of \$5.3 million. Of the 18,123 jobs created, 8,190 jobs are held by women. LEAD delivered a total of 3,541 hours of training or technical assistance to women.

**Social Enterprises:** LEAD partnered with key local institutions such as **Yunus Social Business Haiti, Zafen and Economic Growth Initiative**, to address social enterprises which would provide both an economic and social benefit to the Haitian economy. These partner institutions have supported a total of 7 social enterprises.



**Technical Assistance:** LEAD had an integrated approach to delivering technical assistance, providing support to the entire SME ecosystem as well as targeted, firm-level assistance. Throughout the BPC, LEAD offered support to entrepreneurs to develop their business plans and improve their presentation skills. LEAD also organized roundtables with local Business Development Service (BDS) providers to improve their capacity to meet the business needs of Haitian SMEs. To strengthen the SME ecosystem, LEAD partnered with financial institutions to create linkages between the financial sectors and entrepreneurs, and increase knowledge of available credit and equity sources of capital. LEAD also organized sector-wide training sessions that addressed common needs of multiple enterprises on key topics such as manufacturing standards, health and safety, financial management etc. Finally, LEAD completed an in-depth assessment of each of the 45 enterprises in its portfolio and provided access to consultants to address critical business needs of each firm. Overall, LEAD delivered a total of 10,775 of hours of targeted and sector-wide technical assistance.

**Diaspora Engagement:** The Haitian Diaspora supports the country's economy through remittances, philanthropic initiatives and investments. Remittances from the diaspora have been rising steadily for 20 years, with data from 2016 showing Haiti received US\$ 2.36 billion or over 20% of its GDP from remittances. In April 2017, the Central Bank of Haiti suggested that by 2020 remittances could rise to US\$ 2.7 billion or 29% of GDP<sup>6</sup>. Looking to harness the impact of diaspora activities on the Haitian economy, LEAD engaged the Haitian Diaspora via multiple activities. First, diaspora entrepreneurs looking to establish or grow businesses in Haiti were encouraged to participate in the BPC. As a result 12 of the 45 winners of the BPC are from the diaspora. Secondly, LEAD organized multiple outreach activities with diaspora groups to promote the success of diaspora entrepreneurs. LEAD partnered with the Haitian Hometown Association Resource Group (HHTARG) to support the development of a whitepaper titled "Haitian Diaspora Engagement & Investment in Haiti: New Findings and Recommendations."

LEAD also launched the Social Development Fund, an innovative mechanism that adapted the BPC to fund seven community-based projects (out of 207 applications) that could sustainably generate revenue and meet social needs with the support of diaspora capital. Finally, LEAD also partnered with the National Association for the Advancement of Haitian Professionals (NAAHP) and its partners to launch the Diaspora Challenge Initiative. This competitive exercise canvassed the Haitian Diaspora to identify their best ideas and projects to promote economic and social development in Haiti. Via its various activities, LEAD supported 13 outreach activities and informed 133,663 diaspora members of economic development opportunities in Haiti.

	YEAR 1 2012-2013	YEAR 2 2013-2014	YEAR 3 2014-2015	YEAR 4 2015-2016	YEAR 5 2016-2017	YEAR 6 OCT-DEC 2017
# GRANTS AWARDED	4	9	20	14	0	0
GRANT AWARDED IN USD	\$757,763	\$1,488,006	\$2,807,83	\$1,742,46		
SALES GENERATED	\$2,206,898	\$5,079,656	\$6,172,495	\$6,374,891	\$12,342,924	\$909,697
JOBS CREATED	5,831	1,262	2,448	2,837	1,810	3,935

Haiti's private sector consists mainly of small enterprises. There are around 900,000 micro-, small- and medium-sized enterprises, 60,000 of which are small and medium-sized enterprises—small firms (with between 10 and 49 employees), and mid-size companies (with 50-250 staff).<sup>7</sup>

<sup>6</sup> Data released by BRH at the "Haiti - remittances, impacts on the national economy" conference organized in Port-au-Prince by the Economic & Social Development Council (CDES) <http://www.haitilibre.com/en/news-20563-haiti-economy-impacts-of-remittances-from-diaspora-on-the-national-economy.html>

<sup>7</sup> IFC Enterprise Finance Gap Database - Raw Data, 2010-2011. <https://finances.worldbank.org/Other/IFC-Enterprise-Finance-Gap-Database-Raw-Data/2ppx-k958>



# LEAD

KEY  
ACCOMPLISHMENTS  
AND RESULTS

45

ENTERPRISES



21  
WOMEN  
LED

Organized and completed  
Diaspora Challenge  
Initiative with  
partner diaspora  
groups



12  
DIASPORA

10,745 hours  
of training  
provided

Funded 7 Social  
Development  
projects



# \$10.3

M I L L I O N

LEVERAGED  
IN MATCHING  
CAPITAL

# \$33

M I L L I O N

TOTAL SALES  
GENERATED

Organized key  
events locally and  
in the diaspora

443 firms  
received BDS  
support

The project  
worked with  
20 partners  
to accomplish  
these results



# 18,123

JOBS  
CREATED ACROSS  
SECTORS



# 14,302

FULL TIME EQUIVALENT EMPLOYMENT GENERATED



# COMPONENT 1

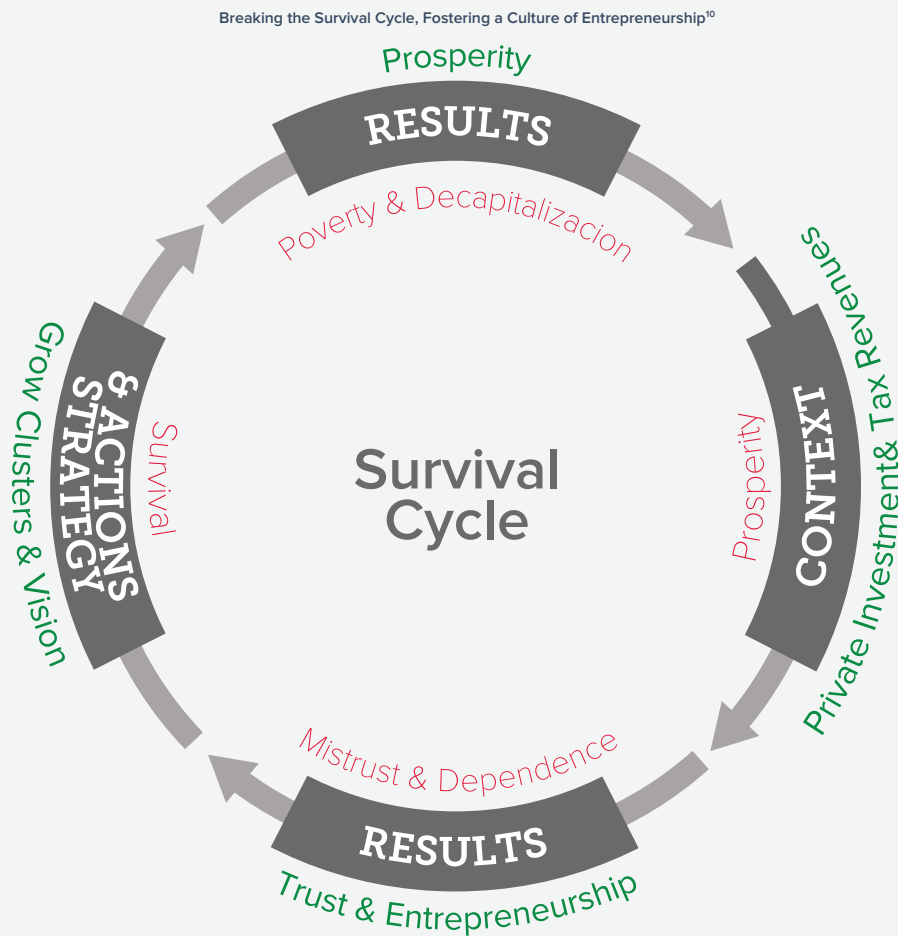
LEAD completed four editions of its Business Plan Competition (BPC) to identify the most promising, investment-worthy enterprises across key productive sectors within the three growth corridors of Port-au-Prince, Saint Marc and Cap Haitian. As the SME eco-system in Haiti had been nascent before the earthquake, and particularly fragile post-quake, LEAD organized its activities to strengthen the eco-system around SMEs so that those enterprises that won the BPC would have access to the resources needed to sustain growth after the project was completed. LEAD also delivered technical assistance at both the firm-level, and across sector needs, to help the SMEs in its portfolio meet their business objectives.



# SME Ecosystem

Haiti's economy is primarily informal.<sup>8</sup> The fact that most of the firms operate at informal levels limits the accessibility to business support services, financial services, and seed capital. It was estimated that 82% of all enterprises are engaged in basic commercial activities, buying and selling products with very limited added value due to the low levels of industry and product transformation that takes place in Haiti.<sup>9</sup>

Guided in part by the Haiti Economic Recovery & Roadmap (ERRM) published in 2010, PADF studied the chart noted below that lays out the "Survival Cycle" illustrated in the middle of the figure, which affects economic growth in Haiti.



Recognizing that LEAD had the potential to play a pivotal role in breaking this cycle through its private sector investment strategy that simultaneous investment in human and social capital is also required if business investment is to be successful. The PADF team designed a technical approach grounded around this theory and enshrined in the acronym EXCITE which when expanded provides the founding principles of LEAD:

<sup>8</sup> Entrepreneurship, Development and Economic Policy in Haiti. Marroquin, 2015.

<sup>9</sup> Private Sector Assessment Report, 2014, Inter-American Development Bank

<sup>10</sup> Haiti Economic Recovery & Roadmap (ERRM), Presidential Commission on Competitiveness Groupe de Travail sur la Compétitivité (GC), 2010.

- E ENTREPRENEURSHIP:** LEAD oriented all its activities to support entrepreneurship and enterprises in Haiti.
- X X-FACTOR:** LEAD recognized that success in entrepreneurship would require the X-factor, an entrepreneur's desire to succeed against all obstacles that we could nurture and support.
- C CREDIBILITY:** LEAD benefited from PADF's sterling reputation, and its activities were managed to build trust and demonstrate results to all stakeholders.
- I INCLUSIVENESS:** LEAD made special efforts to include all segments of Haitian and diaspora society in its activities.
- T TRANSPARENCY:** LEAD activities were managed competitively, providing accounting and transparency to all stakeholders.
- E EXIT IN VIEW:** LEAD activities were designed to promote sustainability, leaving behind a strong cadre of entrepreneurs, an engaged diaspora, and a strengthened SME ecosystem in Haiti.

To support sustainable growth for Haitian SMEs, LEAD determined that funding for entrepreneurs (particularly in priority growth areas such as productive sectors) would be accompanied by:

1. A training and support program (capacity-building, mentoring) to build human capital;
2. Connections to key actors in the ecosystem including business development service providers and chambers of commerce; and
3. Access to capital via financial institutions for long-term support.

Recognizing that in a post-quake context, many Haitian SMEs had been decapitalized and that service providers were often sole proprietorships who had been similarly affected, LEAD considered it important that strengthening the entire ecosystem was an integral part of providing financial and technical support to SMEs. LEAD thus adopted an integrated approach by focusing on developing linkages and supporting the SME ecosystem, concurrent with multiple editions of its BPC.

The cost of credit in Haiti is very high, especially in the microfinance sector. Commercial banks typically charge annual interest rates of 8 - 15%, while micro-finance institutions (MFIs) charge 2-4% per month (24-48% per year) and pawnbrokers and moneylenders charge up to 20% per month (240% per year).<sup>11</sup> The lack of a credit bureau makes it difficult for financial institutions to assess risk and monitor over indebtedness. Due in part to the general economic environment, financial institutions are unwilling to make uncalculated risks and thus act conservatively when granting credit. Therefore, only a small proportion of liquid assets are loaned. LEAD specifically developed relationships with financial institutions so as to help SMEs improve their financial management services, strengthen their business plans, and be able to access long-term credit from commercial banks. Integrating representatives of financial institutions into LEAD activities helped create awareness of SME achievements.

LEAD established linkages with major chambers of commerce, key business development service providers in the three corridors, Government of Haiti actors (Ministry of Finance, Ministry of Commerce & Industry, Ministry of Haitians Living Abroad, and Center for the Facilitation of Investments) and major financial institutions such as SOFIHDES, SOGEBANK, UNIBANK. These linkages also extended to support social enterprise (SEs) via partnerships with organizations focused on strengthening SEs such as Yunus Social Business (YSB Haiti), Economic Growth Initiative (EGI) and ZAFEN.

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<sup>11</sup> 2010 Annual report, Banque de la République d'Haiti, Microfinance industry census in Haiti 2010-2011, SMG for USAID/HIFIVE, September 2012 and Statistical annex of the 2012 annual report of the Banque de la République d'Haiti

The linkages with the SME & SE ecosystem promoted consistent and formal dialogue between entrepreneurs and other stakeholders. For instance, **LEAD** embedded representatives from the ecosystem within the BPC to serve as members of the jury, selection committee members, and for due diligence exercises. This infused local sector expertise into the selection process while building general awareness of the potential of **LEAD** SMEs to innovate and generate growth. **LEAD** also organized multiple roundtable sessions with Business Development Service (BDS) providers in the corridors, both to build their own capacity to service the needs of SMEs as well as raise awareness of the needs being expressed by **LEAD** SMEs. **LEAD**'s technical assistance model made it a priority to meet SME BDS needs from local providers wherever possible.

**LEAD** events, including two editions of its business expo (including B2B matchmaking sessions), "power breakfast" networking events, trainings, and general info sessions, were inclusive of all relevant stakeholders in the ecosystem. These events created multiple opportunities for peer-to-peer networking and generated linkages both within the **LEAD** portfolio and with external actors. Examples of such linkages include supply chain partnerships between enterprise in the agribusiness sector of **LEAD** portfolio, as well as cross-sector distribution partnerships amongst **LEAD** enterprises. Similarly, enterprises within sectors such as recycling, tourism and hospitality often accessed similar services from BDS providers, and direct referrals from **LEAD** enterprises helped build new clients for these providers.

**LEAD** also worked with Chambers of Commerce in all its corridors, as these are natural entry points for local SMEs to access ecosystem stakeholders. **LEAD** encouraged and supported specific chambers in strengthening their own business operations, organizing events, and hosting info sessions from local financial institutions on credit & banking products relevant to SME needs.

**LEAD** also partnered with the Government of Haiti (GoH) ministries that provide support to SMEs including the Ministry of Finance, Ministry of Commerce & Industry, Ministry for Haitians Living Abroad for diaspora engagement, and Center for Facilitation of Investments (CFI). These partnerships resulted in 5 **LEAD** enterprises receiving access to government programs (funded by the Inter-American Development Bank) designed to provide financing to Haitian SMEs.

**LEAD** also coordinated closely with ongoing private sector development projects happening in Haiti and the region. The project staff collaborated closely with USAID-funded LEVE project, ensuring that technical assistance were made judiciously. **LEAD** also worked closely with Caribbean Compete, a project supported by Department for International Development (DFID) and the Inter-American Development Bank, regarding the overlap amongst SMEs supported in Haiti. Similarly, **LEAD** shared information about enterprises in its portfolio that were looking for expansion support with representatives of multilateral agencies such as the Multilateral Investment Fund, Inter-American Development Bank, and the World Bank. **LEAD** staff organized and led quarterly meetings with donors and representatives of the private sector working group post Hurricane Matthew to promote greater coordination.

For SEs, **LEAD** supported the efforts of YSB-Haiti, EGI and ZAFEN by providing them with grant capital to develop their institutional capacity and increase the number of SEs supported by these organizations.

**LEAD**'s efforts at strengthening the **SME ecosystem** will contribute greatly to the long-term sustainability of delivering support to Haitian SMEs after project closes. This is reflective of PADF's central development philosophy for sustainability as this approach leverages available local sources and seeks their buy-in.



## Business Plan Competition

LEAD's Business Plan Competition (BPC) was the primary mechanism to identify promising, investment-worthy enterprises with the greatest potential for job creation and revenue growth. The guiding principles for the BPC were **competitiveness**, **transparency**, and **accountability** which in turn generated trust among the SME ecosystem that the activity produced reliable results.

LEAD vigorously promoted the BPC throughout the three growth corridors and to a diaspora audience in order to attract qualified applicants. Each new edition of the BPC received more applicants than the prior editions, as the success of the project and the winning enterprises helped generate interest and trust in the process. Special efforts were made to promote the competition to women entrepreneurs to encourage their participation.

LEAD sought applications from entrepreneurs (either Haitian, diaspora, or foreign) who wished to operate in the three growth corridors to:

- Expand or diversify an existing business; or
- Start a new business<sup>12</sup>

<sup>12</sup> Start-ups were considered when the business acumen of the entrepreneur could be verified by past business success, as well as the quality of strategic partners to achieve results in a timely manner.



Each iteration of the BPC included multiple stages of review culminating in a presentation in front of a jury. Enterprises were awarded grants between \$50,000 to \$200,000 which they matched with private capital (either equity or debt). All enterprises in the **LEAD** portfolio were provided technical assistance to help them achieve their business objectives. The combined infusion of capital and business expertise helped create sustainable enterprises that would support long-term economic growth in Haiti.

Enterprises (both start-ups and established enterprises) submitted their business plans via an online platform designed for the project, an innovative approach to BPCs in Haiti. **LEAD** provided technical assistance to help SMEs prepare their business plans, undergo due diligence and financial evaluation, and finally present in front of a jury. The stages of the BPC included review committees comprised of external sector experts, banking and financial institution representatives and **LEAD** technical experts. Similarly, jury panels for each edition of the BPC included business leaders, representative of financial institutions, government agencies, partner institutions and other key stakeholders. This was a rigorous, competitive, and transparent process which included review committees composed of external sector experts, representatives of financial institutions, partner organizations, as well as the **LEAD** technical team.

Through the competitive process, entrepreneurs received rigorous, detailed feedback and assistance to help them identify their capital needs, finalize their proposed business plan, include strategic partners where needed, and practice their "business pitches". Financial due diligence exercises also helped entrepreneurs improve their financial management practices.

Via the support of its partners such as **SOFIHDES** and **CSL**, **LEAD** provided applicants with:

1. Practical training in critical areas such as business planning, accounting, human resources, marketing, management, and other related themes.
2. Guidance in developing a bankable business plan.
3. Individual consultations with business development experts to address the specific concerns of their enterprise.
4. Networking opportunities with financial institutions and other entrepreneurs.





“I have been working part-time at CASTMI for several months. **This job allows me to pay my school, to buy my books and clothes**”

— Orenord Nelson, machine operator at CASTMI water plant.



“The **LEAD** project has been a leader for us. We were able to finance the training for our employees which is critical for the maintenance of our equipment and to increase our commercial service. It also helped us to renew our spare parts inventory. **LEAD** arrived at a time when we were desperate, we were even considering closing. Although we had a good product it was unusual to the Haitian market therefore hard to sell.

**This accompaniment has helped put us back on track and today ALS is doing much better and has grown its clientele considerably.**

**Bravo LEAD! You have been a real Leader”**

— Dominique Carvonis Ayiti Linge Services (ALS).  
Owner testimony

“I like the work I’ve been doing for over 5 years at Ayiti Linge, **it has allowed me to take care of my family**”

— Christelle, operator at Ayiti Linge



## Lessons Learned

- ▶ The first edition of the BPC required applicants to submit paper applications/business plans. For subsequent editions, **LEAD** switched to an electronic platform where applicants submitted their business plans online. This was based on feedback from both applicants and selection committee members that an electronic platform would ensure more uniform submissions and ease the process.
- ▶ Recognizing that many entrepreneurs requested and needed technical assistance to help complete their business plans, **LEAD** provided technical assistance from the very first stage of the process.
- ▶ Environmental monitoring and due diligence became mandatory steps of the BPC process by the second edition.
- ▶ For the fourth and most popular edition of the BPC, the program established an efficient, two-part application process: 1) submit a concept note and 2) submit the business plan application for those concept notes selected.
- ▶ Scoring sheets (with weighted values) were provided to reviewers and jury members to ensure that all reviewers were uniformly considering the key objectives of the program.

# Sectors



## FOOD INDUSTRIES

Haiti is renowned for its delightful cuisine. **LEAD** supported 5 entrepreneurs who run diverse businesses in the food service industry including bakery, patisseries, and a fruit salad store. Developing innovative, consumer focused business operations has helped these companies create successful niches for themselves in the sector. These 5 enterprises have generated \$ 2.8 million in sales revenue.



## TEXTILES

While the apparel sector is a key to Haiti's economic growth, **LEAD** supports 3 enterprises who are smaller in size but are primarily focused on the domestic market, delivering high-quality products such as uniforms and consumer wear for the mass market. These companies have generated \$1.1 million in additional sales.



## RECYCLING

Post-earthquake Haiti saw a huge increase in plastics and other contaminants that make parts of the sea and low-lying areas impossible to navigate. **LEAD** supports 4 enterprises in this sector – three of the enterprises are engaged in recycling plastics while the fourth company works on recycling diesel. This sector has contributed heavily to the overall economic impact of **LEAD**, including revenue flows of \$6.6 million. This sector has also contributed the second most number of jobs created to **LEAD's** results. Enterprises in this key sector have received strong technical assistance which has enabled them to become premium suppliers to companies like Timberland.



## TOURISM & HOSPITALITY

Haiti's location, its music, dance, culture and cuisine have often been touted as reasons to dramatically increase its market share of tourism happening in the Caribbean islands. **LEAD's** portfolio includes eco-lodges and service companies including dry cleaning. These companies have generated over a \$1 million in sales.





## MANUFACTURING

Manufacturing is one of the most important sectors in LEAD's portfolio, not least because of its high impact on the local economy. LEAD's 4 manufacturing enterprises include the manufacture and sales of toilet paper, construction frames and bricks, and household chemicals.

LEAD's manufacturing sector accounted for \$6.5 million in sales revenue and is the third most important sector in terms of jobs created. Two LEAD enterprises in the manufacturing sector have won prestigious awards in the locally run Digicel Business Awards – Entrepreneur of the Year competition.



## WATER TREATMENT

In the wake of the cholera crisis in Haiti, Haitians are extremely motivated to make changes to their drinking water supply and this sector is open to innovations. LEAD supports 4 enterprises in this sector who are running successful businesses that has led to formal supply chain actor partnerships. This sector has seen an increase in sales of nearly \$2.4 million over the project.



## ALTERNATIVE ENERGY

Haiti's dependence on fossil fuels to meet its energy needs has a deep negative impact on its balance of trade and leaves it vulnerable to market fluctuations. Household level reliance on charcoal has been linked to health issues that disproportionately affect women, as well as having a negative environmental impact.

LEAD supports 3 enterprises in this sector that are focused on charcoal alternatives or reducing charcoal consumption. These enterprises have generated \$1.7 million in sales revenue.



## TECHNOLOGY

LEAD supports a local tablet manufacturer, SURTAB, which has generated over \$4.7 million in sales revenue. The company has put Haiti on the technology map by producing affordable, high quality tablets which have wide applications across sectors like education, agriculture, manufacturing, construction and health.



## AGRI-BUSINESS

Haiti is blessed with a variety of micro-climates and grows a variety of high quality crops. A key growth sector that LEAD identified within the agri-business sector was value-chain processors who transformed local produce into high-value goods for local consumption or export. For example, LEAD enterprises transform cacao to chocolate, convert raw rice into milled parboiled rice, sisal leaves into ropes, extract juice from local fruits, and produce condiments. Another area of growth is to grow crops at scale, transforming production at smallholder farms to more profitable, large scale operations. Crops which benefited from such investments include peppers and papaya. Overall, there are 13 enterprises in LEAD's portfolio that are in this sector. Together they generated over \$6 million in sales revenue. This is also LEAD's top sector in terms of job creation.

# Cluster Effect

**The 45 LEAD supported enterprises have so far created 18,000+ new jobs and generated over \$33 million in sales,**

a testament to the success of the model of identifying viable SMEs and infusing them with capital and technical assistance. If the project were to scale and support 500 SMEs, one can project that the benefits to the Haitian economy would be tremendous. It would be equally impactful to achieve scale across particular sectors such as agribusiness, manufacturing, recycling and water treatment. By investing in multiple enterprises within a growth sector, the project could increase its impact through the cluster effect.

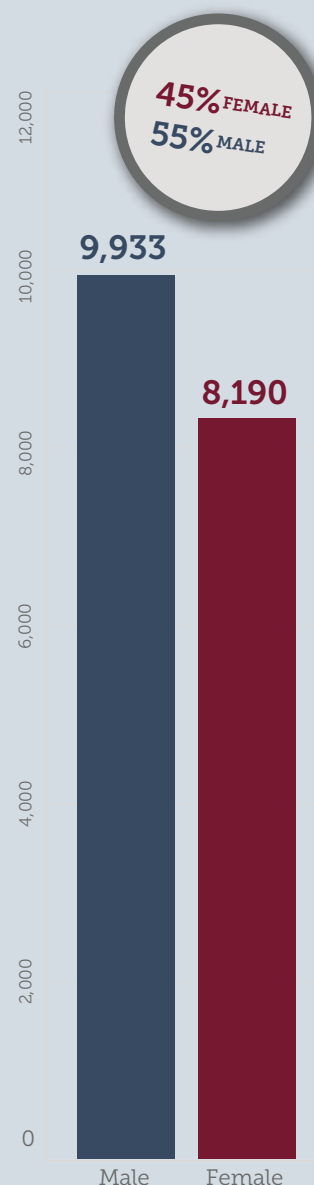
To understand this potential impact, we look to the economics of clusters - a key economic concept developed by Dr. Michael Porter and a principle guiding the design of private sector development projects in Haiti. A cluster is defined as "geographic concentrations of interconnected companies and institutions in a particular field. Clusters encompass an array of linked industries and other entities important to competition."<sup>13</sup>

In the case of LEAD, certain sectors noted above (Agribusiness, Recycling and Manufacturing) naturally had a greater immediate

impact on the metrics of success measured by the project including jobs created and revenues generated. This suggests that these particular firms and the sectors they occupy offer key growth opportunities for the Haitian economy, as there may be additional economies of scale to be achieved. To achieve the full benefits of a cluster, a critical mass of anchor firms and their related industries (input suppliers, value-chain actors, distribution networks, workforce development, and government institutions/enabling factors) must be identified and strengthened so that the entire sector could benefit. LEAD offers the examples of certain sectors as potential sites of such anchor firms and related actors capable of and ready to absorb additional capital, and needing additional technical support. Continued investment in a LEAD-model to support cluster development could help generate high economic value for the country.

LEAD recognized that women and girls in Haiti are disproportionately burdened by factors such as greater obstacles to attend schools, increased health challenges, significant disadvantages in the labor market, and low participation rates in the public sphere. Therefore, one of the guiding principles adopted by LEAD was to promote investment opportunities that would enhance women's entrepreneurship.

Additional jobs by gender



**"I face the same challenges as any entrepreneur in Haiti – we need better infrastructure and improvements to the financial ecosystem."**

— Marie Alice Lemaire.  
Panou, Owner testimony.

<sup>13</sup> Clusters and the New Economics of Competition, Michael E. Porter, 1998

# Women & Entrepreneurship



To encourage participation of women in the BPC, LEAD specifically organized outreach sessions to women entrepreneur groups, as well as provided support to the Chamber of Commerce of Women Entrepreneurs. Via its various activities, LEAD supported 13 outreach activities and informed 133,663 diaspora members of economic development opportunities in Haiti.

LEAD also accounted for traditional gender roles in the Haitian economy and made investments in value-chains that employed women (particularly agriculture, and distribution of fast moving consumer goods) and enterprises that made efforts to recruit women (e.g. – SURTAB, a tablet manufacturer has a workforce primarily consisting of women because of their natural skills for this profession). LEAD also encouraged its enterprises to seek women to fill non-traditional roles such as in the construction and manufacturing sectors. Within sectors, and at the firm-level, LEAD supported enterprises to identify strong women candidates as they invested in workforce development LEAD to boost productivity. Such investments led to firms appointing women in managerial positions (e.g. – CASTMI, a water manufacturer, invested in a young woman to operate its plant in Cap Haitian. This employee, with LEAD assistance, won a prestigious IVLP fellowship to improve her management skills).

Finally, LEAD supported women entrepreneurs by addressing their needs for access to capital and providing them with tailored business consultants so that they could grow their businesses. Two of LEAD's women entrepreneurs (SWITCH S.A. and Glory Industries S.A.) were selected to represent Haiti in the Global Entrepreneurship Summit in 2016 following an extremely competitive worldwide process.

**“I work harder  
everyday to prove  
that I belong here.  
Being a woman  
entrepreneur in Haiti  
is not easy but I see  
it as an opportunity  
to inspire others.”**

— Gueldy Saint Fleur, INCSA.  
Co-owner testimony.

# Social Enterprises

Social Enterprises (SEs) are defined as enterprises whose social impact is as critical to their success as profitability. To support investments in SEs, **LEAD** partnered with three key partners to strengthen their capacity to identify and invest in promising SEs in the three growth corridors.

## **Yunus Social Business (YSB-Haiti)**

YSB-Haiti, affiliated with Yunus Worldwide, was founded by Mohammed Yunus and supports SEs which deliver an important social benefit and reinvest all profits in the enterprise. This model encourages SEs to invest in their workers and the communities they serve. **LEAD** provided YSB with a grant in order to improve its management capacity and to on-lend to SEs in its portfolio. **LEAD** also made direct investments in multiple SEs supported by YSB – ESN (poultry producer), CPBM (a community-based bakery), Snack Fresh Center (vegetable processor), Kreyol Essence (castor oil products), Palmis Eneji (clean energy consumer goods), and NARIZIFWI S.A. (baby food manufacturer).

## **Economic Growth Initiative (EGI)**

**LEAD** provided support to EGI, an organization focused on providing business skills training and business resources to underserved small and growing businesses serving vulnerable communities. **LEAD** provided a grant to EGI to provide training on business plan development, seed capital, and operate business related services (accounting training, access to legal support, and office equipment). EGI delivered a total of 930 hours of assistance and training to entrepreneurs.

## **ZAFEN**

**LEAD** provided ZAFEN, a division of FONKOZE (a leading microfinance institution) a grant to identify promising SEs in the growth corridors (particularly Saint Marc and Cap Haitian) and provide these enterprises with support services. SEs that received such support were eligible to be placed on ZAFEN's online platform (supported by KIVA) to receive loan capital.



# Technical Assistance

Training and technical assistance play a critical role in improving access to finance for SMEs. Organizations that provide training, technical assistance and business development services can help “de-risk” enterprises to make them more attractive to investors. Building the capacity of SMEs enhances their attractiveness and competitiveness. **LEAD** simultaneously worked with both enterprises and Business Development Service (BDS) providers to address the needs in capacity building of the participating enterprises.

The project offered technical assistance and capacity-building support to all their enterprises and partner organizations to support entrepreneurs to implement their business plans and reach their employment, revenue, and other strategic goals. **LEAD** drew upon a large pool of Business Development Services (BDS) providers, both local and international, to provide one-on-one assistance, tailored to the needs of each enterprise. **LEAD** also conducted group trainings, and organized both thematic or sector-based roundtables, and workshops to build general capacity in the sector.



LEAD's technical assistance followed a multi-pronged approach:

- The enterprises completed a baseline assessment that helped LEAD evaluate each enterprise's governance structures, management practices, human resources, financial structure, production management, marketing capacity, and environmental mitigation. The Organizational Capacity Assessment Tool (OCAT) and the Non-U.S. Organization Pre-award Survey (NUPAS), were used to conduct the assessment. Based on the results of the technical and financial evaluation a **Technical Assistance plan** was developed in collaboration with the enterprise.
- General training sessions were held on key topics such as financial management, workforce development and taxes etc. to address common needs across either sectors or a majority of SMEs in the portfolio. Some general trainings were offered to a wider audience to strengthen the entire ecosystem.
- LEAD then recruited BDS providers to address the firm's needs that were so firm-specific that they were not covered under general training sessions.



### BDS Providers

LEAD's technical assistance mandate also included the engagement of local BDS providers through capacity building. LEAD provided capacity building support to local BDS providers to improve their ability to address the needs of the SME market. Through trainings and roundtables, local BDS providers were able to reflect on issues facing their sector and changes that needed to be made to improve their services.

### Some examples of BDS Roundtables and trainings include:

- Roundtable for Financial institutions on the **"Financing of SME's and building the ecosystem."** The roundtable was attended by major stakeholders such as SOFIHDES, Fonds de Developpement Industriel (FDI), FONKOZE, UNIBANK, and Banque Nationale de Credit (BNC) to name a few. The following subjects were discussed: Sharing information to promote the development of the sector; Encouraging competition amongst financial institutions' Training financial managers; Upskilling credit officers and field agents to serve SMEs; developing cooperation between SMEs and banks to exchange information; making entrepreneurs aware of different investment opportunities.
- Roundtable on the **"Accompaniment & Financing of SMEs in the Saint-Marc corridor"**. This event touched on the existing resources and gaps to assist enterprises seeking financing in the Saint-Marc area. Promising sectors and value chains in the "Chaine des Matheux" (salt production, plantain and mango commercialization, tourism and hospitality etc.) were identified. The firm CFET was identified as a credible resource based on the work they have already done with different organizations in human resource development, needs assessment and customized training. The key takeaways were to focus efforts on the creation of the association of Entrepreneurs in the Saint Marc Corridor in lieu of a Chamber of Commerce.
- Provided training on **"Financial Analysis for the non-financial managers"** (see training section for details)
- Training on **"Business Investments, how to buy, sell and divide shares"**. (see training section for details)

To ensure that the enterprises stayed on track following evaluations and recommendations, the **LEAD** team monitored progress through regular site visits. Examples of some **key consultancies and trainings offered to firms** were:

**Financial Analysis:** A renowned local financial expert, Mr. Edouard Clement, provided in-depth, one-on-one financial analysis of numerous **LEAD** supported SMEs to evaluate the firm's financial health and make recommendations based on the findings. Firms that benefited include: Industries Gerby S.A (INGSA), Glory Industries S.A., Industries Kayimit S.A., and Environmental Cleaning Solutions S.A. The expert's recommendations enabled the enterprises to have better control of their profits and loss and identify their needs in terms of capital investment. As a result of these interventions, enterprises that received technical assistance from Mr. Clement were able to measurably improve their financial management structure, assess their capital needs, identify additional funding sources, and renegotiate bank loans or lines of credit and secure new financing.



**Cacao Expert:** **LEAD** called on an international cacao expert through its partner FAVACA to work closely with the two cacao enterprises in its portfolio, SOGEPA, and Produits des Iles S.A. The expert evaluated production operations and made recommendations to improve processes, support new product development, and identified new international clients for value-added cacao product export. The consultant's interventions facilitated standardization of new products, increased production and created growth.

**Recycling Expert:** The recycling sector was greatly impacted in 2016 by the drop in gas prices on the international market. To help mitigate these effects, **LEAD** engaged the services of an international recycling sector expert from FAVACA to assist three **LEAD** enterprises: Environmental Cleaning Solutions S.A, Haiplast Recycling, and Le Nettoyeur S.A. The consultant provided tailored analysis of each enterprise and developed strategic plans on how these enterprises could grow into new markets as well as improve their operations. He also analyzed existing plastic products' quality and qualified them as premium. As a result of the expert's intervention, these firms were able to attain productivity gains in their operations as well as improved quality, resulting in better prices for their products on the international market.



**Safety Expert:** International experts Dr. Makuba Lihono and Dr. Aubrey Mendonca from FAVACA provided "Hazard Analysis and Critical Control Points" (HACCP) training to twelve **LEAD** enterprises in the Agribusiness, Food services, Water treatment and Tourism & Hospitality sectors. HACCP is a management system in which food safety is addressed through the analysis and control of biological, chemical, and physical hazards from raw material production, procurement and handling, to manufacturing, distribution and consumption of the finished product.

**OSHA Expert:** International Occupational Safety Hazard (OSHA) expert from FAVACA, Mr. Marc Dick, conducted site visits and assessments of **LEAD** enterprises local manufacturing and industrial facilities. The expert identified common challenges and made specific recommendations to improve plant safety.



**Industrial Engineering Expert:** Mr. Gilbert Liautaud, a local expert in production lines, evaluated INGSA (manufacturer of cleaning supplies), IKSA (water treatment enterprise) and Jus de Marmelade SA (juice production company). The expert helped in the installation and updating of new lines of production and made recommendations for improvement of operations.



## Key trainings:

- **Business Management** training for SMEs was provided by CSL Pro. The training covered three major topics:
  - 1) **Administrative and Financial Procedures:** This included topics such as effective methodologies for writing administrative, accounting and financial procedure manuals; integrating the concept of document ownership and control; and administrative, accounting and financial management.
  - 2) **Operations and Production Management (Supply Chain):** This covered topics such as flow control principles; satisfying consumer needs; increasing the internal performance of the company; customer satisfaction; understanding the role of information systems (IS) in measuring efficiency of the supply chain; implementing a supply chain strategy; and diagnosing the logistics chain of the company.
  - 3) **Marketing & Sales:** Topics covered included identifying the main spheres of activity and marketing decision making; diagnosing and solving simple marketing problems; identifying data needed to solve particular problems and data collection; and developing a marketing plan.
- **Financial Analysis for non-financial managers:** LEAD provided a two day training to its enterprises and BDS providers offered by local financial expert, Mr. Edouard Clement, on the theme "Financial analysis for non-financial managers".
- **Business Investments - how to buy, sell and divide shares:** This training allowed the participants to better grasp the concept of equity and shares in an enterprise, helping them determine how to divide shares, favorable ownership ratios, selling shares in a company, and to better manage risks associated with shares. It also covered the fiscal, judiciary, and financial implications of such transactions. Participants were informed of the legal, financial and tax implications of corporate investments in the different types of businesses existing in Haiti.
- LEAD enlisted the services of an international expert in "**Occupational Safety and Health Administration**" (OSHA), Mr. Marc C. Dick from FAVACA to provide OSHA training to LEAD funded enterprises. The two day OSHA training was held in Port-au-Prince and Cap-Haitien where participating enterprises were offered training to recognize, avoid, abate and prevent common safety & health hazards in the workplace. The expert developed modules on: usage of tools & machinery; storing chemicals & oil, spillage; safety instructions information & procedures; exits & fire emergencies; adequate ventilation & confined spaces; and personal protective equipment. The training also provided information regarding workers' rights and employer responsibilities for workplace safety.

Supporting and building capacity of local organizations:

LEAD sought to strengthen the capacity of key and intermediary partners such as government agencies, business associations, Chambers of Commerce, service providers and non-governmental organizations to contribute to their growth while promoting economic growth and sustainability. To that effect, LEAD supported a number of partner organizations besides BDS providers and below are a few examples of organizations strengthened in the Saint-Marc and Cap-Haitian corridors.

- **Association Fanm Plantez Preval Renal (ASFAPPR):** Created in 2010, ASFAPPR is an association of women rice producers operating in the Artibonite Valley, with its headquarters in the town of Préval. The association has around one hundred members, and it is run by an Executive Council of nine members. Its primary mission is to improve the socio-economic conditions of its members while participating in the development of the community. In order to provide technical guidance to the members of this association, LEAD brought in a local consultant in organizational strengthening, Mr. José Pierre, to help these women farmers achieve their goals by becoming more competitive. Via intensive training, the consultant helped strengthen the organizational capacities of ASFAPPR to the benefits of its members. Despite the weaknesses and challenges identified, the association has great potential that can lead to its development. This training helped them develop a medium and long-term development plan, with the main objective of developing the resources available and contributing to the economic improvement of its members and the community. The association reorganized itself by defining a clear operational strategy and setting realistic goals. They also organized a fundraising campaign, set up new income-generating activities and developed positive partnerships and collaborations with other organizations in the region.
- **The Chamber of Commerce, Industry and Professions of the North-East (CCIPNE)** is an association of men and women of business and professionals of the Nord East department, affiliated with the Chamber of Commerce and Industry of Haiti (CCIH). It has a dual mission: to promote and defend the interests of its members and to participate in the economic and social development of the department in particular and the country in general. As it is one of the newest chambers in the country, it had a nascent organizational structure and required much support to become more sustainable. The main objective of LEAD’s financial and technical support was to strengthen the capacity of CCIPNE to position itself as a catalyst for development in the region according to its mission. LEAD’s assistance enabled CCIPNE to provide business development services and relevant information for the establishment and structuring of small and medium private and/or social enterprises in the department. LEAD supported the institutional strengthening of the CCIPNE, in part, to encourage registered members to be more active, to convince more SMEs to become members and to better service its members.

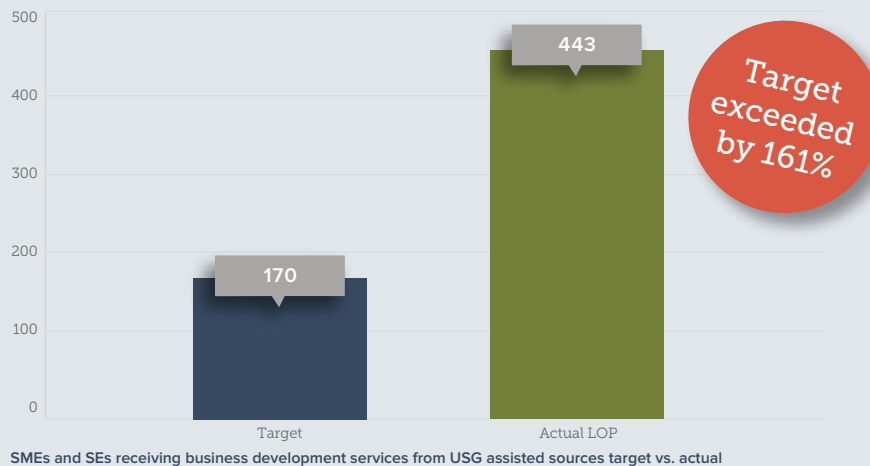
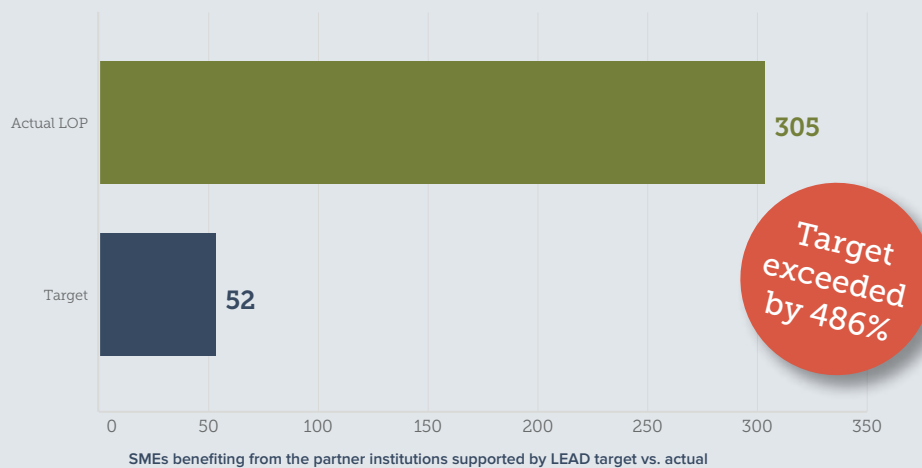
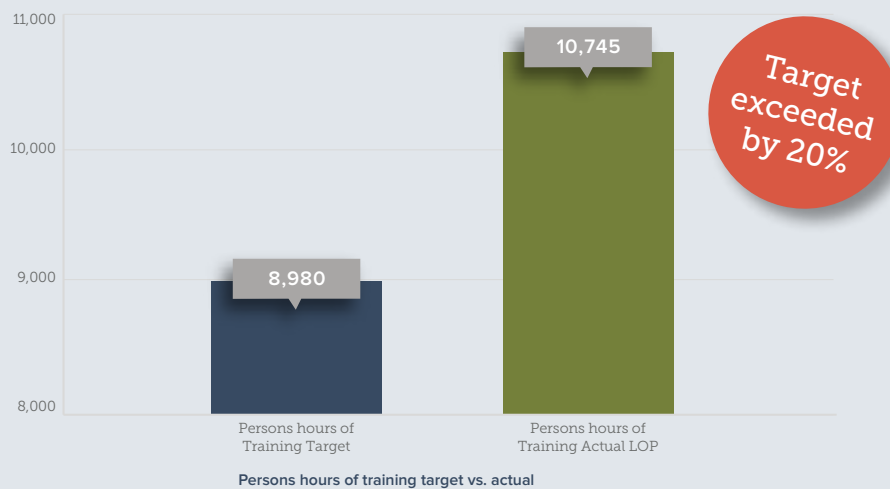
Via the efforts of direct, firm-level assistance, group trainings, supporting BDS providers, and partner organizations, LEAD enterprises demonstrated overall improved management capacity and/or improved their efficiency over the course of the project. The following table and graphs illustrate these results over the course of the project.

**39** Firms (SMEs and SEs) have improved management as a result of USG assistance

**6** Partners institutions have benefitted from capacity-building assistance from LEAD

**6** Partners institutions have improved capacity to support SMEs and SEs





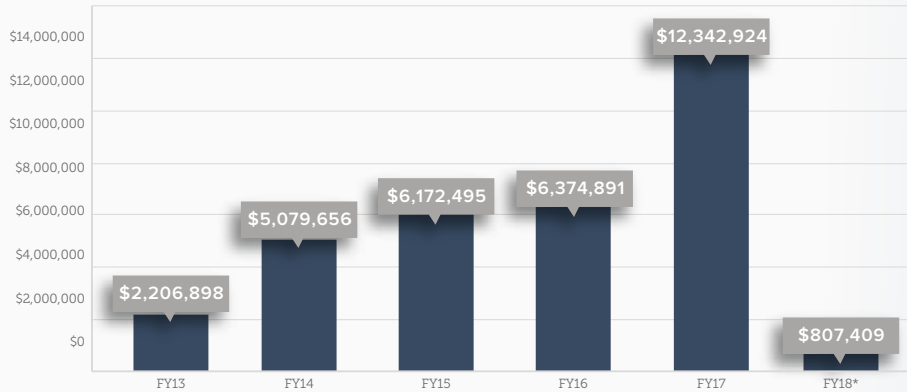
**278** Annual number of SMEs benefiting from the partner institutions supported by LEAD

**316** SMEs and SEs receiving business development services from USG assisted sources

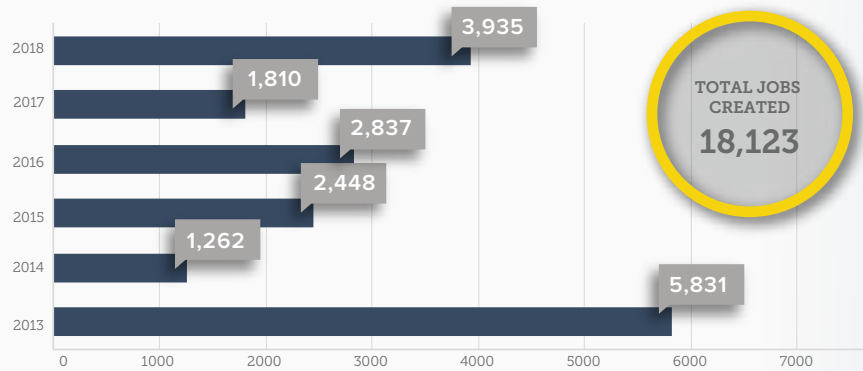
**10,745** Persons hours of training completed in private sector productive capacity

# Key Results of Component 1

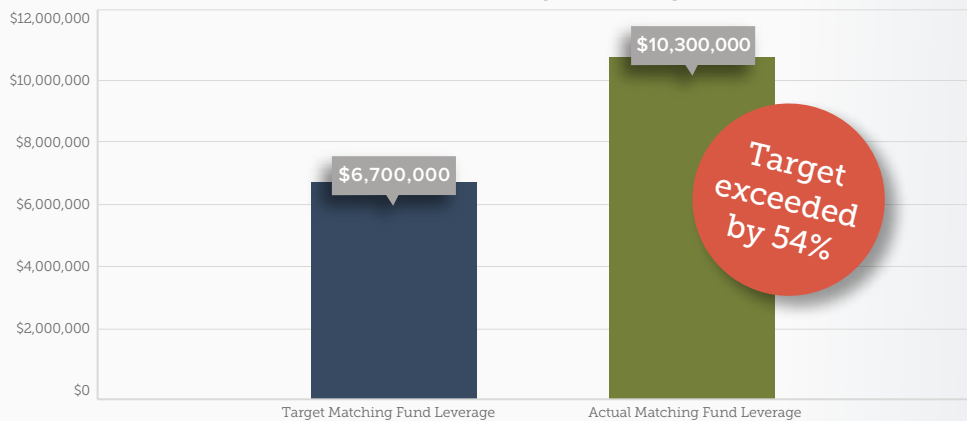
## Sales by Fiscal Year (LOP)



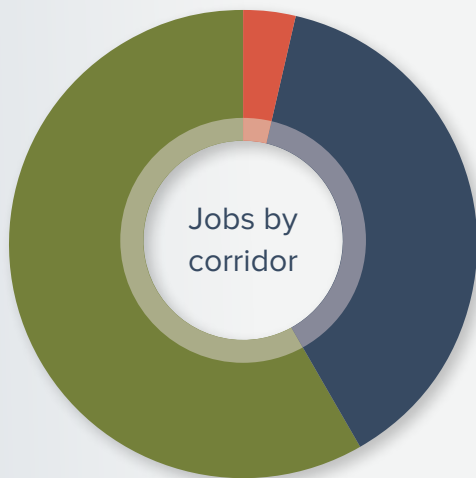
## Additional JOBS created by FY (LOP)



## Private Capital Leveraged with grant funds

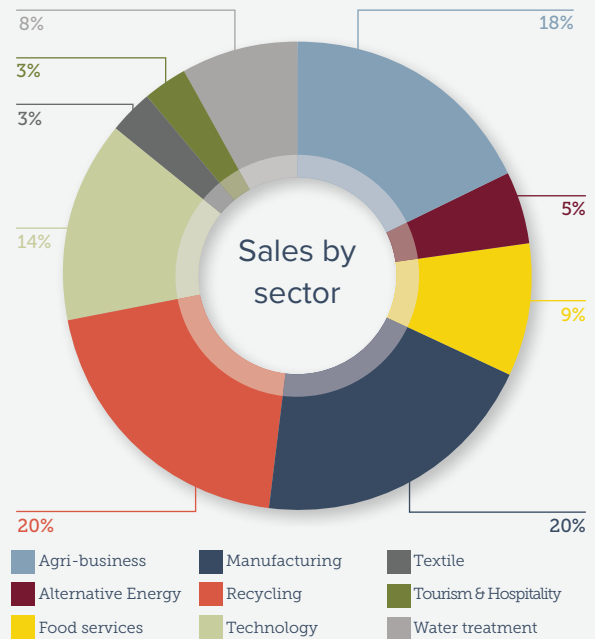
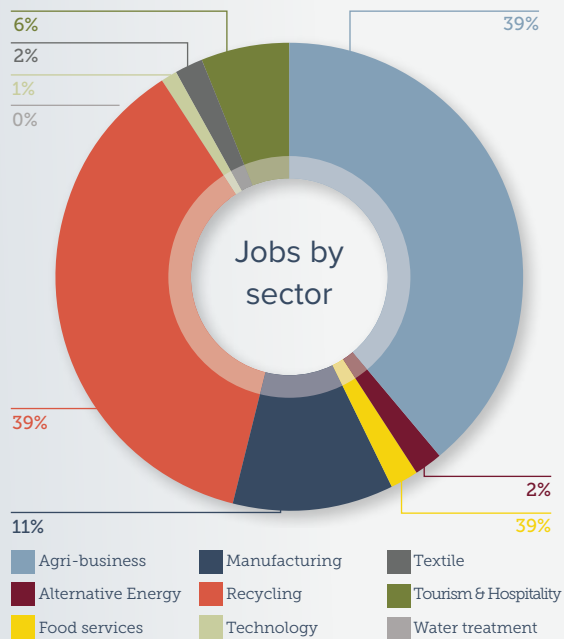
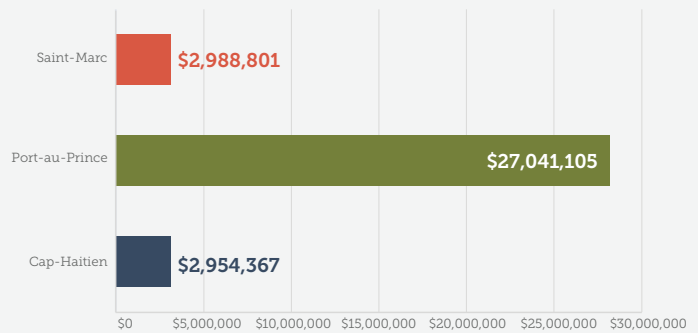


\* FY18: JANUARY TO MARCH



Port-au-Prince Corridor **10,570**  
 Saint-Marc Corridor **682**  
 Cap-Haitien Corridor **6,871**

Sales by corridor





## COMPONENT 2

The Haitian Diaspora has long been a key stakeholder in the country's economic development with remittances contributing up to 20% of the GDP. Post-earthquake, the country saw an increase in remittances alongside a significant increase in migrants which meant the importance of the Haitian Diaspora vis-à-vis the Haitian economy continued to increase. Looking to increase the development impact of remittances and promote investments by the diaspora, **LEAD** embarked on a strategy of engaging the diaspora via multiple activities all centered around harnessing diaspora resources for the development of the country.

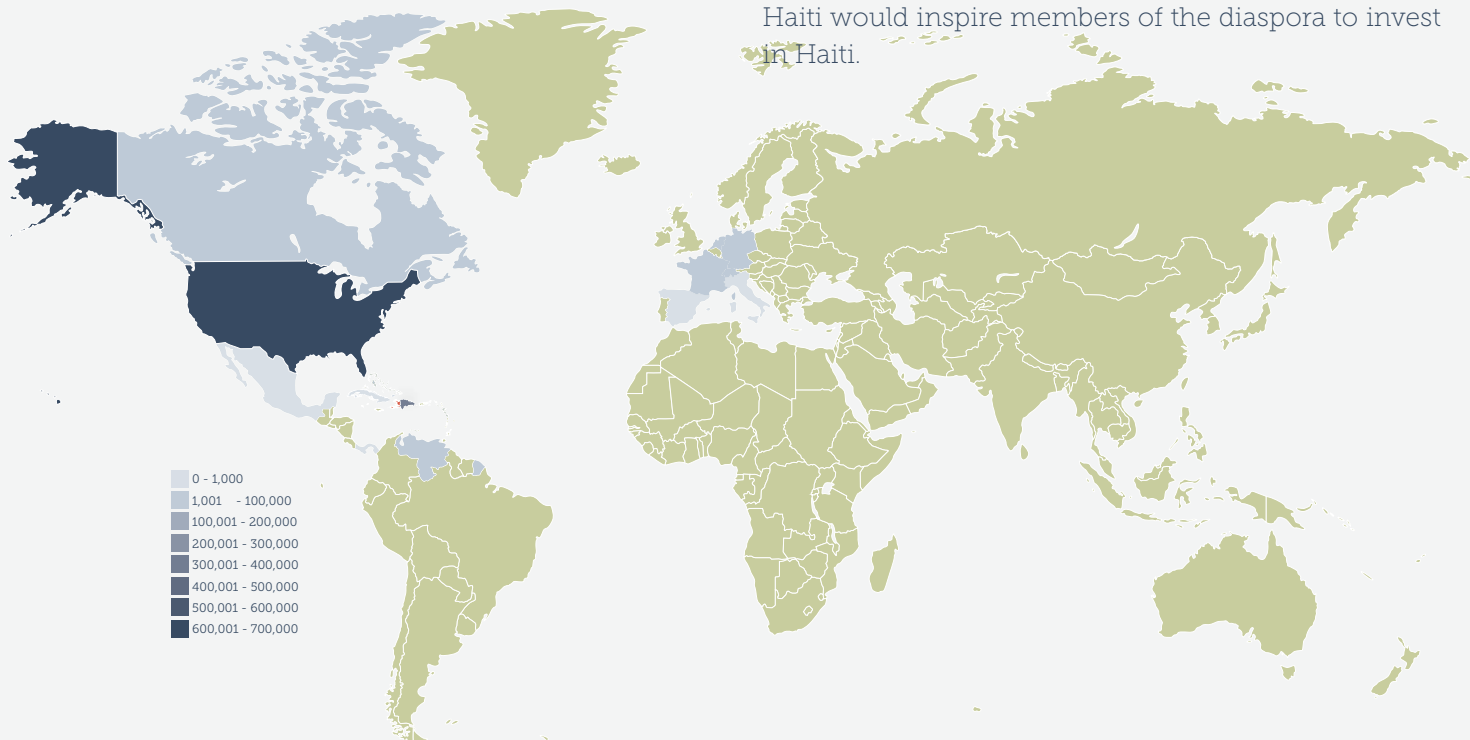


# Diaspora Success

**Outreach to entrepreneurship-minded diaspora:** Wanting to attract those members of the diaspora who were interested in pursuing entrepreneurship opportunities in Haiti, LEAD promoted the BPC to the Haitian diaspora via in-person presentations to diaspora groups at major cities and online webinars. The goal was to inform the audience of the application process, connect applicants to avenues of support, and clarify steps in the process that would lead to an award for successful applicants.

**Nothing sells like success:** Throughout the project, LEAD promoted the success of diaspora entrepreneurs to audiences in the United States and Haiti. While supporting forums and conferences organized by diaspora groups and chambers of commerce, LEAD made presentations to highlight those enterprises that were owned and operated by members of the Haitian Diaspora. LEAD believed that learning first-hand about the success of diaspora entrepreneurs as well as understanding their experience about starting or expanding a business in Haiti would inspire members of the diaspora to invest in Haiti.

**12**  
diaspora  
entrepreneurs  
in the LEAD  
portfolio



Where is the Haitian Diaspora located?

United States	671,000	Sint Maarten (Dutch part)	3,000	Aruba	2,000
Dominican Republic	337,000	Venezuela	2,000	Virgin Islands (U.S.)	1,000
Canada	93,000	Switzerland	2,000	Spain	1,000
France	75,000	Netherlands	2,000	Panama	1,000
Bahamas	29,000	Martinique	2,000	Mexico	1,000
French Guiana	20,000	Germany	2,000	Italy	1,000
Turks and Caicos Islands	15,000	Curaçao	2,000	Dominica	1,000
Guadeloupe	15,000	Bermuda	2,000	Cuba	1,000

Source: Migration Policy Institute tabulation of data from the United Nations, Department of Economic and Social Affairs (2017), Trends in International Migrant Stock: Migrants by Destination and Origin (United Nations database, POP/DB/MIG/Stock/Rev.2017). Available here: <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml>.

# Roadshows

**In-person engagement of the diaspora audience:** LEAD held a total of 13 roadshows – events where LEAD partnered with a diaspora group and engaged a diaspora audience on issues of relevance to Haiti’s economy. Initially, the roadshow events focused on promoting the project and encouraging diaspora members to apply to the BPC. As the number of LEAD-supported diaspora entrepreneurs grew, the focus shifted to promoting successful diaspora entrepreneurs. Roadshows also became a key venue for promoting specific diaspora engagement activities such as research findings from the whitepaper, diaspora challenge initiative, and the social development fund which are all described in more detail further below.

**01**

FY 2012  
New York City -  
Columbia University Earth  
Institute  
Promoting BPC



**09**

FY 2016  
New York City –  
National Alliance  
for the Advancement  
of Haitian Professionals  
Gender Conference/  
Showcasing Women  
Entrepreneurs

**08**

FY 2015  
Port-au-Prince- American  
Chamber of Commerce  
in Haiti Conference/  
Showcasing Diaspora  
Winners

**07**

FY 2015  
Miami –  
Haitian American Chamber  
of Commerce of Florida  
Event/ Whitepaper  
Research Findings



**10**

FY 2016  
Washington D.C. –  
National Alliance for the  
Advancement of Haitian  
Professionals Conference/  
Diaspora Challenge Initiative  
Launch

**11**

FY 2017  
Boston –  
National Alliance for the  
Advancement of Haitian  
Professionals (with partners)  
Diaspora Challenge Initiative  
Symposium/ Diaspora

**12**

FY 2017  
Port-au-Prince –  
Diaspora Challenge  
Initiative Symposium/  
Diaspora Challenge  
Initiative

02

FY 2013  
Port-au-Prince – Haiti  
Renewal Alliance  
Conference/ Promoting  
BPC

03

FY 2013  
Washington DC -  
Haiti Renewal  
Alliance Conference/  
Promoting BPC  
& Showcasing  
Diaspora Winners



04

FY 2014  
Chicago –  
Haiti Hometown  
Associations  
Resource  
Group Event/  
Whitepaper  
Research

06

FY 2014  
Boston – National Alliance  
for the Advancement  
of Haitian Professionals  
Conference/ Whitepaper  
Research Findings &

05

FY 2014/ Atlanta – Haitian  
Nurse's Association Event/  
Whitepaper Research  
Findings



13

FY 2018  
New York City –  
National Alliance for the  
Advancement of Haitian  
Professionals Conference/  
Showcasing all Diaspora  
Engagement Activities

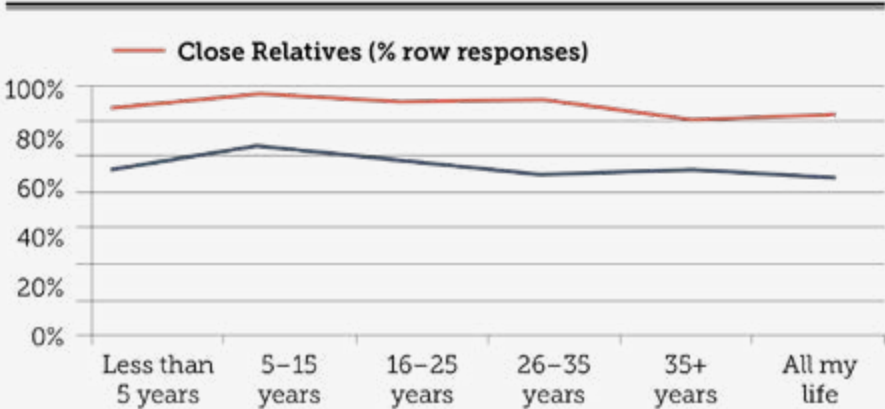
#### Flexible format:

The Haitian Diaspora, while sharing a deep love for Haiti and concern for its development, is a non-homogenous entity with its members varying by age, professional affiliations, kin linkages and generation of migration. To reach this diverse audience, **LEAD** decided to adopt a flexible format to its roadshows. The structure of a roadshow has ranged from large conferences, to one-on-one interactions, to staff-hosted booths and tables, to formal presentations, and small workshops. **LEAD** also engaged with various diaspora groups including formal diaspora organizations, professional associations, and chambers of commerce to ensure that the Haitian Diaspora was kept well informed of **LEAD** activities.

# Whitepaper

LEAD partnered with the Haitian Hometown Associations Resource Group to conduct a survey of the diaspora, study the findings, and develop a whitepaper titled “Haitian Diaspora Engagement & Investment in Haiti: New Findings & Recommendations.” The survey data points were gathered from 436 members who completed an online questionnaire, 80 persons who were interviewed one-on-one at places such as community churches, and 19 in-depth interviews with key stakeholders such as policy makers, community leaders, and business persons. Some key findings from the whitepaper are highlighted below. Please note that this survey allowed for multiple choice responses, so that not all percentage totals equal to a 100%.

Years Abroad and Keeping in Touch with Relatives and Friends in Haiti



**The Haitian Diaspora maintain strong ties to Haiti:**  
As the graph shows, regardless of the time that has passed, the diaspora maintains very close ties to family and strong ties with friends. One important manifestation of this tie is frequent visits home, with nearly 1 in 4 respondents noting that they made more than one visit to Haiti in a year.

**The Haitian Diaspora believes in giving back**  
- either through philanthropy or investments, and sometimes both.

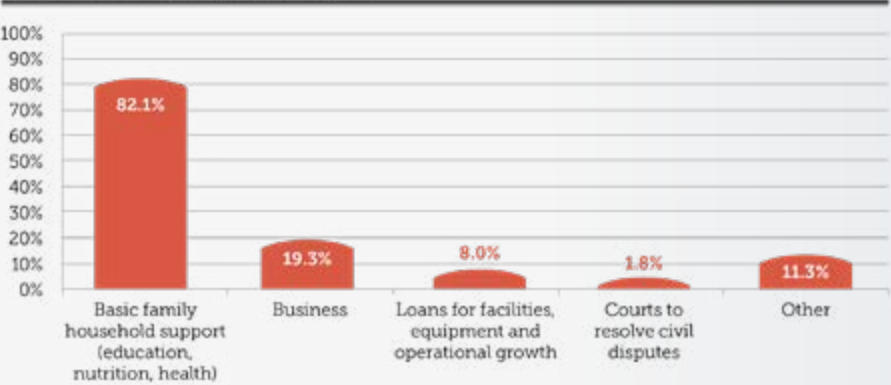
Currently Supporting at Least One Project in Haiti

CURRENTLY SUPPORTING PROJECTS IN HAITI	COLUMN %
Yes	43.6%
No	21.3%
Not sure	35.1%
TYPE OF PROJECT, % POPULATION SUPPORTING	
Education	23.3%
Business/Revenue generating	21.5%
Health	8.7%
Other	7.6%
Environment	3.5%
NATURE OF SUPPORT FOR CURRENT PROJECTS	
Donation of time/knowledge	45.7%
Donation of money	34.1%
Investment in an enterprise	12.0%
Loan to a revenue-generating project and receive interest	4.3%
Interest-free loan to a revenue-generating project	5.8%
Interest-free loan to a social project	4.8%
Other	4.8%



Remittances play a key role in Haiti’s GDP and there is potential to leverage remittance flows: A large percentage of respondents (66%) reported sending remittances, which results in the flow of US\$ 2 billion in yearly flows to Haiti, making up about 20% of the GDP on average. Respondents also noted that the majority of remittances went to direct household expenses for the recipients, a fact that suggests savings and investments products linked to remittances that benefit both the sender and the recipient could be attractive.

GRAPHIC 14  
Remittance Usages, as Reported by Senders



The path to diaspora investment: As the graph below suggests, the Haitian Diaspora has identified clear priorities for where it would like to see investments take root. While many factors are explored that limit diaspora investment today, these identified sectors serve as a roadmap for the Government of Haiti, entrepreneurs, and other stakeholders as to where the supply of diaspora capital might flow towards.

Interest in Sectors of Investment

SECTORS OF INTEREST	COLUMN %
Education	51.4%
Health	34.3%
Small & Medium Enterprises	48.6%
Infrastructure	31.8%
Other	13.0%

“The  
Diaspora’s  
skills, talents  
and resources  
can be  
leveraged.”

— Alix Cantave, Director of the Kellogg Foundation talking about the strong ties between Haiti and its diaspora, particularly in the wake of the 2010 earthquake.

“[The challenge] is not so much to tell the Diaspora to come and invest as it is to provide the necessary tools.”

— Firmin Backer, co-founder of the Haiti Renewal Alliance.

“The return may not necessarily be financial. The return may be the pride that something is done finally, I contributed in making happen.”

— Gepsie Metellus, Executive Director of Santla, explaining the diaspora’s twin interest in investments and philanthropy.

# Social Development Fund

LEAD developed the Social Development Fund as a response to the learnings from the whitepaper noted above, namely that the diaspora were responsive to both investments and philanthropy and had a particular interest in investments that had a strong social impact. Adapting its trusted BPC model to support micro, community-based projects that could be turned into viable, revenue-generating businesses, LEAD launched a call for projects would receive around \$10,000 in funding with the caveat that the project matches the funds threefold to qualify (and with a strong contribution from the diaspora).

## Data-driven activity design

The whitepaper developed by the partner diaspora organization provided two key findings: 1) the diaspora were strongly supportive of social enterprises; and 2) the diaspora were open to multiple ways of combining investments & philanthropy when it came to social projects. These findings are noted below in the two tables. LEAD then extrapolated from these data points to design the parameters of the Social Development Fund and its selection criteria.

**TABLE 16**  
Types of Support for Small Businesses or Social Enterprises

<b>WILLING TO DONATE TO SMALL BUSINESS OR SOCIAL ENTERPRISE (PER YEAR)</b>	<b>COLUMN %</b>
\$100 to \$499	38.6%
\$500 to \$999	8.7%
\$1000 to \$2999	5.2%
\$3000 to \$9,999	1.6%
\$10,000 or more	1.4%
No response	44.6%
Grand Total	100.0%
<b>WILLING TO GIVE INTEREST-FREE LOAN TO SMALL BUSINESS OR SOCIAL ENTERPRISE (PER YEAR)</b>	
\$100 to \$499	28.7%
\$500 to \$999	7.9%
\$1000 to \$2999	2.9%
\$3000 to \$9,999	0.8%
\$10,000 or more	1.6%
No response	58.1%
Grand Total	100.0%
<b>WILLING TO GIVE INTEREST-BEARING LOAN TO SMALL BUSINESS OR SOCIAL ENTERPRISE (PER YEAR)</b>	
\$100 to \$499	22.3%
\$500 to \$999	8.7%
\$1000 to \$2999	7.4%
\$3000 to \$9,999	5.0%
\$10,000 or more	3.3%
No response	53.3%
Grand Total	100.0%

Interest in Types of Investment

<b>METHOD OF INVESTMENT</b>	<b>VERY INTERESTED (ROW %)</b>	<b>INTERESTED (ROW %)</b>
Social Enterprise	22.2%	30.4%
Family Business	20.1%	29.9%
Start Ups	18.6%	29.1%
Land	16.8%	26.0%
Vacation Homes	14.8%	26.0%
Rentals	14.6%	25.6%
Residential/Property	14.3%	29.1%
Public National Diaspora Fund	13.8%	25.3%
Transformative/Strategic Projects	13.6%	26.8%
Infrastructure Bonds	10.7%	16.9%

## The Process

The key tenets of the LEAD BPC – competitiveness, transparency, accountability – were carried over to the design of the Social Development Fund. There was an open call for proposals, and the review process was similar to LEAD where initial review was followed by due diligence and scores were assigned to the applications against various factors including sustainability, diaspora linkages, gender, corridor etc. A total of 7 projects were selected through this process and a formal award ceremony took place in FY 2017.

## Potential to scale

The keys to success for a Social Development Fund project are twofold – selecting community-based projects that can become revenue-generating businesses with the right grant and technical assistance; and engaging the diaspora and promoting the success of a model that combines philanthropy and investment know-how. The success of these 7 projects can be replicated throughout Haiti, with the potential to direct diaspora resources towards communities that have high potential but lack access to resources and partners. Linking up low-income communities to economic growth opportunities will help alleviate poverty and generate funds that can be used to address social development goals that are important to the diaspora such as education, health and infrastructure.



## HAITI 155 - Ice cream for a cause

Bel Rev is a bright space filled with the sound of children (and adults) enjoying scoops of fresh ice cream on hot, sunny days in Haiti.

The dream of a diaspora member who partnered with Blue Marble on this project, Bel Rev (Sweet Dreams) gives back to the community of Fontamara from every sale made.



## ECOLE MASSA – Water is life

At Ecole Adrien Massa, children spend many hours a day learning (and having fun!). With an innovative idea to run a water kiosk that sells clean water to the neighboring community, school officials have found a sustainable way to provide clean drinking water to their students.

Haiti's WASH sector presents many challenges but everyone can agree that providing clean drinking water to students is a great thing to do!



## OJL 5 - Quality national rice

This initiative by an agricultural co-operative acquired equipment to help their farmers dry their rice using more modern methods.

Haitian rice, long known for its flavor, is a staple of the local diet and farmers are the backbone of the economy. This project adds to the rice value chain in the Saint Marc corridor.



## VISION CITADELLE - Clean water for a community

In Verettes, Saint Marc, a rural community lacked water infrastructure. So the visionaries behind Vision Citadelle leveraged their personal investment with funding from the diaspora and LEAD to build a large water reservoir.

Now, they are able to provide filtered water to the community and soon they will be able to supply potable water as well.



## ILES - Learning made fun

The International School of Leadership covers a network of centers in the Northern corridor.

With LEAD's support, these training centers which support many age groups, were able to purchase new equipment and update its curriculum. Tomorrow's leaders are made in today's classes!



## REFADET - Treats made in Haiti

Reseau des femmes actives pour le développement de trou du Nord (REFADET) is an association of dynamic women who transform local products like peanuts delicious butters, jellies and brittle.

Armed with traditional recipes, they combine them with more modern production methods into bring their products to new markets. Enjoy responsibly with a slice of cassava bread.



## CLES - Rice mill in the North

The Collectif de lutte contre l'Exclusion Sociale (CLES for short) is an organization of farmers who pooled resources (local and diaspora) to run a rice mill.

This Cap-Haitian based organization supplies local rice to the ti machann but with the new Takayama rice mill equipment purchased with LEAD funds, their product will soon reach boutique stores and supermarkets.

Port-au-Prince Corridor

Saint- Marc Corridor

Cap-Haitian Corridor

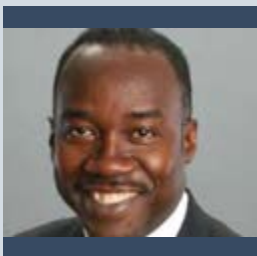


# Diaspora Challenge Initiative

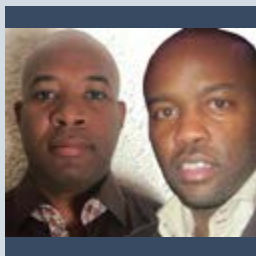
As noted in the whitepaper, besides capital, the Haitian Diaspora have a plethora of resources to offer and a strong interest in Haiti's development. The Diaspora Challenge Initiative was created as an activity to provide the Haitian Diaspora with a platform to put forth their best ideas and projects. The winning ideas & projects were presented to key stakeholders such as donors and the Government of Haiti so that these winners' submissions could become included as priorities, policies and projects for the next few years.



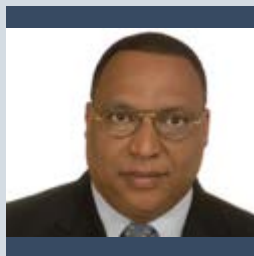
DIASPORA INITIATIVE CHALLENGE  
winners



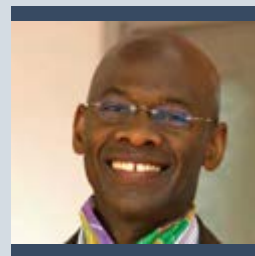
Emmanuel  
Ronald Nertrand



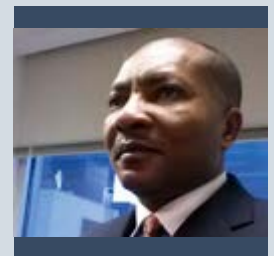
Didier  
Jean-Baptiste  
-  
Steve Chérestal



Jean Conille



Michel Degraff



Scheeler Devis

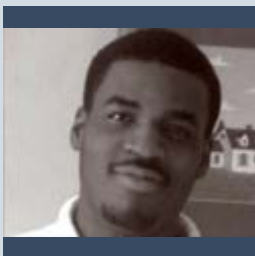


**Process:** The key principle guiding the Diaspora Challenge Initiative was that this should be an activity that would be designed and managed by a diaspora partner, with support from LEAD. Therefore, LEAD first issued a call to diaspora groups to receive proposals for how they would design and implement an activity to garner the best ideas from the diaspora via a competitive process. The submissions received were evaluated by a selection committee and the winning coalition (led by the National Alliance for the Advancement of Haitian Professionals and included GRAHN-USA, Haitian Society for Research Inc. and the Edem Foundation) was awarded a grant to manage this activity.

The NAAHP-led coalition kicked off the Challenge by issuing a call for ideas during a conference in Washington, D.C. that asked members of the diaspora to submit their applications in English, French or Creole. An independent jury then vetted and scored all the submissions (over 189 were received) and the top 10 winners were chosen by a process based on scores assigned. The 10 winners were invited to present their ideas/projects in depth at a symposium held at the Massachusetts Institute of Technology in Boston, followed by a presentation to the U.S. Embassy in Port-au-Prince and a luncheon in Port-au-Prince where key Government of Haiti stakeholders and members of the donor community were present.



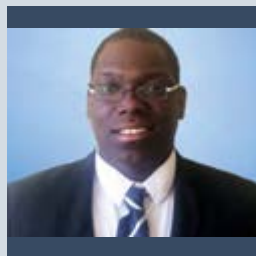
**Innovation & Diaspora engagement:** The Diaspora Challenge Initiative highlights an innovative way in which LEAD sought to engage the diaspora beyond remittances, investments, or philanthropy. The activity was designed to highlight to donors and the Government of Haiti the rich human resources available within the diaspora who are ready, willing and able to work closely with other stakeholders to chart Haiti's development agenda.



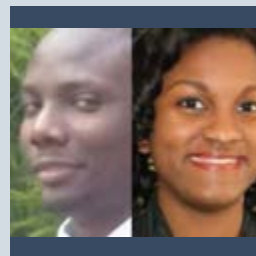
Paul Obed  
Dummingsaint



Nedjeda  
Jean-Paul



MarcRaphael



Wisblaud  
Thermidor  
-  
Beverly  
Malbranche



Marcel Wah

# Remittance Paper

LEAD has drafted a paper on remittances, specifically looking at the various diaspora engagement activities completed under the project and the current global trends in remittances to draw out some potential applications to the Haitian context and the capital needs of SMEs.

LEAD's model of engaging the Haitian Diaspora has resulted an influx of investment capital, know-how and philanthropical flows into the economy. Of particular interest is the Social Development Fund model where the diaspora provide grant contributions to community-based projects which would be linked to diaspora remittance flows to particular communities and the priority sectors and needs of that community.

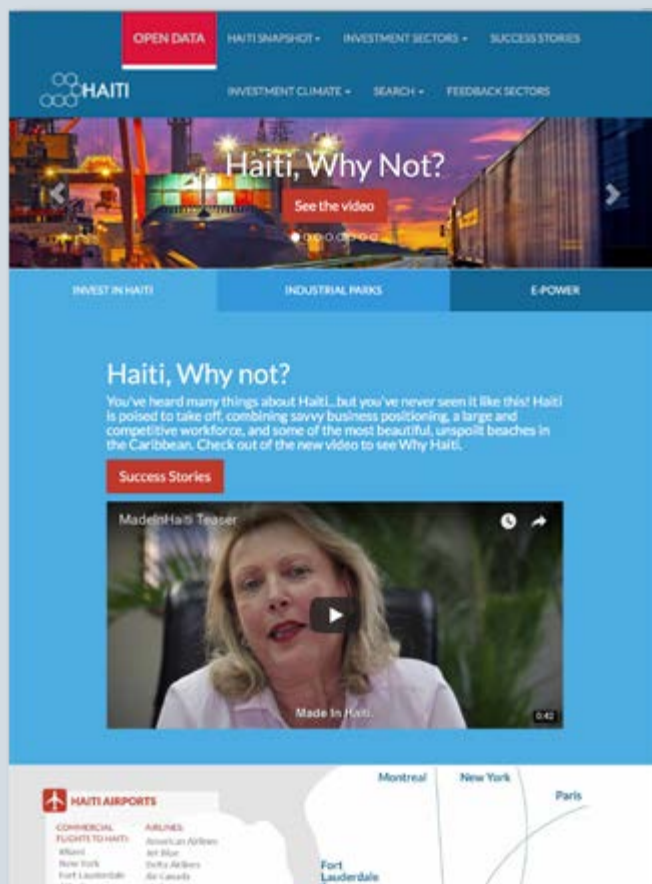
In the current Haitian context, where access to capital affects the majority of micro-, small- and medium-sized enterprises, creating investment-oriented remittance products could potentially leverage private flows to meet larger community or even sectoral needs. This would need careful coordination between the Government of Haiti, financial institutions on both the sender and recipient sides, as well as a pipeline of investment-worthy projects.

It is also worth noting the key trends in remittances globally namely bitcoin/ cryptocurrencies, mobile-based remittances, and savings accounts tied to remittances. As migration remains one of the enduring trends of this century and as more financial services are available digitally, new avenues could open up for the Government of Haiti and financial institutions to creatively leverage private remittance flows to address macro investment capital needs.

# Portal

At the outset, LEAD aimed to launch an online portal to address the diaspora's need for reliable investment oriented information that would considerably aid their ability to invest in Haitian businesses as well as establish new businesses in Haiti. However, as the diaspora activities gained momentum and LEAD began to design the portal, the Government of Haiti, with support from the IADB, entrusted a similar activity to the Centre for Facilitation of Investments (CFI), the government agency tasked with promoting foreign direct investment in Haiti.

In order to coordinate closely with this important government initiative, LEAD had multiple consultations with the senior leadership at CFI and mutually agreed to boost CFI's portal with LEAD-based information in order to provide visibility to successful LEAD enterprises and to continue to demonstrate the wisdom of investing in SMEs particularly those in the priority growth sectors identified by CFI.





LEAD believes that this collaboration with CFI will help highlight, through a government agency, the various successes and opportunities for investment that exist within the SME ecosystem in Haiti.

## Lessons Learned

### ON ENGAGING THE HAITIAN DIASPORA

- ▶ Constant engagement via multiple activities is critical to building lasting, productive relationships with the diaspora.
- ▶ Supporting diaspora-led efforts are more important than direct implementation of project activities.
- ▶ Working with a diverse group of diaspora organizations helped **LEAD** better understand the needs of this non-homogenous group.
- ▶ Activities must be designed to have follow-on actions such as diaspora-run businesses continuing to thrive, or diaspora challenge initiative ideas becoming part of public policy.
- ▶ Sustainability is an important consideration. In order to promote effective engagement between Haiti and its diaspora, sustainable solutions such as the Social Development Fund or remittance-based investment products must be promoted.





Lead site visit to  
veerhouse voda

## CROSS-CUTTING **ACTIVITIES**



# Grants Management

LEAD's matching grant model called for a continuous, ongoing interface between enterprises in the portfolio and the grants management team. The grants team was engaged even during the outreach process promoting the competition to ensure that enterprises could understand the concept of managing USG funds, as well as clarify how to secure matching private capital to unlock grant funds.

Once an enterprise received a grant from LEAD, the grants team provided support through informative compliance training sessions to introduce the principles of USG cost accounting as well as other minutiae of managing USG funds. Similarly, the grants team administered evaluative questionnaires that assessed the enterprise's ability to manage grants effectively and provided recommendations for strengthening an enterprise's internal management capacity where needed. Finally, the grants management team received detailed financial reports on a monthly basis to help aid management of the grants. Audits were carried out when enterprises purchased equipment to ensure compliance with grant terms.

During the life of the grant, LEAD provided continuous support to its enterprises through routine site visits, processing of disbursement requests, verifying matching fund and expense reports, reviewing project technical reports, monitoring compliance with environmental management plans, verifying branding & compliance requests, providing one-on-one firm level technical assistance, and measuring results.

## The Process:

- Enterprises require continuous, ongoing support to understand their obligations to manage USG funds and optimize their business operations.
- Routine site visits to enterprises and meetings with entrepreneurs helped the LEAD grants management team to coordinate its support to enterprises across grants, communications, monitoring & evaluation, technical assistance, and environmental compliance.

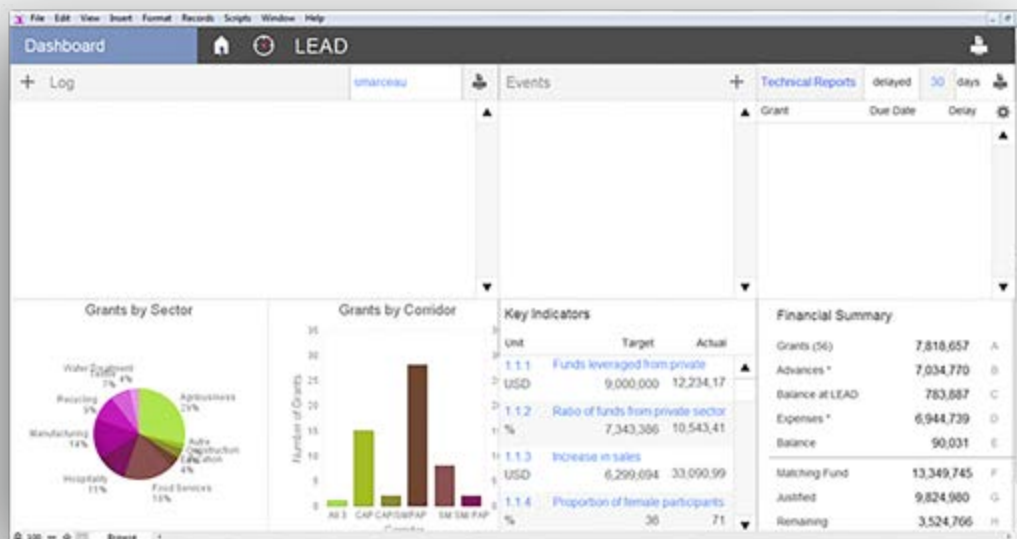


# Monitoring & Evaluation

LEAD recognized that enterprises wouldn't be well versed in measuring performance against grant metrics in addition to their business operation metrics. Therefore, all LEAD sub-awardees received training in monitoring and evaluation requirements as well as one-on-one visits or meetings to help them establish a plan to capture the relevant data and improve their internal reporting methods.

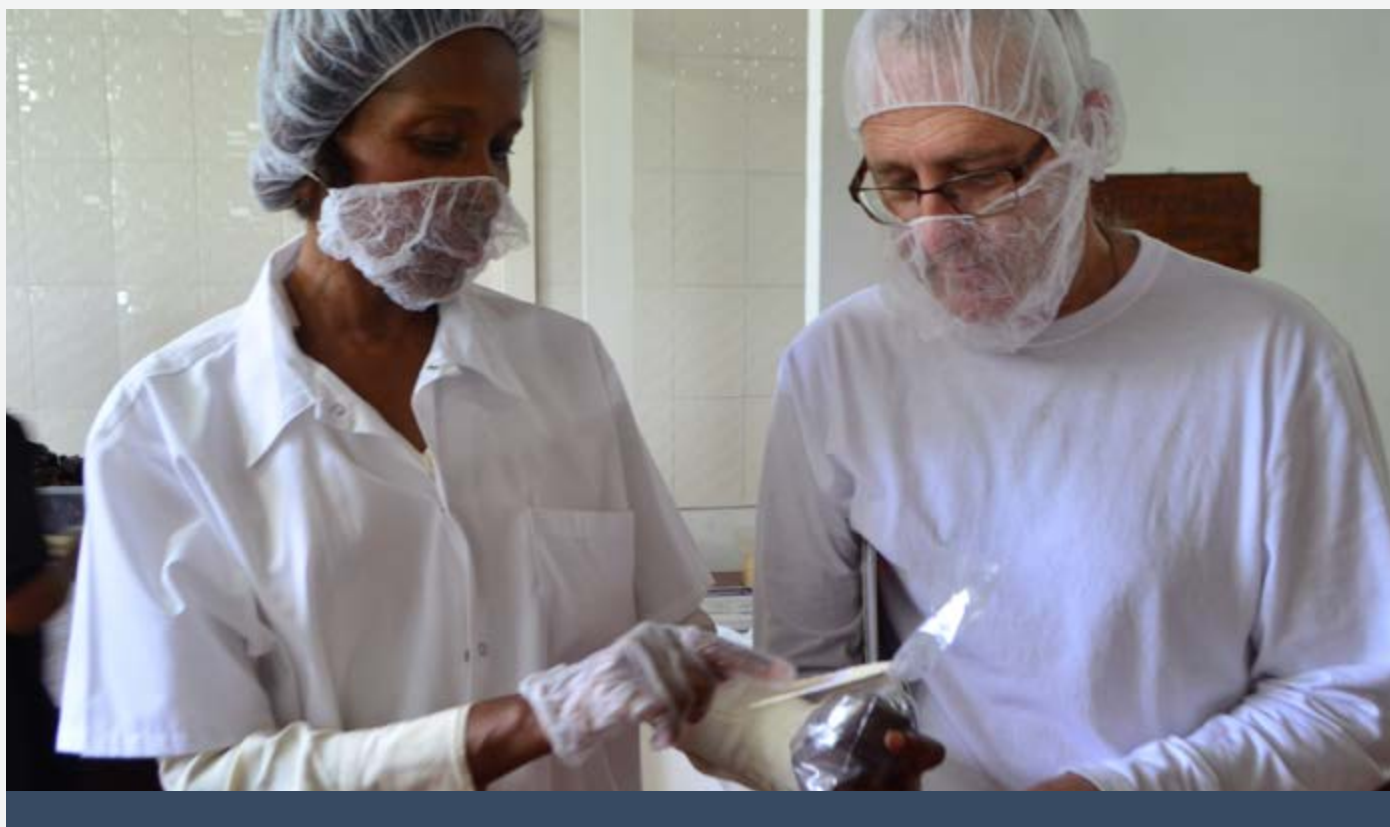
LEAD received monthly reports from enterprises (and partners) that measured progress against the objectives of each grant as well as provided information on any challenges encountered or successes accomplished in that reporting period. These reports were verified, supplemental documentation was collected, and the cumulative results were provided to the donor as well as analyzed internally to help plan future activities.

LEAD submitted results of its monitoring & evaluation activities into DevResults, the USAID data portal. LEAD also operationalized a database called LMS (LEAD Management System) to allow for an electronic management of relevant records including grant agreement details, disbursements, reports, site visits, trainings etc. to ensure real-time information about the project was available to the entire team. This allowed for LEAD to make sound, data-driven management decisions in real time to assist enterprises and measure progress. Throughout the project, the database continued to improve and remained a key tool in LEAD's every day operations.



## Key Takeaways:

- Enterprises were generally unused to tracking information as mandated by USG/USAID guidelines and required assistance in understanding the needs and adapting them to their business processes. This was an especially fruitful process in the Haitian context where enterprises often lack rigor in maintaining business records.
- To help meet LEAD reporting requirements amongst other reasons, some enterprises (ECSSA, DloHaiti for example) deployed highly sophisticated data capture systems in their business operations which allowed for sophisticated, real-time data modeling and promoted efficient business decision making.



## Environmental Management

LEAD's environmental management works to ensure that SMEs are aware of the environmental risks associated with their planned activities, and are trained to adopt new practices and reduce harmful effects. LEAD's environmental management began with an environmental review of an enterprise's existing or proposed activity to identify potential environmental risks, and propose solutions. An Environmental Management Plan was prepared for each enterprise, and monitoring of grant activities against the proposed management plan continued throughout the life of the project.

LEAD also provided one-on-one training on environmental management as well as recommended consultants to support the businesses in implementing activities in a manner compliant with the EMPR. LEAD submitted EMPRs for each sub-grantee and developed Umbrella EMPRs (UEMPRs) for specific industries that received LEAD grants but whose activities were already covered by existing EMPRs. LEAD worked closely with the assigned USAID environmental officer.

Enterprises made visible improvements to their business operations as a result of such support. Some examples include safety precautions posted prominently in manufacturing plants, safety gear made available to at-risk employees, and improved ventilation and waste management systems.

### Key Takeaways:

- Enterprises are receptive to including environmental management plans as part of their business activities but need additional support in the form of firm-level assistance as well as general trainings.
- Implementing such measures can have positive impact on an enterprise's productivity and increased well-being of their employees.

# Communications

LEAD utilized multiple channels of communication to inform grantees, partners, stakeholders, and the general public about its activities. Some examples of communication activities include:

## WEBSITES

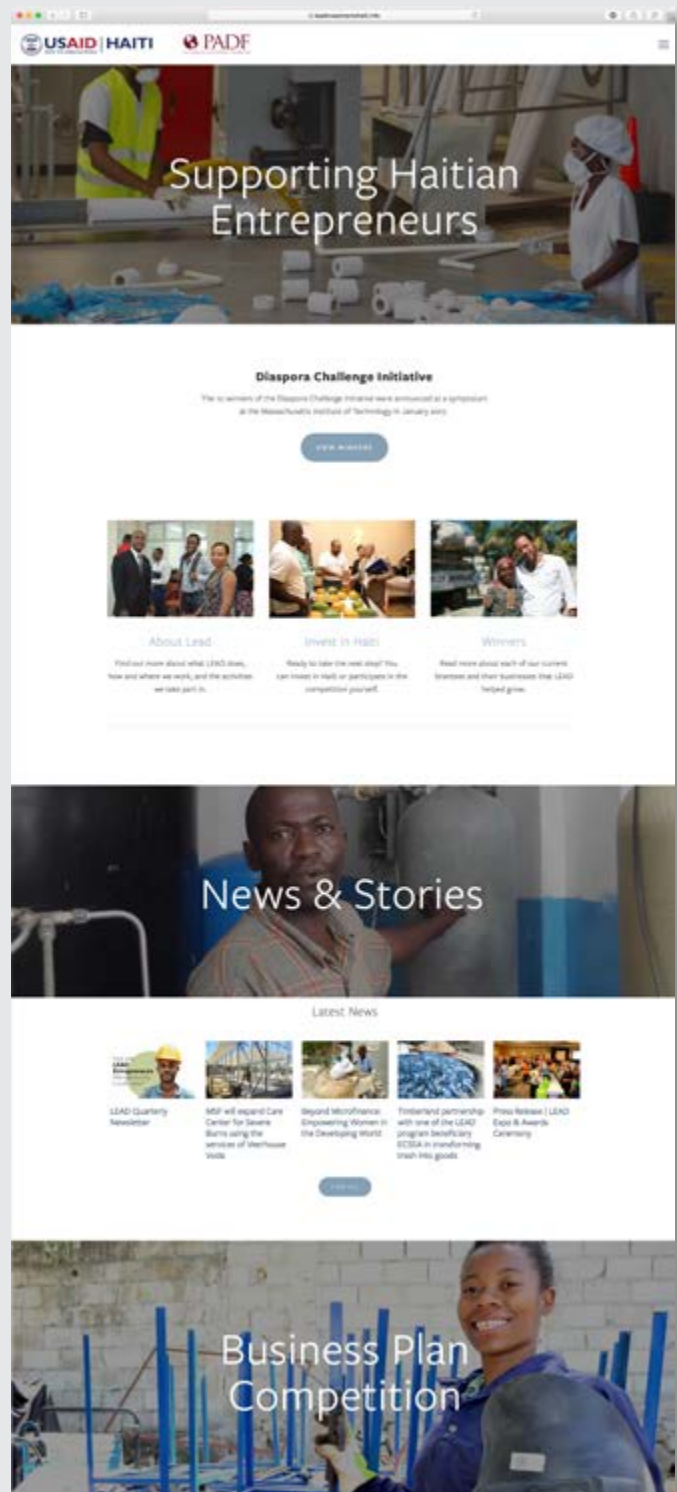
- Promotion of the **LEAD** project, its sub-grantees and activities on its user-friendly and easily accessible website. See <http://leadinvestmentshaiti.info/>
- **LEAD** is also promoted through the PADF website. See [www.padf.org](http://www.padf.org)

## OUTREACH ACTIVITIES

- Email blasts and newsletters to enterprises, private sector leaders, chambers of commerce, partners, BDS providers, and various other well networked organizations and individuals to promote the **LEAD** BPC
- Outreach activities locally and in the Diaspora (Please refer to events section for local outreach events and component 2 section for diaspora outreach.)
- Distribution of updated factsheets and booklets at events

## PRESS

- Multiple news reports in the written press, radio and TV were done throughout the life of the project. The exhaustive list is available in the communications annex.





## SOCIAL MEDIA



- Facebook posts regarding enterprise activities: see [Facebook/PADF Haiti](#)
- Tweets regarding enterprise activities: see [Twitter/PADF\\_Haiti](#), [Twitter/PADF\\_org](#)



## OTHER COMMUNICATION MATERIAL

LEAD communication team also developed a number of branding materials throughout the life of the project to promote enterprises and project activities:

- Factsheets for the project and for each sub grantee (updated regularly)
- Success stories to showcase enterprises
- Branding material: Banners, folders, brochures, Tablecloths, etc.
- Project power point presentations

# Entrepreneurs Spotlights

## Global Entrepreneurship Summit (GES) 2016

Four Haitian entrepreneurs were selected to attend the Global Entrepreneurship Summit (GES2016) hosted by President Barack Obama that was held at Stanford University in Palo Alto, California, from June 22-24. Selected from among 5,000 applicants from around the world, the Haitian businesses joined over 700 entrepreneurs and more than 300 investors at GES2016.

All four businesses selected from Haiti have received investments from the Leveraging Effective Application of Direct Investments (**LEAD**) project, project funded by the U.S. Agency for International Development (USAID) and implemented by the Pan American Development Foundation (PADF) that supports small- and medium-sized businesses in Haiti. "We are very proud of all our **LEAD** grantees," says Nadia Cherrouk, PADF Country Director and **LEAD** Chief of Party. "Those who have been selected to attend the Summit represent the faces of Haiti's emerging economy. They have worked so hard to grow their businesses and are shining examples of what it means to pursue a dream, despite all obstacles."

LEAD entrepreneurs selected to participate at the GES 2016 range from a social enterprise that markets propane stoves to reduce carbon emissions to a company that manufactures hi-tech computer tablets. They are:



**Myrtha Vilbon, Glory Industries:** Glory Industries manufactures personal paper products such as toilet paper and napkins. The factory employs 49 people, 70 percent of them women. 10% have a disability. Thanks to an early grant from LEAD, the company secured bank loans and leveraged over \$1 million to start operations.



**Kalinda Magloire, SWITCH S.A.:** SWITCH S.A. markets propane stoves to the Haitian Diaspora, harnessing the power of remittances to support development. The company has generated over \$400,000 in sales since it started operations in 2014. SWITCH also partners with renowned chef José Andrés and World Central Kitchen to convert charcoal stoves to SWITCH's propane stove system for school lunch programs.



**Elan Moncher, Action et Cooperation en Développement (ACOD):** ACOD is a Haitian agricultural enterprise operating in the North of Haiti, which produces a variety of organic hot peppers, using only organic fertilizers. Through the LEAD project, the company received a grant to install irrigation equipment, construct a business facility, and improve their operations. In the future, ACOD will be able to concretize its project of promoting and exporting the organic Haitian pepper variety to the international market. The company's expansion has been able to generate over 400 jobs.



**Diderot Musset, Sûrtab S.A.:** Sûrtab S.A. is a Haitian start-up that manufactures a popular brand of "Made in Haiti" Android tablets. Since launching in 2013, Sûrtab has grossed more than \$4 million in sales and grown to provide technology-based solutions for key sectors such as education, health and agriculture. Eighty percent of the company's employees are women.

Haitian entrepreneurs face a multitude of constraints to growth as the country continues to develop its infrastructure. Despite these challenges, LEAD has helped to fund dozens of thriving businesses in Haiti. "Haiti presents a complex and challenging business environment," says Jene Thomas, USAID Haiti Mission Director. "The LEAD project shows that with the proper support and financing, businesses can indeed thrive in Haiti. USAID is pleased to see these entrepreneurs included in a prestigious group of their peers from all over the world."

GES brings together entrepreneurs and investors from around the world. The Summit also shows how entrepreneurs are using business to address global challenges. This year's location in Silicon Valley was meant to showcase America's start-up culture while introducing the American market to global investment opportunities. For more information on GES 2016, including the agenda and list of attendees, please visit [www.ges2016.org](http://www.ges2016.org)



## Global Entrepreneurship Summit (GES) 2017

Two LEAD entrepreneurs Pierre Yves Gardère of SISALCO and Monique Duperval of Expert Concept S.A. were also selected to attend the 2017 GES held in India in November 2017. The year's Summit highlighted the theme "Women First, Prosperity for All," and focused on supporting women entrepreneurs and fostering economic growth globally.





## Official Visits to Grantees



- **President Joseph Michel Martelly and U.S. Ambassador Pamela White visit le Jourdain Atelier:**

In 2014, one of the first beneficiaries of the LEAD project “Le Jourdain Atelier” received a visit from then President Michel J. Martelly along with U.S. Ambassador at the time Mrs. Pamela White. The delegation was impressed by the small textile company located in Cap-Haitien that was financed by the project to expand their operations. The plant which then employed almost 20 people was paying over the minimum wage.

- **USAID Officials visit to SURTAB:**

USAID Administrator, Dr. Rajiv Shah, visited SURTAB in December 2014 accompanied by Ambassador Pamela White (Ambassador of the United States to Haiti), Ms. Beth Hogan (Acting Assistant Administrator for the Latin America and Caribbean Bureau (LAC) and Senior Deputy Assistant Administrator (S/DAA) for LAC), Mr. John Grocke (Mission Director of USAID-Haiti), and other staff from USAID. SURTAB is a Haitian enterprise that manufactures “made in Haiti” tablets for use by consumers, enterprises, and institutions. LEAD awarded a \$200,000 grant to SURTAB in September, 2013, that allowed the tech-startup to ramp up its operations.



Upon his arrival, Ms. Nadia Cherrouk (Chief of Party for LEAD) briefed the Administrator about the LEAD project after which he toured the facilities alongside Mr. Maarten Boute, SURTAB’s CEO. During his visit, Dr. Shah was able to see tablets being assembled, repaired, and tested by over 40 young women (and some men!). His hour-long visit included a tour of the “clean room”, where the majority of the high-tech assembly takes place. His tour of the clean room was led by a young Haitian engineer who heads up product development at SURTAB and sets quality standards for the tablets.

Dr. Shah and senior USAID officials complimented SURTAB and LEAD on the success of the enterprise and the project overall. Along with start-up capital, LEAD follows through with technical assistance which was critical for SMEs as SURTAB’s CEO noted. SURTAB and its team are working hard to project another image of Haiti- the land of great opportunities and possibilities. LEAD is proud of their achievements and those of our other SMEs!





- **USAID official visit to Glory Industries:**

The company had the privilege of being visited on February 16, 2016 by a delegation from the US Embassy and USAID that composed of Ambassador Peter Mulrean, Deputy Chief of Mission Mr. Brian Shukan, USAID Mission Director Jene Thomas, and USAID EGAD office: Michael Wyzan, Isaac Michel and Marie-Renee Vertus. The entrepreneur, Ms. Vilbon provided a tour of the factory operations to the Ambassador, USAID Mission Director and team. Visitors followed safety standards to view the basic process of turning bales of paper into long rolls that were then cut to size and packaged. The Ambassador concluded that it was the passion and dedication of entrepreneurs like Mrs. Vilbon that lead to the success of SME's in Haiti and demonstrates the importance of projects such as LEAD.

# Major LEAD Organized Events

**Info sessions** promoting the BPC as well as LEAD's objectives were held throughout the project in all three corridors, however emphasis was put on SM and CAP corridors to encourage decentralization. Invitees were targeted through local resources such as chambers of commerce, financial institutions, local organizations working with SME's etc. These info sessions allowed the project to have a wide variety of enterprises participate in project activities particularly the BPC.

**Diaspora outreach** was organized in major cities in the U.S. promoting and encouraging diaspora entrepreneurs to take part in LEAD project activities. Please see the BPC and component 2 sections for details.

**Power Breakfasts** are now a signature networking event organized periodically by the LEAD project. The morning event is an opportunity for actors of the SME ecosystem to meet and discuss of opportunities, challenges and resources available. Some key Power Breakfasts are highlighted below:

## *Power Breakfast, March 4th 2016*



LEAD organized a networking event on March 4th, 2016 at Hotel Montana. This "Power Breakfast" brought together beneficiaries from the previous BPC and entrepreneurs from the last BPC from all three corridors.

Organizations working with SME's such as the Center for Facilitating Investments (CFI), Ministry of Commerce (MCI), SOFIHDES, Sogebank, Root Capital, and numerous BDS providers were well represented.

With a room full of over eighty attendees, the event began with opening remarks from LEAD Chief of Party, Mrs. Nadia Cherrouk, who stressed on the importance of SME to the Haitian economy and the objective of these networking events organized by LEAD to ensure collaboration opportunities and exchange of products and services.

These remarks were followed by presentations from the Ministry of Commerce represented by M. Herrick Dessources and Mr. Michelet Espady. They presented the diverse products and services available at MCI for SME including a funding project, a BDS provider's platform for technical assistance and the creation of micro-parks. One of the Ministry of Commerce's priorities is to help promote and stimulate the development of enterprises in Haiti.

The CFI also took the opportunity to present their wide range of services to enterprises through their Director, Mrs. Norma Powell. They presented the objective of CFI which is not only to promote Haiti as a potential investment place to investors abroad but also to facilitate investments being done in Haiti not only by foreign investors but also by local entrepreneurs.

The remainder of the matinee was reserved for networking in a non-formal setting which facilitated exchanges between the enterprises and the institutions present. **LEAD** hopes that events like this will continue to create synergies between SME and their peers and the institutions that offer financial and non-financial products tailored to them.

### **LEAD Power Breakfast, March 2017**



On March 30, 2017, **LEAD** commemorated Women's month by organizing a networking breakfast themed "Women in Business." The **LEAD** portfolio had 16 women-led enterprises which represented 35%.

The panel was comprised of seven women entrepreneurs from the **LEAD** portfolio who discussed successes, failures, opportunities, challenges, struggles and accomplishments as women entrepreneurs in the Business Climate of Haiti.

The event was attended by representatives of USAID Haiti, **LEAD** grantees, partners, private sector representatives and other stakeholders who followed up with questions. A common takeaway from the panel was that perseverance and seriousness in doing business were guarantees for success. Following the panel and the Q&A session, the audience continued to exchange and engage. These networking events represent a tangible platform for SME and stakeholders to discuss opportunities, challenges and create synergies to continue developing the private sector in Haiti.





**LEAD** *Power Breakfast, October 2017*

LEAD partnered with the KONBIT project to host another edition of its networking Power Breakfast in FY18. The event was held on October 4, 2017, at the Karibe Convention Center. In a room full with over 85 attendees, the project's Chief Of Party, Mrs. Nadia Cherrouk welcomed guests and speakers followed by a brief introduction of the event and its content by the DCOP, Mrs. Chantale Pierre-Louis. The attentive crowd listened closely to a full presentation of the KONBIT project and the interactive platform it recently launched <https://konbitayiti.globalinnovationexchange.org/>. Gilles Sassines who is the Development Innovation Network Lead for KONBIT led the presentation and demonstrated the navigation and the "how to's?" of the platform in real time followed by a Q&A session in which they were able to address the attendees questions.

KONBIT is a USAID-financed project with the goal of increasing the number of Haitian development partners who are accountable to their constituents, and who are able to effectively compete for and manage resources to achieve significant and sustainable development results in Haiti.

Subsequently, a presentation from PROFIN S.A. was delivered by its CEO, Mr. Robert Paret Jr., PROFIN is a financial institution that operates as an investment bank, under the authorization of the Central Bank (Bank of the Republic of Haiti – BRH). The company offers two types of services: first, financial services in the form of: Bank financing research; debt restructuring; search for private or institutional investors; public issuing of securities (shares and/or bonds); company sale; merger and acquisition. Secondly, PROFIN offers investment services which consists of: custom investment strategies and advice; Securities (including shares and/or bonds) sale; Investment Portfolio Management. PROFIN is the first firm of its kind operating in Haiti. The breakfast concluded with the opening of the networking space which was facilitated by the color coding of the name tags which allowed guests to identify people they wanted to engage with in the room such as entrepreneurs, financial institutions, partners, consultants, BDS, staff, etc.



# EXPOS AND AWARD CEREMONIES

Two award ceremonies and expos were organized to deliver award certificates to BPC winning enterprises and give them a platform through the expo to showcase the enterprises' products and services to a targeted public. This was a high level event attended by officials of USAID, the GOH, partners, financial institutions, private sector representatives, actors in the SME ecosystem, members of our review committees, jury panels, and LEAD entrepreneurs.

## LEAD EXPO & AWARD CEREMONY 2015

On June 2nd, 2015, LEAD hosted a ceremony and exposition to both honor and showcase the 31 winners of at the LEAD BPC. The event was held in the Mahogany Conference Centre at the Karibe Hotel in Port-au-Prince. More than 200 people from the private sector, financial institutions, international organizations and the Government of Haiti attended the event. The event consisted of an award ceremony, followed by an exposition of the enterprises, and B2B match making-session between entrepreneurs and attendees. Mr. Robert Labrousse, The Minister of Haitians Living Abroad, was also in attendance.

Mr. Christian Barrat, as he attended the event as the representative of the Ambassador of the United States to Haiti said, **"We want to see even more aspiring entrepreneurs attract investment, generate jobs, and grow. We also want more Diaspora investors to support community-driven economic development. I am pleased to see that we are on the right track."**

- Mr. Barratt also conveyed the sentiments of U.S. Ambassador Pamela White.



Mr. Christian Barrat, the Deputy Mission Director of USAID-Haiti addressed the audience on behalf of the U.S. Ambassador to Haiti. Mr. Barrat and Ms. Nadia Cherrouk, along with Ms. Gladys Coupet, well-known banking executive and former member of the Board of Directors of PADF, and a Representative of the Ministry of Agriculture, presented certificates to the 31 winners in the areas of Cap-Haitian, Saint Marc and Port-au-Prince.

After the ceremony, entrepreneurs had the opportunity to showcase their businesses at an exposition. All enterprises were invited to set up a booth at the event displaying their products and information about their services for other guests in attendance. Some enterprises even provided samples for participants. This allowed them to gain valuable exposure and showcase their business to a wide audience.



The event also included an hour long business-to-business (B2B) networking session to help the entrepreneurs forge important relationships with financial institutions, service providers, and sector experts. The B2B partner matchmaking was intended to encourage productive interactions between participants at the event. The sessions were designed to provide a platform for the entrepreneurs to access resources beyond capital such as expertise, industry connections, and support from other investors, and a network of other entrepreneurs.



The B2B sessions immediately resulted in several fruitful connections. Three examples of linkages made between LEAD enterprises are notable. The first linkage was established between Madame Belfwi and Sienna S.A., who will provide them with papayas for their smoothie production. Glory Industries and INGSA are in the process of negotiating a partnership in order to complete a full line of cleaning products for customers to purchase. Sisalco was also connected with Pisa and Moulin Lanote in order to produce bags for their cocoa and rice distribution. These negotiations are a direct consequence of the B2B sessions held at the Expo and will benefit not only the companies themselves, but also the Haitian economy, as local businesses continue to support each other.





## LEAD EXPO & AWARD CEREMONY 2017

LEAD, in collaboration with USAID, organized the second SME Expo and Award Ceremony on June 8, 2017, at the Karibe Convention Center. The expo attended by USAID officials, representative from the Ministry of Commerce, private sector, partner organizations, financial institutions, business student delegations and other stakeholders, served as a platform to award new BPC winners and showcase the success of all enterprises in the portfolio.

Haiti's entrepreneurial spirit was on full display at the Expo showcasing Haitian- and diaspora-led businesses in Port-au-Prince, Saint-Marc, and Cap-Haitien. Dozens of businesses received funding and support from USAID through the Leveraging Effective Application of Direct Investments (LEAD) project.

With the theme "SME's Engines of Economic Development," The LEAD Expo was a chance for entrepreneurs to network and display their products to members of the public and private sectors as well as potential investors. U.S. Embassy Chargé d'Affaires Brian Shukan congratulated the entrepreneurs on their success. "Today we celebrate you all as you display Haiti's economic potential," he said in his remarks. Several of the LEAD entrepreneurs also spoke about their experiences running businesses in Haiti and of how grateful they are to the LEAD project which has

not only helped them fund their business plans but also provided them with the necessary tools they need through support and technical assistance to better reach their goals.

Other remarks came from the Chief of Party Mrs. Nadia Cherrouk who thanked USAID for their continuous support, and saluted the outstanding work being done by the enterprises supported by the project. The PADF home office in Washington, D.C. was well represented by its Chief Operating Officer Mrs. Kristan Beck. Mr. Herrick Dessources from the Ministry of Commerce reiterated the Ministry's engagement to supporting enterprises in Haiti to reach their full potential.

Following the Award Ceremony where the winners from the last competition as well as the community-based social enterprises known as SDF, the expo was open to the public. The officials toured the booths and were amazed at the entrepreneurs' wide range of products and services of international standard that reduce the need for imports and encourage exportation as well as generating revenues and encouraging job creation. At the time of the event, the 46 LEAD enterprises had stimulated the Haitian economy by creating 13,695 jobs and producing \$27.9 million in sales and these numbers were on full display at the Expo.



LEAD BPC winners with their certificates

## LEAD KEY DIASPORA EVENTS



### Diaspora Meet and Greet with USAID Haiti Mission Director

In September 2016, LEAD had the opportunity to host a “Meet & Greet” with the USAID Haiti Mission Director, Mr. Jene Thomas and Haitian American Diaspora Organization representatives. The event took place at the PADF headquarters in Washington DC, where over 30 participants discussed USAID’s vision for its next five year strategic plan for the Haiti mission. This initiative was based on USAID’s efforts to engage the diaspora in the economic and sustainable development of their homeland. The discussions points were the following:

1. Successful interventions/approaches with the diaspora that could be scaled up.
2. Best way/channels to communicate with the diaspora.
3. How the diaspora sees the role of USAID/the international community in the long-term in the development of Haiti.
4. Key reform priorities of the diaspora.

The dialogue was quite positive and constructive, with exchanges regarding opportunities, challenges, gaps and possible solutions.



## Diaspora Challenge Initiative (DCI) Award Ceremony



*The Haitian Diaspora remits \$2 billion a year in Haiti. Most of it goes toward supporting critical and immediate consumption needs. LEAD partnered with NAAHP to work with the Diaspora to develop and implement ideas that will also spur economic development in Haiti through remittances by launching the Diaspora Challenge Initiative (DCI).*

The Diaspora Challenge Initiative aims to leverage ideas about successful development concepts amongst members of the Diaspora looking for opportunities to contribute to Haiti's development. NAAHP and partner organizations EDEM Foundation, GRAHN-USA, and the Society for Haitian Research (SHR) led this campaign to select the top 10 winning ideas through a transparent process. The winning ideas cover many sector of development such as agribusiness, technology, energy, health and education.

On January 21, 2017, NAAHP and partners organized a symposium at MIT in Cambridge Massachusetts, where the 10 winners were announced and showcased in front of a large audience of key stakeholders. DCI winners had the opportunity to present their ideas and receive their certificates of accomplishment from LEAD AOR Mr. Isaac Michel and Mr. Paul Altidor Haitian Ambassador.

Keynote speakers at this grand event included Haitian Ambassador to the U.S. Mr. Paul Altidor, Boston Mayor Martin J. Walsh and Massachusetts Senator of Haitian decent Mrs. Linda Dorcea Forry. The winners are seeking to secure funding to pilot or expand their ideas in the near future; their profiles are available via <http://dci.naahpusa.org/>



# Financial reporting SF-425

Submitted as a separate attachment





We would like  
to **thank all** the LEAD Partners  
for their contribution  
to the project.



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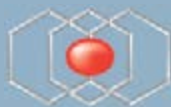
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## About PADF

The Pan American Development Foundation, a 501(c)(3) nonprofit organization, brings together many stakeholders to improve livelihoods, empower communities, strengthen civil society, support human rights, protect the environment and respond to natural disasters in Latin America and the Caribbean.

Established by the Organization of American States in 1962, PADF has worked in every country in the region. In 2016 PADF reached more than eight million people by investing over \$95 million in development resources in 18 Latin American and Caribbean countries.

## About USAID

USAID is the lead U.S. Government agency that works to end extreme global poverty and enable resilient, democratic societies to realize their potential.



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