JEDCO
المؤسسة الأردنية لتطوير المشاريع الاقتصادية
Jordan Enterprise Development Corporation

SMEFP Personnel and Operations Manual

March 1013

Welcome to SMEFP

Welcome to Jordan Enterprise Development Corporation (JEDCO) and to the Small and Medium Sized Enterprise Financing Program (SMEFP). This manual outlines the Program's personnel and operations procedures, which will be utilized by all staff. In addition to outlining the system, it contains specific checklists, templates, and examples, which will make it both understandable and easy to use.

Before reading the manual itself, you should become familiar with the SMEFP and how it will impact Jordan. JEDCO and the United States Agency for International Development in Jordan (USAID) entered into a partnership to enhance access to finance through the creation and operation of a grant and technical assistance program, which targets small and medium sized enterprises (SMEs) in high-growth sectors. This multi-year program will augment other access to finance programs thereby enabling Jordanian SMEs to create jobs, enhance revenues, increase exports, and generate investment.

As such, the SMEFP's grants and T/A are designed to provide SMEs and entrepreneurs with partial funding through which they can develop products, start/expand businesses, purchase equipment, and/or conduct other activities that will create jobs, increase revenues, and enhance exports. Grants to women-owned/managed enterprises and businesses operated in the governorates will be given special consideration, as will those, which create community impact in terms of jobs, revenues, and exports over and above benefiting one business.

As an SMEFP team member, it is important that you understand not only the Program, but your responsibilities as a team member. Knowing your job is important, but you must also understand the procedures that govern the way we do business. This manual will assist you in that process. You are responsible for knowing and agreeing to every aspect of this manual. If you have any questions, please contact:

(Name)

Human Resources Manager

(Contact Information)

Contents

1. Introduction

1.1 Purpose and Use

This manual provides the SMEFP's leadership and staff the guidance necessary on personnel and operations, including the policies, rules, and practices. The manual will therefore guide you in your daily activities as member of the SMEFP team, allowing you full information on your rights and obligations, as well as the processes in place to make the Program run smoothly. The manual provides guidance in the following areas:

- Program background, consisting of objectives, structure and values;
- Staff recruitment and selection, beginning with job identification until the employment contracts are signed and new employees join the Program;
- Staff performance appraisal, including goal setting, mid-year goal review, and performance evaluation;
- Employee policies and practices, including promotion and career development, attendance, leaves, code of personal and professional conduct, travel and sponsored training, salaries and benefits, disciplinary actions, end of service conditions, procedures and practices; and
- Operational policies and procedures, including internal financial management procedures.

Templates and check lists are provided to assist you in your understanding and operational abilities. If you have any questions, please reach out to the Human Resources team at the contact information noted above.

1.2 Disclaimer

This manual is provided for your information and you are required to work according to the procedures it outlines. That being said, it does not cover all potential issues/situations that may occur during the course of your employment. Should a matter arise that is not covered by the manual, you should first contact your supervisor for clarification and if none is forthcoming, you should contact the Human Resources team.

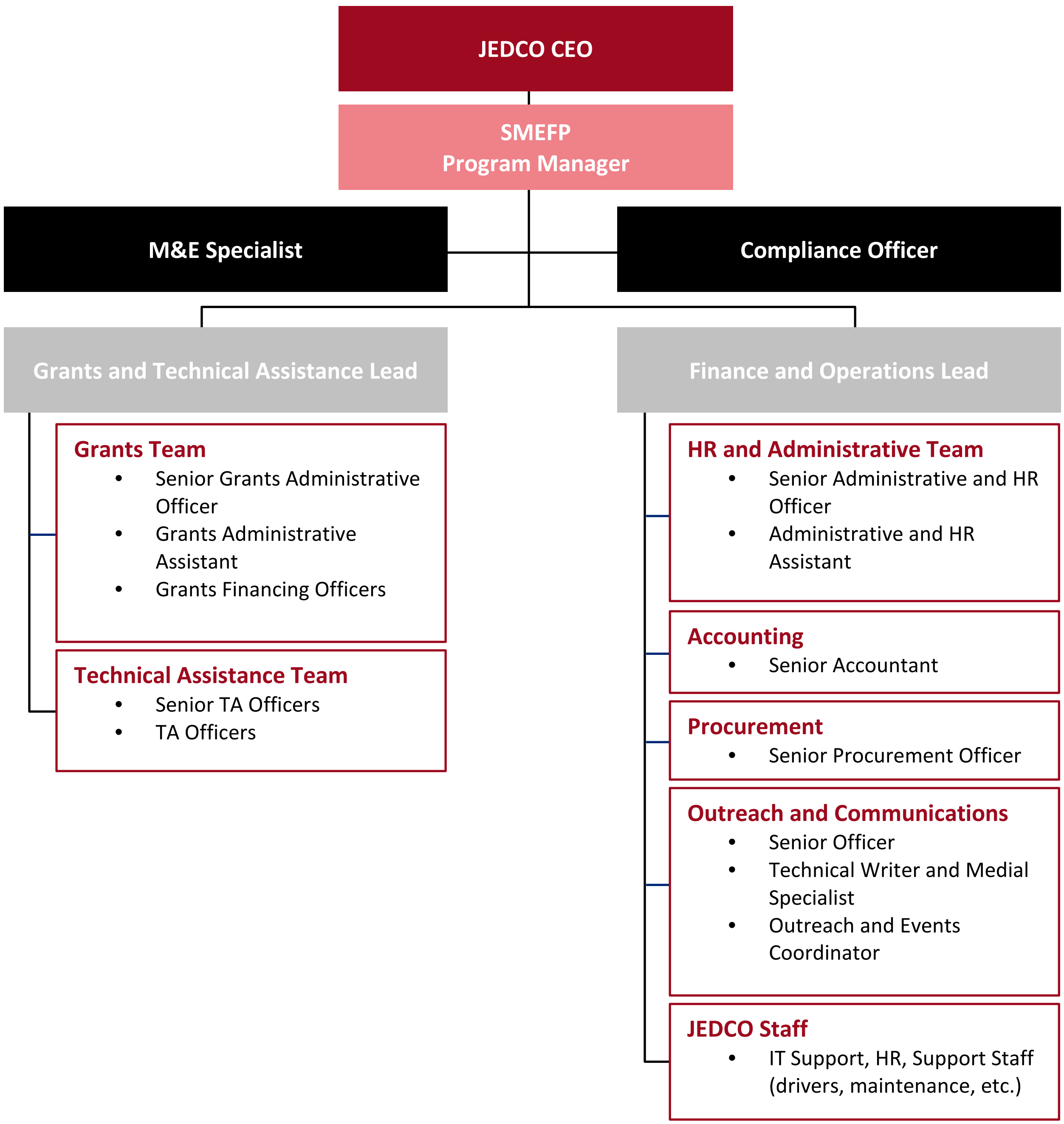
1.3 About the Program

The Small and Medium Enterprise Financing Program (SMEFP) is five-year initiative launched by the Government of Jordan in order to address the constraints confronting SMEs in accessing finance. It is managed by Jordan Enterprise Development Corporation (JEDCO) and funded by the USAID. The Program will leverage existing liquidity in banks and other financial institutions to provide opportunities for the expansion of existing SMEs, and to promote new start-ups that will have a significant impact on job creation and economic development in the medium term. USAID's contribution will enable JEDCO to provide technical assistance and grants to SMEs to ensure that they are able to access credit needed to grow their businesses.

1.3.1 Structure

The SMEFP is a dynamic initiative that offers a range of services to its beneficiaries. Therefore, it operates in a semi-flat/project team structure. Based on the beneficiaries' needs, our teams are assembled from various functional groups. Employees are expected to demonstrate flexibility, resourcefulness, continuous self-development, excellent project management skills, and most importantly, focus on the Program's objectives. The following chart shows the organizational structure of the Program and reporting relationships.

SMEFP Staffing Structure



1.3.2 Program Values, Environment, and Culture

JEDCO offers a healthy work environment for its paid staff under the SMEFP, as it is aware that having a strong and healthy working relationship makes communications clear and attitudes positive. We make it a point to address employees concerns and have an open and friendly atmosphere.

The SMEFP will succeed because it will meet and exceed clients' expectations. The Program's commitment to premier client service begins with understanding their needs and requirements. JEDCO has a long and successful track record of responding to requests, proven managerial capacity, and reliable and effective staff that cover the wide spectrum of services potentially required by the target groups.

The SMEFP is committed to creating a workplace that thrives on teamwork and leadership and where our employees have the opportunity to expand their skills and take advantage of new opportunities and were accomplishments are recognized. As such, JEDCO is an equal opportunity employer that values religious, gender, and cultural diversity, thereby putting in place specific processes to ensure the rights of all our employees.

2. Staff Recruitment and Selection

2.1 Types of Employment

In general terms, the SMEFP employees will be hired on full-time basis, on annual contracts that will be renewed based on merit through the end term of the Program, which is five years in duration. Continued employment, however, is contingent on USAID's continued funding of the Program as well as on the excellence at which you do your job. JEDCO is an equal opportunity employer, which values gender, cultural, and religious diversity. Thus, our recruitment system is based on merit.

Your employment contract will cover the specific procedures of your employment. The Program may be required to hire employees on part-time basis on certain occasions because of need. In such cases, the employment contract will specify the terms and conditions pertaining to this employment including number of working hours, benefits, and other conditions. Therefore, the Program's employment types consist of the following:

- **Full-Time Employees**: They are the employees who are employed to work at the normal scheduled hours (8 hours per day 40 hours per week). Full-time employees are entitled to all benefits and privileges granted by the Program.
- **Part- Time Employees**: They are the persons who are hired for the Program on permanent basis to do regular jobs, but not on a full-time basis.
- **Part-Time Employees who are employees at JEDCO but will partially contribute to the Program**. The type and level of their contribution will be determined in advance and prior to joining the Program. The Program management's responsibility is to ensure that both categories work in harmony to accomplish the Program's objectives.
- **Contractors, Consultants, & Free Lancers**: These are contracted professionals outside of the Program and JEDCO who are hired to perform specific tasks in specific periods. These are hired only when it is determined that the existing staff cannot perform the tasks or their schedules and workload will not allow their being involved in other assignments. Those will be contracted to do specific jobs and will not be entitled to any benefits (including leaves, social security and medical insurance).

2.2 Recruitment and Selection Process

The first step in building the SMEFP team is recruitment of qualified staff, which will consist of the following steps:

2.2.1 Job Identification

JEDCO's SMEFP management will determine what positions it needs to fill, whether it is newly created or is a current position that is vacant. In the case of the latter, the direct supervisor of the vacant position will request that the position be filled and will work with the Finance and Operations Lead, as well as the Human Resources Officer to initiate a recruitment process.

2.2.2 Job Analysis

Upon receiving approval to recruit for a new or vacant position, the supervisor analyzes the position identifying job responsibilities, qualifications, job level, and reporting lines.

2.2.3 Approval for Recruiting

The Human Resources Officer sends a request for recruitment to the SMEFP Program Manager who adds his/her recommendation and asks for the approval of the CEO (Attachment 1). The form is then sent back to the Program Manager who sends it to the Senior Admin & HR Officer.

2.2.4 Job Description

Once the CEO has approved the recruitment action, the direct supervisor will work with the Human Resources Team to develop a job description, which includes the job summary, title, duties, reporting lines, supervisor and subordinates, and qualifications (skills, knowledge, education, experience, and personal traits) needed for the position.

2.2.5 Remuneration Package

Based on the SMEFP HR policies; the SMEFP Program Manager will work with the Finance and HR teams determine the salary range based on the Program's salary scale. The Human Resources Manager will inform the direct supervisor for the position about the proposed salary based on JEDCO’s scale. Salary will be based on the nature of the position, the skills and education required, and the years of experience contained by the successful candidate, but will in no case exceed Program parameters for each position or USAID regulations governing compensation rates for Cooperating Country Nationals (CCNs), which is outlined by its Mission-approved compensation plan.

2.2.6 Recruiting Tools

The Human Resources Manager will assign a team member to determine that best way to advertise the position, as well as the recruiting mechanisms to be used. Typical methods of recruitment will be through advertising through the appropriate media source, placing the advertisement in JEDCO's website, using an outside recruitment firm, or contacting universities to recruit distinguished graduates, among others.

2.2.7 Advertising the Position

- Ad Design

  If a decision is made to advertise in the media, the assigned HR team member develops the job advertisement, which states a general description of the Program, job title, job objective, a brief description of the roles and responsibilities, and the required qualifications. The advertisement specifies the application method and due date. The candidates must submit their CVs and a cover letter by the deadline specified in the recruitment advertisement along with a cover letter to a specific e-mail established by the HR team and published in the advertisement.

- Advertisement Approval

Once the advertisement is designed, the Human Resources team member responsible will forward it to the HR Team Leader for review and approval. Once he/she approves the advertisement, he/she will seek final approval from the SMEFP Program Manager.

- Media Selection

  Once the advertisement is approved, the assigned HR team member will run it in the appropriate local newspapers, post it on JEDCO's website, and announce it internally. Internal candidates may apply but will receive no special consideration over outside candidates.

2.2.8 Initial Screening

Once CVs and cover letters are collected, the HR Manager and the person who will directly supervise the position will review the CVs for compliance with the job description, identifying those who meet the minimum requirements for consideration. This will be done utilizing a CV screening form (Attachment 2), which shows names of applicants, date of application, screening results (qualified or unqualified), and the reason for the screening result. This form will be signed by both staff members and kept along with accompanying applications in the HR department for future reference.

2.2.9 First Interview

After CVs undergo an initial screening, they will be vetted for quality, with those most interesting to JEDCO's management being called for first interviews. The person supervising the position for which recruitment has been initiated and the HR Manager will select the CVs for the initial interview and will notify candidates of the appropriate time and place for the interviews. The following will govern the interview process:

- **Interviewers**: The direct supervisor and HR Manager will comprise the interview team (evaluators).
- **First interview structure:** In advance of the interview, they will develop a list of questions that will be asked to each candidate. The questions will relate to the position to allow for the collection of detailed information that is needed for the evaluators to reach a fair and accurate decision.
- **Candidate Score sheet:** Based on the job description, the evaluators will utilize a scoring sheet (Attachment 3), which lists the required competences and assigns a scale/weight for each competency. This score sheet will be completed and signed by each evaluator for each of the candidates.
- **Call for interviews:** The HR Team will reach out to the identified candidates and invite them for interviews. The date, time and place will be set in advance by the evaluators.
- **Interview file:** The HR Team will prepare the interview file for each evaluator. The package will include the candidate's CVs and application, and a copy of the job description.
- **Scoring**: During each interview, the evaluators will solicit the needed information from the candidate and accordingly score him/her on each competency. Directly after the interview is concluded, both evaluators will discuss their individual results, compare scores, write down their comments, determine the final score, and jointly sign the scoring sheet.
- **Selecting the top three candidates**: Based on the scoring results, the evaluators will identify the top three candidates.

2.2.10 Second interview

- Depending on the nature of the position, the second interview committee may the SMEFP Program Manager, JEDCO CEO and/or the Finance and Operations Lead. The HR Manager will determine the makeup of the final interview committee. In general JEDCO's CEO will be part of the committee for any recruitment that involves senior management, while the committee for mid-level management will likely include a component lead.
- The Human Resource Team will contact the top three candidates to establish a date and time for the second interview.
- The HR Team will provide the final interview panel with a file that includes the job description, candidate's CV, and a copy of the scoring results of the first interview.
- Each interviewer will develop his/her own questions for the candidates and a design/timeframe for the interviews will be developed.
- The final interview committee will use the Final Interview Scoring Sheet **(Attachment 4)** to rate the candidates.
- Based on the interview results, the top rated candidate will be selected and documented on the form.

2.2.11 Checking References

- Once a consensus candidate has been selected, the assigned HR Team member will reach out to the selected candidate and ask for three references from individuals who had or having working relationship with him/her.
- The HR Team member will contact the references asking them to provide input on the Reference Check Form **(Attachment 5).**
- The HR Team member will send thank you e-mail to all references that complete and return the Reference Check Form.
- The HR Team member will inform senior management and the direct supervisor of the position being recruited as to the results of the reference check.
- A final determination on hiring will then be made and the SMEFP Program Manager notified.

2.2.12 Filling in the Bio-Data Form

- Once a candidate has been approved for hiring, he/she must complete a bio-data form (Attachment 6) as per USAID regulations.
- Upon completing the bio data form and returning it to the HR team, each of these form will be kept in the candidate's file.
- The information on the bio-data form will be checked against the salary scale to make sure that the salary history of the candidate fits in the salary scale.
- No waivers will be sought for candidates whose past salary history either does not support the salary being offered by JEDCO or whose salary history indicates significantly higher compensation than JEDCO is allowed to pay due to its budget and/or scale for this position.

2.2.13 Obtaining USAID Approval

- The selected candidate's CV along with the position description and bio data form and the proposed rate will sent to USAID for approval.
- If the USAID approves the selection, the candidate will be informed and a job offer prepared.

2.2.14 Job Offer

- The HR Team will prepare the job offer, get needed endorsement from the SMEFP Program Manager, and send a copy of the offer to the successful candidate for review and signature (Attachment 7).
- The HR Team will then prepare a list of needed documents and verification of experience and education for the candidate to provide within three days of receiving the offer. The assigned HR Team member will validate the candidate’s educational and work history, reporting the results to the HR Manager.

2.2.15 Preparing and Executing an Employment Contract

- The HR Manager will draft the contract based on the information provided earlier in the job offer and utilizing the SMEFP template.
- The assigned HR Team member will then contact the selected candidate to ask him/her to review the contract and sign two copies.
- Should the candidate have any concern regarding the contract terms, the HR Manager will inform the supervisor for the position, as well as the Finance and Operations Lead for advice on how to proceed.
- Upon final agreement, the candidate will sign two copies of the contract. The SMEFP Program Manager or JEDCO’s CEO will sign on behalf of JEDCO.
- The employee will receive on copy of the signed contract, while the other will be retained for SMEFP’s records and placed in the employee’s personnel file, along with his/her CV, interview scoring sheets, etc.
- A copy of the contract will be sent to the Program's Senior Accountant to follow up on financial matters.

2.3 Post Contracting Arrangements

- After the contracting process takes place, the HR Team will contact the candidates who were interviewed but not hired to notify them about the results and the reasons why they were not selected for the position.
- The assigned HR Team member will enter the employee info into JEDCO’s HR system, including the employee’s serial number, name, national ID number, date of birth, social status, academic qualifications, previous experience, salary as per the contract, social security and income tax, leave types, etc.
- The employee’s direct supervisor will determine seating arrangements and office requirements for the new employee including software and hardware requirements. The HR Team will follow up on

these arrangements and ensure that they are addressed within the required time frame and before the employee start date.

- The assigned HR Team member will coordinate with the Information Technology Team to make necessary preparations for the new employee including creating password/network access, email account and installing the software required for his/her position.
- In case of emergency, all employees will provide the HR Team with contact information for the person(s) who should be contacted. If emergency contact information changes, the employee should make sure that the HR Team is notified of the change immediately.

2.4 Receiving the New Employee

- The employee's direct supervisor will receive him/her, introduce him/her to Program's staff and his/her team, and show him/her around the JEDCO office.
- An assigned HR Team member will conduct an orientation session for the new employee, including background about the Program, its divisions and structure, policies, rules and regulations, and professional conduct. This will include a briefing on Personnel & Operations Manual.
- The assigned HR Team member will provide the employee with a time attendance card (or on-line equivalent) and train him/her on using it.
- The new employee will submit a copy of his/her ID and fill out a health insurance application.
- JEDCO's network administrator will conduct a computer and network orientation session.
- The employee will sign an "Acquisition Form" stating that he/she has received office equipment such as the computer and other supplies, as per JEDCO's policies.
- The employee will sign a statement saying that he/she has read the Personnel and Operations Manual and will comply with all applicable regulations.

2.5 The Probation Period

All new employees are subject to a 3-month probationary period. This gives both the new employee and the Program time for mutual evaluation. The employee's performance will be reviewed before the end of the probationary period. Should satisfactory progress not been made during this period, SMEFP-in accordance with Jordanian Labor Law-reserves the right to terminate his/her employment without notice. Equally, employees under probation have the right to resign during this period with no prior notice.

During the probationary period, employees accrue both sick and annual leave. However, use of annual leave is discouraged during probation except in case of emergencies.

If the 3-month probationary period passes and the employee receives a positive evaluation from his/her direct supervisor, then he/she is considered automatically a full-time employee with full benefits and privileges as per contract conditions.

The following will occur during the probation period:

- The direct supervisor or any assigned team member orients the employee

- The supervisor provides necessary guidance and support to the employee and begins observing his/her performance.
- If during the probation period, the supervisor sees that the new employee is not up to performance standards, he/she informs his/her supervisor and the HR Manager who will act accordingly.
- Two weeks before the end of the probation period (three months), the assigned HR Team member sends the probation period evaluation form (Attachment 8) to the new employee's supervisor to complete.
- The supervisor completes the form, discusses it with component lead, and sends it back to the assigned HR Team member.
- The direct supervisor informs new employee of the evaluation results and the decision regarding confirmation of employment.

2.6 New Staff Orientation

All new employees will receive orientation to the Program and JEDCO and to their new jobs. The orientation is designed to provide the employees with an understanding of JEDCO and the SMEFP's structure, culture, policies and procedures. The HR Team will design and conduct the orientation session.

The Program's employees will have access to JEDCO's intranet, which will have all information needed for the staff such as this manual, personnel systems and procedures, leave forms, attendance, salary inquiries, and Program- related instructions.

In coordination with relevant Program units, mentors may be assigned to new employee(s) for a specific period. The mentor will help the new employee cope with the work environment, provide him/her with on-the-job training and answer his/her questions. The mentor will be chosen based on experience and willingness to be a mentor.

2.7 Staff Recruiting and Selection Checklists

2.7.1 Recruiting and Selection Checklist

Activity		By Whom	Status (Yes, No)	Comments
1.	Identify hiring needs	Direct Supervisor		
2.	Prepare hiring request form and send it to Management	Direct Supervisor & HR		
3.	Approve hiring request	SMEFP Program Manager		
4.	Prepare job description and qualifications	Direct Supervisor & HR		
4.	Decide on the best recruitment tool/s	Direct Supervisor & HR		
5.	Prepare Ad Content and Design	Direct Supervisor & HR		
6.	Approve Ad Design	Component Lead		

Activity		By Whom	Status (Yes, No)	Comments
7.	Post the Ad in the newspapers and/or JEDCO website	HR & IT Teams		
8.	Receive applications	HR		
9.	Screen CVs based on job qualifications	Direct Supervisor & HR		
10.	Form 1st and 2nd interview committees	Direct Supervisor & HR		
11.	Prepare questions for interviews	Technical staff		
12.	Contact candidates and schedule 1st interview	HR		
13.	Prepare interview files for each candidate containing CV, job description, and interview scoring sheets	HR		
14.	Book a room for interview	HR		
14.	Receive candidates	HR		
15.	Conduct interview	Direct Supervisor and HR		
16.	Complete the scoring sheet and sign	Interview committee		
17.	Select the top 3 candidates	Interview committee		
18.	Contact the top 3 candidates and schedule 2nd interview	HR		
19.	Prepare interview file for each candidate containing CV, job description, scoring sheet of 1st interview, and 2nd interview scoring sheet	HR		
20.	Book interview room	HR		
21.	Receive candidates	HR		
22.	Conduct 2nd interview	CEO/Component Lead or Program Manager with the HR		
23.	Score candidates	Interview committee		
24.	Select best candidate	Interview committee		
25.	Send the selected candidate the bio data sheet to fill it out	HR		
26.	Conduct reference check	Direct Supervisor and HR		
27.	Determine candidate level, grade, and salary	Senior Accountant and SMEFP Program Manager		
28.	Send CV, job description, proposed job level, grade and	SMEFP Program Manager		

Activity		By Whom	Status (Yes, No)	Comments
	salary to USAID for approval			
29.	Upon receiving USAID approval, draft job offer	HR and Component Lead		
30.	Sign job offer	SMEFP Program Manager		
31.	Send job offer to candidate for review and signature	HR		
32.	Follow up with candidate on job offer and receive the signed offer or candidate's concerns	HR		
33.	Discuss candidate's concerns with component lead or Program Manager	HR		
34.	Confirm or finalize job offer	HR and SMEFP Program Manager		
35.	Ask the candidate to submit verification documents such as the academic certificates, experience letters, training certificates, etc.	HR		
35.	Draft contract	HR		
36.	Sign the contract by candidate and CEO	HR		
37.	Open a file for the new employee and place all documents in it	HR		

2.7.2 Post-Contracting Arrangements Checklist

Activity		By Whom	Status (Yes, No)	Comments
1.	Contact candidates interviewed but not hired, apprising them of their status	HR		
2.	Coordinate with IT Team to make necessary preparations such as prepare the computer, software, creating outlook account, etc.	HR/IT staff		
3.	Make seating arrangements	Direct Supervisor		
4.	Obtain emergency contact information from the candidate	HR		

2.7.3 New Staff Orientation Checklist

Activity		By Whom	Status (Yes, No)	Comments
1.	Receive new employee and walk him/her around the Program facility	Direct Supervisor		
2.	Introduce him/her to colleagues	Direct Supervisor		
3.	Assign a mentor if necessary	Direct Supervisor		
4.	Brief the employee on the Personnel and Operations Manual	HR		
5.	Train new employee on the job	Direct Supervisor or an assigned staff member		
7.	Monitor new employee performance and give guidance	Direct Supervisor		
8.	Explain responsibilities during the probation period and how the new employee will be evaluated	Direct Supervisor		
9.	Send the probationary period evaluation form to line manager	HR		
10.	Conduct evaluation towards the end of the three months	Direct Supervisor with follow up by HR		
11.	Make a decision based on evaluation	Component Lead and SMEFP Program Manager with recommendation from the Direct Supervisor		
12.	Inform the new employee on the confirmation of employment decision	Direct Supervisor		

2.8 Templates for the Staff Recruitment and Selection Process

Attachment 1: Request for Hiring

Hiring Needs

Position: ______________________ **Number:** ______________

Justification: ______________________

____

____

Main Responsibilities: ______________________

____

____

____

____

Qualifications: ______________________

____

____

____

Estimated Salary: ______________________

Component Lead name	**Signature**	**Date**

Program Manager Name	**Signature**	**Date**

CEO Decision: ☐ **Yes** ☐ **No**

CEO Name	**Signature**	**Date**

Attachment 2: CV Screening Form

Position Title ______________________________

Component ______________________________

No.	Applicant Name	Application Date	Qualifications		Screening Result		Comments
			Education	Experience (No. of Years and Relevance)	Yes	No	

Employee Name | **Signature** | **Date**

________________ ________________ ________________

Employee Name | **Signature** | **Date**

________________ ________________ ________________

Attachment 3: Candidate Scoring Sheet (1st Interview Evaluation Form)

Position: ______________________________

Interviewee: ______________________________

Interviewer: ______________________________

Interview Date: ______________________________

Competency (Refer to Job Description to Score on the Candidate's Credentials)	Weight	Rating (1-5)	Score
Competencies related to job duties			
Education and training			
Previous experience (relevance and depth)			
Skills and knowledge			
Soft skills and personal traits required for the work			
Language skills			
Total Score			
Availability (Earliest possible start date):			
Package expectations:			
Current Salary:			
Interviewer Comments			
Interviewer Signature			
Panel Final Score			
Panel Comments			
Panel Member 1 Name **Signature**	**Panel Member 2 Name** **Signature**		

Attachment 4:Final Interview Scoring Sheet

Position: ______________________________

Interviewee: ______________________________

Interviewer: ______________________________

Interview Date: ______________________________

Competency (Refer to Job Description to Score on the Candidate's Credentials)	Weight	Rating (1-5)	Score
Technical competence			
Previous experience			
Personality (cultural fit, adaptability, confidence, etc.)			
Language skills			
Total Score			
Interviewer Comments			
Interviewer Signature			
Panel Final Score			
Panel Comments			

Panel Member 1 Name **Signature**	**Panel Member 2 Name** **Signature**
Final Decision **Comments by CEO**	**CEO Signature** **Date**

Attachment 5: Reference Check Form

Candidate Name ______________________

Position ______________________

Reference Name ______________________

Contact Address ______________________

Date ______________________

- How did you get to know (Candidate's name) and where?
- How long did you stay in contact with the candidate in the working relationship?
- What was the form of working relationship that you had with the candidate? (Supervisor, consultant, client, etc.)
- How do you evaluate the candidate in the following competencies and traits (Please score only the competencies that are in line with your previous experience with him/her:

Competencies and Traits	Rating (1-5)

- Please indicate you general impression of the candidate (Excellent, very good, good, not good)
- In general, would you recommend hiring the candidate for this position? (Yes, No) and why?

Name ______________________

Position ______________________

Signature ______________________

Attachment 6:Contractor Employee Biographical Data Sheet

<table>
<tr><td colspan="2">1. Name (Last, First, Middle)</td><td colspan="2">2. Contractor’s Name</td></tr>
<tr><td colspan="2" rowspan="2">3. Employee’s Address (include ZIP code)</td><td>4 Contract Number</td><td>5 Position Under Contract</td></tr>
<tr><td>6. Proposed Salary</td><td>7. Duration of Assignment</td></tr>
<tr><td>8.Telephone Number (include area code)</td><td>9. Place of Birth</td><td colspan="2">10. Citizenship (If non-U.S. citizen, give visa status)</td></tr>
<tr><td colspan="4">11. Names, Ages, and Relationship of Dependents to Accompany Individual to Country of Assignment</td></tr>
</table>

<table>
<tr><td colspan="4">12. Education (include all college or university degrees)</td><td colspan="3">13. Language Proficiency</td></tr>
<tr><td>Name and Location of Institution</td><td>Major</td><td>Degree</td><td>Date</td><td>Language</td><td>Proficiency Speaking</td><td>Proficiency Reading</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

14. **Employment History**

Give last three (3) years. List salaries separate for each year. Continue on separate sheet of paper if required to list all employment related to duties of proposed assignment.

Salary definition – basic periodic payment for services rendered. Exclude bonuses, profit-sharing arrangements, commissions, consultant fees, extra or overtime work payments, overseas differential or quarters, cost of living or dependent education allowances.

<table>
<tr><td rowspan="2">Position Title</td><td rowspan="2">Employer’s name and address
Point of contact &telephone #</td><td colspan="2">Dates of Employment (mm/dd/yyyy)</td><td>Annual Salary</td></tr>
<tr><td>From</td><td>To</td><td>Dollars</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
</table>

15. **Specific Consultant Services (**give last three (3) years)					
Services Performed	**Employer's name and address** **Point of contact &telephone #**	**Dates of Employment (mm/dd/yyyy)**		**Days at Rate**	**Daily Rate In Dollars**
		From	**To**		

16. **CERTIFICATION:** To the best of my knowledge, the above facts as stated are true and correct.	
Signature of Employee	Date

Contractor certifies in submitting this form that it has taken reasonable steps (in accordance with sound business practices) to verify the information contained in this form. Contractor understands that USAID may rely on the accuracy of such information in negotiating and reimbursing personnel under this contract. The making of certifications that are false, fictitious, or fraudulent, or that are based on inadequately verified information, may result in appropriate remedial action by USAID, taking into consideration all of the pertinent facts and circumstances, ranging from refund claims to criminal prosecution.

Signature of Contractor's Representative	Date

Attachment 7: Job Offer

Mr./Ms. ____ **Date** ________________________

Dear Mr. Ms. ____

Reference to our meeting on _______________________ regarding ________________________-position, I am pleased to extend the following offer to you for your consideration:

Job scope____

- Employment type: (limited, unlimited contract)
- Compensation package:
  - Monthly salary:---
  - Other benefits: ---

Please note that your salary will be subject to deductions enforced by Jordanian laws.

We look forward to having you as a valued member of our team.

Best regards,

Program Manager

Name ____

Signature ____

I accept the offer

Name ____

Signature ____

Date ____

Attachment 8: Probation Period Evaluation Form

Employee Name ____________________ **Position** ____________________

Evaluator's Name ____________________ **Position** ____________________

Employee Start Date ____________________ **Evaluation Date** ____________________

Criteria		Above Expectations (3)	Meet Expectations (2)	Below Expectations (1)
1.	Performance of tasks assigned to him/her during the probation.			
2.	Ability to learn and adapt to working environment			
3.	Ability to learn new concepts and apply what he/she learns			
4.	Ability to adapt to working environment			
5.	Demonstration of attitudes and behaviors required for the job and work in general			
	Total			

Supervisor's Comments

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____

Recommendations (by Supervisor and Component Lead)

____

____

____

____

Signature ____________________ **Date** ____________________

CEO Approval ____

Signature ____________________ **Date** ____________________

3. Performance Appraisal Process

3.1. Process Initiation

The HR Team initiates the performance appraisal process based on the following schedule:

Process	Timeframe
Goals setting	
Mid-year goals review	
Performance appraisal	

3.2 Goal Setting

Using the Goals Setting Form template (Attachment 1), each SMEFP employee will establish two types of goals the each year:

- **Performance Goals:** They should reflect the Program's goals and objectives and illustrate how the employee will contribute to achieving those goals through specific activities. Those goals should be based on the Program's work plan.
- **Personal Development and Career Goals:** The employee will set goals that will help his/her career development, either through training opportunities, expanding job-related responsibilities, or getting involved in assignments that lead to skill development in the required area(s).

3.3 Goals Discussion and Documentation

- **Goals Discussions:** During goal discussion meetings, an employee’s direct supervisor will review the goals set by his/her subordinates, to make sure they are aligned with the program's goals, work plans, and job descriptions. In addition, they will ensure that personal development goals are realistic and agree on actions that facilitate their achievement. This step is very critical as it becomes the base for the employee appraisal that takes place in November of each year. Once both parties agree on the meeting outcomes they both sign the goal setting form.
- **Documentation:** An employee’s direct supervisor will provide the HR Team with the original copy of the staff goals setting forms to be kept in the personal files for future reference. Both the direct supervisor and staff member keep a copy of this form for his/her own reference.

3.4 Mid-Year Performance and Goals Review

Six months after goal setting, the supervisor and his/her subordinate will meet individually to discuss performance, achievements and challenges, in order to identify any changes in strategy and/or priorities that affect performance. Once both parties agree on the meeting outcomes, they both sign the mid-year performance and goals review form (Attachment 2). The supervisor will provide the HR Team with the original copy of these forms to be kept in personal files for future reference. Both the supervisor and staff member will keep a copy of this form for his/her own reference.

3.5 End of Year Performance Evaluation

- According to the performance appraisal process schedule, the HR Team will prepare the Performance Appraisal Form (Attachments 3 &4) and send it to all SMEFP team members.
- Team members will complete Part A (the self-assessment part) and send it to their direct supervisors within three working days.
- Direct supervisors will review the staff self-assessment reports, compare them with the goal setting results, the job descriptions, and program work plans and accordingly fill in their part of the performance appraisal form. This is due within five working days.
- Direct supervisors and employees will agree on meeting days/times to discuss the results of the performance appraisal process.
- During this meeting, the direct supervisor and the employee will discuss in full details each element of the performance appraisal form, explain the merits behind their judgments, provide evidence to support their case, and try their best to reach an agreement on the different elements of the evaluation.
- Based on the performance appraisal, specific actions will be discussed and reflected on next year's goals setting process.
- The forms will be approved and signed by the SMEFP Program Manager and the CEO.
- Any employee objections due to perceived unfair evaluation during this process will be escalated to the Component Lead, who will discuss the issue with both the employee and his/her direct supervisor. If necessary, he/she may reach out to others for input as well. The Component Lead will be the “court of last resort” relative to the evaluation and his/her assessment will be considered final.
- If there is agreement on the evaluation , the direct supervisor and the employee will sign the form and make two copies to be kept with each of them for future reference.
- The direct supervisor will provide an original copy of the evaluation form to the HR team for inclusion in the employee’s personnel file.

3.6 Performance-Based Salary Increases

- Based on the results of an employee’s annual evaluation, and subject to budget restrictions and Program regulations (including those imposed by USAID), JEDCO’s CEO and the SMEFP Program Manager will agree on the yearly salary increase program, which will assign a certain salary raise percentage for each performance appraisal rating (exceptional, above expectations, meet expectations, below expectations). No salary increase will be awarded to employee’s who are below expectations.
- Based on the above, the HR Team will prepare a list of employees with their ratings and proposed raises and levels/grades.
- The above list will be sent to USAID’s COTR and Compliance Officer to ensure compatibility with USAID policies and salary scale.
- The SMEFP Program Manager will secure USAID’s approval for the proposed promotions and/or salary increases.

- The SMEFP Program Manager will send USAID's approval to the HR Manager.
- The HR Manager will send the approval to the Senior Accountant to update his/her records process the increases.
- Evaluation letters signed by the SMEFP Program Manager will be sent to employees informing them of their final appraisal results and any salary increase.
- Employment contracts will be modified and submitted to employees for signature. An original copy of the signed and amended contract will be placed in the employee's personnel file.
- Salary increases are not automatic or guaranteed. They will be assessed each year based on JEDCO's policies. The guidelines outlined in this manual apply to ALL JEDCO employees, not just those working for SMEFP, though salary increases for SMEFP employees are subject to approval by USAID.

3.7 Important Remarks

- Direct supervisors will conduct regular sessions with his/her employees to track performance and provide advice. Therefore, the performance appraisal process should be viewed as on-going and not one that is only associated with the formal procedure that takes place at the end of the year.

If a direct supervisor sees that a particular employee is not fulfilling the duties of his/her job, he/she will handle the situation as follows:

  - He/she will set targets and actions for the employee to upgrade his/her performance to the required level. This will be documented in a letter which is sent to the employee and signed by him/her.
  - He/she will observe employee performance and if required progress has not been made, the employee will receive a second letter indicating the need to improve and the needed actions.
  - If the employee performance does not improve, he/she may be demoted or terminated pursuant to JEDCO policy and Jordanian law.

- A "below expectations" rating will not only culminate in an employee receiving no salary increase. It may also mean the employee's contract is not renewed.

3.8 Performance Appraisal Process Checklists

3.8.1 Goal Setting Checklist

Activities		By Whom	Status (Yes, No)	Comments
1.	Admin and HR team prepares the goal setting form and sends it with an email explaining the process to all employees	HR team		
2.	The employees fill it the goal setting form for the whole year and sends it to their line managers	Program employees		
3.	The line managers reviews the forms and schedule	Direct Supervisors		

Activities		By Whom	Status (Yes, No)	Comments
	individual meetings with employees to discuss the			
4.	The line managers and employees conduct the individual meeting, agrees on the goals and signs on the forms	Employees and their Direct Supervisors		
5.	The line manager makes two copies of the signed form, gives a copy to the employee, keeps one in his/her file, and gives the original to the Admin & HR Senior Officer	Direct Supervisor		
6.	The Admin & HR team keeps the original in a file opened for this purpose and place a copy in the employee file	HR team		
7.	Both the line managers and employees use the form to follow up on the achievement of goals.	Direct Supervisors and Employees		

3.8.2 Checklist for the Mid-Year Goal Review

Activities		By Whom	Status (Yes, No)	Comments
1.	The Admin & HR team prepares the mid-year goal review form and sends it to all employees beginning of June	HR team		
2.	The employees fill out the form indicating the status of each goal and updating the goals of the next six months	Employees		
3.	The employee sends a copy of the form to line manager for review	Employee		
4.	The line manager reviews the form and notes his/her comments	Direct Supervisor		
5.	The line manager schedules meeting with the employee to discuss the mid-year review form	Direct Supervisor		
6.	Conduct the meeting	Direct Supervisor and employee		
7.	Sign on the form	Direct Supervisor and		

Activities		By Whom	Status (Yes, No)	Comments
		employee		
8.	Make two copies of the form, give one to employee, one for line manager and submits the original to Admin & HR team	Direct Supervisor		
9.	Keep the original form in the evaluation file and place one copy in the employee file	HR team		

3.8.3 Checklist for the End of Year Evaluation

Activities		By Whom	Status (Yes, No)	Comments
1.	Prepares the End of Year Evaluation Form	& HR team		
2.	Sends the form to all employees	& HR team		
3.	Fill out the self-assessment form	Employees		
4.	Send the form with the self-assessment to line manager	Employee		
5.	Reviews the self-assessment and fill out the evaluation part	Direct Supervisor		
6.	Send the evaluation form filled by the line manager to employee	Direct Supervisor		
7.	Employee reviews the form and note his/her comments	Employee		
8.	Line manager schedule a meeting with the employee	Direct Supervisor		
9.	Conduct the meeting	Direct Supervisor and employee		
10,	Sign on the form	Direct Supervisor and employee		
11.	Make two copies of the form. Give one to employee and keep one for the line manager and submit the original to Admin and Admin and HR team	Direct Supervisor		
12.	Sends signed forms for Component lead to approve them	Admin & HR team		
13.	Approve the form or discuss with line manager	Component lead		

Activities		By Whom	Status (Yes, No)	Comments
14.	Send the form back to Admin and HR team	Component Lead		
15.	Place a copy of the form in the evaluation file and another in the employee file	Admin and HR team		
16.	Prepare a sheet listing employees and their ratings	Admin and HR team		
17.	Sends the sheet to Program, Manager and component lead	Admin and HR team		
18.	Agree on the salary raise percentage for every evaluation rating	SMEFP Program Manager, USAID COTR and Compliance Officer, Senior Accountant		
19.	Make a decision regarding the salary raise percentage and raise budget	SMEFP Program Manager, USAID Compliance Officer, Senior Accountant		
20.	Obtain USAID approval on the raise budget	SMEFP Program Manager		
21.	Prepare letters for employees informing them of their evaluation results and salary raise if any.	Admin and HR team		
22.	Sign the letters	SMEFP Program Manager		
23.	Place copy of the letter in the employee file	HR team		
24.	Send letters to employees	HR team		
25.	Send copy of the letter to Senior Accountant	HR team		
26.	Update financial records	Senior Accountant		

3.9 Performance Appraisal Process Templates

Attachment 1: Employee Goals Setting Form

Employee Name ______________________________

Line Manager ______________________________

Goals Timeframe ______________________________

Date ______________________________

Instructions

You are required to set two types of goals for the 20xx year. The first type is your performance goals; which will be derived from your team's work plan for this year and the second is the personal development and career goals.

Remember, your goals should be SMART: Specific, Measurable, Actionable, Realistic, and Time Bound. These goals will be re-visited with your supervisor regularly throughout the year so that progress toward achieving the goals can be monitored carefully.

Example**:** If one of your goals was to become more proficient with Excel, converting that into a "SMART" goal would be:

*"To **integrate** the use of Excel in tracking employees and the training programs they attend **by January 1, 2013** with the **help of training programs** offered through the Program".*

This goal has a specific end result and a deadline that facilitates performance and performance measurement.

Performance Goals

For the current program year, document your goals and describe your expected performance. Refer to the Program's Work Plan and/or any agreements with your Line Manager and simply insert them here. You should specify the activity due date and how you judge level of goal achievements.

Program Goal	Performance Goal	Timeframe	Measured By

Line Manager Comments

Personal Development and Career Goals

In this section, you need to identify goals that will help you progress in your career. This might include acquiring a new skill, expanding your knowledge, and/or improving a certain aspect in your performance.

Some questions that might help you in articulating these are: "what do I need to improve relative to my job description?" Or "where do I want to be in 5 years in my career" and "what actions will I need to get there?".

Personal Development and Career Goal	Action You Will Take to Achieve Goals	Support You Will Need to Achieve Goals

Line Manager Comments

Signatures

Employee ____________________ Line Manager ____________________

Date ____________________ Date ____________________

Attachment 2: Mid-Year Performance and Goals Review Form

Employee Name ______________________________

Line Manager ______________________________

Evaluation Period ______________________________

Date ______________________________

Goals Achievement

- **Performance Goals** (Insert goals that you listed earlier in your goal setting form)

Performance Goal	Status	Amendments/ Changes	Employee Comments

Line Manager Overall Rating

☐ Exceptional Performance

☐ Exceeds Expectations

☐ Meets Expectations

☐ Below Expectations

Line Manager Comments

____

____

____

____

- **Personal Development and Career Goals** (insert goals that you listed earlier in your goal setting form)

Personal Development and Career Goal	Actions Undertaken	Status	Employee Comments

Goals for the Next Six Months

- **Performance Goals for the Next Six Months**

  Based on your achievements in the last six months, please update your goals for the next six months:

Program Goal	Performance Goal	Timeframe	Measured by

- **Personal Development and Career Goals for the Next Six Months**

  Based on your achievements in the last six months, please update your goals for the next six months:

Personal Development and Career Goal	Action You Will Take to Achieve Goals	Support You Will Need to Achieve Goals

Line Manager Comments

____

____

____

____

Signatures

Employee ______________________ Line Manager ______________________

Date ______________________ Date ______________________

Attachment 3: Performance Appraisal Form for Management Positions

Employee Name		**Position**	
Time in Current Position		**Evaluation Period**	
Line Manager's Name		**Appraisal Date**	

Instructions

- Using this form, the employee makes a general reflection on his/her evaluation period. He/she fills part A which is an overall reflection on his/her performance and work in general, and a self-assessment of his/her achievement of the goals that were set at the beginning of the evaluation period.
- The line manager makes an assessment of the competencies that are listed in part B and sends the form to the employee.
- Upon receiving the form, the employee reviews it and prepares his/her comments in preparation for the performance review meeting with his/her line manager.
- The employee schedules the review meeting with the line manager to discuss the evaluation. The discussion will cover strengths and weaknesses in the different areas identified in the form. Both the line manager and employee give justification of their assessments and seek to reach agreement on the different items.

Self-Assessment

- **Overall Reflection**

What were your major assignments during the appraisal period?

-
-
-

What were your best achievements?

-
-
-

What were the challenges/difficulties faced?

-
-
-

What sort of support do you need to handle such difficulties/challenges?

-
-
-
-

Your assignments during the review period have been: ☐ **Challenging** ☐ **Not Challenging**

Comments:

Your workload during the review period has been: ☐ **Light** ☐ **Just Right** ☐ **Heavy**

Comments:

- **Achievement of Goals**

  Assess your achievements against your performance and personal development goals. Indicate achievements relevant to each goal and state your comments and justifications.

  – Performance Goals

Performance Goals	Status	Employee Comments	Line Manager Comments

  – Personal Development Goals

Personal Development Goals	Status	Employee Comments	Line Manager Comments

Competencies

This part will be completed by the line manager and then discussed by line manager and employee. The following ratings will be used to describe the level of performance in each competency:

- Exceptional performance (Frequently exceeds job requirements)
- Above expectations (Sometimes exceeds job requirements)
- Meets expectations (Frequently meets performance expectations)
- Below expectations (Does not meet performance expectations)

Strategizing and Planning	Rating
1. Effectively participates in developing the Program's strategies and policies.	
2. Sets effective work plans in alignment with the Program's strategies.	
3. Effectively tracks and monitors implementation of work plan	
4. Continuously brings in new and creative ideas and approaches to improve the Program's work and status.	
5. Continuously looks for, and seizes opportunities, that enhance the Program's achievements.	
Rating	

Decision Making and Problem Solving	Rating
1. Makes effective and timely decisions; explores options, analyzes, and weighs alternatives against pre-set criteria.	
2. Proactively, handles anticipated problems and/or solves them as they occur.	
3. Effectively involves staff t in the problem solving, acknowledges staff input, and creates a sense of ownership and commitment among them.	
4. Encourages creativity and thinking out of the box in decision making and problem solving.	
5. Regularly informs senior management on Program risks and possible mitigation plans.	
Rating	

Performance Management	Rating
1. Sets challenging, yet achievable performance targets, streamlines staff efforts, supports, mentors, tracks and assesses performance effectively and in a timely manner.	
2. Sets performance standards and indicators in cooperation with employees and communicates them.	
3. Manages to results; continuously stresses on achieving goals and expected results.	
4. Develops and utilizes monitoring and evaluation techniques and takes creative preventive and corrective measures and actions.	
5. Acknowledges good performance, gives constructive feedback, and takes corrective measures when required.	
6. Implement the Program's staff appraisal policy effectively and in a timely manner.	
7. Assesses quality of work and ensures compliance with policies and standards.	
8. Takes responsibility and accepts accountability on team's performance.	
Rating	

Staff Empowerment	Rating
1. Assesses staff training and development needs in cooperation with the Admin and HR team and develops	

	a staff training plan based on Program's priorities and career goals.	
2.	Assists staff in setting their career development goals and helps them achieve them.	
3.	Encourages and mentors staff for growth and provides opportunities for job enrichment and expanding responsibilities.	
4.	Delegates work for staff and helps them acquire new knowledge and skills.	
5.	Shares knowledge with staff and provides opportunities for learning.	
		Rating
Leadership		**Rating**
1.	Takes charge, directs, motivates, recognizes staff efforts, and accepts accountability for team performance.	
2.	Builds on individual's skills and attributes and maximizes staff contributions in achievement of the Program's goals.	
3.	Facilitates team's work, solves problems, and creates a supportive working environment.	
4.	Presents a role model by demonstrating desirable behaviors and practices.	
5.	Builds effective teams (Promotes team efforts and instills team spirit among employees).	
6.	Instills a culture of trust, honesty, creativity, responsiveness, customer orientation, team work, responsibility and accountability within the team and the Program in general.	
		Rating
Knowledge Management		**Rating**
1.	Builds necessary reports that ensure documentation of all work aspects and submits up to date reports and data to concerned individuals in the Program.	
2.	Establishes alliances with subject matter experts and leverages opportunities to share knowledge with others.	
3.	Assists in building a knowledge sharing environment.	
4.	Leverages resources that facilitate work, improve service offerings, and enhance efficiency and effectiveness of the Program.	
		Rating
Client Relationship Management		**Rating**
1.	Effectively participates in creating a data base of clients and stakeholders.	
2.	Identifies clients' needs and continuously seeks to meet them.	
3.	Communicates effectively with clients and stakeholders and establishes a good rapport with them.	
4.	Redesigns interventions to suit clients' needs and improve customers' satisfaction.	
5.	Gains trust of clients through demonstrating credibility and knowledge ability.	
6.	Supports the Program's efforts to measure clients' satisfaction through encouraging clients to provide input and feedback on the Program's services.	
7.	Demonstrates effective and professional approach in representing the Program; creates and maintains the desirable image.	
		Rating
Communications Skills		**Rating**
1.	Conveys messages precisely, comprehensively and courteously to colleagues, supervisors, and	

	stakeholders.	
2.	Conducts effective presentations.	
3.	Demonstrates effective interpersonal skills, presents oneself professionally, and creates an atmosphere of trust and respect with others.	
4.	Keeps the Management updated on the team's efforts and achievements and reports challenges and suggested solutions.	
5.	Communicates effectively in writing including report writing.	
		Rating

Fiscal Responsibility		**Rating**
1.	Applies accurate and organized methods for setting and maintaining Component's budgets.	
2.	Effectively utilizes resources.	
3.	Identifies and applies cost-effective methods for all areas of the budget.	
4.	Demonstrates effective budgetary forecasting.	
		Rating

Self Development		**Rating**
1.	Leverages strengths, identifies development needs, and seeks to fulfill them.	
2.	Bridges performance gaps through different resources and approaches.	
3.	Seeks new and challenging clients and professional development experiences to ensure continuous self-development.	
		Rating

Technical Skills and Knowledge (Refer to Job Description)		**Rating**
1.	Demonstrates ability, knowledge, and skills needed to perform tasks identified in the job description proficiently and in a timely manner. **(Please refer to job description)**	
2.	Demonstrates knowledge and ability to assume more challenging responsibilities and/or responsibilities linked to higher positions.	
		Rating

Line Manager's Comments

Summary of Performance Ratings (to be filled in by Line Manager)

Area		**Rating**
1.	Achievement of Performance Goals	
2.	Strategizing and Planning	
3.	Decision making and Problem Solving	
4.	Performance Management	

Area		Rating
5.	Staff Empowerment	
6.	Leadership	
7.	Knowledge Management	
8.	Client relationship Management	
9.	Communications Skills	
10.	Fiscal Responsibility	
11.	Self-Development	
12.	Technical Skills and Knowledge	

Overall Employee Rating (to be filled in by Line Manager)

Rating	Exceptional	Above Expectations	Meets Expectations	Improvement Needed
Line Manager				

Overall Comments

Employee

Line Manager

Recommendations (to be filled in by Line Manager)

Signatures

Employee Signature ______________________ Line Manager Signature ______________________

Date ______________________ Date ______________________

Component Lead/ Program Manager Signature	______________________
Date	______________________

Attachment 4: Performance Appraisal Form for Non-Management Positions

Employee Name		**Position**	
Time in Current Position		**Evaluation Period**	
Line Manager's Name		**Appraisal Date**	

Instructions

- Using this form, the employee makes a general reflection on his/her evaluation period. He/she fills part A which is an overall reflection on his/her performance and work in general, and a self-assessment of his/her achievement of the goals that were set at the beginning of the evaluation period.
- The line manager makes an assessment of the competencies that are listed in part B and sends the form to the employee.
- Upon receiving the form, the employee reviews it and prepares his/her comments in preparation for the performance review meeting with his/her line manager.
- The employee schedules the review meeting with the line manager to discuss the evaluation. The discussion will cover strengths and weaknesses in the different areas identified in the form. Both the line manager and the employee give justification of their assessments and seek to reach agreement on the different items.

Self-Assessment

- **Overall Reflection**

What were your major assignments during the appraisal period?
•
•
•

What were your best achievements?
•
•
•

What were the challenges/difficulties faced?
•
•
•

What sort of support do you need to handle such difficulties/challenges?

-
-
-
-

Your assignments during the review period have been: ☐ **Challenging** ☐ **Not Challenging**

Comments:

Your workload during the review period has been: ☐ **Light** ☐ **Just Right** ☐ **Heavy**

Comments:

- **Achievement of Goals**

  Assess your achievements against your performance and personal development goals. Indicate achievements relevant to each goal and state your comments and justifications.

  – Performance Goals

Performance Goals	Status	Employee Comments	Line Manager Comments

  – Personal Development Goals

Personal Development Goals	Status	Employee Comments	Line Manager Comments

Competencies

This part will be completed by the line manager and then discussed by line manager and employee. The following ratings will be used to describe the level of performance in each competency:

- Exceptional performance (Frequently exceeds job requirements)
- Above expectations (Sometimes exceeds job requirements)
- Meets expectations (Frequently meets performance expectations)
- Below expectations (Does not meet performance expectations)

	Work Management and Organizing	Rating
1.	Demonstrates understanding of the Program's vision and mission and how they relate to the Team's and own work.	
2.	Effectively participates in developing the Team's strategies and plans.	
3.	Prioritizes work based on importance and urgency.	
4.	Effectively manages his/her time based on priorities.	
5.	Effectively handles multiple tasks.	
6.	Continuously brings in new and creative ideas and approaches to improve the Team's work.	
7.	Makes effective and timely decisions related to his/her work; explores options, analyzes, and weighs alternatives against pre-set criteria.	
8.	Applies innovative approaches to solving problems and making decisions.	
	Rating	

	Work Execution	Rating
1.	Focus on his/her performance goals and persistently seeks to achieve them.	
2.	Effectively follows up, tracks, and monitors implementation of his/her plan.	
3.	Demonstrates ability to handle difficult situations.	
4.	Continuously meets deadlines.	
5.	Continuously meets quality standards.	
6.	Abides by the Program's policies and standards.	
7.	Continuously looks for, and seizes opportunities that could enhance Team's achievements.	
8.	Report to Management on timely basis and gives updates on work progress as necessary.	
9.	Works independently and effectively seeks Management support when needed.	
10.	Shares knowledge and information with colleagues to enhance coordination and assists in promoting a culture of knowledge sharing.	
	Rating	

	Client Relationship Management (for Employees Facing Clients)	Rating
1.	Effectively participates in creating a data base of clients and stakeholders.	
2.	Demonstrates ability to design interventions that meet clients' needs.	
3.	Communicates effectively with clients and stakeholders and establishes a good rapport with them.	
4.	Gains trust of clients through demonstrating credibility and knowledge ability.	

5.	Supports the Program's efforts to measure clients' satisfaction through encouraging clients to provide input and feedback on the Program's services.	
6.	Demonstrates effective and professional approach in presenting the Program; creates and maintains the desirable image.	
		Rating
Communication Skills and Team Work		**Rating**
1.	Conveys messages precisely, comprehensively and courteously to colleagues, supervisors, and stakeholders.	
2.	Conducts effective presentations.	
3.	Demonstrates effective interpersonal skills, presents oneself professionally, and creates an atmosphere of trust and respect with others.	
4.	Keeps the Management updated on his/her efforts and achievements and reports challenges and suggested solutions.	
5.	Communicates effectively in writing including report writing.	
6.	Works well with others, cooperates with colleagues, and promotes team spirit.	
		Rating
Self Development		**Rating**
1.	Leverages strengths, identifies development needs, and seeks to fulfill them.	
2.	Bridges performance gaps through different resources and approaches.	
3.	Seeks new and challenging opportunities and professional development experiences to ensure continuous self-development.	
		Rating
Reliability		**Rating**
1.	Takes overall responsibility of his/her work.	
2.	Attends to high quality standards, risk mitigation, and customer service.	
3.	Delivers high quality deliverables.	
4.	Regularly informs senior management on Program risks and possible mitigation plans.	
5.	Demonstrates ability to act independently and adjust work plans according to circumstances.	
6.	Demonstrate a high sense of urgency and high energy level.	
7.	Works well under pressure.	
		Rating
Technical Skills and Knowledge (Refer to Job Description)		**Rating**
1.	Demonstrates ability, knowledge, and skills needed to perform tasks identified in the job description proficiently and in a timely manner.	
2.	Demonstrates knowledge and ability to assume more challenging responsibilities and/or responsibilities linked to higher positions.	
3.	Demonstrates ability to learn new concepts and skills that contribute to work and achievement of personal development goals.	
		Rating

Line Manager's Comments

Summary of Performance Ratings (to be filled in by Line Manager)

Area	Rating
1. Work Management and Organizing	
2. Work Execution	
3. Client Relationship Management	
4. Communications Skills and Team Work	
5. Self-Development	
6. Reliability	
7. Technical Skills	

Overall Employee Rating (to be filled in by Line Manager)

Rating	Exceptional	Above Expectations	Meets Expectations	Improvement Needed
Line Manager				

Overall Comments

Employee

Line Manager

Recommendations (to be filled in by Line Manager)

Signatures

Employee Signature	________________	Line Manager Signature	________________
Date	________________	Date	________________
Component Lead/ Program Manager Signature	________________		
Date	________________		

4. Employee Policies and Practices

4.1 Promotion and Career Development

JEDCO is committed to assisting its employees in achieving their career goals, which is why the SMEFP's career development system focuses on employee growth and career advancement. Employees can move across grades and levels in the salary scale depending on performance appraisal results and upon approval of USAID.

4.2 Working Hours Policy

- SMEFP working hours are 8 hours a day, five days a week, Sunday through Thursday, from 8:00 a.m. to 4:00 p.m.
- These working hours are flexible for the employees according to their circumstances, to start at 8:00 a.m. or 8:30 a.m. till 4:00 p.m. to 4:30 p.m. with prior approval of their supervisors.
- Employees are expected to be on time, but if late, employee must stay past regular departure time to make up the late time if he/she is not more than 30 minutes late. If the employee is more than 30 minutes late, he/she must submit a leave form.

4.3 Timesheet Policy:

As per the JEDCO policy, employees are required and responsible for recording their working hours, leaves and holidays, by completing the SMEFP timesheet template on a daily basis and submitting it at the end of each month to his/her supervisor for approval. Each employee will be provided a timesheet upon joining the Program. To complete the timesheet, the employee will:

- Employee must at the start of each month complete items at the top of the time sheet (name, status, etc.) and print out a copy.
- Each day, the employee will record time in ink, as per the following:
  - In rows 1 and 2, record time of arrival and time of departure.
  - In row 3, fill in productive work hours each day, up to 8.
  - In row 4, fill in productive hours beyond 8 or overtime hours
  - In rows 5-7, put in any authorized personal leave, authorized sick leave or authorized holiday.
  - In rows 8-9, put in any personal or sick leave without pay.
- At the end of the month, employee should transfer the data from handwritten sheet to the spreadsheet, print out a copy and submit it along with the handwritten sheet to their supervisor for approval.
- Time sheets are filed by the HR team in the employee files and scanned copies are sent to the Senior Accountant to process the monthly salaries.
- The time sheet Template will be entered onto JEDCO's intranet and programmed so that necessary calculations can be made automatically.

4.4 Overtime Policy

- Non-supervisory staff is eligible for overtime but senior management employees are not.
- Overtime pay will be calculated in accordance with the Jordanian Labor Law in force. The rate of hourly overtime pay will be calculated by the following formula: Monthly payment multiplied by 12 divided by 260 divided by 8, which is in accordance with current law.
- For overtime hours worked during the normal work week, the employee will receive 125% of their normal hourly rate, and for hours worked during the weekend (Fridays and Saturdays) he/she will receive 150%.
- Overtime must be approved in advance by the SMEFP Program's Manager with concurrence of the relevant Component Lead.
- Overtime approvals should be attached to the timesheets when due.

4.5 Leaves and Holidays

4.5.1 Annual Leave

- SMEFP employees are entitled to 14 paid days of annual leave. Prior to working for the SMEFP for one year, an employee is entitled to annual leave calculated proportionally to the period of his/her service at the Program.
- Those who work for the Program for 3 years or more are eligible for 21 days of paid leave.
- Employees under probation are not eligible for annual leave except in emergency cases. After the completion of probation period and confirmation of employment, the accrued service time will be provided and the employee may take leave upon approval of direct supervisor.
- The employee may accumulate unused vacation time and carry it over to the next year. However, this time must not exceed two years' worth of accruals or 42 days maximum.
- Employees who fall ill during annual leave will be entitled to treat the days of sickness as sick leave provided the employee has a doctor's note stating case and time. The employee must notify the HR team as to the change in status of the time off. However, the employees are eligible to utilize the health insurance plan provided by the Program where applicable.
- If, for any reason, employees know that they will be returning late from vacation, they must contact their supervisors and obtain their approval on the late return. If the employee's request is not approved, he/she has to report to work immediately.

4.5.2 Administrative Leave

This term is used to denote time away from the office for which an employee is paid. This may include the cases of inclement weather (as announced by the Jordanian Government), reduced Ramadan working hours, or for any other reason called upon by the Jordanian Government.

Administrative leave days may be made up either by working additional hours or on Saturday's as determined by Management.

4.5.3 Leaves During Working Hours:

- The Program's employees may request leave during working hours in which case it has to be approved by the supervisor. The time away from the office must not affect work schedules.
- Leaves during working hours will be deducted from the employee's leave balance.
- The maximum duration of the leave during the day is 4 hours. A leave for more than 4 hours will be treated as a full day leave and will be deducted from the employee annual leave balance. As a general rule, leave during working hours must be kept to the minimum.

4.5.4 Sick leave

- The employee is entitled to up to 14 days' sick leave per year. Unused sick leave is not transferable to the next year's balance. In order for the leave to be treated as a sick leave, the employee has to provide a signed report from his/her doctor. Extended sick leaves are governed by the Jordanian labor Law. Any employee can refer to the HR Team for more details or clarification. Holidays and weekends within a sick leave are calculated as part of the sick leave.
- Employees are required to personally notify their supervisors of unplanned medical absences as early as possible. An employee who is unable to call in may have a responsible person do that on his behalf. Upon the employee's return, a sick leave request form should be completed and should be accompanied by a medical report. It must be approved by the employee's supervisor in order to be in force.
- The employee's supervisor may approve the sick leave with no medical report if he/she is convinced that the employee's health condition does not allow him/her to report to work and if the period does not exceed two days. Unapproved sick leave will be deducted from the employee's annual leave balance.

4.5.5 Engagement and Marriage Leaves

In the occasion of an engagement, the employee is eligible for one day paid leave. An employee is granted three days paid leave in the occasion of his/her marriage.

4.5.6 Maternity Leave

Female employees shall be granted 10 weeks calendar maternity paid leave. Out of these 10 weeks, a minimum of 6 weeks should be taken after delivery. The employee must notify his/her supervisor and the HR Team of the expected maternity absence 3 months prior to the expected delivery date. The employee remains entitled to all Program's benefits during the 10 weeks maternity leave.

Holidays within the maternity leave will be considered part of the maternity leave.

4.5.7 One-Hour Maternity Daily Leave

According to the Jordan Labor Law, once an employee who has been on maternity leave returns to work, she is entitled to a one-hour daily leave for the purpose of feeding and taking care of her baby. This is the case for one year after the delivery date, but requires prior approval from her direct supervisor.

4.5.8 Unpaid Leave

- Unpaid leaves are only granted in rare situations and when the Management is convinced of the need for the unpaid leave and after the employee has utilized all his/her annual leave. To request unpaid leave an employee must submit a request to his/her supervisor. The supervisor will review the request and forward it to Senior Management with his/her recommendations. The Management will review the case and make the final decision.
- The maximum unpaid leave is 30 days in any one year, unless decided differently by Senior Management.
- An employee must submit the request for unpaid leave at least four weeks before the scheduled leave time.

4.5.9 Compassionate Leave

Employees who want to take time off due to the death of an immediate family member should notify their supervisors immediately. In general, funeral leave will normally be granted, unless there are unusual business needs or staffing requirements. Employees, may, with their supervisors' approval, use any available vacation days for additional time off as necessary.

Compassionate leave is granted to employees as follows:

Relation to the Employee		Number of Days
1.	Wife/Husband, Father/Mother, Son/Daughter, Brother/Sister	3 Days
2.	Grandfather/Grandmother, Grandson/Granddaughter,	2 Days
3.	Cousin, Niece/nephew, Uncle/Aunt	1 Day
The employee will be granted 5 paid days leave if the situation involves travel abroad for the cases 1 and 2 shown in this table.		

4.5.10 Ramadan Hours

During the holy month of Ramadan, the official working hours will be reduced. The HR Team will circulate a memo to all employees regarding Ramadan's working hours one to two weeks before the month commences.

4.5.11 Tracking Leaves

The HR Team will track employee leave using a tracker designed for this purpose. The tracker is used to ensure that the leave balance covers the requested leave time. The SMEFP will use JEDCO's intranet to enter the leave and calculate leave balance.

4.5.12 Requesting and Approving Leaves

All leaves have to be requested using JEDCO's intranet. The direct supervisor will use the system to approve or disapprove, and the HR Manager will be automatically notified through the system.

4.6 Salaries and Benefits

4.6.1 Salaries

- Salaries are determined based on the types of jobs and qualifications needed to fulfill them, in accordance with JEDCO and USAID policy. When a person is hired, he/she will be asked to complete a bio data form, which outlines his/her salary history. This history, in addition to the type of job and the scale for that job, will be used to determine the initial salary.
- Salaries are reviewed annually based on the performance appraisal conducted in November. The SMEFP's Senior Management will determine if salary increases will be offered and the percentage of said increases. Salary increases must be approved by USAID.
- In accordance with Jordanian law, each employee will be eligible for an additional two months' salary (13 and 14 months) which will be paid at the end of June and December.
- All employees are paid during the first seven days of the following month. The Senior Accountant will ensure that all pay checks/transfers are ready by that date.
- A salary slip will be provided to all employees each month to inform them of any salary deductions or increases.
- Consultants, sub-contractors and free lancers are paid according to deliverables only or as specified in their contracts as detailed in the **Grants & Technical Assistance Manual.**

4.6.2 Social Security

All employees are required to pay Social Security taxes at the rate of 5.5%. This amount will be deducted by JEDCO.

4.6.3 Income Tax

Income tax will be deducted from the monthly salary payment and transferred to the Income Tax Department in accordance with Jordanian law.

4.6.4 Health Insurance

All full time SMEFP employees are eligible for health insurance benefits, as are their dependents. Employee subscription in the Health Insurance system is voluntary.

The HR Team is responsible for managing health insurance issues for staff that includes; adding and excluding employees from the insurance policy, sending reimbursement requests, receiving reimbursement checks and filing.

- Process for including new employees to insurance
  - Take a copy of the employee's family book and ID.
  - Have the employee complete the insurance addition request.
  - Write an addition request letter and forward it the Operations & Finance Component Lead.
  - File a hard copy in the personnel file.

- Place the above documents in an envelope and forward it to the appropriate representative from the insurance company
- The envelope should include the following; (copy of the family book, copy of the employee's identification card, insurance addition request and request letter).
- Send an email to the Senior Accountant to notify him/her, and CC the account manager from the insurance Program.

- Process for excluding resigned employees from insurance
  - Draft an excluding request letter and sign it by the Finance and Operations Component Lead.
  - Copy the letter and place it in the employee's personnel file.
  - Send an email to the Senior Accountant to notify him/her, along with the insurance company's the account manager.

4.7 Program's Sponsored Training

- SMEFP encourages employees to enroll in training courses relevant to their work. Employee can submit a formal training request to his/her supervisor. Approval of a training request depends on factors such as relevance of training to Program's work, budget, the added value of the training on the Program and the employee, and the employee's performance record.
- In some cases, the employee may be asked to share the cost of the training. This will be decided on case-by-case basis.
- In addition to training requested by the staff, SMEFP may nominate employees for certain training courses depending on skills development needs or Program requirements.
- An employee will be required to report on the training he/she is attending or has attended.
- In order to maximize the benefit of training received by SMEFP employees, and whenever applicable, an employee will be asked to train other employees and extend the knowledge he/she has acquired.
- The Outreach and Communications team will enter all training activities for the staff and beneficiary into USAID's TraiNet portal as follows:
  - Log in TraiNet page (**http://trainet-vcs.usaid.gov/**)
  - Sign in with your ID.
  - Go to in-country, US, or third country programs.
  - Create an in-country program.
  - Fill in all training information according to what is required by the system (task number, name of training, date, etc.).
  - Enter the budget.
  - Create a group and add gender (number of male and female participants) and nationality.
  - Save program and log out.

4.8 Code of Personal and Professional Conduct

SMEFP employees should display personal integrity, honesty, self-discipline, diligence and professional competence.

As such, all employees are expected to behave in a manner that protects the Program's interests and projects a positive image. All employees must adhere to the following:

- Employees must maintain confidentiality at all times. They are not allowed to disclose any confidential information related to the Program or its clients.
- Employees will safeguard any information received by them during their work.
- All SMEFP property must be used for official purposes only.
- All employees must practice professional behavior in dealing with each other and in dealing with the clients and parties who have working relationships with the Program.
- Shouting, yelling, and causing disruption and noise are unprofessional behaviors, which will not be tolerated.
- Cooperation, respect to others, and team spirit are favorable behaviors that are encouraged.
- All employees must observe the policies, procedures, culture, and norms established by JEDCO.
- JEDCO adheres to a STRICT policy on harassment of any kind, whether due to gender, disability, or religion. The rights of all JEDCO employees must be respected regardless of their role in the organization. Any employee who feels he/she has suffered harassment of any kind should immediately report the act to his/her supervisor (or to the next highest supervisor if his/her supervisor is the individual responsible for the harassment). Once the report is filed, the supervisor must initiate an investigation within seven days of the report, conducting due diligence that includes talking with all the individuals involved. He/she must then determine whether or not harassment has in fact occurred and if so, take the appropriate action in accordance with JEDCO policy, which in the case of sexual harassment will result in immediate dismissal for cause.

4.9 Outside Employment (Another Job)

Outside employment for full time employees is not permitted. Exceptions may be made the SMEFP Program Manager’s written approval in consultation with an employee’s direct supervisor.

4.10 Program's Resources:

- All employees should act responsibly when using SMEFP equipment such as PC, telephone, fax, copying machines, and printers.
- Computers, software and the email system are the SMEFP’s property and are intended for business use only. If an employee has any computer issues or problems, he/she should notify the information technology department and not try to solve the issues on his/her own.
- The SMEFP purchases and licenses the use of various computer software for business purposes and does not own the property rights to this software or its related documentation. The Program prohibits the illegal duplication of software and its related documentation.

4.11 Dress Code

Program's employees are expected to present a clean and professional appearance, whether in or outside the office. Employee dress should be at all times neat in appearance and in a manner consistent with a professional atmosphere, keeping in mind the impression made on beneficiaries, clients, visitors, and other employees.

Employees who have scheduled meetings with beneficiaries or clients, outside and inside the SMEFP office should dress professionally and in a respectful manner to the culture.

4.12 Smoking

In keeping with the SMEFP's intent to provide a safe and healthy environment, smoking is not allowed inside the JEDCO premises.

Employees must observe the beneficiaries' and client's smoking policy when they are visiting them.

4.13 On-premises Lunch

Employees wishing to have their lunch at the office must do so while keeping a low profile and making sure that they are not visible to clients or visitors. All employees are expected to be cautious while handling their food and beverages around equipment, hardware, files and documents, in order to avoid any damage to such items.

On-premises lunch should be a light snack or a sandwich that does not have a strong odor or results in a mess.

4.14 Alcohol, Drug and Weapon-Free Workplace:

SMEFP is firmly committed to maintaining a safe, healthful and secure workplace. The Program's policy is that employees are prohibited from the possession and dispensing of alcohol and drugs (except for drugs prescribed by a doctor or un-prescribed drugs such as aspirin) or being under the influence or use of such items. Possession of weapons on work premises or during the conduct of official duties is strictly prohibited. Violation of this policy will result in immediate dismissal.

4.15 Music Policy

Employees with private offices may play their radios at a low volume. In shared offices, employees have to use headsets when they wish to listen to music. To avoid creating a noisy atmosphere, mobile phones have to be set to a low ringing volume.

4.16 Health and Safety Policy

It is SMEFP policy to give the greatest importance to health and safety of its employees and it is considered a management responsibility equal to that of any other function. It is the duty of management, within reason, to prevent personal injuries or any actions that may cause harm to employees. It is equally the duty of employees to exercise their responsibility and to do es much as possible to prevent injury to themselves and to others. Should an on-the-job injury occur, an employee should notify his/her supervisor immediately.

4.17 Employee Complaints and Issues

The SMEFP's management recognizes that from time to time an employee may wish to air a complaint relating to his/her work. In this respect, the SMEFP's policy is to encourage open communication between the employee and his/her supervisor to ensure that questions and problems can be addressed and resolved quickly and to the satisfaction of all concerned. However, realizing there may be occasions when staff members feel uncomfortable with this approach or perceive that an exchange will not be productive, an employee can request a confidential meeting with the HR Manager to address the issue. The HR Manager is neutral and will serve as a counselor/mediator. If the issue/problem is not resolved, the employee can request a meeting with the SMEFP Program Manager to bring the issue to their attention. The SMEFP Program Manager will then take the necessary actions to solve the problem or address the issue and will be the final arbiter on the issue.

4.18 Information Technology Policies

4.18.1 General

- A user ID will be given to each new employee.
- Password guidelines
  - All user-level passwords (domain user, email account, web account, etc.) must be changed at least once every 6 months.
  - User accounts that have system-level privileges granted through group membership must have a unique password different than all other accounts held by that user.
  - Passwords must not be inserted into emails or send through Instant Messaging software, or any other electronic communication.
  - The following characterize strong passwords:
    - Contain both upper and lower case characters.
    - Have digit and punctuation characters as well as letters.
    - Are at least 8 characters.
    - Are not based on personal information, names of family, etc.
    - Password should never be written down, or stored on-line.
    - Try to create password that can easily be remembered.
    - Passwords should not be shared with anyone.

4.18.2 Internet

- Internet is a business resource and thus should be used wisely.
- Intellectual property rights should be respected.
- All information sent over the Internet, whether via e-mail or postings must be treated as public information, and the right precautions should be taken to ensure that sensitive information is kept confidential.
- Accessing non-business related web sites is discouraged.

- The following are unauthorized actions that must be avoided:
  - Posting Program's material on the Internet unless approved by the Management.
  - Exchange of Program's confidential information.
  - Uploading / Downloading software or documents to other machines via the Internet, (this includes audio/video files) unless authorized by the Management.
- Instant messaging applications are good tools for communication; make sure you use them wisely. Keep personal use of it at the minimum.
- All Internet connectivity must go via the firewall / proxy.

4.18.3 E-mail

E-mail is another important tool that facilitates our work with each other and with counterparts/stakeholders. General professional email practices should be followed at all times. E-mails to clients should be formal and should avoid excessive use of fonts, slang, expressions and smiles. E-mails should be written free of any spelling mistakes. They should be clear, direct to the point and use no offensive language of any type. Use of bold should only be used to attract attention to important note only. The use of messenger should be minimized and only for collaborating on minor issues. Personal chats with friends, relatives or other external parties should be avoided.

4.18.4 Guidelines for using the Email

- Writing emails:
  - Write well-structured emails.
  - Signatures must include your name, job title, Program name, and contact information.
  - Users must spell check all mails prior to transmission.
  - Do not send unnecessary attachments; compress large attachments.
  - Do not write emails in capitals.
  - If you forward emails, state clearly what action you expect the recipient to take.
  - Only send emails of which the content could be displayed on a public notice board. If they cannot be displayed publicly in their current state, consider rephrasing them, using other means of communication.
  - Only mark emails as important if they really are important.
- Replying to emails:
  - Be prompt in replying to emails. Consider the urgency and importance.
  - If you believe it will take you longer time than expected to reply to an email, make sure you acknowledge receipt of email, and give a time frame by which you will be responding. This way you will reflect courtesy and professionalism.
  - Sending offensive or inappropriate e-mails will not be tolerated and could result in disciplinary action.

4.18.5 Email signature

All emails should contain the following signature at the end of the message:

<First name> <Last name>
<Position>
SMEFP/JEDCO - <Office location> (http://www...???.....com)
Tel. <Telephone number for the office>
Fax. <Fax number for the office>
Email <email address>
Mobile Number (optional)

4.18.6 Personal Use

Personal use of email should be limited. In case of distributing non-work related emails, the following guidelines should be followed:

- Always use each person's email address, and don’t use the SMEFP’s distribution groups (since these groups might contain people from outside the Program, or a person that does not like to receive such emails). Or you could create your own personal distribution lists on Outlook (refer to Outlook help to know how or ask any person from the IT Team)
- Make sure the other person is interested in receiving such emails.
- If the email contains attachments, try to compress them or put them in a shared folder on your computer and put a link to it in your email. As a general rule, do not send emails which are bigger than 1MB (i.e. total size of the email with its attachments).
- Add a prefix for your emails on the subject line to identify your own emails like: [Funny Emails].... So the other party can easily identify the nature of this email.

4.18.7 Confidential Information

Never send any confidential information via email. If you are in doubt as to whether to send certain information via email, check this with your supervisor first.

4.18.8 Support

You can always rely on the Information Technology Support Team to provide you with the technical support and solving your day-to-day problems that are related to the technology (such as internet connectivity issues, email services, etc.)

4.18.9 Process for Requesting Information Technology Support

- If you have access to the email system you can send email describing the problem and requesting support.
- If you don’t have access to the email system, you can directly communicate your problem to the IT support team.
- The IT support team will respond as soon as possible to your issue, and walk you through the solution.

- JEDCO's intranet can be used to report any IT problems. The IT Team will address the situation and inform the employee that the problem has been resolved.

4.19 Travel, Accommodation and Expense Reporting

The SMEFP will cover all business travel and accommodation expenses for the employee according to pre-set rates and per diems in accordance with USAID policies. Travel arrangements and hotel reservations will be made according to Program's travel policy. The Communications and Outreach Team will be responsible for organizing travel arrangements with parties inside and outside the Program.

Because SMEFP is funded by USAID, additional travel restrictions may be in place. Please consult the Communications and Outreach Team for any issues regarding travel. When SMEFP team members attend conferences or business trips, they are eligible for per diems. Per Diems rates include lodging, meals and Incidentals and will be consistent with JEDCO's policy. In no instances, however, will per diems be more than allowable under US Government regulations. Per diem rates for countries and cities are available by accessing **http://aoprals.state.gov/web920/per_diem.asp**. Please be aware that JEDCO may pay lower rates than those allowed by the USG. **Travel re-imbursement form and per diem calculation sheet will be available with the Senior Accountant.**

4.19.1 Process Per Diems payments:

- The Senior Accountant will receive an email from the Outreach and Communications Team requesting the preparation of per diems for travelers.
- The Senior Accountant will ensure the sure the request contains all of the requirements noted below:
  - The authorized per diem rate
  - Flight itinerary
  - Estimated Costs
  - USAID Approval
  - Operations & Finance Lead approval
  - A passport copy of the participant
- The Senior Accountant will enter information about the per diem request by using the per diem expense sheet, according to the following rules:
  - The traveler will receive only 75% of the USAID maximum per diem rate of the country that he/she is travelling to on travelling days, and 100% on all the days the participant spends in the foreign country.
  - The participant will receive only 75% of the total of the per diem in advance plus the maximum transportation allowance for the airport transportation and any extra fees the participant will have to pay before travelling such as the visa fees.
  - 25% remaining per diem will be paid when the participant returns and submits a proof of travel, such as a boarding pass or a lodging receipt. Any transportation or other expenses that were related to work are added to the 25% remaining per diem.

- The participant will prepare a payment request for the advance payment including all the above. The final settlement payment (25%) will be due upon the return of the participant from the trip and upon receipt of back up documents. A copy of the advance payment will also be attached to the final settlement.
- The Senior Accountant will send the payment request to the Finance and Operations Lead for review and approval.
- Upon receiving the approval, the Senior Accountant will prepare the check and submit it to the traveler.
- Please note this procedure takes time, so employees are encouraged to start the process early.

4.20 Telephone Calls and Personal Visits:

Personal telephone calls and personal visits should be kept to the minimum. Personal calls (on Program's phone and on own mobile) should be brief. Private long distance calls are to be made only in emergencies. Private long distance calls will be charged to the employee's account and deducted from his/her salary. Personal visitors are not allowed on the Program's premises unless advanced approval is obtained from the employee's immediate supervisor.

4.21 Procurement

The procurement process detailed in the **Grants and Technical Assistance Manual** applies to procurement of goods and services for the Program's use.

SMEFP employees are expected to procure goods and services with integrity and transparency, keeping in mind the following goals:

- Integrity and transparency
- Full and open (or adequate, at a minimum) competition
- Fair and reasonable prices
- Fair and objective evaluation of offers
- Using responsible suppliers/service providers
- Documentation of the acquisition process

The regulations for procurement of goods and services (including T/A providers and sub-contractors) are as follows:

Procurement Amount/Category ($)	Required Documentation
Procurement between $3,000 - $10,000	• Simplified RFQ/RFP or SoW/ToR • Actual Quotes/Bids • Bid Comparison Matrix or Chart • Purchase Order/Contract
Procurement between $10,000 - $25,000	• Simplified RFQ/RFP or SoW/ToR • Actual Quotes/Bids • Bid Comparison Matrix or Chart • Purchase Order/Contract

Procurement Amount/Category ($)	Required Documentation
	• Other documents as required (e.g.: waiver)
Procurement between $25,000 - $100,000	• Simplified RFQ/RFP or SoW/ToR • Actual Quotes/Bids • Bid Comparison Matrix or Chart • Evaluation/Selection Memorandum • Purchase Order/Contract (Annexes 3J, 3K, 3L in Grants and T/A Manual) • Source/Nationality Certificate (Annex 3M in Grants and T/A Manual) • Other documents as required (e.g.: waiver)
Procurement >$100,000	• RFQ/RFP • Actual Quotes/Bids • Bid Comparison Matrix or Chart • Evaluation/Selection Memorandum • Purchase Order/Contract (Annexes 3J, 3K, 3L in Grants and T/A Manual) • Source/Nationality Certificate (Annex 3M in Grants and T/A Manual) • Other documents as required (e.g. waiver) • Published RFQ for procurements over $250,000

Any questions concerning these regulations should be addressed to the Senior Accounting Manager or the Finance and Operations Lead.

4.22 Ending Employment

4.22.1 Resignation

- Notice Period

  An employee who wishes to resign should give a minimum of one-month notice before the resignation effective date. This noticed may be waived by the Component Lead.

- Return of Property

  Employees must return all Program property before the resignation's effective date.

- Clearance

  A clearance process for resigned employees will be as follows:

  - The resigned employee must conduct external clearance at the income tax department. The employee will take a salary statement sheet which is prepared by the Senior Accountant to the Income Tax Department to obtain the clearance.
  - The resigned employee will conduct an internal clearance to ensure that he/she hands in the Program's property and conducts smooth handover of his/her work. Exit checklist template is in (**Attachment 1).**

- Upon receiving the final clearances, the employee will sign a form declaring that he/she has received all his/her rights and that he/she is releasing the Program from any commitment to him/her (**Attachment 2).**
- After the employee conducts the needed clearance and hands over his/her work, he/she will be given a letter clearing him/her from any future responsibility or obligation related to the Program. The clearance form is in **(Attachment 3).**

• The Final Paycheck

Upon completing the clearance process, the Senior Accountant will issue the final check to the employee. The employee will be reimbursed for any unused vacation days. If he/she has taken more vacation days than what is entitled, the additional days will be deducted from his/her final payment. Any expenses accrued by the employee will be deducted from the employee's final check.

4.23 Disciplinary Actions

4.23.1 Rationale

Employees are encouraged to use reasonable judgment at all times and to seek advice during any situation that makes them uncomfortable, as the SMEFP's management wants to ensure a fair and systematic approach to the enforcement of the Program's code of conduct, policies, practices and procedures.

4.23.2 Disciplinary Steps

Depending on the circumstances of an incident, discipline will normally be progressive and bear reasonable relationship to the violation. The types of discipline that may occur are as follows:

- Verbal warning
- Written warning # 1
- Written warning # 2
- Dismissal

4.23.3 Gross Misconduct:

There are infractions that are so egregious that SMEFP's management will have no recourse other than immediate dismissal for cause. These include but are not limited to the following: drug or alcohol abuse, falsifying records, violation of the confidentiality agreement, making threatening remarks to other employees or managers, continuous unexplained absences, engaging in activities that represent a clear case of conflict of interest, engagement in any activity deemed harmful to Program's staff, associates, clients and the business interests of the Program, and lying about one's credentials.

If an employee is absent without notice for more than 10 consecutive days, the Program may dismiss him/her, if the employee absents himself for more than 20 intermittent days in one year the Program may dismiss him/her. The cases of staff dismissal are stipulated in article 28 of the Jordanian labor law.

4.24 Exit Interview/Questionnaire

An employee who resigns from the Program may be asked to attend an exit interview or fill out an exit questionnaire. Information provided in exit interviews/questionnaires will be used in assessing the need for policy changes within the Program. A sample exit interview form is included in **(Attachment 4).**

4.25 Checklists

4.25.1 Employee Exit Checklist

Activities		By Whom	Status (Yes, No)	Comments
1.	Organizes the internal and external clearance (Income Tax Clearance)	Admin & HR		
2.	Checks furniture	Admin & HR		
3.	Checks Office equipment and supplies	Admin & HR		
4.	Returns Program's properties	Admin & HR		
5.	Collects health insurance cards and send a letter to insurance company to remove the employee from insurance	Admin & HR		
6.	Makes sure that the employee return IT equipment and software	IT Administrator		
7.	Stops the employee's access to outlook and Program's systems	IT Administrator		
8.	Ensures proper work hand over by employee	Direct Supervisor		
9.	Receive all requested reports and files from employee	Direct Supervisor		
10.	Receives a report on the status of employee's work	Direct Supervisor		
11.	Conducts balance settlement for the employee taking into consideration any advances, accrued payment, phone invoices, etc.	Senior Accountant		
12.	Conducts exit interview	Admin & HR		
13.	Prepares the experience certificate for the employee	Admin & HR		
14.	Prepares the final check for the employee and submits it to him/her after obtaining all required clearances.	Senior Accountant		
15.	Ask the resigned employee to sign the clearance and settlement form declaring that he/she has received all his/her rights and dues related to the Program.	Admin & HR		
16.	Give the resigned employee a clearance letter signed by the Program Manager declaring that the resigned employee is	Admin & HR		

Activities	By Whom	Status (Yes, No)	Comments
released from any responsibility related to the program now and in the future			

4.25.2 AID International Travel Checklist

Participant Processing Checklist (U.S. and Third Country Training)

Participant Name: ________________

Participant Job Title and Employer: ________________

Participant Address During Training: ________________

Training Program Title: ________________

Address of Training Provider: ________________

Training Budget (disaggregated by instruction, participant, and travel) ________________

U.S. Training	Third Country Training
☐ Participant is a Jordanian citizen and does not hold a U.S. citizenship or permanent residence status; copy of face page of passport provided to USAID/OPM	☐ Participant is a Jordanian citizen and does not hold a U.S. citizenship or permanent residence status
☐ Visa application completed	☐ Training locality is in adherence with Geographic Code 941 OR waiver is submitted to Mission Director for approval
☐ Data entered into TraiNet for issuance of DS-2019 form	☐ Visa obtained
☐ Security Risk Determination documentation submitted	☐ Health insurance obtained
☐ Medical exam undergone and certificate available on file, if applicable	☐ Language proficiency verified and on file OR waiver submitted to OPM for approval
☐ Enrollment for HAC insurance completed	☐ Pre-departure orientation provided: briefing on allowance and benefits, health insurance, travel and accommodation, training program, cultural aspects, etc.
☐ English language proficiency verified and on file OR waiver submitted to OPM for approval	☐ Gender targets considered
☐ Fly America regulations fulfilled	☐ Cost control principles followed
☐ Pre-departure orientation provided: briefing on allowances and benefits, health insurance, travel and accommodation, training program, cultural aspects, etc.	☐ Post-training follow-up plans prepared
☐ Conditions of Sponsorship signed and on file	
☐ Gender and HBCU targets considered	
☐ Cost control principles followed	
☐ Post-training follow-up plans prepared	
☐ Additional documents to be provided to OPM after completion of training: Copy of training request approval Copy of stamped DS-2019 form Copy of stamped I-94 U.S. entry form	

USAID Representative/Contractor Representative: ________________

Date: ________________

4.26 Templates

Attachment 1: Employee Exit Clearance

The Admin and Admin & HR team

- Organizes the internal and external clearance (Income Tax Clearance) that has to be conducted by the employee
- Checks furniture
- Checks Office equipment and supplies
- Returns Program's CDs from the employee
- Collects health insurance cards
- Conducts exit interview
- Prepares the experience certificate for the employee

Senior Admin and HR Officer Signature and Date

IT Administrator

- Makes sure that the employee return IT equipment and software
- Stops the employee's access to outlook and Program's systems

IT Admin Signature and Date

Line Manager

- Ensures proper work hand over by employee
- Receive all requested reports and files from employee
- Receives a report on the status of employee's work

Line Manager Signature and Date

Senior Accountant

- Conducts balance adjustment for the employee taking into consideration any advances, accrued payment, phone invoices, etc.

- Prepares the final check for the employee and submits it to him/her after obtaining all required clearances.

Senior Accountant Signature and Date

Attachment 2: Clearance and Acknowledgment of Settlement

I, the undersigned, hereby certify that I have received the sum of ….. from …….., which represents the final settlement of my financial dues incurred through my work for the Program, which ended on….., and all the rights attached to it. As per this certificate, I acknowledge that I have received all my rights from the Program and fully and absolutely release it from any claims or requests whether now or in the future, including, for example, remuneration for days off or over time. This clearance represents final settlement of all my rights incurred to me due to my work for the Program, therefore foregoing any claim attached to my work there.

Name	
Signature	
Date	

Attachment 3: Employee Clearance

Date: ______________________________________

To Whom It May Concern,

We, the (organization name), hereby certify that (name of staff member) had worked for our organization as (position title) from ….. till ….. when he/she concluded his/her appointment. The aforementioned had handed over all items that he had received from the Program during his appointment, and therefore, the Program has no right to claim anything from him/her beyond the date mentioned above.

(Name of staff member) was given this certificate at his/her request.

Best regards.

Program Manager

Attachment 4: Exit Questionnaire Form

Dear ___________________________________

Based on your work experience in the Program, and in order to help us improve our policies, procedures, and practices, please answer the following questions:

What were the things that you liked in the Program?

What were the things that you disliked?

What are the reasons behind your resignation?

What are your suggestions for improvements?

Any comments you would like to share with us:

5. Financial Management Processes for SMEFP

The SMEFP's international financial management system will not only comply with USAID regulations, but will also ensure maximum program efficiency. The following outlines the system that will be used by the Finance and Operations Team to administer the SMEFP.

5.1 Method of Payment

There are two primary types of payments allowed under USAID grants: advances and reimbursements. Because of the nature of the SMEFP, advances are the mechanism, which will most benefit the program. Advances differ from partial, progress, interim, and mobilization payments because they are not based on actual performance or actual costs incurred. Instead, they are provided only for immediate disbursement needs-defined as 30 calendar days. Therefore, JEDCO will request advances on a monthly basis.

The method of payment will be a monthly advance to JEDCO from USAID, as requested by JEDCO on a quarterly basis and revised as necessary. JEDCO will conduct due diligence to determine its monthly cash needs for operations, grants, and technical assistance and submit a quarterly budget to USAID outlining these requirements. Each month, JEDCO's SMEFP finance personnel will submit a voucher (SF 270 included in the Appendix) requesting the monthly segment of funds budgeted for the quarter. This voucher will be submitted thirty days in advance of the expected advance payment, or no later than the first day of the month prior to the expected payment (e.g. for an advance needed on December 1st the advance request would be submitted on November 1st). Advance payments will be made by Electronic Funds Transfer (EFT). Late submissions may be rejected, causing JEDCO to have to request a reimbursement for that month, which would seriously impair its cash flow. This being the case, it is imperative that JEDCO SMEFP finance staff meet the submission deadline established in this manual.

The JEDCO SMEFP finance staff will submit SF 270 to **accountspayablejordan@usaid.gov**, cc'ing Ala Shalan (**ashalan@usaid.gov**) and Stephanie Wilcock (**swilcock@usaid.gov**), after which it will be date stamped and logged into the system. JEDCO SMEPF finance staff will receive notification that the voucher has been received and is being processed.

5.2 Monthly Liquidation of Advances

Liquidations will be based on actual cash disbursements within a month rather than on accruals, estimates, projections, or payments made by post-dated checks. Liquidations must be submitted every month, no later than 15 days after the end of the month in which the funds were spent. For instance, the liquidation for advance funds spent in December would be due on or before January 15th. The liquidation will be completed in the appropriate form (SF 1034 included in the appendix). JEDCO will endeavor to ensure that its budget for advances is consistent with anticipated expenditures, as it understands that advances, which are not liquidated (if deemed significant by USAID), must be explained and potentially returned to USAID.

5.3 Quarterly Advance/Liquidation

Each quarter, no later than 20 days after which the last advance for a quarter is liquidated (e.g. if the last advance for the October-December quarter is liquidated on December 31st, the quarterly advance liquidation will be due to USAID by January 21st). The quarterly liquidation will be submitted on for SF 425, which is included in the appendix and will include a detailed financial report (template included in the appendix) as a supplement. This form will record ONLY cash transactions/liquidations within the quarterly reporting period.

5.4 Accruals

Quarterly accrual reports are due to USAID on March 15th, June 15th, September 15th, and December 15th. These reports will provide USAID with insight as to the value of goods and services received but not yet paid, which is integral to its financial planning. This also allows JEDCO that benefit of understanding its pipeline and burn rate.[1] Sources for accruals may be a) invoices received by JEDCO but not yet paid, b) payroll expenses as yet unpaid, c) sub-contractor/grantee bills, invoices, and/or progress report, and d) estimated expenditures (budget, work plan, pipeline, burn rate). The template for reporting accruals is included in the Appendix.

5.5 Additional Reporting

The following additional reports are required on an annual basis:

- Annual Financial Report: Due by October 30th (one month after the end of USAID fiscal year) this report outlines advances/expenditures during the previous twelve month period. The first such report may report on a period shorter than twelve months.
- Commodity Report: Due by December 31st, this report outlines what commodities were purchased by JEDCO and/or its partners and the sourcing of those commodities.
- Foreign Taxation Report: Due by April 1st of each year, this report outlines the foreign tax obligation for the previous fiscal year.

The following schedule collectively outlines the deadlines for each submission discussed above:

Advances, Liquidations, and Reports	Submission Deadline
Advance Request (SF 270)	1st day of month
Liquidation: Monthly (SF 1034)	15th day of month in which funds are spent
Liquidation: Quarterly (SF 425)	20 days after the last advance for the quarter is liquidated
Accruals	March 5, June 15, September 15, and December 15
Annual Financial Report	October 30
Annual Commodity Report	December 31
Annual Foreign Taxation Report	April 1

[1] The pipeline is the amount of funding obligated (not the amount of the award but the current amount of funds obligated) minus the expenditures (both cash and accrual). The burn rate is the rate at which obligated funding is spent (not accrued but actually spent) within a defined period.

	2012		2013											
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Advance Request (SF 270)	1 Nov	1 Dec	1 Jan	1 Feb	1 Mar	1 Apr	1 May	1 Jun	1 Jul	1 Aug	1 Sep	1 Oct	1 Nov	1 Dec
Liquidation (SF 1034)		15 Dec	15 Jan	15 Feb	15 Mar	15 Apr	15 May	15 Jun	15 Jul	15 Aug	15 Sep	15 Oct	15 Nov	15 Dec
Liquidation (SF 425)				20 Jan				20 May			20 Sep			
Accruals					15 Mar			15 Jun			15 Sep			15 Dec
Annual Financial Report												31 Oct		
Annual Commodity Report		31 Dec												31 Dec
Annual Foreign Taxation Report						1 Apr								