



**INTEGRATED DEVELOPMENT  
FOCUS, SOMALIA - IDF-S**

# **HUMAN RESOURCE MANAGEMENT, ADMINISTRATION POLICIES AND PROCEDURES MANUAL 2018**





# **INTEGRATED DEVELOPMENT FOCUS – SOMALIA (IDF-S)**


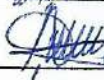

## **Human Resource Management, Administration Policies and Procedures Manual 2018**

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**POLICY APPROVAL**

<b>APPROVING AUTHORITY</b>			
<b>Title</b>	<b>Name</b>	<b>Signature</b>	<b>Date</b>
IDF Executive Director	Ali Mohamed Noor		15/07/2018
IDF Board Member	Lul Mohamed Aedi		15/07/2018
IDF Chairperson	Ibrahim Abdullahi Ibrahim		15/07/2018



## CHAPTER 1: INTRODUCTION AND MINIMUM STANDARDS

### 1.1 Overview

- a) IDF considers its staff as the most important asset hence the need for staff has clear guidance on the minimum standards necessary to ensure that IDF manages its staff well.
- b) The procedures and guidelines in this Personnel Policy contain information which aims to provide staff with an appropriate working environment, where each person will access clear information, enjoy good direction and information of the organizations decision-making process in relation to human resource issues.
- c) There is desirability of retaining the regulations existing unless the need to amend them is clear. There is also desirability of having terms and conditions of service for staff being related as closely as is practicable to those obtaining in other comparable organisations
- d) These regulations shall apply to all employees of IDF unless any of the contents specify otherwise. The Board of directors has authority to use his discretion to waive any provisions of these regulations in any particular case.
- e) Any amendments shall be communicated to all affected staff and shall be entered in all copies of this manual regulation to be circulated. Should there ever be a conflict between stipulations of the manual with any other relevant statutory stipulations or laws, the later shall prevail.
- f) The following principles of human resource management form the minimum standards and are the foundation upon which this HRM policy, procedures and guidelines are based:

Procedure/ Guideline		Principles
P1	Staff policy document	That each staff has access to a copy of the staff policy manual
P2	Diversity	That IDF's ethos of equality of opportunity is applied to all posts. IDF shall strive to ensure both gender and ethnic diversity in the composition of its staff
P3	Application of Local Law	That IDF is aware of and abides by the Laws and regulations of Somalia and different federal member states
P4	Terms and conditions	That a legal and up to date written contract exists between IDF and each individual staff member
P4	Recruitment and selection	That IDF employs the most suitable people available to work for the organization
P4	Job description	That each employee has a written record of their role, responsibilities and reporting requirements
P4	Staff personal files	That there is an up to date, accurate and complete record of personal details for each staff member
P5	Remuneration	That there is a salary and benefits scale, which is fair both to the individual – relative to living standards – and the organization, given its charitable status.
P6	Employee relation	That staff are given an opportunity to make their views known to management and to discuss their terms and conditions of service
P7	Staff health	That IDF provides medical cover to its members of staff
P9	Training	That IDF promotes staff training to enhance skills learning within the context of IDF's work.
P9	Development	That reviews of staff performance and the opportunity for two-way feedback are conducted on a regular basis.

## **1.2 Authority of IDF Board and Management**

Personnel policies are established by the Board of directors of IDF. The Executive director is responsible for the interpretation and execution of such procedures. Efforts will be made to establish terms and conditions of employment that are comparable to those enjoyed by staff of comparable employment within the same sector, subject to IDF's capacity to pay. IDF expects the highest quality of performance by employees.

These rules may be amended by the Board of director on the recommendations of IDF's management team. When the interests of IDF so require, the Executive director may make individual exceptions to these provisions. Any major exceptions will be reported to the Board.

## **1.3 Classification of Employees**

- a) **Full-time** employees are hired to work on a scheduled basis of 48 hours each/week and may be entitled to certain benefits. Full time employees are paid on a (i.e. monthly) basis.
- b) **Part-time** employees are hired for less than 40 hours per week. Part time employees are typically not entitled to the same benefits that are provided to full time staff. In instances where benefits are provided to part-time employees they are prorated unless otherwise specified. Part-time employees are paid on a (i.e. bi-weekly or monthly) basis and are generally paid according to the number of hours or days worked in a pay period.
- c) **Temporary employees** are hired for a short period of time and generally are not entitled to any benefits. During the time hired, the schedule may be full-time or part-time. Temporary employees are paid on a schedule agreed upon at time of hire and are generally paid according to the number of hours/days worked in a pay period.

## CHAPTER 2: RECRUITMENT, SELECTION AND APPOINTMENT

### 2.1 General principles

- a) IDF is an 'equal opportunity employer' and is committed to hiring highly qualified individuals regardless of gender, race, creed or marital status. IDF strives to attract, retain and develop staff of the highest quality and will strive to provide fair and equitable treatment to its staff, and encourage opportunities for personal growth.
- b) The primary objective of recruitment for IDF is to secure the highest standards of efficiency, competence and integrity.
- c) The power of appointment is vested in the Board of Directors or its designate. The position of Executive director shall only be filled by a member of the Board of Directors which is normal the secretary to the Board of Directors.
- d) The responsibility for ensuring that appointments are consistent with IDF's high standards of competence is vested in board acting through the Executive director.
- e) All appointments will comply with IDF's policy on classification of posts according to the salary scales. This classification is based on the level of responsibility, extent of supervisory duties and other requirements as specified in the job descriptions.
- f) Classification of posts forms the basis of decisions relating to appropriate salary scales and associated benefits, recruitment, promotion and staff development.

### 2.2 Recruitment

- a) Recruitment procedures are established to ensure fair and equitable practice, but should not conflict with the primary objective of securing high standards of competence.
- b) All recruitments of senior staff shall be sanctioned by the Board, upon need assessment or the remaining of a vacant position in IDF. All programs should raise vacancy requisitions to the Executive director for review prior to the board's approval.
- c) The recruitment process shall be guided by the seniority of the vacant position. However the Executive director shall identify the need for a new position and the same shall be communicated to the Board of Directors.
- d) Except when the Board expressly provides, vacant staff positions shall be first advertised internally to give priority to existing staff qualified to carry out such responsibilities.

#### 2.2.1 Vacancy announcement, short listing and interviews

- a) All vacancy announcements must include: a) Post, title & grade; b) Major duties & responsibilities; c) Education and qualifications required; d) Experience required; e) Other desirable qualifications; f) Brief description of IDF; g) Location of duty station; h) Application procedure (to whom applications should be addressed, number of references, format of curriculum vitae, etc) and i) Closing date for application
- b) The job description for each position shall be prepared by the head of function and verified by the Executive director and Approved.
- c) All applications will be reviewed on the basis of the advertised requirements. Applicants whose applications indicate qualifications closest to the position advertised will be interviewed by an interview panel set up by the Executive director.
- d) The panel will make recommendations for appointment to the Chairperson or to any officer authorized by him or her, commonly the Executive director.

#### 2.2.2 Selection and interview panel

- a) A selection/interviewing panel shall carry out interviews for all positions. Appropriate members of the selection/ interviewing panel may include outside members who are considered to bring to the panel special technical skills and expertise.



- b) As deemed appropriate, the selection/interviewing panel may apply a number of generally accepted selection techniques, which may include face-to-face interviews, skill tests, personality assessments and any other, informed checks. Their recommendations after the interview shall be implemented by the Executive director.
- c) Interview notes, test papers, any relevant documentation and copies of interviewee's certificates will be submitted to the Executive director who shall ensure that the documentation is complete before issuing any letter of appointment.

### **2.3.3 Offer of appointment**

- a) All appointment letters will be signed by the Executive director in consultation with the Board. The Executive director will inform the Board of all newly recruited staff.
- b) Upon appointment, all staff shall receive either a letter of appointment or a contract. All letters of appointment should state: a) The type of appointment; b) The title, grade and location of the post; c) Major duties and responsibilities; d) Salary, allowances and general benefits; e) The commencement date for work and expiry date of the appointment; f) Any specific conditions relating to the offer and; g) That the appointment is subject to the applicable provisions of the HR Policy Manual.
- c) IDF accepts no responsibility for contracts/letters of appointment issued without proper authority and all contracts or letters of appointment expire according to their terms.
- d) Detailed Appointment Letters shall be issued to all candidates at the time of selection to minimize potential misunderstandings related to employment terms and conditions of service.

### **2.3 Probation, confirmation, promotions & demotions**

- a) All contract employees shall serve a 3 months probationary employment period. After the second month of employment, the immediate supervisor will appraise the employee.
- b) The suitability for confirmation will then be determined, and with the supervisor's agreement and the endorsement of the Executive director's the employee shall be confirmed as a permanent employee at the end of the third month.
- c) The following conditions pertain to probationary status:
  - Employment can be terminated, upon consultation with the Executive director
  - Employees on probation are entitled to a one-month notice for termination of employment or payment in lieu thereof.
  - In such cases, the employees shall not have access to the staff grievance procedure.
  - Employees on probation are not entitled to loans.
  - Employees on probation are not eligible for salary increases or bonuses.
- d) Confirmation of the appointments depends on satisfactory completion of the probationary period, which entails satisfactory performance of their duties & responsibilities, and satisfactory conduct, as evaluated by their supervisor.
- e) Supervisors may request three months extension of probation if, in their judgment additional time is necessary to assess the employee's ability to perform the job.
- f) For contracts of less than one year, the probation period shall be one month.
- g) IDF staff can be promoted where they have the competency to successfully compete in the open market for a vacant position at a higher level. Promotions are normally done in conjunction with the annual appraisal cycle. Contract duration is not affected, although terms and conditions may be altered. Promotion can be made either to an existing post, for which there is a vacancy, or to a newly created post.
- h) In the event of a demotion the contract duration is not affected, although the level of responsibility and the terms and conditions of employment may be altered. Demotion will normally entail a decrease in salary appropriate to the demotion.

## 2.4 Job Description & Staff files

- a) All employees will have a current job description, which delineates basic responsibilities. The employee may be required to perform other duties periodically in response to the demands of IDF. It is also understood that job descriptions are not static and are subject to change from time to time.
- b) Job descriptions will be written in a language that clearly defines the scope and limitations of the job and are presented to employees upon employment
- c) The employee is required to confirm receipt and attest to having read and understood the job description & other policies by signing declaration, which shall be placed in their personnel file. All job descriptions will be reviewed at least once every year.
- d) Job descriptions will contain at least the following: Job title; Location of the job; Reporting relationships; Job purpose; Key duties & responsibilities; & Job specifications
- e) IDF shall maintain a complete personnel file for all employees, in current order and must on a minimum basis contain the following documents: [a] Original application or resume; academic/professional certificates; [b] Certified copies of interview assessment sheet; [c] Reference letters for at least two referees; d] Signed copy of JDs, contract/ letter of appointment; [e] Copy of national identification card or passport; [f] Two passport size photographs; [g] Completed personal data form (showing e.g. marital status, career details, family data etc); [h] Annual performance appraisal form; [i] Details of next of kin; [j] Nominated beneficiaries for terminal benefits in case of death of the employee; [k] Loan details; [l] Grievance disciplinary records and; [m] Confidential memos
- f) Documentation required from a new employee must be submitted and entered in the employee's personnel file prior to commencement of work. The HR officer shall be responsible for updating personnel files with internally generated documentation.
- g) Correct and accurate employment records are important and every employee must notify the HR/administration Officer of any changes in the following: Address and phone numbers; Person to be notified in case of an emergency; Legal change in name with effective date; Change in next-of-kin with effective date; Change of marital status with the effective date; Birth of child, or any change of dependents and Change in academic or professional qualifications

## 2.5 Performance Management

- a) All employees will participate in a performance review process designed to review last performance & discuss the employee's development needs and career progression.
- b) Performance management information will also be used for making administrative decisions regarding annual salary increments, promotions, transfers and or terminations.
- c) A formal documented appraisal of each employee must be completed at least once a year and in any case, not later than the end of February the following year.
- d) New employees will have their performance evaluated before the end of the probationary period and before confirmation of the employment contract.
- e) The first step in implementing the performance management system requires the formulation of performance agreements, which define expectations, the results to be achieved and the competencies required for attaining the results. This is followed by setting of performance ratings which should lay more emphasis on the developmental rather than the punitive aspects of employee performance. Other steps include:
  - The development of an action plan intended to contribute to the policy of continuous learning, which is necessary for improving organizational effectiveness.
  - Continuous progress reviews that should take place informally or through formal team meetings to deal with performance problems and to ensure that agreement is reached on the action and timeframe required for improving performance.
  - Proper documentation of the performance management process using performance management form. Appraisers and appraisees must jointly complete all performance documents. A record of performance achievements must also be maintained setting out an action plan to improve performance or develop job related competencies. No salary action will be taken without a current performance record on file.

- Feeding back the performance information to employees so that they can correct any deficiencies. The emphasis is placed on competencies and the feedback is directed at describing behavior rather than judging and apportioning blame.
- f) IDF will provide a guide and tool for execution of performance management process. Besides, IDF will offer in-house training on the performance management tool and process for all staff; appraisers and appraisees.

## **2.6 Employment of consultants**

- a) IDF employs consultants from time to time on a short-term basis to undertake specific pieces of work (short-term basis means for a period of less than 3 months).
- b) A consultant should only be considered if it's not possible to have an existing staff do the task or secondment. Approval from the Executive Director is required before any consultants are asked to undertake work for IDF.
- c) A consultant is not an IDF employee & thus cannot enjoy related contractual privileges.
- d) The employment of current IDF staff on consultancies is strictly prohibited.
- e) Clear terms of references must be developed before any person is approached with a request to undertake consultancy work for IDF. Expenses must fall within budget.
- f) The Executive director or the right authority will then consider the proposal and decide whether it is appropriate to cover the work by hiring a consultant.
- g) The procurement controls/ procedures as detailed in the Finance policies & procedures Manual are applicable in the procurement of consultancies / consultants.
- h) All payments to consultants shall be subject to payment procedures as detailed in the Finance Policies & Procedures Manual.

## CHAPTER 3: DUTIES AND OBLIGATIONS

### 3.1 General

- a) IDF staff should at all-time bear in mind the preserve and judgment expected of them by reason of their employment. By accepting appointment they pledge themselves to discharge their functions with honesty and integrity and solely in IDF's interest.
- b) Staff are expected to exercise discretion in all matters of IDF's official business. IDF aims to provide fair and just conditions of employment for all categories of staff and endeavors to find a balance between demands of service and the welfare of staff.
- c) Staff members are subject to the authority of the Executive director and are subject to assignment by him/her to any of the activities or offices of IDF. They are responsible to him/her in the exercise of their functions.
- d) The whole time of staff members within the working hours specified shall be at the disposal of IDF. No personal work is to be carried out during these hours.
- e) Staff members shall avoid any action or public pronouncement which may adversely reflect on the integrity, independence and impartiality of IDF.
- f) Staff members shall exercise the utmost discretion in regard to all matters of official business. They shall not communicate to any person any information, known to them by reason of their official position, which has not been made public, except by previous written authorization of the Executive director. These obligations do not cease upon separation from IDF.
- g) Staff members shall not engage in any political party activity which is inconsistent with, or might reflect upon, the independence and impartiality required by their status as employees of IDF. Any staff member who becomes a candidate for public office of a political organization shall, in the first instance, disclose their interest to the Executive director or the chairman of the board in the case of the Executive director.
- h) Staff members are required to conduct themselves in a manner that will preserve IDF's high standards and professional and, social image. They are expected to treat other staff members, as well as all other persons with whom they come into contact IDF's business, with courtesy, respect, equality and cultural sensitivity.
- i) IDF strictly prohibits any kind of prejudicial behavior or harassment.

### 3.2 Other general rules

- a) All employees shall be expected to dress appropriately and in a manner that is consistent with acceptable office standards and which avoids giving offence or impacting negatively on IDF's image and reputation.
- b) Employees' conduct towards the public shall at all times be courteous. They shall take care to give correct information regarding the performance of their duties.
- c) All complaints by community members must immediately be brought to the attention of the Executive director. Employees shall not conduct themselves at any time in such a manner as to bring IDF into disrepute.
- d) No staff members may be actively associated with the management of, or hold a financial interest in any business concern which conflicts with the interests of IDF and/or his/her employment with IDF.
- e) Staff members who have occasion to deal in their official capacity with any matter involving a business concern in which they hold a financial interest shall disclose the measure of that interest in writing to the Executive director. The holding of shares in a publicly quoted company shall not constitute a financial interest within the meaning of this rule.
- f) IDF's official responsibilities must always take priority over outside services. Staff may not engage in any outside occupation or employment without the prior written approval of the Executive director. This does not apply to posts in religious or social organizations or to assignments connected with IDF's networks.

- g) All rights, including title, copyright and patent rights, in any work produced by a staff member, as part of his or her official duties shall be vested in IDF.
- h) Information related to the communities that IDF works with and all other confidential information may be deemed sensitive and must be kept strictly confidential and must not be discussed outside the office. Failure to treat this kind of information confidentially is a breach of policy that can result in summary dismissal.
- i) The normal working hours in IDF shall be 40-48 working hours per week. All employees are expected to keep these work hours as specified without exception. All employees shall further be required to maintain an 8-hour day and a 40-48-hour week. IDF official times are: Saturday - Thursday: 8.00am to 1.00pm and 2.00pm to 5.00pm
- j) For security reasons, all visitors must identify themselves. All employees are notified that visits by family and friends during working hours can be disruptive therefore such visits are discouraged and will be regulated.
- k) IDF will take necessary action to deal with cases of theft by employees, including handling such culprits to the police for investigation and prosecution.
- l) IDF is committed to investigating every theft or inventory loss, no matter how small, in order to collect the documentation necessary for termination, prosecution and recovery of stolen goods.

### **3.3 Established work practices**

IDF has established best working practices, which must be observed by all employees. These working practices are intended to ensure that employees maintain the highest standards of ethics and professionalism when handling information or using organization's property. The following shall apply:

- a) Employees must endeavor to act on incoming correspondences within the working day.
- b) All employees are requested to clear their desks and switch off the computer whenever they leave the office for the day. All documents should be returned to the appropriate files and locked up in cabinets.
- c) Employees who are required to work away from the office, are requested to make every effort to inform their immediate superior of their whereabouts and the telephone number where they can be reached.
- d) When working from a community member's premises, employees are cautioned not to abuse any privileges extended to them in making and receiving telephone calls.
- e) Employees should not solicit or agree to receive any money from a community member as an inducement to facilitate IDF's work or for personal reasons.
- f) Employees should discourage community members from addressing letters to them personally; rather letters should be addressed to IDF and marked for the attention of the employee. In the event that employees receive letters addressed to them personally the reply must be from IDF.
- g) When any employee is called upon to deal with any matter or issues in whom they have personal interest, such employees shall immediately disclose their interest to the Executive director.

## CHAPTER 4: STAFF STRUCTURE, FUNCTIONS AND REMUNERATION

### 4.1 Overview of Staff Structure

- a) The organogram of IDF provides an overview of the staff positions within the organization. Each position is described in a job description which lays down the responsibilities, place in the organization and the required expertise.
- b) On the basis of responsibility and expertise, the job is classified in the salary structure by the Board, or an external expert. Each position is weighed with respect to other positions in the organization and based on this positions are placed in the salary system.
- c) If a person is engaged for a certain position, but does not yet meet all job requirements, the person can be classified in a grade below corresponding grade to the position.
- d) A growth plan is agreed between IDF & the employee and highlights the requirements the employee will have to fulfill in order to qualify for the fixed grade. If the employee does not reach the desired level in 3 years, the preliminary grade becomes the final grade.
- e) Staff function and job descriptions are specified for every staff position and contract.

### 4.2 Salary

- a) It is IDF's policy to provide a package (salaries, benefits and allowances) which is competitive with similarly situated, organizations operating in the same sector for equivalent positions and categories of staff.
- b) Pay policy is based on the principle of equal remuneration for equal work. Salaries are related to the job and its agreed evaluation.

#### 4.2.1 Salary determination and classification

- a) Salary will be determined through job analysis, evaluation and the organizations capacity to pay. Salary scales and related allowances for recruited staff members are established by the Executive director with reference to IDF's salary structure.
- b) IDF endeavors to provide for an equitable starting salary for every employee that takes into accounts the duties, qualifications, and experience and responsibility requirements determined by the job description for each position.
- c) All appointments will comply with IDF's classification of posts and staff. Such policy has been established in recognition of the need to reward different levels of skills, qualifications, experience and responsibilities in different ways.
- d) Classification provides a broad definition of the way in which IDF structures its organization, and is an aid to planning and budgeting.

#### 4.2.2 Payment of salary

- a) Salary scales are denominated in the appropriate applicable currency, and salaries are payable in that agreed currency probably the US Dollar, regardless of nationality. Payment of salary is made monthly in arrears to all regular staff members.
- b) Proper recording and maintenance of payroll system is essential for determining the costs of IDF operations. In case of Tax authorities such as Somalia Ministry of Finance reporting purposes. Somali ministry of Finance might also require various payroll reports to be prepared and submitted according to specific filing schedules.
- c) The officer in charge of payroll shall at end of each month prepare a monthly payroll report which should be checked for accuracy by the Accountant and approved by the Executive director. This shall be supported by pay slips to each staff detailing gross salary, any allowances, benefits, all deductions and net pay.
- d) IDF will adopt a payroll system that would meet local statutory requirements. Payroll register should at least include the following information: Name of employee; Salary; Other remunerations; Withholding taxes; Statutory deductions in case of any; Other authorized deductions and Net pay

- e) Payroll Register shall be prepared by the payroll Accountant by 20th of the month approved by the Accountant and authorized by the Executive director. The payroll shall be supported by all staff pay slips before approval.
- f) Duly approved Payroll Register and pay slips are then returned to the HR Officer for processing of the salary cheque – to be processed through the normal cheque process.
- g) Other payroll deductions shall be paid through the chequing system by the HR Officer (please refer to cheque disbursement procedures per the Finance Policies Manual).
- h) The HR Officer must issue all staff with pay slips detailing their remuneration details for the month by the 28th of the month. All staff shall sign off their pay slip and return a copy for filing by the payroll Accountant.
- i) IDF staff shall be responsible for taxes levied on their salaries by taxing authorities in their home/residence countries or host/post countries. IDF accepts no responsibility other than that required by law or its host country agreements, to withhold or collect such taxes as maybe required of the staff.

#### 4.2.3 Salary adjustments

- a) The authority to adjust salaries and allowances is vested in the IDF Board of Directors. Base salaries are fixed as set forth in the contract of employment.
- b) Performance evaluations will be carried out annually, and subject to the availability of funds salary increments may be granted to those staff members who are deemed by the management to have performed at superior or outstanding levels.
- c) Salary adjustments fall into four categories:
  - Promotion, accompanied by a pay raise equivalent to salary scale of the new position;
  - Merit salary adjustment, to award exceptional service;
  - In exceptional cases, the board may review salaries based on cost of living adjustment (COLA) to cushion employees from extreme inflationary fluctuations on basic and or standard commodities
  - No salary adjustment, for employees who do not perform at their required capacity.

#### 4.2.4 Salary advances

- a) IDF will use advances to employees so that they can adequately pay for personal expenses e.g. salary advances, etc. A salary advance is defined as a sum of money up to the value of one month's salary paid in advance, repayable over the next two months.
- b) Salary advances are intended to cover cases of temporary hardship occasioned by an unforeseen emergency & are not be automatic upon request but at the discretion of IDF

#### 4.2.5 Deductions from salary

Deductions from salary and personal accounts may be made, provided that there is a clear explanation in writing to the staff member of the reason for the deduction. Deductions from salary may be made for the following reasons:

- a) Voluntary contributions to pension schemes, insurance schemes as determined by the staff member
- b) Indebtedness to IDF for salary advances or loans
- c) Repayment for lost or damaged IDF goods
- d) Items charged to the staff member's account
- e) Voluntary contributions to cooperative societies, banks or other approved institutions, or in response to court order.

**NB:** Procedures on accounting for advances are detailed in the Finance Manual.

#### 4.2.6 Payroll taxes

- a) Various laws may require that IDF make certain deductions from an employee's pay such as government tax. In Somalia, the Ministry of Finance of SNG or federal member state is mandated by law to collect taxes from organizations such as IDF PAYE, Withholding tax and other taxes from employee taxable incomes.
- b) Somali Ministry of Finance is very serious about employers meeting, reporting, and remitting deadlines. Failure to report and/or remit payroll taxes could result in expensive liability on IDF.
- c) All compensation paid to employees shall be reported to the tax authorities and taxes deducted. Allowances and bonuses are not subject to taxes.
- d) If an employee discovers an error in their pay-check, they should review the matter with the Accountant immediately. Employees should contact the Accountant with any questions concerning pay check

#### 4.2.7 Allowances and Benefits

- a) IDF strives to provide within the scope of its agreements and its financial ability a package of allowances. Details of such allowances will be made available to staff in their appointment letters and in subsequent letters in the event of change.
- b) IDF's core activities are field-based. It is recognized that for the effective performance of their duties, employees will be required to frequently travel from their workplace to visit community members within the specified zone.
- c) In this regard IDF will provide a transport allowance to all appropriate staff members to enable them reach their destinations without hindrance.
- d) In order to achieve equity between staff members, any allowances or related payments which IDF provides are payable only to the extent that no duplication of allowances arise by virtue of another payment made by a source external to IDF. Staff are obliged to provide information on their own circumstances if such duplication should arise.

#### 4.3 Travel

- a) All official travels shall be requested in advance by completing a Travel Authorization (TA) form. International travel must be requested at least 2 weeks in advance subject to authorization by the Executive director. Domestic travel request must be made at least one week in advance. TA forms shall be issued in numerical order.
- b) All TAs must be reviewed as to the purpose of travel, the amount of cash advance, and the availability of funds. Cash advances for travel shall be granted provided that all previous travel advances have been properly liquidated.
- c) Cash advances shall be accounted for using the Expense Liquidation Report. All cash advances shall be liquidated within 10 working days upon completion of travel.
- d) IDF recognizes that there will be occasions when employees will be required to work on assignments out of town that will necessitate overnight accommodation. In such cases employees will be expected to requisition for a Safari advance to cover traveling costs, meals and accommodation. The following procedures shall apply:
  - a. Per Diem will be provided for employees for travel on duty to cover necessary expenses, such as transportation, lodging, meals and other incidental expenses, subject to initialization by the immediate supervisor, authorization by the Accountant and approval by the Executive director.
  - b. Employees are required to account for the travel advance within the first week of their return by providing a breakdown of their expenses. The employee's immediate superior must approve this account before being forwarded to the Executive director
  - c. Employees who fail to account for the safari will be requested to repay the total amount of the advance otherwise the amount will be offset against their monthly salary



- e) In order to facilitate traveling arrangements, employees should requisition for funds at least 7 working days in advance. The requisition must indicate the purpose and location of the journey, length of stay and actual dates of travel. A breakdown of the activities to be undertaken as well as anticipated expenses to be incurred should be provided
- f) Lodging – lodging in a moderately-priced accommodation facility provided the staff member is not given free accommodation by any third party. By moderately-priced facility is meant sufficiently clean, comfortable, convenient, accessible and safe but not luxurious. Receipts will be required for liquidation.
- g) Meals and other incidental expenses - for meals, and other incidental expenses such as laundry, toiletries, snacks, personal phone calls and faxes, reading materials, etc., the staff shall be given a flat rate based on the approved standard rates. The staff need not present any receipt in liquidating these allowances.
- h) Travel advances shall be liquidated or accounted for as provided under the policy on cash advances.

#### 4.4 Relocation

- a) Benefits are only provided to an employee whose relocation has been requested and approved by IDF Management and Board. Benefits are not provided to an employee who has requested an internal transfer to another office for personal reasons.
- b) The board/Management will provide professional advice, guidance and support and facilitate all stages of the process in partnership with line management. The intention is also to provide eligible employees with a fair and transparent relocation experience that facilitates a smooth transition for each individual, promoting work performance and staff retention. This policy must be read in conjunction with the Travel Policy and Recruitment Policy of the organization as shown above.
- c) The following guiding principles shall apply:
  - The terms and conditions of relocation shall be included in the employee's letter of appointment.
  - The relocation process shall be: a) fair and equitable; b) transparent; c) cost effective; and d) adherent to organizational policies, practices and procedures.
  - The Executive Director may exercise discretionary authority in the application and implementation of this Relocation Policy. However, such discretion must be exercised consistently, and be driven primarily by budgetary factors and other organizational imperatives.

##### 4.4.1 Relocation Benefits

- a) **Travel** - Travel costs will be reimbursed in line with IDF's Travel Policy to facilitate the one-way transportation of the eligible employee (i.e. via air, public ground transportation, or use of a personal vehicle). As per IDF's Travel Policy, mileage reimbursement for use of a personal vehicle will be based on the prevailing public transport rate. Car hire is not eligible as a means of reimbursable relocation.
- b) **Temporary Transport** - Transport to and from the employee's new place of residence will be arranged for the employee's first 5 working days. Thereafter the employee shall be responsible for his / her own transport.
- c) **Special Leave for Relocation** - IDF will provide 2 days of leave to employees to facilitate relocation to a new residence. The days of relocation must be communicated in advance and agreed with the relevant Line Manager.
- d) **Recovery of Relocation Costs** - Should the employee leave IDF within 12 months of relocation for any reason, other than retrenchment, death, unfair dismissal or disability, he/she will be required to refund the accommodation and relocation allowances received under this policy on a prorata basis, excluding expenses incurred as part of travel.

##### 4.4.2 Exceptions/ Exclusions

This Relocation Policy does not cover relocation of family members. Any exceptions to this policy would be considered based on the level and strategic importance of the position by Management

## **CHAPTER 5: LEAVE AND HOLIDAY**

### **5.1 Staff Leave**

IDF recognizes the following leaves

#### **5.1.1 Annual Leave**

- a) Annual leave is accrued paid leave and provides eligible employees opportunities for rest, relaxation and personal pursuits. Annual leave is accrued and posted at the rate of 1.75 days per month equating to 21 days per year.
- b) The maximum accumulation of unused annual leave that can be carried forward to the next year is 10 days per calendar year (inclusive of any compensatory leave days) with January 1 serving as the cut-off date.
- c) All requests for leave must be submitted in writing to the HR officer, and be approved by the Executive director at least two weeks prior to the start of the leave.
- d) Upon termination of employment, employees will be paid unused annual leave that has been earned through the last day of work up to the maximum of 30 days. Such leave is paid at the employee's base pay rate at the time of vacation.

#### **5.1.2 Sick Leave**

- a) All employees who fall sick must seek medical treatment and a medical treatment certificate obtained covering the period of sickness. Such certificates must be presented to IDF at the earliest opportunity, but in any case within 24 hours.
- b) Where an employee fails to submit such certificate, he/she shall be deemed to have absented himself from work without authority and shall not attract payments for the days in question
- c) Employee serving in contract will be entitled to a maximum of 30 days on full pay, when sick and, and thereafter 15 days on half pay during any 12-month period. After this, the employee will not be entitled to any payment. Such employees must have in any case served the organization for at least two months
- d) Where an employee has exhausted his/her sick leave entitlement, the Executive director shall refer such employee to a medical doctor for recommendation on possibility of recovery and regarding the medical fitness to follow his/her occupation thereafter.
- e) Where the medical doctor's recommendation states that there is no reasonable prospect of the employee resuming full duty, the employee shall be retired on medical grounds.

#### **5.1.3 Compensatory Leave**

- a) On occasion, professional staff may need to work beyond their normal workday due to completion of time-sensitive responsibilities or necessary business travel.
- b) IDF grants compensatory leave to full-time staff for time worked in excess of 48 hours a week. Compensatory time must be logged in the monthly time sheet.
- c) An employee must have the use of compensatory leave approved in advance by the supervisor, as is the case with normal leave days. Compensatory leave shall be granted on a day for day basis. Minimum compensable period shall be half a day per week.

#### **5.1.4 Compassionate Leave**

- a) Employees who wish to take time off due to a death of a family member should notify their supervisor as soon as possible. Up to five days per year of paid compassionate leave will be provided to all full-time employees, at the discretion of the employer.
- b) Unused compassionate leave does not carry over from year to year. Employees may, with the Executive director's approval, use any other paid leave for additional time off as necessary.

### 5.1.5 Maternity and Paternity Leave

- a) A female employee, having had a live birth shall be entitled to three continuous month's (i.e. 90 consecutive days) leave with full pay, excluding the annual leave entitlement for that year. Male employees are not entitled to any paternity leave.
- b) Maternity leave shall be inclusive of weekly rest days and Gazetted Public Holidays.
- c) The employee shall give notice of the expected dates of confinement/delivery at least three months before such a date and apply for leave at least one month before the said date.
- d) A certificate from the employee's obstetrician stating the expected date of delivery should be produced at this time. An employee will be required to proceed on maternity leave at least two weeks before the expected date of delivery.
- e) Childbirth in respect of a female employee shall not be deemed to be sickness and the employer shall not be required to meet the medical costs incurred thereon i.e. any hospital delivery expenses shall not be met by the employer.
- f) Employees on maternity leave shall not incur any loss of privilege during such period.

### 5.1.6 Bereavement Leave

- a) In the event of death of a spouse, child, or parent of an employee, s/he shall be entitled to bereavement leave of seven (7) days per event per calendar year. These days shall not be deducted from annual leave.
- b) If an employee requires extra time after expiration of the bereavement leaves period, this extra time shall be deducted from his/her annual leave.
- c) In the event of death of any other person who is not the spouse, child, or parent of the employee, s/he may be granted leave at the discretion of the IDF Senior Management Team but this leave must be deducted from the entitled annual leave of the employee.

### 5.1.7 Excessive Leave

- a) All employees are required to report for work on time or provide a written justification to the Executive Director and/or immediate supervisor explaining any expected lateness from resumption of duty after the leave end date.
- b) An employee who does not return to duty after the leave end date, and does not report in writing the reason for the delay, may be considered to have deserted their post if the absence lasts for more than seven (7) calendar days. Consequently, their salary payment shall be curtailed effective from the leave end date.

## 5.2 Public Holidays

- a) All full-time employees are eligible for paid holiday time off immediately upon employment. The holiday schedule is determined each year by the Executive director. Holidays that fall on a Friday will typically be observed on Saturday.
- b) Depending on the location/work station of various staff, IDF observes the following paid holidays each year for Somalia.
 

-	Eid-ul-fitr	2days
-	Eid ul-ad ha	3 days
-	1st July	1 day (independence day, Somalia)
-	January 1 (New Year)	1 day
-	May 1 (Labour Day)	1 day

## 5.3 Annual Leave Allowance

IDF shall pay a leave allowance every December to all regular contract employees at a rate not to exceed 1% of basic annual salary, whichever is less.

#### **5.4 Acting Allowance**

- a) An employee may be appointed to act temporarily in a position higher than his/her usual job position. Such appointments must be affected in writing by the Executive Director after consultation with the Senior Management Team.
- b) Any appointments to management positions within IDF must also be approved by the Executive Director and sanctioned by the Board.
- c) Employees appointed to act in positions higher than their regular jobs for a period exceeding thirty (30) calendar days shall be paid 10% of the basic monthly salary of the substantive holder of that position in addition to their basic salary.
- d) Acting appointments shall not exceed three (3) calendar months in duration. Whenever possible, the Senior Management Team shall ensure that the vacant position is either filled or eliminated within three (3) calendar months from the date the position became vacant.

## CHAPTER 6: PERFORMANCE MANAGEMENT

### 6.1 Performance Management Philosophy

- a) In a good working relationship, managers and employees consult regularly with each other about their work. However, it is also important that there is an official moment at which a number of issues can be brought up for discussion to enhance cooperation and performance.
- b) IDF invests in the quality of its staff in order to achieve better results. This is only possible if everyone in the organisation cooperates, if clear agreements are made on who can expect what from whom and if such agreements also have consequences in the longer run.
- c) In order to attract and retain a highly qualified and competent work force, IDF will put in place performance management program aimed at providing employees with opportunity for constructive work reviews. The program is designed to address performance and skill developmental needs and interests of its employees and help IDF compensate employees in a fair and equitable manner based upon demonstrated job performance.
- d) A performance review will be carried out to measure the employee's performance within a calendar year but shall be carried out on a continuous basis. This will make the organization to; (1) attract and retain qualified staff, (2) motivate employees by rewarding their contribution in a fair and equitable manner and support sustained performance, (3) encourage career development by enhancing employees' skills and competencies, and (4) support management in the realization of the objectives of the organization.
- e) The program provides for the establishment and communication of employee's performance plans and procedures for evaluating employee's performance. No employee should feel threatened by this process since it is fundamentally designed to show the employee how he/she is doing on the job and to provide concrete suggestions for improvement. This is also an opportunity for the employee to raise any concerns or issues he/she may have that are integral to improved performance. Review records are also used as a basis for decisions on placement, career development and contract renewal.
- f) The performance management philosophy has been developed based on the following principles:
  - To identify individual and/or team objectives and measures linked to IDF's vision, mission, core values, business and strategic objectives.
  - To promote employee career development through creating an environment of learning and quality improvement through training, coaching, counseling and mentoring.
  - To provide open and honest periodic evaluations of employee's performance.
  - To administer a financial rewards system that would differentiate rewards to employees on the basis of performance.
- g) IDF's performance management focuses on organizing, mentoring, guiding, and evaluating individual growth & development within the organization's framework. IDF is committed to a performance management system that, at a minimum, recognizes the importance of:
  - Clear, comprehensive job descriptions
  - Measurable objectives or performance standards
  - Regular supervisor-subordinate feedback sessions
  - Written annual performance appraisals for all staff
- h) An adequate understanding and reasonable application of these key elements will form the basis of effective performance management.

### 6.2 Performance Appraisals

- a) Appraisals refer to periodic (at least once a year) discussions between individual staff and their line supervisors on the work situation and the employee's performance (way they carry out their tasks and all external aspects that have an influence on their performance). Performance appraisal is thus an evaluation of the contribution of an employee's performance to the overall achievement of IDF's objectives.

- a) The purpose of the performance appraisal process is to:
- Assess the progress and results achieved during the appraisal period against set goals, targets and action plans and give the employee feedback on how they have performed against agreed objectives or performance standards on a quantitative or qualitative basis.
  - Enable IDF to document an employee's performance for current and future reference and develop joint agreements on how to improve future performance
  - Give IDF a consistent basis for considering performance awards/promotion and amongst others optimize job performance and adjust job requirements where necessary.
  - Help the employee to understand how IDF perceives his/her performance and therefore enable the employee to take steps, where needed, for improvement.
  - Identify reasons why employee is unable to achieve target goals and try to improve on them or solve the problem if they are organization created.
  - Obtain insight in wishes and potential of staff member for further training and development and facilitate the setting up of relevant mechanisms for staff development.
  - Discuss on future growth and development prospects for the employee within the organization including promotion, transfers, remuneration review, bonuses awards etc.
  - Agree on new or revised future goals and work plans (setting new tasks/targets in result agreements)
- b) The following procedure shall apply to the performance appraisal process:
- All employees will participate in a performance evaluation process at least once annually.
  - The management of IDF shall establish performance standards, which together with specific objectives/targets set for the staff shall form the basis for performance appraisals.
  - The supervisor and the subordinate will at the beginning of the review period jointly set specific objectives which the employee will be expected to achieve during the specified period which could be monthly, quarterly, semi-annually, or annually. The set goals should be realistic, challenging, clear, comprehensive, in line with the job description of the employee, and the overall work plans of IDF; and a time frame for accomplishment and review (interim and end of period review) must be agreed on.
  - The supervisor and the subordinate will agree on the standards for measuring and/or evaluating the goals, including key performance indicators.
  - The supervisor will play a vital role in assisting the subordinate towards achieving the goals and meeting the performance standards through coaching, mentoring, counseling, and supervising
  - Periodically during the calendar year, the employee will be expected to complete a self assessment report/form and forward it to the supervisor who shall evaluate and give an input whether they agree with the self assessments or not.
  - The employee and the supervisor will discuss the appraisal in a formal set up, and the outcome documented in an appraisal form.
  - During the evaluation, the employee should feel free to discuss their evaluation and the job with the supervisor. This opportunity offers both of them to discuss work performance during the year. The discussion will include both areas of strength, to exploit and areas that need improvement and to devise strategies for the improved performance, to consider plans for professional development and to discuss any other matters in the work environment that affect the job and performance.
  - The completed evaluation forms will be signed and dated by both the employee and supervisor before forwarding it to the Director. A copy of the signed and endorsed appraisal form will be kept in the employee's personnel file. Performance reports must be signed by the employee concerned, the supervisor and the Director.
  - IDF will in cases where the employee's performance is below acceptable standards, put in place a process to help the employee improve performance. An employee will only be exited from IDF on grounds of poor performance if after appropriate interventions there is no improvement. Such an employee will be put on a three month's program after which if there is no noticeable improvement a decision will be made by the management on the continuation of his/her employment with IDF.

- d) The defined areas of degree of performance will include but not limited to:
- *Knowledge of job:* Considers how well the employee is qualified to undertake the work and how far he/she possesses suitable experience.
  - *Proficiency:* Considers the results achieved by the employee and the skill s/he displays at work.
  - *Ingenuity:* Considers the employee's ability to deal with changing circumstances, to devise new methods, to plan ahead and to exercise good judgment.
  - *Interest and enthusiasm:* Considers the employee's positive attitude to his work; and their passion and positive inspiration in their job?
  - *Dependability:* Considers how far the employee may be relied upon to carry out tasks entrusted to him/her and general attitude towards his/her responsibilities.
  - *Co-operation:* Considers the employee's attitude to supervisors, willingness to co operate with fellow employees and his/her relations with public.

### 6.3 Performance Standards, Records and Improvement

- a) Performance standards will be set for each job so as to have criteria for evaluating employees as mentioned in section 6.2 above. The management will develop a performance evaluation tool which will capture the following areas valuable in performance of tasks within a job; technical knowledge, client service, leadership and training skills, development of human resource, successful development and implementation of programs, cost control, personal attitude, professionalism and teamwork.
- b) The Management of IDF will have in place an appraisal review form, which may be revised if need arises. For an effective and efficient appraisal process, staff will be required to familiarize themselves with the components of the Appraisal Form, mission, overall objectives, the strategic plan, and the annual work plans.
- c) It is the responsibility of the Director to ensure that appraisal of all staff are carried out and the results submitted and approved by the Board within the first quarter of the subsequent year following the calendar year period of appraisal.
- d) The line supervisor is responsible for making the appointments with the staff they supervise. The appraisal will take place in a surrounding conducive to discussions of a personal confidential nature, and sufficient time will be allocated to it. Should the staff member so indicate, a third person can be co-opted to participate in whole or in part of the appraisal. This person will be identified by mutual agreement between the supervisor and the staff being appraised.
- e) Each appraisal will be minuted, the minutes to be signed by the two participants and added to the personnel file. Staff appraisals shall use prescribed forms/formats. The Director, the employee's supervisor and the employee must sign the appraisal form to acknowledge participation in the process and agreement/disagreement with the results.
- f) The immediate supervisor must in every case hold face-to-face discussion with individual employee to explain ratings given. Where these meetings have not been held, the appraisal shall be invalid.
- g) All the three must sign the appraisal form and where any of the signatures are missing, then the appraisal will be rendered invalid and another new process must be initiated and finished within 15 (fifteen) days of realizing the mistake.
- h) All appraisal forms are maintained in an individual's personal file kept by the Finance manager for all positions other than that of the Director that shall be kept by the Board.
- i) The performance improvement steps are coaching, verbal warning and written warning. Minor cases of misconduct and cases of poor performance are best dealt with by advice, coaching and counseling. The supervisor is responsible for providing the employee with written documentation of all discussions and the paperwork is kept with both the supervisor and the employee. If performance does not improve, the supervisor may proceed to the next step in the disciplinary process, a verbal warning and if necessary, a written warning.

## CHAPTER 7: STAFF TRAINING AND DEVELOPMENT

### 7.1 Training and Development

Performance of the organization and its development depends on the competency and the commitment of staff. IDF believes that continuous training and development of staff is important in order to effectively contribute to the achievement of its objectives. Staff training and development may be undertaken in different ways such as: -

- a) **Induction:** This is a training intended to familiarize the staff with amongst about IDF, its relationships with other organizations and donors; the policies, rules and regulations governing the operations of IDF and its employees and the duties and responsibilities of the employees. All new staff shall on engagement undergo induction training for a period of one/two weeks as coordinated by the immediate supervisor.
- b) **On the job training:** On the job training is a continuous process available to all categories of staff. IDF will make use of the more senior and experienced staff in specialized fields in carrying out this type of training
- c) **Individual staff training:** These are based on a strengthening needs assessment by the employee and supervisor. This training can be funded partly or fully by IDF on approval of the Executive director and or board.
- d) **Joint training:** Training for more than 1 member of staff, either per job group, parts of the organization or for the entire staff based on jointly identified staff training needs.
- e) **Others:** These can be lectures, seminar, workshops organized by IDF or outside organizations and institutions.

### 7.2 Training & Development Needs Analysis

- a) Each year IDF will develop an annual training plan based on an inventory of training needs and a consideration of individual and team needs.
- b) In individual result agreements which are held with the supervisor, training needs and career development are discussed and performance indicators are established in order to determine the expected result of the training.
- c) Need for further development does not always need to result in training. Self-study of books or other materials can also be seen as further individual development.
- d) Due to limitation of resources, IDF encourages staff to also make their own arrangements to pursue further training for self-development.
- e) Where there is need for on the job coaching, the supervisor will look for possibilities of coaching/training on the job and will make a clear plan of action with the respective staff.
- f) Where there is more staff with similar training needs, joint-training possibilities will be pursued. Training and staff development is a responsibility shared by staff members and the organization.
- g) The board shall have the responsibility of approving any funding for training of staff before its undertaken.

### 7.3 Measurement of Training & Development Results

- a) After completion of all individual trainings, employees are requested to register the results of the training in the training evaluation form. This is done to get clarity about the quality of the training and the usefulness of the training for the particular member of staff.
- b) Results of the training will be discussed during the annual performance reviews with the staff and supervisor. During this meeting eventual new needs for training will also be assessed.



## CHAPTER 8: OCCUPATIONAL SAFETY, HEALTH & GENERAL ADMINISTRATION

### 8.1 Occupational or Workplace Safety

- a) IDF recognizes the importance of the safety and occupational health of staff and aims to provide safe work areas, equipment and material to protect themselves and other's safety.
- b) IDF shall maintain her working area in a perfect safety and hygiene condition to avoid any risk of accident that may risk and or negatively affect the health of the staff.
- c) IDF shall build, equip and install electricity, water and any other facilities that may help protect any possible risk to the employees in the workstation including provision of proper ventilation and light in order to make the working environment conducive
- d) All employees are expected to observe safety rules and report unsafe conditions to the administration department before anything bad happens.
- e) IDF shall strive to provide an environment reasonably free of health hazards and contaminants, which may adversely affect the safety and health of its staff &/or visitors.
- f) IDF will take care of 50% of all medical expenses of an employee who gets injured during working hours and while in the course of their duties. Any such injuries must be reported to the administrator immediately, however minor they may seem.
- g) All the working places of the organization will have sufficient and suitable toilets [male and female toilets will be separated]. All IDF buildings/offices must have running water for washing and adequate drinking accessible to all employees.
- h) IDF will provide a very professional and reliable security staff for all working places to protect the employee and property of the organization.
- i) IDF will ensure the security and the safety of the staff by keeping away all kinds of weapons from the working environment and shall take disciplinary action to any staff that possesses unauthorized weapons in the workplace.
- j) IDF will provide safety and security to all its visitors and gusts. The security personnel are not allowed to enter office premises and meeting venues with deadly weapons.
- k) IDF provides information to all employees about workplace safety and health issues through regular channels such as staff meetings and e-mails. Such sessions shall be used to train employees on how to use safety equipment and tools (e.g. fire extinguishers), first aid and actions and/or reactions during an emergency.
- l) The Administrator/Accountant is responsible for the availability, maintenance and accessibility of the office's First Aid kit. First Aid kits will also be made available in IDF vehicles and during all work-related field trips.
- m) In the case of fire or emergency, all staff should leave their offices immediate and exit from the building. Do not stop to clear papers or personal belongings.

### 8.2 General Safety and Health Considerations

#### 8.2.1 Drug and Alcohol Use

- a) IDF strives to provide a drug-free, healthful and a safe workplace and requires its employees to report to work in appropriate mental and physical conditions.
- b) No employee may use, possess, distribute, sell or be under the influence of illegal drugs while at work. The legal use of prescribed drugs is permitted on the job only if it does not impair an employee's ability to perform the essential functions of the job effectively and in a safe manner that does not endanger others in the workplace.
- c) Violations of this policy may lead to disciplinary action, up to and including immediate termination of employment, and/or participation in a substance abuse rehabilitation or treatment program. Such violations may also carry legal consequences.

### **8.2.2 Life-Threatening Illnesses in the Workplace**

- a) Employees with life-threatening illnesses e.g. cancer or AIDS, may to continue with their normal pursuits, including work, to the extent allowed by their condition. IDF supports these endeavors as long as employees are able to meet acceptable performance levels.
- b) IDF will make reasonable accommodations to allow qualified employees with life-threatening illnesses to perform the essential functions of their jobs.
- c) IDF treats employees' medical information as confidential and takes reasonable precautions to protect such information from inappropriate disclosure. Anyone inappropriately disclosing such information may be subject to disciplinary action.

### **8.2.3 Smoking**

- a) In keeping with IDF's intent to provide a safe and healthful work environment, smoking is prohibited at IDF offices. This policy applies equally to all employees and visitors.
- b) The Director may designate areas outside of the common areas in which smoking is permitted. Smoking is not permitted in IDF vehicles.

### **8.2.4 Communicable Disease and the Workplace**

- a) IDF will make every feasible effort to provide a safe and clean environment for employees including minimizing the spread of communicable diseases e.g. TB.
- b) Each employee has the responsibility to protect colleagues by not coming to work when they have either symptoms and/or a diagnosis of a communicable disease.
- c) The employee should notify the Director by telephone of their condition. The Director will then work with the Administrator to determine what precautions, if any, can be taken to limit potential spread to other employees.

### **8.2.5 Emergency Office Closings**

- a) At times, emergencies such as political instability, severe weather, or power failures can disrupt the operation of IDF, interfere with work schedules, or endanger the well being of employees. These extreme conditions may require the closing of an office of IDF.
- b) In the event that an emergency occurs during non-working hours, IDF office will initiate its "phone chain" to inform all staff members of the circumstances and action to be taken.

## **8.3 Policy on HIV and AIDS**

- a) This section of the manual aims to provide mechanism for disseminating proper guiding information for safeguarding non infected employees and caring for employees living with or affected by HIV/AIDS. This policies aim for non-discriminatory practices for managing human resource related issues in respect to HIV/AIDS status.
- b) The organization is an equal opportunity employer and will not use HIV/AIDS testing when recruiting job candidates. IDF treats job candidates who are known to have HIV/AIDS no differently from those who have any other life-threatening and non- contagious disease. Fitness to perform the job will be the only criterion that shall apply.
- c) Employees are under no obligation to notify IDF of their HIV/AIDS status and other medical information, unless disclosure is legally required, the employee's health is affecting their own/ organization's performance or lengthy employee absence necessitates management to obtain the employee's medical status, with the employee's written permission.
- d) Should it become known to the organization that an employee is HIV positive; the management will ensure the absolute confidentiality of this information and make every effort to protect that person from stigmatization and discrimination

### **8.3.1 Harassment and Discrimination**

- a) Any form of discrimination or harassment, directly or indirectly, towards an HIV/AIDS infected employee is considered to be misconduct warranting disciplinary action and will not be tolerated. This includes treating those affected differently or not applying a professional judgment in making personnel decisions.
- b) Discrimination in any form, from pre-employment to post-employment, including hiring, promotion, assignment, responsibilities, and benefits based on the actual, perceived or suspected HIV status is prohibited.
- c) Persons with HIV/AIDS already employed by IDF shall be entitled to the same employment rights, benefits and opportunities as other employees, namely security of tenure; reasonable alternative working arrangements, when necessary; and protection from stigma, demotion, discrimination and discontinuation by co-workers, from unions, employers and clients.
- d) Termination on the basis of actual, perceived/suspected HIV status deemed unethical.
- e) HIV-infected staff shall act responsibly to protect their own health & prevent HIV transmission.

### **8.3.2 Sick Leave, Redeployment or Termination**

- a) Employees who are prevented from performing their duties due to HIV/AIDS illness will be granted sick leave to regain their health. Sick leave is allowed under the terms and conditions described under the organization's sick leave policy.
- b) Where the organization is advised by a medical authority that an employee is unfit to carry out normal duties and there are no grounds to indicate that improvement is likely in the foreseeable future, and then an interview must be held with the employee to explore alternative future employment positions including redeployment to lighter duties; and or shorter daily or weekly working hours.
- c) IDF shall take steps to advise the employee on the implications of any of these options. All interviews and actions agreed are confirmed in writing to the employee.
- d) Termination on capability and medical grounds is allowed as a last resort with a date to terminate being set in advance if there is no return to work. IDF shall strive to comply with local labor legislation on termination and deployment.

### **8.4 Insurance**

- a) The Accountant shall be in charge of all insurance matters of IDF. Before 1st January of each year the insurance company contracted by IDF shall provide cover notes and confirmations for all policies held, which shall be filed and properly referenced by Accountant.
- b) Depending on the operational country, the Logistics officer shall ensure that all the necessary policies are in place at all times and any new adjustments within the years of insurance due to acquisition, disposal or change in risk factors and amounts are effected with the insurance firm immediately to avoid any insurance losses.
- c) The Accountant shall lodge any claims due to insured losses immediately such a loss is incurred and adequate compensation done by the insurance firm.
- d) The Accountant shall ensure that all premiums are paid on time. To facilitate such payment, the Accountant shall ensure that all debit notes; copies of cover notes and any other necessary correspondences with insurance agents are available every year.
- e) Decision of insurance should be based on the degree of exposure to risk, value of the assets and the cost of insurance. Every year (or at any time new assets are acquired) the Logistics Officer should analyze IDF assets and operations to determine the values at risk and the nature and degree of exposure.
- f) The services of an insurance broker may be used to identify appropriate insurance carrier, based on financial stability, service and record of settlement of claims.

## CHAPTER 9: DISCIPLINARY CODE, PROCEDURES AND SEPERATION

### 9.1 General provisions

- a) Disciplinary rules and procedures are necessary for fairness and order in the treatment of individuals. This disciplinary code has been developed in order to inform staff members of the possible consequences of actions which are contrary to the standard of conduct or performance expected of staff members.
- b) The need to invoke disciplinary measures is rare and should remain so. The objective of IDF's disciplinary provisions is primarily prevention or correction rather than punishment.

### 9.2 Misconduct

Misconduct means wrong and improper behavior. Innocent errors, omissions, or mere inefficiency constitutes do not constitute misconduct but disobedience, insubordination or gross negligence does. The following are generally considered to be acts of misconduct.

#### 9.2.1 Misconduct affecting Suitability of Employee for Employment

- a) Non-performance of duty or Negligence of duty,
- b) Sleeping during duty hours or Loitering during duty hours,
- c) Absences without leave or Absence in spite of refusal of leave,
- d) Constant indifference to work or Lack of efficiency,
- e) Irregular or late attendance or Habitual late attendance,
- f) Doing personal work during duty hours,
- g) Damage to property/funds of IDF,
- h) Unauthorized communication or disclosure of information, and/or
- i) Carelessness in handling IDF property/instruments.

#### 9.2.2 Misconduct affecting Discipline

- a) Riotous and disorderly behavior,
- b) Willful disobedience or default or insubordination, disobedience of orders when justified,
- c) Acts of misconduct outside working hours; offence involving moral turpitude,
- d) Illegal strikes, go slow and acting in a manner prejudicial to the interest of IDF,
- e) Interference or tampering with safety devices,
- f) Threatening or intimidating any official(s) of IDF,
- g) Unauthorized use of IDF property for personal purposes,
- h) Writing anonymous or pseudonymous letters,
- i) Writing to superior authority without proper channel, and/or
- j) Malaise criticism of organizational authority.

#### 9.2.3 Misconduct affecting Morality

- a) Theft, dishonesty, fraud, lying, misrepresentation and falsification of reports or documents,
- b) Acceptance of a bribe,
- c) Drinking alcohol while on duty, Alcoholism/Drug addiction,
- d) Damage to property or reputation of employer,
- e) Conviction in the court of law,
- f) Gambling,
- g) Sexual immorality, scandal or harassment\*,
- h) Use of abusive language or physical violence in the office,
- i) Refusal to accept orders of competent authority of IDF.

#### 9.2.4 Sexual harassment

- a) IDF prohibits action or conduct by any staff member that could reasonably be viewed as sexual harassment. For purposes of this policy sexual harassment is defined as making a request or exerting pressure for sexual activity/favors, unwelcome verbal/physical conduct of a sexual nature which causes personal offence, or the abuse of the authority conferred on staff members by their position or use of pressure to obtain favors of a sexual nature.
- b) In the latter case, this includes, but is not limited to, a word, gesture, attitude or behavior by a hierarchical superior with a view to compelling another staff member to respond to a solicitation of a sexual nature. Sexual harassment may also include making gestures, noises, jokes or comments, including innuendoes regarding another person's sexuality.
- c) Any staff who feels that s/he is being subjected to sexual harassment should take assertive action immediately. This begins with making his or her disapproval or unease known to the offender immediately and reporting the incident for disciplinary purposes to the Director.
- d) IDF urges employees who feel and or believe they have been or are being harassed to promptly and directly notify the offender that the behavior in question is inappropriate and request that the behavior be stopped. There are two options that exist to resolve an incident of sexual harassment - an informal procedure and a formal procedure.
  - i) **Informal Procedure:** The informal procedure may be followed if the harassment is not sufficiently serious to warrant the formal procedure.
    - The complainant or an appropriate person can address the issue with the person engaging in unwanted conduct and explain that his/her behavior is unwelcome, offensive, makes the victim feel uncomfortable and/or that it interferes with his/her work.
    - Any allegations of sexual harassment, whether the staff has been a victim of such an incident or becomes aware of the same, must be brought to the attention of her/his immediate supervisor and/or the Human Resources and Administration Manager as soon as possible.
  - ii) **Formal Procedure:** In the event that the unwanted behavior is serious, or if the informal procedure does not resolve the matter, then the formal procedure shall apply
    - Serious cases of sexual harassment include, but are not limited to, quid pro quo harassment (e.g. a direct supervisor seeks sexual favors in return for something within the supervisor's powers such as threatening to fire someone or offering them a raise), sexual assault or the threat of it, and rape. The complainant must inform his/her immediate supervisor and the Human Resources and Administration Manager of his/her grievance in writing.
    - Any reported allegations of harassment shall be investigated promptly. Confidentiality shall be maintained throughout the investigation process to the extent possible, under the circumstances, considering the sensitive interests of all concerned.

#### 9.3 Discharge and Principles governing it

IDF adheres to the policy that any procedure involved in bringing to an end an individual's employment must be observed to ensure fairness. In this regard therefore:

- a) No employee will be dismissed for comparatively minor misconduct or for a first breach of discipline other than for those classified as gross misconduct.
- b) No employee shall be dismissed unless and until all circumstances of the case in question shall have been carefully considered and discussed by the management or by a designated disciplinary committee if it will be in place/functional.
- c) The ED or his designee shall exercise power of retirement, termination, dismissal or any other discharge from employment. All dismissal shall be in writing. Such retirement, dismissal or discharge of senior management shall be done in consultation with the board members

### 9.3.1 Warning Procedure

An employee whose work or conduct is unsatisfactory or who otherwise commits a misconduct which in the opinion of the IDF does not warrant summary dismissal shall be warned in writing. The following procedures shall apply:

- a) The first, second and third warnings shall be entered in the employee's employment record and copies sent to their relevant supervisors
- b) Where an employee refuses to accept a warning letter, it shall be deemed to have been served on him and a copy shall be placed in the employee's employment record.
- c) Once a written warning has been issued, an employee shall have the right to appeal against it within 48 hours, after which the right to appeal shall lapse. An employee with two warnings committing a third misconduct, is liable for summary dismissal
- d) Where an employee completes a year from the date of that last warning without further misconduct, any warning entered in his employment record shall be cancelled.
- e) Reasons for official warnings may be:
  - Non-compliance with the staff regulation or code of conduct.
  - Non-compliance with the work schedule or the non-justified absence at work.
  - Absence from work without notice during working hours.
  - Lack of respect, physical or verbal threats towards visitors, staff members of the own or partner organizations and/or IDF property.
  - Negligence in the performance of his/her tasks.
  - Being otherwise found to be unsatisfactory in his/her work performance.
  - Disobedience of orders and instructions from hierarchical superiors

### 9.3.2 Withholding of Salary

In cases of unjustified absence, loss or deliberate destruction of organizational material, fraud leading to misappropriation or theft of materials/funds, IDF may withhold/reclaim totally or a certain percentage of the concerned employee's salary. In no case may the amount of salary withheld be higher than the equivalent of the length of the absence or the sum price of the damage. Additionally, IDF will recover loss of property from an employee who:

- a) Negligently fails to collect any monies' owing to the IDF under her responsibility;
- b) Is personally responsible for shortage or misapplication or loss of funds;
- c) Knowingly uses without authority stores, vehicles, buildings, equipment or any other IDF property or services provided for official purposes or use.
- d) An employee aggrieved by a surcharge action may appeal in writing through his/her supervisor to the Executive director in accordance with the procedure laid down.
- e) Where after the investigations the employee is found guilty or proved to be at fault, such employee shall be summarily dismissed and shall not be entitled to benefits.
- f) Where IDF fails to prove beyond doubt that the employee was at fault but IDF still considers that it is in its best interest that the employee's services are terminated, such employee's services may be terminated. However, such employee shall be paid the benefits including salary up to and including the date of termination.
- g) Where staff is found not to be at fault, such employee shall be reinstated with full benefits.

## 9.4 Summary Dismissal/Termination

Any action by employee constituting gross misconduct may be punishable by summary of dismissal. Such dismissal shall be without notice. Any of the matters set out in this manual shall apply.

### 9.4.1 Right of Defence

- a) An employee alleged to have committed gross misconduct should be allowed an opportunity to defend himself/herself within a period of 48 hours.

- b) The above period isn't a rigid maximum but as employee who requests for a reasonable extension of the period may be given consideration to enable them complete the statement of explanation, such extension shall in any case not exceed a further 48 hours
- c) If an employee allowed an opportunity to defend him/her fails to do so or where the reasons so advanced do not exonerate the employee; the management will take a decision on the basis of the information available to them.

#### **9.4.2 Further Inquiry**

- a) If, on consideration of the reports, the management is of the opinion that the matter requires further investigation, a further inquiry will be made before a final decision is made.
- b) If, on consideration of the reports and answers, if any, by the employee to the charge(s), the management is of the opinion that no further investigation is necessary, it will forthwith confirm the disciplinary action already taken against the employee.
- c) If, on consideration of the reports and answers, if any by the employee to the charge(s), the Management is of the opinion that the employee's explanation totally exonerates him/her from any blame, he/she shall order that the action taken be withdrawn.
- d) The staff shall be informed in writing of the decisions arrived at in respect of his/her case.

#### **9.4.3 Right of Appeal**

- a) Where an employee has been disciplined through the action of warning, suspension, termination, demotion, or by any other disciplinary procedure, he may appeal against such disciplinary measure through his/her supervisor in the following manner;
- b) An employee through whom the appeal is lodged shall attach his/her comments before forwarding the appeal to the higher supervisor for action.
- c) The appeal must be received within 48 hours from the date of the letter of discipline.
- d) All appeals must be in writing; the right to appeal shall lapse after the 48-hour period.
- e) Only one appeal will be allowed in respect of one disciplinary action.
- f) The decision on appeal shall be promptly communicated back to the staff in writing & is final.

#### **9.4.4 Misconduct Involving Criminal Proceedings**

- a) Where an employee commits a misconduct that may also involve criminal proceedings, IDF shall carry out an independent investigation into the circumstances of the misconduct, procure a written statement from the employee, and having regard to all the reports, and the employee's record of service shall take appropriate disciplinary action.
- b) Where the investigations reveal sufficient grounds to warrant dismissal, action will be taken to dismiss the employee summarily, independent of any police action or investigations. Thereafter, IDF may report the matter to the police for criminal investigations.
- c) In stating the misconduct for which disciplinary action is taken, IDF shall avoid use of criminal terminology such as theft, forgery, stealing etc.

#### **9.4.5 Falsification of Information and Records**

False information supplied to IDF relating to experience, education, credentials, past employment, salary history, job responsibilities or other personal information, is grounds for denial of, or termination of employment.

#### **9.4.6 Absence and Lateness**

- a) Employees of IDF are expected to be punctual and regular in attendance. Staff are expected to report to work as scheduled and to remain at work except for meal periods, authorized breaks or when required to leave on authorized IDF business or field work

- b) All staff must notify their immediate supervisors as soon as possible if they are unable to report to work. In all cases of absence or tardiness, employees must provide their immediate supervisors with a reason or explanation. Other than extenuating circumstances, all staff must notify the office on each day that they are not able to report to work.
- c) Staff absent for three (3) or more days due to illness or injury or on two or more occasions during an eight (8) week period, may be required to submit a medical certificate of incapacity to work from a registered medical practitioner upon their return to work.
- d) Excessive absenteeism (excused or not) may be grounds for disciplinary action including termination of employment. Staff failing to report to work for a period of three (3) consecutive days without notifying their immediate supervisors may be subject to appropriate disciplinary action including dismissal

## **9.5 Administration of Employee Separation**

### **9.5.1 Termination**

Termination of services of IDF employees, where applicable, shall be as follows:

- a) If, it is considered that it is desirable in the IDF interest that the service of an employee be terminated on any provision of this section of the regulations, the employee will be notified in writing of the specific reason of which termination of his service is contemplated together with the substance of any report or part thereof that is detrimental to him.
- b) If, after the employee has been given an opportunity to defend him/her, it is still considered that his/her service should be so terminated, action will be taken to terminate his service in accordance with his terms of employment. Commonly:
  - All employees will receive one-month notice or months' pay in lieu of such notice.
  - Employee serving the probationary period or on contract employment may be terminated by giving one month notice or one months' salary in lieu of notice.
  - Nothing in the foregoing shall be construed so as to derogate the right of the IDF to terminate a contract summarily for lawful cause.

### **9.5.2 Unsatisfactory Performance or Conduct**

- a) Unless otherwise specified in the employment contract, IDF shall, whenever possible, give the employee at least one (1) calendar months prior notice if termination of employment is due unsatisfactory performance or conduct except in the case of Gross Misconduct.
- b) The IDF Management shall complete the Unsatisfactory Performance Termination Checklist before dismissal of any employee for unsatisfactory performance or conduct except in the case of Gross Misconduct.
- c) All employees subject to dismissal for unsatisfactory performance or conduct shall be offered the opportunity to resign except in the case of Gross Misconduct.
- d) Local legal counsel shall be advised of all dismissals.

### **9.5.3 Resignation**

An employee is required to give notice of intention to resign or to pay salary in lieu of such notice by giving a written one months' notice or one Month's pay in lieu of such notice. The requisite period of notice may be reduced or waived at the discretion of the Executive director

### **9.5.4 Retirement**

- a) IDF shall ask employees to retire from its service on attaining the retirement age of 60 yrs. An employee may elect to retire voluntarily from the services of the IDF on attaining the age of 55 years and upon giving appropriate notice.



- b) Staff may retire or be retired prematurely on grounds of ill health at the request of IDF or the staff on the basis of a doctor's medical report attesting to such illness that render the employee unable to perform their duties effectively and recommending termination of employment. Should such a medical report be disputed, IDF shall seek a second medical opinion from one or two other doctors singly or jointly which opinion shall be final.
- c) Where the illness arises from an occupational disease or injury at the place of work, the employer shall act in accordance with the Workmen's Compensation Act of the host country which requires that in the event of dispute over the opinion given by a doctor appointed by the employer or the employee, the matter shall be referred to the Labour Commissioner to appoint a Medical Board for determination. The decision of the Board shall be final.
- d) The power to institute employee retirement shall be vested in the Executive director.
- e) At the sole discretion of IDF, an employee may be allowed to defer his/her retirement on attaining the apparent age of 60 years. Such employee must however retire on attaining age 65 years. On retirement, employees will be entitled to retirement dues as follows:
  - Employee serving in the contractual employment will receive retirement benefits on the basis of the years completed or as per contract agreement/terms
  - All employees will be entitled to pension as laid out in the Pension Rules.
  - An employee who dies whilst in the service of the IDF will be paid retirement benefits.
- f) During the probation period, either party may terminate the contract at any point without any notice. Only days worked shall be paid for and no other benefits.

#### **9.5.5 Redundancy**

- a) IDF can remove a regular employee from service due to reasons of re-organization, functioning, readjustment of work, abolition of office, job or occupation, reduction of activities or programs or where the services of an employee become unnecessary to IDF requirements. The decision is made at the discretion of the Executive director.
- b) Staff members who separate due to redundancy may be entitled to payment of the following entitlements according to appropriate Kenya labor laws and regulations (local legal counsel should be consulted): a) Salary in lieu of notice excluding entitlements, b) For every completed year of service, fifteen (15) days basic salary at the current basic rate, c) Salary and entitlements for any days worked up to the last work day, d) Salary and entitlements in lieu of any leave earned but not taken, e) Any other ex-gratia payments at the discretion of IDF, f) Certificate of Service/Letter of Recommendation

#### **9.5.6 Contractual Termination**

- a) Lack of Funds, Non-Fulfillment, or End of Donor Contract (Contractual Terminations)
- b) Unless otherwise specified in the employment contract agreement, IDF shall, whenever possible, give the employee at least one calendar month prior notice if termination of employment is due to lack of funds, non-fulfillment of contractual obligations by the donor or the donor contract is ending.

#### **9.5.7 Death of an Employee**

Where an employee dies whilst in the service of IDF, IDF shall as soon as practicable inform the next of kin and also give notice to the Labour Officer or where there is no Labour Officer, to the District Commissioner of the district in which the employee was employed.

#### **9.5.8 Clearance Certificate and Certificate of Service**

- a) On leaving the services of IDF, all employees will be required to return in satisfactory condition all equipment and any other articles, which are the property of the IDF before the employee receives his final dues
- b) When an employee is paid the final dues on discharge from employment and having returned all IDF property in his/her possession in satisfactory condition, he/she shall be required to sign a clearance certificate.

- c) IDF shall give every employee a certificate of service upon the termination of his employment unless the employment has continued for a period of less than four consecutive weeks. Every certificate shall contain the name of the employer and his postal address; name of the employee; date employment commenced; nature and usual place of employment; date when employment ceased; and any other such particulars as may be prescribed.

#### **9.5.9 Final Pay Cheques/Separation Pay**

- a) The Kenyan Law requires employers to immediately pay discharged (dismissed) employees and those resigning voluntarily their accrued earnings.
- b) The employer has the right to reduce the employee's final pay-cheque by any lawful charges or indebtedness owed by the employee to the IDF.
- c) The exiting employee's supervisor should review the employment contract and the personnel file to determine all funds owed to the employee.
- d) The failure of IDF to comply with any statutory requirements may make IDF liable for legal action including penalties.

#### **9.5.10 Testimonial and Confirmation Reference**

- a) Where an employee or a prospective employer of that employee requests for a testimonial or confidential reference, these will be issued at the discretion of IDF management.
- b) Such testimonial or confidence reference shall give an honest and balanced assessment of the employee's performance and conduct during his period of service with the IDF.
- c) The testimonial or confidential reference shall be given by the Executive director or by a duly authorized person acting on his/her behalf.

## CHAPTER 10: OFFICE ADMINISTRATION

### 10.1 Office Telephone, Computer and Internet

- a) Office equipment such as office desk, telephones, cameras, mobile phones etc. assigned to an employee to conduct IDF business should be handled with discretion and care.
- b) Use of audio and voice e.g. TV, radio and conversation on telephone should be in good sense with respect to both volume and nature.
- c) Personal calls on IDF lines shall be subject to approved telephone rules and charges for such may apply, on actual basis. Such charges will be invoiced to the staff and if not paid within the time provided, be deducted from the staff payroll.
- d) Computers, computer files, the e-mail system, Internet access and software furnished to employees are IDF property and are intended for its business only. Employees should not use passwords, access files or retrieve any stored communications not assigned to them without prior authorization.
- e) IDF strives to maintain a workplace free of harassment and sensitive to the diversity of its employees. Therefore, IDF prohibits the use of computers, the Internet and the e-mail system in ways that are disruptive, offensive to others, harmful to morale or damaging to IDF's reputation and image. For example, the display or transmission of sexually explicit images, messages and cartoons is not allowed. Other such misuse includes, but is not limited to, ethnic slurs, racial comments, off-color jokes, or anything that may be construed as harassment or showing disrespect for others.
- f) IDF's E-mail and telephone may not be used to solicit offers for commercial ventures or personal religious or political causes unless authorized by the Executive Director.
- g) IDF purchases office licenses for use on various office equipment e.g. computer software for its business purposes only and does not own the copyright to this software or its related documentation unless authorized by the software developer, thus IDF staff do not have the right to reproduce such software for personal use. Employees may use only the software on local area networks or on multiple machines according to the software license agreement. IDF prohibits the illegal duplication of software and its related documentation.
- h) To ensure that these policies are followed, IDF reserves the right to review computer files and e-mails of employees in cases when a credible accusation of policy misuse has been reported.
- i) IDF reserves the right to retrieve computer files and e-mails of employees if a necessity arises for information kept by an employee who is unavailable within a reasonable timeframe. Employee computer files and e-mails will only be retrieved with approval of the Office Manager.
- j) Employees should notify the Executive Director upon learning of violations of this policy for disciplinary action.
- k) Employees should also notify the Office Manager if any equipment appears to be damaged, defective, in need of repair or lost. Prompt reporting of damage, defects, and the need for repairs could prevent deterioration of equipment and possible injury to employees or others.
- l) In the event that an employee is involved in an accident in the office or when travelling on IDF business, the employee is expected to report the accident and any injuries to staff or a third party to the Executive Director within 24 hours. The Executive Director with the assistance of the Office Manager will then work to complete the proper procedure for medical and insurance claims.
- m) The improper, careless, negligent, destructive or unsafe use or operation of office equipment may be subject to disciplinary action, up to and including termination of employment.

## **CHAPTER 11: EXTERNAL COMMUNICATION AND MEDIA RELATIONS**

### **11.1 General Policy Stipulations**

- a) The Executive Director shall be in charge of all official external communications for IDF. S/he is the only official mandated to answer routine inquiries from the news media concerning specific program activities in which IDF is involved.
- b) All media inquiries about IDF or inquiries in which additional research may be required should be referred to the Executive Director. Any non-director staff member who receives a call from the media should refer that call to the Executive Director.
- c) All official written correspondence using IDF stationery (e.g. IDF Letter head) must be approved by the Executive Director or his/her delegate.
- d) Employees are not authorized to make any declarations (in whatever form) to the press or media, this sort of creation will be liable to render him/her for disciplinary action.
- e) Unless authorized by the Executive Director, an employee shall not make statements to the press, radio or television or other organizations or to unauthorized persons on IDF matters.
- f) No other actions whatsoever which involve IDF with other organizations or local authorities may be decided on by an employee without the prior approval from the Executive Director.

### **11.2 Communication and Dissemination of Information**

- a) IDF will continually need the communication capability to rapidly identify, send, receive, and understand strategic information that is credible, sensible, and relevant.
- b) In order to deal with the public that requires prompt information and an enabling working relationship. IDF undertakes to develop a rapid response system to events, while maintaining the goodwill of partners and beneficiaries, it is imperative that all care is taken to ensure the smooth transfer of information amongst staff and to all the publics that benefit from or support the services of the organization as well as the internal publics i.e. the staff who provide the services sometimes at great cost and risk to their own safety and lives.
- c) IDF expects employees to always seek the safest and least costly form of communication. Cellular phones should not be used when regular hardwire phones or other alternatives are available. The IDF PABX exchange is fitted with Mobile phone facilities, both Hormoud and Sometel lines which therefore allows all users to access the services from the regular land lines on office desks.

### **11.3 Internal and External Communication**

- a) IDF recognizes that effective internal communication helps an organization to meet its objectives. All IDF Headquarters staff and County field staff are the image bearers of the organization. Their conduct in public and in private has a bearing on how the organization is perceived.
- b) IDF will not hinder any form of communication networks – formal and informal that support individual growth among staff so long as such communication does not go against the stated objectives, values and fundamental principles of the organization. All IDF employees are encouraged to keep their reporting lines/supervisors informed of their actions before going to a senior staff for complaints, concerns and work.
- c) Electronic communication has become a major part of internal and external communication - IDF has developed guidelines in this policy to facilitate proper and safe use of electronic communication channels.
- d) IDF operates a relatively flat organizational structure that encourages open communication and an open-door policy. All staff and volunteers working for IDF headquarters and County/ field projects will be treated with respect by colleagues and teamwork will be expected and encouraged at all times.
- e) Staff, Interns and volunteers in the field taking pictures or recordings of beneficiaries must seek their permission to do so and must inform them on the use to which the pictures and recordings will be put prior to taking the pictures or making the recordings except where such permission cannot be obtained because the beneficiary is incapacitated. Such pictures and/or recordings may never be used for commercial purposes.

- f) IDF is committed to informing the public of its activities and will maintain and will work with the logistics/ admin unit to set up and maintain a website. However the heads of departments, Regional program associates and subject matter experts will ensure that the information on the website is updated regularly and is factually accurate and technically correct.

#### **11.4 Press and Media Management**

- a) All press related matter will be coordinated by the office of the Executive Director. IDF will make every effort to forestall negative publicity and bad press. In the event that IDF suffers negative publicity that could damage its public image and ruin its relations with stakeholders and partners, the Executive Director will take responsibility for damage control.
- b) The communications office will monitor all media and notify the Executive Director of any bad press or media coverage with potential for damaging the image of the organization. The Executive Director, working with the board will take up the matter with the concerned organization or persons and through quiet diplomacy clarify the IDF's position.
- c) Where necessary, the Executive Director will call a press conference or issue a press release, letters or verbal explanations and end with the assurance that the IDF remains steadfast in discharging its mandate to all its publics guided by the Mission and Vision anchored on the national health policy. A permanent record of the communication will be kept.
- d) Where there is need for the offending party to apologize to the Organization, the Executive Director will work with the Public Relations office and the IDF lawyers to ensure that the apology is received from the offending organization.

#### **11.5 Copyright and Plagiarism**

- a) A copyright is a property right created by law that protects the expression of ideas, as opposed to abstract ideas or concepts. A copyright provides its owner with certain exclusive rights including the legal right to prevent others from reproducing the copyrighted work and publicly distributing and displaying the copyrighted work.
- b) IDF maintains an ownership interest in all written reports, articles, photos, and tapes produced by an employee in his/her professional capacity while at IDF. An employee may not copyright such material without the express written permission of IDF's Executive Director.
- c) IDF also expects employees to adhere to international copyright laws with regard to the works of others. Plagiarism is strictly prohibited. No staff member should use within any IDF report or other written material another's copyrighted product without proper acknowledgement or, where necessary, the express permission of the author.

## CHAPTER 12: TRANSPORT MANAGEMENT

### 12.1 Requisition of Motor Vehicles

- a) Requisition of Motor Vehicle shall be by use of a Work Ticket. The work ticket shall be raised by the requisitioner and approved by the head of department/project and the office manager.
- b) Requisitions must be received at least two days to travel date for out of the office travel while travels within/ around the office can be real time provided a motor vehicle is available for use.
- c) Priority shall be assigned on first come first served basis except in emergency cases.
- d) All staff of IDF are allowed to drive IDF vehicles provided: -
  - They have a valid driving license (interim licenses are not allowed)
  - Are not under the influence of drugs/alcohol
  - Travel distance is not over 150kms return trip
  - Have been approved to drive IDF vehicles by the Executive Director
- e) All travel of over 150kms return trip shall be by the employed drivers of IDF except in cases where the staff has been approved to use the vehicle for private use.
- f) Private use of IDF vehicles shall be approved by the Executive Director.

### 12.2 Motor Vehicle Insurance

To manage vehicle related risks, the Office Manager shall;

- a) Keep up to date insurance coverage;
- b) Ensure that all vehicles have comprehensive type of insurance
- c) Maintain all vehicles/cycles in a good working condition;
- d) Ensure safe packing of vehicles/cycles;
- e) Carry only authorized passengers or goods and in the right quantities;
- f) Maintain safe speeds and ensure that all vehicle occupants belt up while traveling
- g) Ensure all vehicles are fitted with first aid boxes

### 12.3 Procedures on Use and Maintenance

- a) Every vehicle/Cycle must have a work ticket (log-sheet), kept in the vehicle. The work ticket should record;
  - The starting and closing mileage,
  - Purpose of the journey,
  - Officer approving the journey,
  - Mileage at fueling and quantity of fuel,
  - Name of the driver
  - Details of servicing (mileage reading date and time)
- b) At the end of every month, a summary should be made by the lead driver of the mileage covered, fuel consumed and servicing or repairs done. From these statistics, it is easy to determine the areas where heavy costs are being incurred and corrective action taken promptly.
- c) All IDF vehicles/Cycles must be registered in its name and not in any other individual or organization's name. The board must authorize exceptions especially where donor funded projects must be registered differently as a donor condition.
- d) All IDF vehicles shall be driven in strict observance of the local laws on transport, traffic and licensing. Any diver / staff who breaks local laws while driving shall be deemed to have committed an offence and will face disciplinary action including paying for charges that arise out of that offence (such as vehicle repair costs not covered by insurance, government charges and damages to property not covered by insurance among others).
- e) IDF's name and logo should be on all its vehicles/cycles. IDF vehicles/cycles should as much as possible be housed at the office and be fully insured and depreciated accordingly.

- f) IDF's vehicles/cycles shall be used strictly for official duties, any (authorized by the Executive Director or his/her designate) personal use will be charged to the staff at market rates per kilometer. In case of misuse, offenders shall be surcharged in addition to any other disciplinary action, which may be taken against them.
- g) The Office Manager should ensure vehicles/cycles are properly managed by:
  - Keeping individual files for each vehicle
  - Keeping all legal documentation as provided for by local laws/rules for each vehicle
  - Keeping a vehicle maintenance and repairs record showing service history and or replacement plans for the vehicles/cycles
  - Ensuring that basic regular servicing is done
  - Writing up of work ticket whenever the vehicle is used
  - Following a clear procedure for buying and recording fuel usage
  - Establishing a known procedure for reporting problems
  - Clearly spelling out actions to be taken in the event of accident
  - Setting up rules for personal use of vehicles/cycles
  - Undertaking regular review of the work tickets to know how vehicles/cycles are used
  - Carefully planning the usage of all vehicles/cycles with the staff and
  - Establishing a clear procedure for authorization and usage

#### **12.4 Taxi and Other Transport Management**

- a) Use of other non-IDF vehicles shall only be limited to unavailability of own vehicles.
- b) Taxi shall be requisitioned with a work ticket marked "No Internal Transport" by the Office Manager.
- c) On receipt of taxi invoices, the matching work ticket shall be attached and submitted to finance for payment.
- d) External transport service providers shall be selected through the IDF procurement of service procedures detailed under procurement above. Unauthorized single sourcing shall not be allowed unless it is an emergency.

#### **12.5 Motor Vehicle Facilities and Equipment**

##### **12.5.1 Introduction**

- a) All IDF facilities, equipment and vehicles are tools provided to employees for project objectives, and they are not the personal property of the employee.
- b) IDF facilities, equipment and vehicles may not be used by an employee for personal or outside business. The unauthorized use by an employee of IDF facilities, equipment or vehicles may result in disciplinary action up to and including termination. Any resulting damage to IDF facilities, equipment or vehicles will be the responsibility of the employee.
- c) In order for an employee to take IDF equipment or vehicles off IDF premises, the employee must obtain the prior written approval of his/her supervisor. When the equipment or vehicle is returned, the supervisor should check to see that all components of the equipment or vehicle have been returned, and that the same are in good working order.
- d) Upon an employee's termination of employment from IDF, he/she is required to immediately return any equipment or vehicle that has been issued to them during the course of their employment.

##### **12.5.2 Motor Vehicle Use and Maintenance**

- a) It is the policy of IDF that vehicles owned or leased for various business purposes be operated and maintained in a safe and secure manner.
- b) Only IDF employees should ride in IDF vehicles, and IDF vehicles are for the exclusive use of employees in the execution of their duties. Partners may however be allowed to ride in IDF vehicles as long as they are with staff and engaged in a program activity. They must however sign a waiver form.
- c) Employees driving IDF vehicles are expected to exercise proper care and handling of the vehicle assigned to them and to use them only for business purposes.

- d) As a driver of an IDF vehicle, employees should display courtesy and defensive driving tactics at all times. All drivers:
- Must possess a valid driver's license for the country in which the vehicle is operated.
  - Must adhere to all applicable traffic laws in the country in which the vehicle is operated.
  - Are responsible for all tickets/ fines incurred for failure to obey applicable traffic laws.
  - Who operate "off-road" vehicles (forklifts, tractors, heavy equipment etc.) are expected to adhere to all applicable laws or regulations pertaining to the safe operation of the vehicle.
  - If an employee loses the privilege to drive, the employee must notify his/her supervisor at the time the employee loses driving privileges. An employee's failure to notify his or her supervisor of such loss can result in disciplinary action, up to and including termination.
- e) The following basic principles govern the use of IDF vehicles:
- No IDF vehicle shall be used for a purpose which does not accord with these policies.
  - ii) No IDF vehicle shall be driven by a person who is not an authorized IDF driver.
  - Local law must be respected at all times.
  - No IDF vehicle shall be driven by a person under the influence of alcohol or drugs.
  - Speed limit for IDF vehicles will be the lower of 100KM/H or the legally allowed speed unless the life of the driver and the passengers is substantially threatened.
  - IDF vehicles will not be driven before 6:00AM or after 6:00 PM unless exigent circumstances otherwise require, which should be documented.
  - All IDF vehicles must be insured comprehensively.
  - IDF operates a car-pooling system for achieving work related transport functions. Vehicles are made available upon request.
  - Staff may use a taxi with the supervisor's authorization, in cases where IDF vehicles would have been used, but where the same are not available.

### 12.5.3 Authorized Drivers

- a) Only IDF authorized drivers are allowed to drive IDF vehicles. IDF authorized drivers must meet the following minimum criteria:
- Must be specifically employed by IDF as a driver.
  - Under exceptional circumstances, an employee not specifically hired as a driver, may drive an IDF vehicle but only with the express written approval of the HR/ Administration Manager or his/her delegate. Justification for such an occurrence must be clearly documented.
  - Must hold a valid driving license for the class of vehicle driven. Copies of this must be given to the HR and Administration manager at the Nairobi Headquarters. IDF will pay annual driving license fee for those employees employed specifically as drivers.
- b) All staff who are authorized to self-drive IDF official cars must be apart from having been drivers for of such classes for at least three years must also undergo a road test by an employed driver of IDF. Staff employed as drivers must pass a driving assessment by the Automobile Association of Kenya.

### 12.5.4 Request and Use of Motor Vehicles

- a) In order to assist the HR and Administration Manager to plan, transport requests for overnight trips, the employee requesting for this service should fill the Transport Request Form and given to the Administration focal person at least one day before the vehicle is needed. The following is required on the form before it is brought to the HR and Administration Office:
- Details of officer requesting and purpose for which the vehicle will be used.
  - Budget codes to be charged for the trip.
  - Approval of staff's supervisor.
  - No vehicle should be allowed out of the premises without approved Transport Request Form.



- b) Requests for a vehicle to travel out of Nairobi should be given to the HR and Administration officer at least five working days before the projected date of travel. This will give the HR and Administration office enough time to make sure he/she has a vehicle in proper condition to handle the distance/roads such a journey might entail.
- c) Please note that staff may be required to combine trips if the situation demands. This would include when there is a scarcity of vehicles, or where such a combination would result in IDF saving money.
- d) The requesting staff will be assigned a vehicle with a driver, unless no driver is available in which case he/she may be given a car to drive if he/she is an authorized driver. In order to give time for cleaning and maintenance checks, vehicles will not be available before 6.00am, except for emergency or urgent cases. Please plan your appointments appropriately.

## ANNEXTURES – JOB DESCRIPTIONS

### EXECUTIVE DIRECTOR

#### Objectives of the Position

Under the direction of the Board of Directors, the Executive Director (ED) is responsible for IDF's overall management, operations, public relations and control/protection of its resources while ensuring compliance with donor & regulatory requirements.

#### Essential Duties and Responsibilities

- a) Overseeing all accounting functions including those necessary for auditing, budgeting, property management and payroll in accordance with the IDF finance policies and procedures.
- b) Overseeing all aspects of human resource management for all staff including but not limited to hiring, developing, compensating, terminating and generally applying board-approved staff policies in accordance with legal/statutory requirements.
- c) Interacts with other organizations, such as donor agencies, partners, authorities, and other IDF collaborators in regard to matters affecting IDF.
- d) Grants/contracts management e.g. negotiating project agreement terms, monitors progress of agreements and maintains agreement documentation to ensure fulfillment of agreement terms including receipt and expenditure of funds.
- e) Assists in the development of current and long-term organizational goals and objectives as well as policies and procedures for IDF operations. Establishes plans to achieve goals set by the Board & implements policies, subject to approval by the Board.
- f) Working closely with the Program Coordinator and Finance & Administration Officer to ensure appropriate support systems and responsive, quality projects, grant management, accounting, HRM and other related administrative functions.
- g) Analyzing/evaluating suppliers services (e.g. insurance, evaluators, auditors and other consultants) to determine providers that best meets the needs of IDF, negotiate services terms and executes contracts.

#### Core Competencies

To perform effectively in this position, the incumbent should demonstrate the following competencies:

- a) **Management:** Understand & comply with internal controls and comply with legal and statutory requirements. Have strong leadership, communication, interpersonal and organizational skills. Team player with a high level of creativity and innovativeness..
- b) **Job Knowledge/experience:** Understand technical aspects of managing an NGO & the duties and responsibilities of the position; minimum of 5 years post qualification experience in NGO setting. Demonstrated experience of working in partnership with other organizations for purposes of networking
- c) **Initiative in fulfilling the goals of IDF:** Be able to recognize and bring to the attention of the chair of the board issues that affect the organization and make suggestions on how to handles these; implement plans to reach organizational goals as determined by the board; display initiative in developing action plans & resolving any problems.
- d) **Communication:** Communicate effectively with multiple audiences on various issues using a variety of formats e.g. written communications, verbal presentations etc.
- e) **Dependability:** Be responsible while remaining careful, thorough, accurate, and reliable in achieving the organization's and communities' goals and be responsive to emerging issues
- f) **Computer Literacy:** The position requires extensive computer use so the employee must be proficient in using word processing and spreadsheet computer packages
- g) **Minimum qualifications and Training:** A development diploma and or degree from a recognized institution coupled with broad management training & experience.

## PROGRAMME COORDINATOR OR OPERATIONS DIRECTOR

### Objective of the position

Responsible to the ED, the Programme Coordinator shall be responsible for ensuring quality of delivery of projects for IDF. The Programme Coordinator shall supervise and is responsible for all roles and duties of Program, Project Officers and field workers.

### Essential Duties and Responsibilities

- a) Be in-charge of all project activities of IDF.
- b) Identifying, together with key stakeholders, areas for further improvement on management and/or program quality. Defining, together with relevant stakeholders, frameworks, procedures and indicators oriented towards improved project management and quality.
- c) Analyzing the operational environment, management and organization and ensuring that project activities fit structurally into IDF's mission, vision, objectives & policies.
- d) Administering relationships with stakeholders/communities & providing them with direction so as to improve on their quality, sustainability of results and capacity and meet the desired quality requirements.
- e) Assist the Logistics Officer/Finance and Administration Officer to maintain and manage the assets of the project, making sure they are properly used for the task they were designed for.
- f) Liaise with the Logistics Officer/Finance and Administration Officer to ensure that procurement procedures are adhered in purchasing supplies for project implementation.
- g) Approve all project requisitions for purchases and supplies including budget line expenditures for activity implementation.
- h) Be in-charge of all project budgets. He/she will prepare all project budgets and submit them to finance for consolidation.
- i) Shall oversee the preparation of all proposals for project funding and submit them for approval to the ED/Board
- j) Shall liaise with finance in preparing monthly project variance and budget monitoring reports and offer explanations for budget variances.
- k) Shall guide and train new project employees and staff in their respective duties?
- l) Shall coordinate all project reporting. Shall liaise and cooperate with the Project Officers in preparing and delivering monthly, quarterly and annual project reports.
- m) Ensure timely reporting to government/authorities, donors, etc. in accordance to their reporting requirements.
- n) Informing relevant persons/institutions on support given to communities and results regarding their organization and program activities.
- o) Shall manage project monitoring systems and database. Shall conduct participatory evaluation of the projects in the community and assess the degrees of success and / or failures to reach the desired goals and targets.
- p) Shall perform any other responsibilities assigned to him/her by IDF.

### Core Competencies

- a) Knowledge of development up to University/college level
- b) Knowledge of project management and country political, religious & social structures
- c) Clarity of expression for drafting project & financial plans and advice regarding relevant organizational policies. Clarity of expression for representing IDF's interests
- d) Social skills for managing relationships with various stakeholders and for accompanying and guiding communities in the administration of their activities

## FINANCE AND ADMINISTRATION OFFICER (FAO)

### Objectives of the position

The incumbent shall ensure financial management of programs & organization including financial planning (including sustainability) and reporting for IDF and maintain appropriate records of IDF staff, payrolls and property. The FAO shall be responsible for preparing, analyzing & reconciling financial information to prepare financial & statutory reports; ensure sound financial controls are implemented to protect IDF assets and advising on the IDF current & projected financial position.

### Essential Duties and Responsibilities

Under the supervision of the ED, the FAO shall have the following responsibilities:

#### Human Resource Administration

- a) Be in charge of all HR requirements of the organization as approved by the ED/board.
- b) Coordinate the recruitment/filling of vacancies under the ED/Board supervision.
- c) Administrate the human resource policies and procedures of the organization.
- d) Manage all staff documents and files of the organization.
- e) Administrate the human resource policies and procedures of the organization.
- f) Shall manage all staff documents and files of the organization.
- g) Shall supervise the recruitment and filling of vacancies in the organization.
- h) Discharge the duty of development of contracts for both staff and consultants, terms & conditions of service and maintaining a good working environment for staff.
- i) Develop annual human resource plans that maximize the resource value required by IDF, maintain optimal staff levels and manage human resource budgets of IDF.
- j) Monitor all staff movements and time of work including leaves and off duties and out of work station movements.
- k) Serve on the planning and policy making committees.
- l) Create organization strategy for training and organizational development plan to meet personnel, professional, and organizational needs of organization employees.
- m) Recommend and maintain an organizational structure and staffing levels that accomplishes organization's goals and objectives.
- n) Supervise dispute resolutions and disciplinary cases of staff.
- o) Ensure that IDF complies with local relevant statutory and legal requirements regarding human resources.
- p) Ensure compliance with administrative donor requirements and contracts.
- q) Shall supervise staff remuneration structures and manage staff benefits and recommend any policy changes to the ED and the Board of IDF.

#### Finance

- a) Administrate all financial policies, controls & procedures of IDF and ensure adequate measures have been instituted to curtail fraud and or misappropriation.
- b) Be in charge of budget preparation & monitoring including preparing actual versus budget variance reports, seek explanations of variances by budget holders and submit such budget reports to the ED for approval and the board for discussion.
- c) Supervise all the roles & duties of all admin staff (accountant, cashier, clerk, logistics officer, drivers, messengers, guards, cleaners etc)
- d) Be the custodian, administrator & preparer of the payroll. S/he shall process the payroll monthly and submit it for approval before payments are processed.
- e) Chair the procurement committee and check and verify all procurement documents before payment is approved by the ED.
- f) Be in charge of all bank transactions, s/he shall receive, check and approve all bank reconciliations of the organization.

- g) Be in-charge of the operation of the accounting system; manage all system passwords; check & review all transaction posted; approve general journals and adjusting entries in the system.
- h) Check & verify all payment vouchers prepared by the accountant and submit them for approval by the ED and or Board
- i) Ensure safe custody of all cash and cheques of IDF.
- j) Be the custodian of IDF assets and manage their safety, use and allocation.
- k) Be in-charge of all insurance requirements of IDF.
- l) Check/ verify all financial reports prepared by the IDF & submit them for approval.
- m) Prepare the trail balance, balance sheet, income & expenditure and cash flow statement of IDF on a monthly basis and submit to the ED for review and approval.
- n) Supervise the external audit function to its conclusion and submit audited reports to the Executive director and the Board.
- o) Shall perform duties as assigned from time to time by IDF and delegate his/her duties to other staff after approval of the Executive Director.

### **Core Competencies**

The incumbent should demonstrate the following competencies:

- a) Minimum Qualification and Experience: A diploma and or degree in accounting, business administration or CPA III. Must have gained over five (5) years experience in accounting and budgeting from a busy financial department in an NGO setting.
- b) Skills: Must have strong communication skills and must be proficient in using MS-Office and an accounting computer software packages.

## **ACCOUNTANT**

### **Objectives of the Position**

The accountant shall be work under the direct supervision of the Finance and Administration Officer and shall directly report to him/her. He/she shall supervise the cashier and manager all the roles and duties of the cashier.

### **Essential Duties and Responsibilities**

His/her other roles and duties are;

- a) Prepare Cheque Disbursement Vouchers for all cheque payment to be made by IDF and submit them for approval by relevant officers.
- b) Receive, check & approve cash disbursement vouchers as per limits authorized by the organization policies.
- c) Shall record all transactions in the accounting system including payments, receipts and adjusting journals after they have been properly authorized. He/she shall only delegate such duties when allowed by procedure and approved by the FAO.
- d) Verify authenticity of all supporting documents attached to Payment Vouchers before processing payments. Ensure that payment vouchers are adequately supported
- e) Make sure all procurement procedures have been adhered to before preparing purchase payment vouchers e.g. Requisition Form, Purchase Order, and Receiving Report.
- f) Manage all bank accounts' transactions and reconcile bank ledgers with bank documents and communicate any reconciling differences with the bank.
- g) Keep all blank vouchers including Cash Disbursement, Receipts Books and Purchase Orders.
- h) The Accountant must make sure that all cash and cheque payments received are deposited to the IDF's respective safe and subsequently bank accounts.
- i) To ensure that payments for statutory deductions, bills and special disbursements are made within the specified time so as to avoid fines resulting out of deferment.
- j) Record all cash transaction in the Cash Book and Ledgers

- k) Prepare Monthly Financial Reports of the Organization
- l) Prepare Consolidated Financial reports of IDF including project and donor reports.
- m) Submit all financial reports to the Chairperson for approval via the FAO/Director.
- n) Consolidate the overall annual budget of IDF under the FAO's supervision
- o) Conduct surprise counts of cash maintained by the cashiers of the Organization.
- p) Manage the movement, safety of assets and maintain the asset & inventory register.
- q) Manage imprests/advances made by IDF & prepare such reports and reconciliations.
- r) Effective management of the transport system
- s) Manage all procurement & stocks management for IDF under the FAO's supervision.
- t) Maintains banking relationships.
- u) Shall perform duties as assigned from time to time by the FAO/Director.

### **Core Competencies**

In order to effectively perform the above tasks, the holder of this position should have the following competencies:

- a) Minimum Qualification & Training: A diploma in accounting, business studies or CPA II.
- b) Relevant Experience: Must have gained over two (2) years' experience in accounting and budgeting in an NGO setting.
- c) Skills: Must have strong communication skills and must be proficient in using MS-Office and an accounting computer software packages. Be able to maintain regular contacts with other departments/projects and external organizations. Analyzing individual's circumstances and determining the most appropriate action.

## **PROGRAMME OFFICER**

### **Objectives of the Position**

The project/Program officer shall be in-charge of project (s) and/or program(s) assigned to him/her. Will ensure that all activities under such a project/program are fully implemented as budgeted and that the desired objectives and impact is achieved

### **Essential Duties and Responsibilities**

- a) He/she shall supervise all field officers under their project /program.
- b) He/she will prepare all project budgets and submit them to the programme coordinator for approval/submission to FAO for consolidation.
- c) Under the guidance of the programme coordinator, take an active role in the initiation and or reparation of all proposals for project funding
- d) Shall monitor all the budgets in his/her project and ensure that budgets are strictly followed, where that is not the case, submit written explanations for action.
- e) Liaise with the programme coordinator in preparing monthly project variance and budget monitoring reports and offer explanations for budget variances.
- f) Shall prepare all payment and procurement requisitions for the project /program.
- g) Ensure the execution of all project activities to ensure program objectives are attained.
- h) Shall supervise all project activity implementation & prepare to submit implementation reports to the Project Coordinator.
- i) Shall prepare monthly project monitoring reports and submit them to the Project Coordinator for review and approval.
- j) Shall be the custodian of all IDF assets allocated to the project of their responsibility and ensure that such asserts are used as intended during allocation.
- k) Perform duties as assigned from time to time by IDF.

### **Core Competencies**

- a) Minimum knowledge of development up to college level
- b) At least 3 years experience with projects administration in a medium sized NGO
- c) Knowledge of project management and prevailing religious & social structures
- d) Clarity of expression for drafting project & financial plans
- e) Social skills for managing relationships with various stakeholders and for accompanying and guiding communities in the administration of their activities

## **CASHIER/ACCOUNTS CLERK**

### **Objectives of the Position**

The Cashier/Accounts Clerk shall be responsible to ensure that all organizational incomes are receipted and the payers are issued with the right receipts and payments are correctly administered. The Cashier shall work under the supervision of/report to the accountant. S/he shall perform roles and duties as per the set rules and procedures of the organization

### **Essential Duties and Responsibilities**

The roles and duties of the Cashier are;

- a) Maintain safe custody of all cash of the Organization
- b) Keep all expendable/consumable inventory and stationery for the organization.
- c) Disburse all the properly approved cash to payees using approved Disbursement Payment Vouchers.
- d) Receive all goods and stationeries procured by IDF as per the orders placed and keep record of custody and release.
- e) Release requisitioned Inventory and stationery with approved Requisition Slips.
- f) Prepare/issue Cash Receipt for all cash inflows and incomes on preprinted vouchers and cash disbursement vouchers for cash payments of the organization and submit to the accountant for checking and recording in the accounting system.
- g) Prepare daily cash counts and monthly cash certificates and reconciliations of cash under his/her custody and submit to the accountant for checking.
- h) Prepare daily and monthly cash reports as required by the organization.
- i) Prepare cash schedules and journal vouchers for recording into the accounting system by the Accountant.
- j) Ensures all financial transactions are documented and recorded and that accounting transactions are done accurately and in accordance with policies and procedures.
- k) Ensures the accounting system is kept updated.
- l) Provides data/accounting information for preparation of financial reports required by IDF and various outside agencies with the approval of the Accountant.
- m) Provides financial information/reports for effective management of IDF financial/ cash position.
- n) Perform any other duties as assigned from time to time by the Accountant/FAO.

### **Core Competencies**

- a) Must be in possession of secondary education with passes in English & Mathematics
- b) CPA part 1 or its equivalent with a working knowledge of financial accounting.
- c) Minimum 2 years relevant work experience
- d) Excellent interpersonal and communication skills.
- e) Ability to identify accounting and financial errors.
- f) Good organizational skills.
- g) Keeps confidential financial and organizational information.
- h) Knowledge of personal computers using Microsoft e.g. access, excel, word & outlook
- i) Strong communication skills and must be proficient in using MS-Office suite.

## LOGISTICS OFFICER

### Objectives of the Position

The Logistics Officer shall be supervised by the FAO and shall report directly to him/her. He/she shall supervise the roles and duties of all the security officers, drivers, messengers and cleaners; they shall directly report to him/her.

### Essential Duties and Responsibilities

#### a) General

- a) Manage and be in charge of all procurements of IDF as approved by relevant officers.
- b) Shall implement all procurement controls and procedures of IDF.
- c) Shall be the secretary of the procurement committee and will initiate all procurements and ensure that all procurement documentations are properly done and filed.
- d) Shall prepare all LPOs and submit them for approval.
- e) Safely keep all procurement blank documents.
- f) Shall ensure that goods and services are delivered as ordered, supervise receiving of goods in stores and the dispatch of all inventory from stores.
- g) Shall coordinate and manage all movement of procured items in the implementation of IDF activities.
- h) Shall supervise the use and allocation of IDF assets including motor vehicles.
- i) Shall see to the annual valuation of assets in the stores, and give the value assessment to the Accountant during the annual stocktaking period.
- j) Check and ensure the security and safety of IDF resources including staff.
- k) Shall liaise with staff and arrange all travels both within and outside the country.

#### b) Store Keeping

- a) Shall keep and manage stores, keeping proper records of entries and issues as per IDF standard procedures and requirements.
- b) Shall ensure the quality and quantity of goods received before preparing and issuing the Goods Received Note (GRN)
- c) Shall prepare and update the "Bin Card" for all goods in the store. Prepare store reports
- d) Shall periodically conduct inventory and ensure that the "Bin Card" records tally with the goods found in the stores.
- e) Shall see to the security of all stores.
- f) Shall prepare stores budgets and arrange for timely purchases, keeping an eye on the stock re-order levels. Shall always make sure the store supplies are up-dated.
- g) Shall compute the stores data and statistics and report to the accountants as needed.
- h) Shall design coding systems and see to the security of assets in the stores.
- i) Shall maintain frequent stock checking.
- j) Shall prepare monthly store reports and give it to the FAO
- k) Shall perform any other duties as assigned from time to time by IDF.

### Core Competencies

- a) A working knowledge of logistics & administration desirable.
- b) Form 4 level of education.
- c) Excellent interpersonal and communication skills.
- d) Good organizational skills.
- e) 2 years relevant experience

## SECRETARY/RECEPTIONIST

### Objective of the position

Overseeing IDF office front desk activities, and organization and maintenance of the filing system. Shall be responsible to the Accountant/Finance & Admin Officer



### **Essential Duties and Responsibilities**

- a) Answering callers' and visitors' questions and ensuring that the right information is provided. Assessing which people within the organization callers or visitors wish to speak to. Translating callers' information into messages for absent colleagues and deciding as to whether to take or transfer calls or ask the caller to ring later.
- b) Creating the right climate for visitors by presenting a welcoming & friendly appearance and taking into account the safety of colleagues.
- c) Keeping an overview of incoming messages/mail and ensuring that they are received by the right staff. Keeping track of mail to be sent and outgoing telephone calls.
- d) Register and forward incoming and outgoing e-mail/mail. Receive, register and if needed edit outgoing e-mail/postage.
- e) Making appointments for staff, keeping track of appointments and assess possibility to combine appointments. Being aware of difficulties with appointments and changing them if necessary. Keeping a track of which colleagues and visitors are in the office.
- f) Identify essential information during IDF team meetings and draft minutes.
- g) Organize and maintain IDF filing system both hardcopy and electronic. Ensuring that documentation is readily available for staff.
- h) Maintain, administer and control the use of petty cash.
- i) Assist the accountant/financial officer in any additional task, if required.

### **Core Competencies**

- a) Secretarial qualification and Secondary school education
- b) Knowledge of English & automated administrative systems
- c) Knowledge of reception and telephone systems
- d) Knowledge of the organization and the names, jobs and workstations of IDF staff
- e) Knowledge of IDF project structure and areas of work networks and contacts.
- f) Clarity of expression for drafting general organization information
- g) Social and good communication skills for receiving visitors and answering phone calls

### **DRIVER (S)**

#### **Objective of the position**

Ensuring well maintained and well controlled vehicle fleet and ensures safe and efficient transport of staff, visitors and goods. Also responsible for delivering and collecting mails and information according to specific instructions, cleaning and undertaking routine servicing of motor vehicles. Responsible to the Logistician/Finance & Admin Officer

### **Essential Duties and Responsibilities**

- a) Safe and efficient driving of IDF staff and visitors who may require transport to go to meetings, field or other places as may be authorized by the ED, FAO and or logistician
- b) Transport goods as required. Collect/deliver cargo and mail pouches from/to various destinations as authorized by the Logistician, Director or Senior Projects Officer.
- c) Maintain appropriate logbook registration for own use of car. Monitor appropriate logbook registration of other staff using the office vehicles
- d) Shall maintain vehicle logbook records, fuel records, vehicle services. Before making any journey, make sure the vehicle is in a roadworthy state/in good condition, including regular control of oil level, fuel consumption, battery, tire checks and cleanliness of the vehicles.
- e) Inform without delay the logistician of any accident, technical failure/shortfalls or need for maintenance
- f) Shall maintain general cleanliness of the vehicle and before leaving the station, make sure the vehicle has a tool box, spare tire and jack.

- g) At any time, no vehicle will carry more than the legally required passenger or luggage capacity and shall carry only authorized IDF staff and property.
- h) It is the driver's responsibility to see to it that all passengers are strapped in their sit-belts, or have their helmets on in case of motorcycles.
- i) It is the driver's responsibility in liaison with the Logistics Officer to ensure that vehicle insurances/licenses are timely paid for in accordance to the national laws.
- j) Shall drive vehicles in accordance to the principle rules of his driving license.
- k) Responsible for regular inspection of running state of the vehicles
- l) Shall perform other responsibilities assigned to him/her by his/her senior officials.

### **Core Competencies**

- a) Valid drivers license, excellent driving skills and driving experience for at least 3 years
- b) Good social skills in order to relate with passengers (staff) and external relations
- c) Good knowledge of road network in project areas
- d) Experience in four wheel driving
- e) Experience in maintenance and small repairs of vehicles
- f) Education up to primary school level

## **SECURITY OFFICER (S)**

### **Objective of the position**

Responsible to Logistics Officer. Provide security to ensure that staff and visitors have a safe and conducive experience while working and visiting IDF premises respectively. Ensure that all IDF assets are safe and that all security systems are functioning effectively and properly.

### **Essential Duties and Responsibilities**

- a) The security officer shall be supervised by the Logistics Officer and shall report directly to him/her.
- b) He/she will ensure security of all IDF property and staff within his/her areas of responsibility as assigned by IDF.
- c) Shall inspect the area of work before and after duty to ensure security of organization and property before handing over to the any other security officer.
- d) Shall sign attendance register at entry and exit from duty.
- e) Question and find out security details of any visitors before allowing them access to any IDF property, and report any noted anomalies to the officer in charge or the police incase of an emergency.
- f) Shall keep an eye on assets being brought in and out of his guard area, and record whatever is taken out. Shall have the right to object anything being taken out if suspicious of any abnormalities and report the same.
- g) Ensure that all visitors and property leaving the IDF compound are recorded and/or registered.
- h) Ensure that the IDF office entrance is secured at all times - Opening and locking all office doors and windows at entry and exit from duty
- i) Ensure IDF emergency action plan and evacuation procedures in place.
- j) Ensure that all security-related matters and concerns of staff and IDF property and visitors are addressed effectively.
- k) Train staff in security-related procedures and on all security-related issues
- l) Monitor the security environment, identify potential threats & recommend appropriate action.
- m) Shall perform other responsibilities assigned to him/her by his/her senior officials.

### **Core Competencies**

- a) Minimum qualification and Experience: have training in advanced security operation management or equivalent qualifications. Must have gained a minimum of two years relevant experience in providing security services in a busy and customer focused environment
- b) Skills: Must have good communication skills and keen to details.

## MESSENGER/OFFICE ORDERLY

### General Purpose of the Job

Responsible to the Accountant for ensuring a clean and conducive office environment, delivering and collecting messages, documents, packages and other items against specific instructions. Other duties include undertaking simple repairs to keep the office in good condition.

### Essential Duties and Responsibilities

- a) Maintenance of cleanliness inside and outside office premises, gardening and toilet cleanliness.
- b) Taking files and documents from one office to another both internal and external as required.
- c) Filing documents as directed by superior officers.
- d) Preparing teas/coffees as required by the office
- e) Serving as the "Postman"
- f) Helping the Logistics Officer to maintain and manage office supplies and properties, and report any damages at the earliest time possible.
- g) Helping with photocopies and all printing duties.
- h) Shall perform other responsibilities assigned to him/her by his/her senior officials.

### Core Competencies

- a) Experience in cleaning and serving in offices
- b) Basic knowledge in keeping and monitoring inventory system
- c) Social skills for relating with staff and visitors and serving them in a friendly way

## FIELD OFFICERS

### Objective of Position

Responsible to the project/programme officers, the field officers shall be responsible for assisting the project officers implement planned program/project activities of IDF

### Essential Duties and Responsibilities

- a) Shall report to the assigned Project Officer and perform such duties as assigned;
- b) Implement project activities as per the work plan and budget.
- c) Ensure project supplies are safely delivered to project site by liaising with the logistics officer.
- d) Prepare and submit to the project officer field activity implementation reports for review and report compilation.
- e) Coordinate with other field staff in implementing activities
- f) Keep safe custody of IDF assets assigned to his/her area of responsibility.
- g) Ensure that all activities are started and completed within budgeted times.
- h) Ensure that feedback received from communities during activity implementation is communicated to the relevant offices of IDF for follow up.
- i) Perform duties as assigned from time to time by IDF.



# INTEGRATED DEVELOPMENT FOCUS, SOMALIA - IDF-S

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