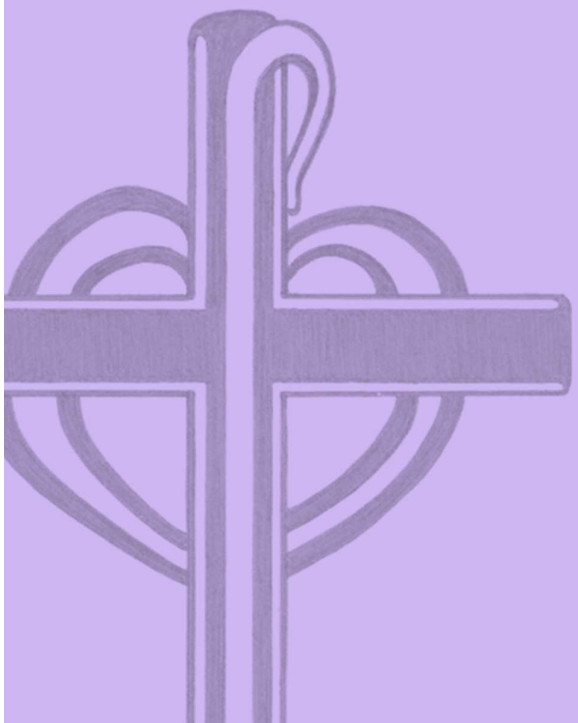
GSIF POLICIES, STANDARDS AND PROCEDURES

Human Resource Management

GOOD SHEPHERD INTERNATIONAL FOUNDATION ONLUS

"A person is of more value than the whole world"

St. Mary Euphrasia



GOOD SHEPHERD INTERNATIONAL FOUNDATION ONLUS

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Glossary

GSIF: Good Shepherd International Foundation

MDO: Mission Development Office

OLCGS: Sisters of Our Lady of Charity of the Good Shepherd

NGO: Non-Governmental Organization

PM: Program/Project Manager

F&A: Finance and Administration

M&E: Monitoring and Evaluation

CFO: Chief Financial Officer

CV: Curriculum Vitae

HR: Human Resources

JD: Job Description

PMS: Performance Management System

HRM: Human Resources Management

Annual action plan: A document that outlines the major objectives or initiatives of an organization for a given year, typically including a timeline for implementation

Background check: A process of confirming appropriateness of a candidate for a position by verifying personal information such as academic credentials, credit history, or criminal records.

Coaching: The process in which a supervisor assists his/her employee in developing her or his knowledge, skills, and attitudes

Feedback: Structured information that one person offers to another about the impact of her or his actions or behaviour. It is a process of communicating what one experiences, observes, thinks, and feels about the other's actions or behaviour.

Line Manager: the direct supervisor.

Market salary analysis: An assessment that matches positions of an organization to positions with similar responsibilities in other organizations for the purpose of comparing compensation.

Organizational Charts: A visual representation of the reporting relationships among a group of employees within an organization or department within an organization.

Performance improvement plan: An action plan set to assist an employee in meeting the desired level of performance and professionalism when performance monitoring, review, and assessment results show that the employee needs to improve his or her work.

Performance management: The process of assisting employees in maintaining or improving performance through ongoing employee coaching, monitoring and assessment, and development.

Performance review and assessment: A formal process through which the employee's work performance is reviewed and assessed against set performance and development objectives.

Introduction

GSIF believes that teamwork, shared responsibility, accountability, open communication, participatory approach to management, respect, empowerment and compassion are the best ways to manage relationships with staff members, mission partners, volunteers, project beneficiaries, donors and all those who share its commitment to achieve the Good Shepherd mission.

People are GSIF's most valued assets; human resources management promotes and administers policies and procedures that ensure that staff members have the skills, motivation, and opportunities to make their best contributions to the mission.

The GSIF Board of Directors has - by statute and by law - all ordinary and extraordinary management powers of the Foundation, and therefore also related to HR Management as a whole. The operational management of HR is delegated to the Director as per the Internal Regulation and the Power of Attorney.

Human resources management is the function that deals with issues related to all the people who individually and collectively contribute to the achievement of the GSIF's objectives. Among these issues are:

- **Staffing, Recruitment, and Orientation**: GSIF must plan what type of staff and positions are needed in the short and long term, based on organizational goals and action plans This is the process that introduces new hires to the systems, structures, policies, and communication flow in the organization;
- **Compensation and Benefits**: the purpose of a compensation and benefits system is to pay employees for their work in a just manner;
- **Performance Management**: it is the process of assisting employees in maintaining or improving performance through defining clear expectations and development needs, ongoing employee coaching and development, and assessment of results. Performance management clarifies expected performance and holds the employee accountable for her or his work and behaviour;
- **Staff Care and Safety**: staff safety procedures are designed to eliminate death, injury, or illnesses from occurring in the workplace or during the performance of work duties off-site and to secure and protect all assets of the organization well-being;
- **Timekeeping and Payroll Administration**: is the process executed by the F&A Desk to prepare and execute payment of salaries.

- **Separations**: The process of terminating employees varies depending on the reasons for termination. Separations should be handled with the utmost care, especially in cases in which it is the employer's decision to terminate an employment relationship. Organizations should ensure that the process is respectful of each person involved.

Scope of application

The GSIF Human Resources Manual is applicable to all GSIF national and international workforce, either employees, volunteers, interns. Parts of this manual is applicable also to external consultant or contractors.

This Manual does not refer to the statutory functions of GSIF (Members of the Board of Directors, Director, Treasurer, Auditor, Control Body) but only to the operational workforce.

Compliance with this manual is also required, where applicable, to local implementing partners receiving grants or funding from GSIF. In particular, this manual must be attached as an integral part to the MoUs signed with the implementing partners.

PART I: General Principles and Policies

1.1 Objectives of the Manual

The present document serves as a guide in HRM for the staff, management and board of the Good Shepherd International Foundation Onlus (GSIF). It integrates and clarifies the legal provisions of the contracts applied to staff members and it offers a comprehensive vision of the philosophy and approach that the GSIF adopts in its relationship with employees, consultants, collaborators, managers, etc.

These guidelines have been approved by the Board of GSIF and are used to govern all matters related to human resources management. The principles included in this manual are in addition to, and not a substitute for, the ethical guidelines recommended by staff members' respective professional societies or associations, national laws, including applicable regulatory agency rules and regulations, and Good Shepherd policies. Each member of staff is responsible to adhere to these standards. This manual does not replace the provisions of the national contract, which regulates all legal and fiscal matters between GSIF and its employees.

1.2 Relationship with the Congregation and its offices in Rome and abroad

The Congregation is the Founder of the GSIF and, within its organogram, it is represented by the Assembly of the Founders, which has specific powers according the By Laws and appoints the Board of the GSIF. However, the GSIF is a separate and independent juridical entity. The Congregation has granted office space to the GSIF at its Generalate in Rome, via Sardiello 20, and this agreement is regulated by a "free loan contract" (*comodato d'uso gratuito*). The staff of the GSIF share the common spaces of the other staff working at the Generalate and respect the rules of the Generalate, which is also the house of three religious communities.

The Local Units of the OLCGS in the developing countries are the main operating partners of GSIF. In order to govern this partnership, GSIF has stipulated specific agreements in the form of Memorandum of Understandings (MOUs) with the Provinces, or the equivalent legal entities that are responsible for the programs at the grassroots. GSIF is also responsible to coordinate an international network of Mission Development Offices (MDOs). This role is regulated by specific MOUs, signed between the GSIF and the legal entities in charge of the Offices in country.

1.3 General principles

A) Compliance with Local Legislations and Donor Requirements: all the contracts of employment, consultancy, volunteer work, internship, must be made in accordance with the country labor Laws and Regulations and donor regulations. Always consider the good practice of having a written opinion issued by a local Legal Consultant in coordination with GSIF Legal consultant, if needed. The opinion should consider all the different aspects of the working relation (type of contract and pros and cons comparison between different type of contracts, national salary scale, holidays and leaves, separations, etc.)

B) Fair and safe workplace and equipment: GSIF is committed to ensure to all staff member the highest level of fairness and safety of the workplace and adequacy of equipment.

C) Communication: GSIF is committed to ensure clear, open, and direct communication among all staff members at all levels of the organization. GSIF promotes a sound feedback mechanism throughout all sectors and across different levels of the organization. See Annex 9 GSIF internal communication cycle.

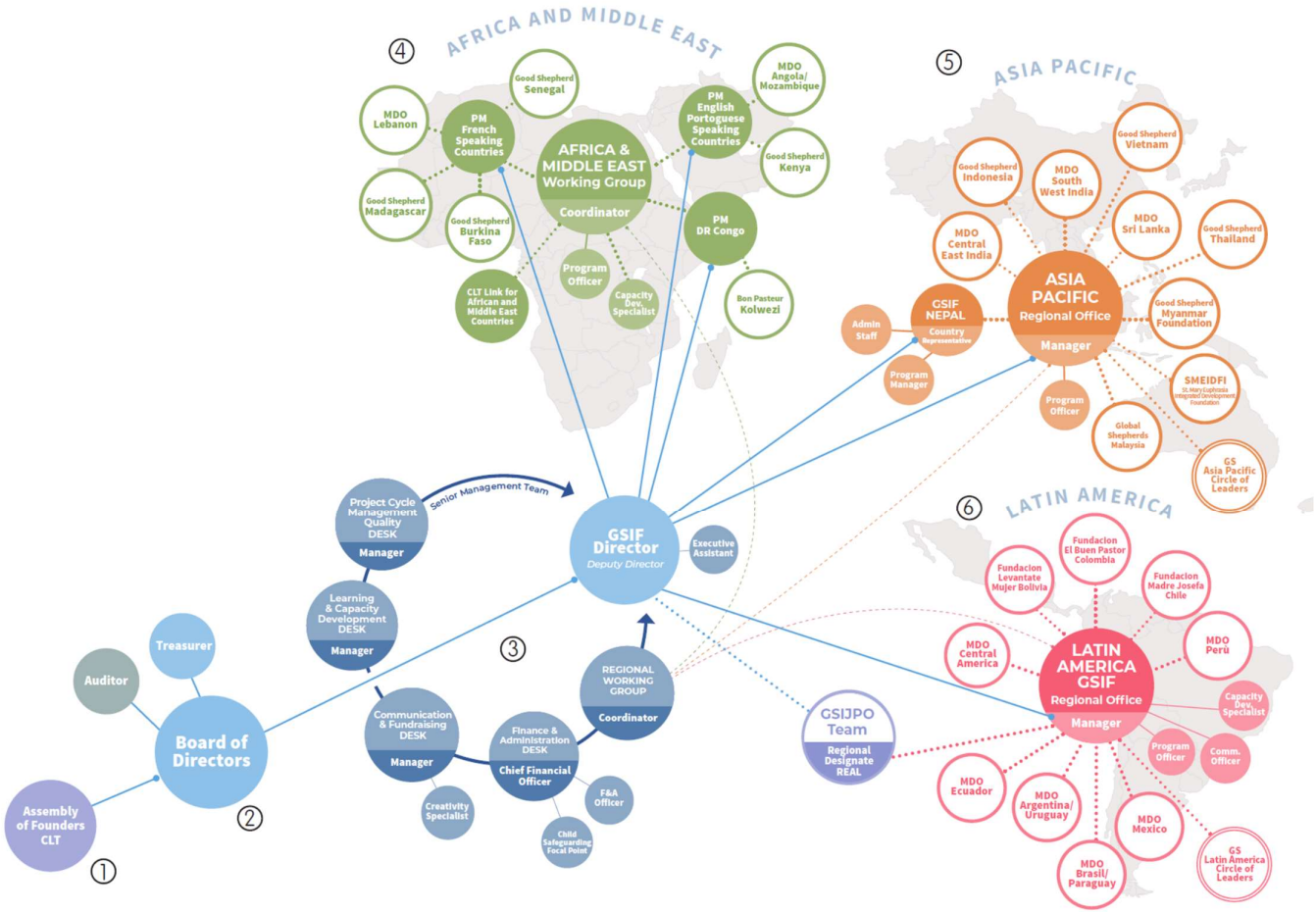
D) Confidentiality: most of the information relating to HR activities is of a confidential nature and should be treated as such. Failure to do so may expose the organization to risks and liabilities.

E) Equal opportunity and work-life balance: GSIF provides equal employment opportunities to all employees and prospective employees in every facet of its operations. All employment related decisions, including hiring, promotions, transfers, training, compensation, treatment of employees and

corrective action are made solely on the basis of individual qualifications and job performance without regard to race, colour, national origin, citizenship status, religion, creed, age, sex, sexual orientation, marital status, disability, carrier status, disabled or on any other basis prohibited by applicable law. GSIF will not allow any form of retaliation against individuals who raise issues of equal employment opportunity. GSIF is committed to providing staff with fair and appropriate means to allow a satisfactory level of work-life balance. In order to guarantee this provision, all means of work from a distance (teleconference, skype, email, telephone, etc) can be adopted and all staff, contractors and volunteers are encouraged to use them. In the organization of office working hours, scheduling of meetings and missions abroad, GSIF will take in due consideration the requests of staff, volunteers and contractors and their needs to balance their time and commitments with personal/family duties.

F) Understanding of OLCGS Spirituality and Charism: GSIF's vision, mission and core values are inspired by the principles and practices of the Congregation: to promote human dignity and cooperation for fair and sustainable development. For mission effectiveness and for delivering the highest quality of service to the most vulnerables, it is key that GSIF staff develop an understanding and appreciation of the Spirituality and Charism of the Congregation so that the level of performance in result areas and in the competency-profile is enriched by a sense of belonging and participation in the Congregation.

1.4 Organizational Chart



Assembly of Founders 1

Ellen Kelly
Congregational Leader

Josita Corera
Susana Franco
Zelna Oosthuizen
Bridget Paily
Frances Robinson
Hanan Youssef

Board of Directors 2

Elaine Basinger - *President*
Hubert Janssen - *Secretary*
Yolanda Borbon
Zoe Dean-Smith
Silvio Gentile
Pierre Harang
Paulette Lo Monaco
Patricia Marshall
Joyce Mayer
Allen Sherry
Bridget Paily
Andrée Perreault
Hanan Youssef

Treasurer

Calogero Gugliotta

Auditor

Antonello De Gennaro

Good Shepherd International Foundation - ROME 3

Cristina Duranti - *Director*
Calogero Gugliotta - *Deputy Director*
Clizia Straccamore - *Executive Assistant*

Finance & Administration DESK
Calogero Gugliotta - *Chief Financial Officer & Child Safeguarding Focal Point*
Laura Talamonti - *Finance & Admin officer*

Program Cycle Management Quality DESK
Simone Capolupo - *Desk Manager*

Learning & Capacity Development DESK
Giovanna Reda - *Desk Manager*

Communication & Fundraising DESK
Sara Braga - *Communication & Fundraising manager*
Giuseppe Ragone - *Creativity Specialist*

Regional Working Group
Andrea Curreri - *Coordinator*

Africa and Middle East Working Group 4

Coordinator
Andrea Curreri

Program Officer
--

Capacity Development Specialist
Mathilde Guntzberger

Program Manager French Speaking Countries
Giovanna Reda

Program Manager DR Congo
Simone Capolupo

Program Manager English/Portoguese Speaking Countries
Andrea Curreri

CLT Link for African and Middle East Countries
Sr. Zelna Oosthuizen

Asia Pacific Regional Office 5

Regional Manager
Theresa Symons

Program Officer
Veronikaa Nagapan

GSIF Nepal

Country Representative
Taskila Nicholas

Program Manager
--

Admin Staff:
- Admin and Finance Officer
  Bharat Thapa
- Office Assistant
  Sukhra Raj Bamjan
- Logistic Support
  Kapil Khadgi

Latin America Regional Office 6

Regional Manager
Heidy Hochstatter

Program Officer
Martine Buijs

Capacity Development Specialist
Maricruz Tabbia

Communication Officer
Alex Vásquez Ocampo

CLT
Congregational Leadership Team

F&A
Finance and Administration

PCM
Project Cycle Management

MDO
Mission Development Office

PM
Program Manager

GSIPO
Good Shepherd International Justice and Peace Office

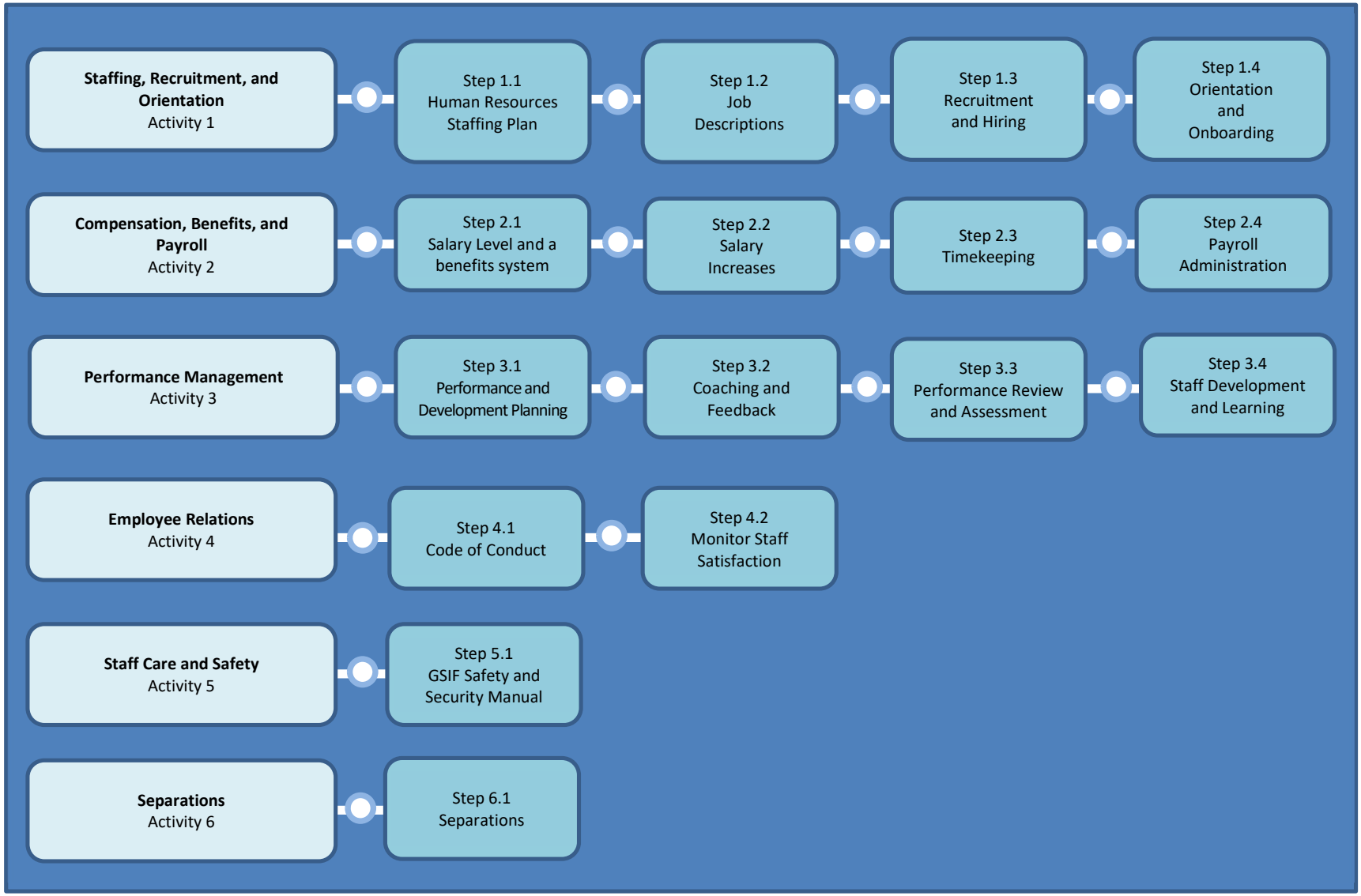
Direct Report

Functional Report

Partnership Relationship

GOOD SHEPHERD INTERNATIONAL FOUNDATION ONLUS

PART II: THE HRM PROCESSES MAP



Activity 1: Staffing, Recruitment, and Orientation

Robust staffing and recruitment processes along with a robust orientation process help to ensure a smooth transition into a new job or new organization and will help new employees integrate into the work environment and organizational culture. With these processes in place, it is likely that their needs will be met, enabling them to be successful in their new job.

Step 1.1 – Human Resources Staffing Plan

Step number	1.1
Step name	**Human Resources Staffing Plan**
Input	• Organizational goals and action plans (global or regional/national) • Needs of the Desks and/or of the Regional/National office • Funding available
Output	Human Resources yearly staffing plan
Organizational roles responsible	Director/CFO
Integration Points	Desk Manager/Program Manager/Regional Manager/Country Representative/Local partner/CLT or other representative of the OLCGS, as needed
Summary	The CFO supports the Director in building a yearly staffing plan based on organizational goals and action plans and on needs of the GSIF Desks and of the Regional and Country offices. The staffing plan takes into consideration the funding available. The staffing plan allows the organization to plan in advance the resources needed for recruitment and hiring for the positions indicated in it. A staffing plan does not always require hiring from outside the organization. During the Human Resources yearly Staffing Plan, the Director and the CFO will also take into consideration opportunity and timing of salary increases.
Tools	- GSIF Strategic Plan - GSIF Financial Plan and Funding Plan

Step 1.2 – Job Descriptions

Step number	1.2
Step name	**Job Descriptions**
Input	• HR staffing plan
Output	Job description document
Organizational roles responsible	GSIF Line Manager/CFO
Integration Points	Director/SMT/Desk Manager/Program Manager/Regional Manager/Country Representative/Local partner
Summary	Based on the staffing plan as well as emerging organizational development

	and operational needs, the Director in consultation with the SMT and RM makes the decision to hire staff. Based on the inputs provided by the relevant team members, the Line Manager of the new staff, in coordination with the CFO, prepares a detailed job description and a job vacancy announcement for the position to be filled. The job description specifies the responsibilities, required qualifications and skills, reporting relationships, and other important aspects of the position based on the organization's strategy, goals, and plans. The JD must include elements of the GSIF organizational and leadership model to ensure that there is full alignment with the core competencies and values of the organization.
Tools	- JD template Template JD GSIF.docx

Step 1.3 – Recruitment and Hiring

Step number	1.3
Step name	**Recruitment and Hiring**
Input	• Job vacancy announcement • Candidate application and supporting documents • Interview • Testing and background check • Employment offer
Output	The offer is accepted by the best-qualified candidate
Organizational roles responsible	CFO
Integration Points	Director/Desk Manager/Program Manager/Regional Manager/Local partner
Summary	The hiring process is the main part of the recruitment process. Once the organization has identified a pool of qualified applicants, the selection process includes analysing applicants' documents, interviewing, testing and background investigation, and making an employment offer. This process should be based on the laws of the country where the hiring organization is based. The CFO is responsible for posting the vacancy announcement and for coordinating the selection process which involves the following stages: • Analysing applicants' forms and shortlisting; • Interviewing; • Testing; • Reference and background checks; • Employment offer and employment contract. The above stages are conducted in a team composed by the CFO and relevant one or more integration points (Director/Desk Manager/Program Manager/Regional Manager/Country representative).

	The panel should have the list of pre-determined questions to ask, which may be accompanied by a rating system. Interview questions should include questions aimed at assessment attitudes, values and behaviours. The recruitment process must follow the prescriptions of GSIF Child Safeguarding policy for staff recruitment, hiring, orientation and background checks. Terms and conditions of employment must be carefully evaluated with the support of the legal and labour consultant at country and GSIF/international level. A personnel filing system should be maintained in the F&A Desk and managed according to the provisions of the law on data protection (GDPR). Each employee's file should consist of all documents related to the employment relationship such as contract, job description, CV/résumé, warning letters, leave documents, and performance plans and appraisal. The documents should be accessible to employees upon request but otherwise kept confidential. The national law on employee filing and document retention should be consulted.
Tools	- Scorecard for HR selection process Scorecard for HR selection process

Step 1.4 – Orientation and Onboarding

Step number	1.4
Step name	**Orientation and Onboarding**
Input	• Job description • GSIF Organizational Model • GSIF Strategic plan • Regional or country level plans
Output	Induction Plan
Organizational roles responsible	Line Manager/CFO
Integration Points	Director/direct supervisor of the new staff/Desk Manager/Program Manager/Regional Manager/Local partner/ CLT representative and other congregational relevant members/GSIF Board Members/ Generalate Community Coordinator and Generalate staff
Summary	Orientation and onboarding are designed to introduce new hires to GSIF, fellow employees, their immediate supervisors, and the policies, practices, and objectives of GSIF and of the Congregation and its partners. The orientation and onboarding process is usually spread out over a few months. It includes frequent feedback, relationship building, and mentoring. The line manager of the new staff, in collaboration with the CFO, will guide the induction.
Tools	• GSIF Policies, Standard and procedures

	• OLCGS resources/Congregational documents (general description and history of the Congregation, OLCGS position papers, mission effectiveness materials) • Induction plan template Microsoft Word Document

Activity 2: Compensation, Benefits, and Payroll

The purpose of a compensation and benefits system is to compensate employees for their work in a just manner.

While GSIF aims to attract human resources with high level of talents, passion for the mission, and expertise, it is committed to compensate the employees with higher standards of economic justice and fairness.

Step 2.1 – Salary Scale

Step number	1.1
Step name	**Salary Scale and benefits**
Input	• Job descriptions • CCNL (Contratto collettivo nazionale di lavoro) • Market salary analysis
Output	Salary scale
Organizational roles responsible	Director/CFO
Integration Points	Labor Consultant
Summary	The Director and the CFO shall determine the salary level for each position based on the salary scales of CCNL (*Contratto Collettivo Nazionale di Lavoro*), considering the specific Job Descriptions and taking into consideration the local and international market salary levels. Benefits can be granted depending on the performance and shall be determined every year.
Tools	-

Step 2.2 – Determine Salary Increases

Step number	2.2
Step name	**Salary Increases**
Input	• CCNL (Contratto collettivo nazionale di lavoro) and legal requirements

	• Performance evaluation • Role evolution • CV/Profile improvement
Output	% of salary increase
Organizational roles responsible	Director/CFO/Board of Director (for the Director's salary increase)
Integration Points	Labor Consultant, Desk Manager and Regional Manager
Summary	Salary Increases can be granted depending on the performance, on the evolution of the role and on the CV/profile improvement, and shall be determined every year during the HR yearly Staffing Plan and taking into consideration the annual performance review. The proposal of salary increases is made by the CFO and approved, without or with modification, by the Director.
Tools	

Step 2.3 – Timekeeping

Step number	2.3
Step name	**Timekeeping**
Input	Timesheet
Output	• Timesheet for payroll • Analytical timesheet
Organizational roles responsible	Employees, CFO
Integration Points	Director
Summary	Timekeeping is the process of compiling information on each employee's time and attendance data. It helps HR, Desk and Regional managers in the accurate and timely assessment and compensation of employees, demonstrating accountability to stakeholders by ensuring each employee's time and attendance data reflect his or her actual activity. It is also an important tool for self-assessment in relation to her/his own work position in order to stimulate a sense of responsibility and individual accountability within the organization with a view to empowering each member. Each employee should fill-in a timesheet for each payroll period and the monthly analytical timesheet using the GSIF's standard forms, in order to comply with the national law provisions. The CFO is responsible for giving support, maintaining the tools and dealing with the external consultant, as appropriate.
Tools	- Timesheet for payroll - Analytical timesheet

Step 2.4 – Payroll administration

Step number	2.4
Step name	**Payroll administration**
Input	• Master salary record for each employee • Tax scheme • Timesheet for payroll
Output	Payroll information sheet
Organizational roles responsible	CFO
Integration Points	F&A Officer Labor Consultant
Summary	The CFO will compile the information needed for payroll calculation and accounting, as well as for executing payment. The employees are requested to fill-in the timesheet for payroll related to the previous month by the 15th of every month.
Tools	-

Activity 3: Performance Management

Performance management is the process of defining clear performance expectations and development needs and ensuring ongoing employee coaching, development, monitoring, and assessment. This process assists employees in maintaining or improving performance and in developing knowledge, skills, and attitudes. It holds employees accountable for their work and behaviour and is crucial to the success of any organization. As in all areas of personnel policy, local labour law should be consulted before designing and implementing a performance management system (PMS) to ensure compliance with the law.

Employees and their direct supervisors are collaborators in implementing the PMS, as they all work toward the same goals. In particular, the **direct supervisor's role** in performance management includes the following:

- Assist employees in setting individual objectives that contribute to the achievement of their unit/departmental plans;
- Ensure each staff member has a clear understanding of what is expected of her or him;
- Serve as a coach, counsellor, and guide assisting employees on an ongoing basis in achieving set targets;
- Work with employees to revisit and revise performance and development plans as necessary when organizational priorities change;
- Be responsible for providing development opportunities and resources in line with organizational priorities and needs and with employees' growth plans;
- Motivate employees to succeed by rewarding their accomplishments Employees are primarily accountable for how they perform on the job.

Each **employee's role** in performance management includes the following:

- Proactively examine how his or her overall role relates to the objectives and action plans of their department/unit;
- Be familiar with the behaviours that reflect the organization's mission and values;
- Examine the knowledge and skill requirements for her or his role and performance targets;
- Reflect on his or her achievements during the past performance period and define what strengths can be made stronger;
- Reflect on her or his career goals and how they link to her or his current job and organizational needs;
- Be accountable for honouring commitments made.
- Be proactive in seeking feedback and assistance from his or her supervisor as needed.

Step 3.1 - Performance and Development Planning

Step number	3.1
Step name	**Performance and Development Planning**
Input	• The strategic objectives of the organization along with the vision, mission, and values statements. • The desk/office (as applicable) objectives and annual action plans • Job description • Employee's performance results from the previous performance period • Performance development and evaluation form
Output	Employee's performance and development plan
Organizational roles responsible	Employee Direct supervisor
Integration Points	Collaboration among various departments/units on setting objectives that contribute to achieving common targets/results
Summary	Performance and development planning assist the employee in understanding what must be accomplished during the performance period and how duties and responsibilities should be performed to best suit GSIF needs and values. The standard performance period is usually one year, which coincides with the annual reporting period within the organization. Performance and development planning is a collaborative effort between employees and their supervisors, as they are both accountable for the end results. The performance and development plan lists the performance and development objectives for each performance period. It clarifies expectations and sets standards for: • the results to be accomplished, • the knowledge and skills to be acquired or improved, and • the behaviour best suited for the specific job responsibility and work environment.
Tools	- Performance evaluation and development template

Step 3.2 - Coaching and Feedback

Step number	3.2
Step name	**Coaching and Feedback**
Input	• Job description • Employee's performance and development plan • Input from employee's colleagues and other stakeholders • organization's core competencies profile
Output	One to one minute Revised performance and development plan, as needed

Organizational roles responsible	Employee Direct supervisor
Integration Points	Direct supervisors should solicit input on the employee's performance from those who have regular direct working relationships with the employee, either within or outside of the employee's desk/office. Depending on the employee's role, input may be solicited from external stakeholders such as local partners, beneficiaries, donors etc.
Summary	The process of providing coaching and feedback is critical in management as it supports performance and personal development aligned with the organization's core competencies profile through an open, genuine dialog between the direct supervisor and the employee. This process provides opportunities to monitor employee performance and development plans, affirm good performance, identify potential performance problems, and examine how learning is applied to work. The coaching and feedback process should be ongoing throughout the performance period. This ongoing process ensures that the employee is not surprised at the performance review and assessment at the end of the performance period. The coaching and feedback process is also used by the direct supervisor to initiate the development of a performance improvement plan in cases in which an employee consistently does not meet expected performance and/or behavioral standards. For details on the performance improvement plan, please refer to Step 3.4. **Coaching** is the activity of one person assisting another in developing her or his knowledge, skills, and attitudes. The coaching process provides employees and their supervisors with the opportunity to do the following: • Reflect on overall job satisfaction, performance, development, and relationships; • Affirm good performance and relationships; • Address inadequate performance and relationships; • Examine how learning is being applied to work. Direct supervisors should use coaching to assist employees to do their jobs well. By recognizing the employee's strengths rather than focusing entirely on areas for improvement, direct supervisors will maintain employees' self-esteem. **Feedback** is structured information that one person offers to another about the impact of his or her actions or behavior. It is a process of communicating what you experience, observe, think, and feel about certain aspects of the employee's performance. In this process, the giver and receiver of the feedback engage one other. Feedback should always be constructive and GSIF encourages the staff to give constructive feedback and be open minded in receiving feedback as feedback eliminates guesswork and reduce misunderstandings.
Tools	- Annex 2 - Guidelines for Giving and Receiving Feedback

Step 3.3 - Performance Review and Assessment

Step number	3.3
Step name	**Performance Review and Assessment**
Input	• Employee's performance and development plan • Input from employee's colleagues and other stakeholders
Output	Performance results Performance improvement plan
Organizational roles responsible	Employee Direct supervisor
Integration Points	CFO
Summary	Performance review and assessment is a formal process through which the employee's work performance is reviewed and assessed at the end of the performance period. This process is used to determine performance results against the performance standards included in the Job Description and adapted to the development objectives set at the beginning of the performance period. Usually it takes the form of a discussion between a direct supervisor and an employee. The purpose is to identify strengths as well as opportunities for improvement and development. For assessing the Performance results, the supervisor must use the Performance assessment template. When performance results show that an employee may require some form of coaching, mentoring, and/or learning to improve performance and/or behavioral standards that are not being met, the direct supervisor may initiate the development of a performance improvement plan. This plan is developed following a constructive discussion between the direct supervisor and the employee. It documents specific areas for improvement and describes what actions will be taken to improve or gain the knowledge, skills, and attitudes needed. This plan can be set at any time during the performance period based on ongoing monitoring and coaching, not only as a result of the annual performance review and assessment. The plan should cover a time period no longer than three to six months, during which time the supervisor will assist the employee in achieving set targets. If the employee continues to miss or fall short of performance standards, the supervisor may take steps to initiate termination of employment. This step should be considered only after all performance improvement options have been explored. Local laws should be consulted to ensure that steps taken meet legal requirements.
Tools	- Performance evaluation and development template

Step 3.4 - Staff Development and Learning

Step number	3.4
Step name	**Staff Development and Learning**
Input	• Performance results • Performance gap analysis • Staff development and learning budget, if needed
Output	Staff development and learning plan
Organizational roles responsible	Employees (for proposals), Direct supervisors (in managing role), Learning and Capacity Development Desk Manager and CFO in support role.
Integration Points	Learning and Capacity Development Desk Manager
Summary	Staff development and learning encompasses various activities intended to support staff in meeting performance expectations and growing professionally. Organizations are more likely to support staff development and learning activities when individual needs and goals are in line with those of the organization. Once a performance gap is identified, it is not advisable to jump immediately to defining development and learning activities to be undertaken. It is essential to first analyse the root causes or the underlying issues of the gap, as not all performance gaps might be the result of a lack of adequate knowledge, skills, and attitudes. Not every gap needs to be addressed by staff development and learning activities. The following are examples of such gaps: • A mismatch between the talents of an individual and the job (Can the staff member be moved to another position for which her/his knowledge, skills, and attitudes are better suited?) • Lack of clarity with regard to the processes (Can the process be clarified or simplified? Is there a need to develop a tool to aid that process?) • Failure to provide staff with the resources needed to perform the job well (Does the staff member not have access to proper equipment or software? Are there other resources that would help the staff member?) • Lack of clear distribution of roles and responsibilities (Do staff members complain that certain roles are overlooked?) This step is referred to as a **performance gap analysis**. Supervisors use it in determining whether staff development and learning is the solution to the performance gap(s) identified or other actions should be taken to address the issue. If the performance gap analysis leads to the conclusion that the gap is the result of lack of adequate knowledge, skills, and/or attitudes, careful attention must be paid to selecting the appropriate development and learning solution. A direct supervisor and an employee can discuss and choose from many options, including the following: • Self-study • On-the-job coaching and mentoring • Job shadowing: observing another employee's day-to-day activities • Job rotation: performing a different job at the same level • Acting as a member of a committee • Attending meetings and conferences

	• Training sessions When staff development and learning require funding, as in the event of attending a conference, or participating in a training course, there should be a transparent process for allocating these funds. This process sets criteria for the type of learning opportunities to be sponsored and ceilings on spending. As development takes time to bear fruit, it is not sufficient to evaluate the knowledge and skills acquired at the end of the learning activity. GSIF must also evaluate whether the person applied the learning in her/his job. The coaching and feedback and the performance review and assessment processes outlined in Step 3.2 and Step 3.3 will assist GSIF to do that. These steps help define what changes have taken place as a result of the learning: Is the employee performing at the expected standards? Does she or he behave according to organizational values? How does the employee's performance affect the achievement of organizational strategic and annual plans?
Tools	- Performance evaluation and development template

Activity 4: Staff Relations

Employee relations is an area of HR that focuses on improving relationships between the employer and the employee and providing them the opportunity to communicate openly.

Strong HR systems include proactive employee relations measures, such as:

- Establish a code of conduct to create a positive work environment
- Monitor staff satisfaction and engagement, taking action as appropriate
- Address conflict between staff members in a timely neutral manner
- Ensure mechanisms for representing and protecting employee rights
- Ensure confidentiality
- Follow HR policies consistently

Step 4.1 - Code of Conduct

Step number	4.1
Step name	**Code of Conduct**
Input	Local law Organizational mission and values
Output	A well-communicated code of conduct
Organizational roles responsible	CFO/Director
Integration Points	Board of Directors
Summary	To clearly communicate expected behaviors for all employees, organizations should institute a policy that protects the rights of staff, beneficiaries, and other stakeholders. This policy is called a code of conduct. This code will include a section on conflict of interest. The code of conduct creates a standard that is consistent with the values of an organization and is always created in accordance with local law.
Tools	- Chapter Code of Conduct of this manual - Risk Awareness Manual - Child Safeguarding Policy

Step 4.2 - Monitor Staff Satisfaction

Step number	4.1
Step name	**Monitor Staff Satisfaction**
Input	• Employee feedback • Survey and interview data
Output	Survey and interview data analysis

Organizational roles responsible	CFO/Director
Integration Points	Staff
Summary	The CFO will conduct on a yearly basis a survey for assessing the overall Staff Satisfaction and will share it with the director. A strong feedback system and culture will help to have a clear understanding of the level of satisfaction of all the employees. GSIF ensures that all staff have the possibility to share information openly and without fear. The rights of employees should be protected from possible retaliation. Confidentiality must be ensured. In case of conflict between staff members, the supervisor supports employees in addressing their conflicts in an effective way.
Tools	- Survey Monkey

Activity 5: Staff Safety

For HR Safety and Security, refer to **GSIF Safety and Security Manual**.

Activity 6: Separations

Important considerations applicable to all steps of separation include the following:

- Ensure the organization adheres to local laws, lowering the risk of staff taking legal action;
- Ensure that a separating staff member is aware of his or her obligations and rights;
- Ensure staff members are treated fairly at the point of separation;
- Enhance possibility of rehiring the same staff member if her or his services are needed in the future;
- Lower the risk of the separation process having negative impact on the organization's reputation and staff morale;
- Promote fairness when dealing with staff separations.

Step 6.1 - Separations

Step number	6.1
Step name	**Separations**
Input	• National labor laws • Interaction with employee • Exit interview • Payment of final dues • Handover notes from the employee
Output	Efficient and effective management of separation
Organizational roles responsible	CFO/Director Employee
Integration Points	Labor consultant
Summary	The process of separation, in any of the possible cases (resignation, Retirement, Fixed Term Contract, Redundancy, Termination for Cause, Death), is coordinated by the CFO under the supervision and in coordination with the Director.
Tools	-

PART III: CODE OF CONDUCT AND CONFLICT OF INTEREST

The Good Shepherd International Foundation is founded by the Congregation of Our Lady of Charity of the Good Shepherd to support its programs for vulnerable children, girls and women in Africa, Asia Pacific, Middle East and Latin America.

The GSIF Code of Conduct descends from the GSIF Organizational Values which are inspired by the Congregation's Values.

GSIF Organizational Values are: Integrity, Perseverance, Initiative, Flexibility, Harmony.

3.1 Code of conduct for staff, volunteers, and contractors

a) GSIF staff, volunteers, and contractors shall be dedicated to providing competent professional service with compassion and respect for the inherent dignity and worth of each person;

b) GSIF staff, volunteers, and contractors work closely with the members of the Congregation, share office space and other communal areas. They often spend time in OLCGS houses and communities, during site visits or general meetings. In all those circumstances the accommodation arrangements proposed can be discussed with the GSIF Director, if not suitable for the staff, volunteer, contractor, or for the hosting OLCGS community, alternative arrangements can be provided. In all cases, the cohabitation for long or short periods of GSIF staff, volunteers, and contractors with OLCGS communities must be regulated by the highest degree of respect and discretion in order to avoid disruption of the live of the religious community. Great attention must also be paid by GSIF staff to the local cultural and traditional practices, which must be respected and observed if not in contrast with personal beliefs. This applies also to dress-code and relationship with the hosting communities. For dress-code, it is recommended to adopt an appropriate one which would not embarrass the hosting community and/or the beneficiaries of the project. Depending on the local arrangements, GSIF staff, volunteers and contractors may be invited to attend religious celebrations with the hosting communities. GSIF staff, volunteers and contractors are not demanded to attend, it is left to the individual sensitivity, beliefs and interests the decision to participate in whatever is proposed by the hosting communities;

c) GSIF staff, volunteers, and contractors shall deal in an honest and trustworthy manner with sisters, project's participants and colleagues;

d) GSIF staff, volunteers, and contractors shall respect and protect the rights of participants and colleagues and shall safeguard confidences within the constraints of applicable law and regulations;

e) GSIF staff, volunteers, and contractors shall strive to continuously develop and enhance their skills and professional expertise;

f) GSIF staff, volunteers, and contractors shall recognize the boundaries of their expertise and take responsible steps (including appropriate education, training, consultation, and supervision) to ensure the competence of their work and to protect mission partners, project beneficiaries and co-workers from harm;

g) GSIF staff, volunteers, and contractors must never exploit mission partners, project beneficiaries and co-workers' vulnerability for their personal gratification, gain or benefit;

h) GSIF staff, volunteers, and contractors must not ordinarily give or receive gifts to/from mission project beneficiaries and co-workers, nor shall they ever personally give, lend or borrow money/favours/services to/from project beneficiaries. Exceptions can be acceptable based on cultural and traditional practices at the grass-roots level. It is important tough, that these practices do not create dependency or "special relationships" between the GSIF staff and the project beneficiaries or mission partners;

i) GSIF staff, volunteers, and contractors must not engage in any romantic and/or sexual activity with mission partners or project beneficiaries or their extended family members, or individuals with whom they have close personal relationships;

j) GSIF staff, volunteers, and contractors must not encourage unacceptable or illegal participant behaviours such as use or sale of alcohol or illegal drugs, etc;

k) GSIF staff, volunteers, and contractors must not discriminate and never exclude, segregate or demean the dignity of any project beneficiary and colleagues based on ethnicity, national origin, citizenship status, race, colour, sex, creed, age, socio-economic status, marital status, sexual orientation or mental or physical disability;

l) GSIF staff, volunteers, and contractors must avoid conflicts of interest in which their position in a GSS program can be used to support/enhance private business or enterprise;

m) GSIF staff, volunteers, and contractors must serve as a role model to project beneficiaries and mission partners and, therefore, they must act appropriately toward project beneficiaries and mission partners at all times.

3.2 Conflicts of Interest

A situation of Conflicts of interest arises when a member of the staff is entering into a transaction or arrangement that might benefit the private interest or might result in a possible excess benefit transaction.

It is in the best interest of the GSIF staff to be aware of and properly manage all conflicts of interest and appearances of a conflict of interest.

This policy is intended to supplement but not replace any applicable laws governing conflict of interest applicable to non-profit and charitable organizations.

An interested person is any director, manager, officer, or member of the staff with decision powers, who has a direct or indirect financial or personal interest.

Here some examples of potential or actual conflicts of interest that should be avoided and disclosed. The list is not exhaustive and is intended to provide guidance:

- **Self-benefit**: Using your position or relationship within the organization to promote your own interests or those of your family or your enterprise;
- **Influence peddling**: Soliciting benefits for yourself or your family from outside organizations in exchange for using your influence to advance the interests of that organization within the OLCGS organization;
- **Property transactions**: Directly or indirectly leasing, renting, trading, or selling real or personal property to or from the organization;
- **Use of the organization property for personal advantage**: Using or taking organization resources, including facilities, equipment, personnel, and supplies, for private use or other unauthorized activities;
- **Recording or reporting false information**: Misrepresenting, withholding, or falsifying relevant information required to be reported to external parties or used internally for decision-making purposes, in order to derive personal benefits.
- **Gifts and gratuities**: No employee may solicit or accept, directly or indirectly, any gift, gratuity or favour that has substantial economic value, where either party could infer any obligation.
- **Reimbursements**: No employee may authorize their own reimbursements for expenses.
- **Non-compete**: No employee may provide services for compensation to any organization engaged in similar activities as GSIF, except with prior authorization by the Director.

PART IV: EMPLOYMENT PRACTICES

4.1 Attendance and Punctuality

Attendance and punctuality are essential parts of job performance and all employees are expected to maintain exemplary records of attendance and punctuality. The critical nature of GSIF's work requires that all employees commit to making a good faith effort to attend regularly work duties either in physical presence at the assigned office, or at a distance, accessing the virtual workspace of GSIF through the appropriate IT tools provided by the organization, to ensure availability for teamwork, meetings etc. In instances when you are not able to be in the office on the assigned days or access the virtual workspace according to the assigned schedule, you must communicate it promptly to your supervisor prior to your normal workday starting time. Excessive absences or lateness will lead to corrective actions.

4.2 Employee Records

For each employee there is an archive folder in the Department of Finance and Administration of the GSIF.

The employee files include:

- employment application;
- resume;
- references;
- payroll;
- performance evaluations and documentation;
- other information pertinent to the employee or required by law or policy.

The GSIF treats all employee records in strict confidence, in compliance with the privacy law and regulations (GDPR) and maintain all the information in protected facilities. Access to the contents of the employee files is allowed only on a "need to know" basis. Except when required by law or when required for auditing or accreditation purposes, the Foundation shall not share any file information with outside parties without the employee's explicit written permission.

4.3 Working place

The offices of the GSIF are located at the Generalate of the Good Shepherd Sisters in Rome, Via Raffaello Sardiello 20. Unless otherwise specified, this is the working place of the GSIF.

In the same building the sisters host the Leadership Teams of two other congregations: the Sisters of Notre Dame and the Franciscan Sisters. The Generalate is the administrative headquarter of the Congregation, where the Central Leadership Team, the General Secretary, the Communication officer and the Treasurer are based and have their offices. However, it is very important to remember that the Generalate is also home to three communities of sisters, coordinated by a local leader, who supervise all the activities within the house. The sisters have their residence on the different floors and share their chapels, offices and living rooms with the employees. The community has its own dining room and the employees have their dining room. All the employees can ask for meals at the sisters' kitchen at a price of 3.50 Euro.

It is recommended to pay attention and respect to the life of the community at the Generalate.

One very important function of the Generalate is to host meetings of sisters and lay partners from all parts of the world. It will be very common to hear different languages and meet many international guests in the corridors. This is a great opportunity for all staff to become familiar with the international outreach of the Good Shepherd sisters.

4.4 Working hours

Full time employees are required to work 8 hours a day, 5 days a week by contract. Part time employees are required to work 4 hours a day 5 days per week. Since the kind of work developed at GSIF doesn't necessarily require physical presence at the office, it is possible to agree with the GSIF Director a schedule including hours worked at the office and at home. See also the **GSIF Smart Working Guidelines.**

4.5 Planning of holidays and leaves

As GSIF is an Italian legal entity, GSIF staff located in Italy generally observe the following **national and local holidays**:

1. 1 January (New Year's Day)
2. 6 January (Epiphany)
3. 25th April (Liberazione dal nazifascismo - 1945)
4. Easter Monday
5. 1st May (Labour Day)

6. 2nd June (Republic Day)
7. 29th June (Saint Patrons of Rome)
8. 15th August (Assumption)
9. 1st November (All Saints)
10. 8th December (Immaculate Conception)
11. 25th December (Christmas)
12. 26th December (St. Steven)

International staff should observe the local national prescriptions.

The period of **annual holiday leave**, accumulated in relation to the months of employment, is considered an inalienable (non-transferable and undisputable) right of the employee. The period of reference for calculation of annual leave, unless otherwise established by law, is the calendar year (1st January to 31st December).

The period of annual leave must be agreed with the employee's direct superior on the basis of a "annual holiday plan" drawn up in advance, necessary for efficient and effective performance of work activities. The holiday plan is coordinated by the CFO and validated by the Director.

The days of annual holiday leaves depend on the single or national labour contract.

Sickness absences must be justified as follows:

a) as soon as possible and no later than the second day of absence, except for reasons of force majeure/impossibility, the employee must notify his or her direct superior, with the most suitable method, of the "sickness absence" situation;

b) after the second day of sickness absence, the Worker must justify his or her absence with a "sickness certificate" issued by Public Health Structures and/or Private Health Structures recognised and accredited with the National Social Security Institute (INPS).

The "sickness certificate code" and/or "other equivalent documentation" must be filed in the worker's "personal file".

Both Organisation and Employee must comply with the provisions of the Law concerning **maternity leave**.

4.6 Grievance Handling

To all the employees shall be accorded an opportunity to raise their complaints or dissatisfaction without fear and no employee shall suffer any prejudice or victimisation in his/her employment as a consequence of lodging a grievance or attending to one.

As a general rule, grievances shall be settled as early as possible and at the lowest level of supervision or management.

The immediate supervisor shall informally resolve the grievance within a reasonable time, which shall not exceed forty-eight (48) hours or two (2) working days. If the grievance is not resolved, the aggrieved employee shall request a formal hearing from the Director.

4.7 Discipline

Disciplinary action shall be taken as a corrective measure in instances of unacceptable behaviour (which includes, but not limited to misconduct and negligence). Disciplinary action must comply with the local legislations and regulations.

Disciplinary actions can be taken against the employee in the cases specifically indicated in the National applicable bargaining agreement.

Therefore, the Employee behaviours subject to sanctions, will also be punished with the sanctions specifically provided in the National applicable bargaining agreement

With the exception of serious and wilful misconduct requiring immediate action by the GSIF, unless otherwise authorised and specified by Law, actions of a disciplinary nature must be preceded by formal notification letter.

A trace of the verbal and written warnings must be kept in a specific annex. Any warning must always be accompanied by the Employee's explanation for his or her conduct.

A copy of the disciplinary action report, forming an element of proof for any disciplinary action, must always be kept in the Employee's personal file.

Disciplinary actions can be taken in compliance with the Law and always on the basis of a written opinion issued by the legal consultant of the GSIF.

ANNEXES

Annex 1 - National Contract for Trade and Service Companies (C.C.N.L. per i dipendenti del terziario: commercio, distribuzione e servizi)

http://file.conflavoro.it/pdf/ccnl/ccnl-commercio-terziario-distribuzione-e-servizi.pdf

Annex 2 - Guidelines for Giving and Receiving Feedback

When you receive a feedback…

Solicit feedback in clear and specific areas	Ask, "How might we as CRS staff improve the usefulness of our project site visits?"
Make it a point to understand the feedback	Use paraphrasing skills, and ask clarifying questions, such as "What I'm hearing is…"
Help the giver to be specific	Ask, "Could you give me a specific example of what you mean?"
Avoid making it more difficult for the giver of feedback	Reacting defensively, angrily or arguing are all ways to turn feedback off.
Don't give explanations	It may be hard to remain silent, but keep in mind that explanations often seem defensive.
Show appreciation	Thank the person for making the effort to give you feedback.
Respond to key points	Say what you intend to do as a result of the comments you are receiving.
Remember that feedback is one person's perceptions—not universal truth	Keeping this in mind can help you to be less defensive. Confirm the feedback with others to determine if there is a pattern.
Pay attention to non-verbal feedback	Are people falling asleep as you speak? Do they look uncomfortable?

When you give a feedback…

Be specific and descriptive, but concise	Give specific, descriptive examples of the behaviour or performance that you have observed. Don't use judgmental language like, "You are unprofessional." Instead, say, "You have missed three deadlines." Speak only for yourself (avoid "Everyone is saying…"), and restrict examples to things you know for certain.
Provide positive feedback	Don't take good work for granted; tell people when they do a job well. As above, avoid general praise like, "Keep up the good work!" Be specific. Say, "I noticed that partners were engaged and pleased with the excellent preparation and strong facilitation of the last project review meeting you organized."
Direct feedback towards behavior that the person can control	Saying, "Your English is unclear" is not a constructive comment. Focus on areas that the person can improve.
Be direct, clear, and to the point	Not being clear can create misunderstanding and discomfort. Don't leave the person guessing.
Time your feedback appropriately	Feedback is most effective right after the behaviour or performance occurs or after it's asked for. Ensure privacy, and allow time for discussion. Is the moment right? Consider more than your own need to give feedback.
Be calm	Don't attack, dump (overload), blame or vent your anger. If you are not calm, do not provide feedback at that time. Wait until you cool off.
"When you do x, I feel y"	Say, "When you are late for meetings, I feel frustrated" instead of "You are always late for meetings!"
Watch out for non-verbal communication	Avoid giving feedback with inappropriate non-verbal gestures such as raised eyebrows, rolled eyes, or a sarcastic or haughty tone of voice.

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Annex 3 - Job Description template

POSITION:	**UPDATED ON:**
REPORTS TO:	**N° DIRECT REPORTS / FUNCTIONAL REPORTS:**
PLACE OF WORK:	**CURRENTLY COVERED BY:**

PURPOSE:
The purpose of a position describes: • *why a position exists,* • *what purpose does the organization want to pursue through the role,* • *the mandate that the person holding the role receives and that must guide her behaviours.*

AREAS OF RESULTS	**ACTIVITIES**	**PERFORMANCE STANDARDS**
What are the results the position must ensure? *They descend from the "purpose", are more than one but not more than 5 and are expressed with the verb "she ensures that ...". Do not confuse with activities and results (i.e.: "Ensuring compliance with quality standards" is a result, while "ensuring quality control" is an activity)*	*These are the activities that the position holder puts in place to ensure the result: they are usually described with "do ...", "perform ...".*	*It is the statement of the organization's expectations on what can be considered an excellent performance. It must be the constant reference for those who have the role of understanding if she is doing good or bad. It is the reference for performance evaluation.*

COMPETENCY PROFILE		
Knowledge	**Skills**	**Attitude**
The basic ("theoretical") knowledge needed to cover the role.	The skills needed. For example, guiding people, doing problem solving, public speaking, reporting, etc.	The characteristics to which it is necessary to give importance ("at the head" of the scale of values) of those who hold the role. For example: accuracy, reliability, sense of responsibility, result orientation ...

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Annex 4 - Scorecard for HR selection process

Example of scorecard

	CV				I Interview								Excercise	II Interview			Total
CANDIDATE NAME AND SURNAME	Relevant working experience (NGOs, religious, etc.)	Relevant Education	Languages (Proficient English)	**Sub Total**	(Field) Experience in Project Mgmt	(Proposals and reporting) writing skills	Research, M&E and Need Assessment	Budget design and monitoring	Experience in relevant thematic areas	Previous experience with religious org.	Motivation	**Sub Total**				**Sub Total**	
				0								**0**					**0**
				0								**0**					**0**
				0								**0**					**0**
				0								**0**					**0**
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				0								**0**					**0**
				0								**0**					**0**
				0								**0**					**0**
Ranking	**1 to 5**	*being 5 the best ranking*															

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Annex 5 - Induction plan template

Induction Plan for New staff

Name and Role of the new staff:		**Line Manager:**	
Date:		**Participants to the induction:**	- A - B - C - D
Probation period end date:			
Objectives of the induction:			
Resources:	**GSIF General Organization**	-	GSIF Policies, Standards and Procedures
	Understanding of OLCGS Spirituality and Charism	-	Resources on heritage and history of the Congregation of OLCGS including an introduction of St. John Eudes, St. Mary Euphrasia and their lay partners; - The Good Shepherd Position Papers on Migration, Trafficking, Girl Child, Prostitution, Economic Justice and Integral Ecology; - Congregation Direction Statement; - Documents on Partnership and Co-responsibility for Mission.
	Specific resources needed as per the Job Description of the new staff	-	Job Description - X - Y
	Other Material	-	X - Y

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Induction Agenda

Monday	Tuesday	Wednesday	Thursday	Friday
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**

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Induction Report

At the end of the induction period, the line manager reports on the overall induction of the new staff, highlighting critical aspects, as appropriate.

Annex 6 - Analytical timesheet

Analytical Timesheet Template

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Annex 7 - Performance development and evaluation template

Employee: _____ **Role: _____** **Line Manager: _____**

Date of Performance Review: _____

SECTION 1: PERFORMANCE DISCUSSION
SECTION 2: YEARLY ACTIVITY PLANS
SECTION 3: ORGANIZATIONAL VALUES AND COMPENETCY PROFILE
SECTION 4: OLCGS SPIRITUALITY AND CHARISM
SECTION 5: PERFORMANCE SUMMARY
SECTION 6: PERSONAL LEARNING AND DEVELOPMENT PLAN

****

SECTION 1: PERFORMANCE DISCUSSION

Taking into account the result areas and the performance standards set in the Job Description, rate the performance and explain in the column Comments and details.

Results Areas *(as per Job Description)*	**Performance Standards** *(as per Job Description)*	**Performance Rating**[1]	**Comments and details**
	•		
	•		
	•		

[1] *Rate **3** for Exceeds Expectations, **2** for Meets Expectations, **1** for Needs Improvement, **N** for New (Too early to assess/review).*

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SECTION 2: YEARLY ACTIVITY PLANS

*In the first table, taking into account the activity plan set for **the current year**, rate the level of accomplishment and highlight any relevant detail related to delays, limits to achieving objectives, or achievement of objectives beyond what was planned.*

*In the second table, highlight the main objectives and goals set for the **next year**, adding comments as appropriate.*

Year	Level of accomplishment[2]	Highlights
CURRENT YEAR		

Year	Main objectives and goals	Comments
NEXT YEAR		

[2] *Rate 3 Exceeding Accomplishment, 2 Fully Accomplished, 3 Partially Accomplished.*

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SECTION 3: ORGANIZATIONAL VALUES AND COMPENETCY PROFILE

GSIF will take into account the following behaviors related to the GSIF Organizational Model in rating individual employee's performance.

Organizational Values	Description of the value/Behavior	Performance/Comments[3]
INTEGRITY	***We are coherent, fair, just and transparent in all relationships. We act with honesty, trust and respect, in line with our Mission and values.*** *Behavior: When making decisions, we focus on the goal of serving the most vulnerable people deploying our full potential and inspired by the Congregational and GSIF Mission values.*	
PERSEVERANCE	***With determination and zeal, we strive to overcome obstacles and find energies, motivations and strategies to reach our goals. We turn challenges into opportunities.*** *Behavior: Challenges and obstacles are an integral part of our life and work. We face them with patience and resilience, guided by our goals, which are clear and meaningful. Our commitment is always oriented towards a positive solution.*	
INITIATIVE	***Guided by critical thinking and a sense of responsibility, we take risks. We promote creative, innovative and positive changes to achieve our strategic goals.*** *Behavior: We promote change by acting with energy and passion. We drive innovative processes and initiatives to respond to global trends and challenges, without losing focus on our ultimate goal: improve GSIF capacity to serve effectively the most vulnerable and marginalized. We remind ourselves that ultimately, we do what we do, for them, not for ourselves.*	
FLEXIBILITY	***We understand the complexity of the contexts where we operate, and we identify the most effective solutions, respecting the diversity related to each context, to promote continuous improvement.*** *Behavior: We show empathy and adopt active listening with our partners. We do not judge them. We try to deeply understand and celebrate their diversity and uniqueness. We adopt empathic and flexible solutions.*	
HARMONY	***We work together with empathy and seeking integration, promoting the diversities within our teams, to create synergies that increase the capabilities of individuals and generate added value.*** *Behavior: We develop and keep a comprehensive view, without judgement.*	

[3] *This section is not for a quantitative scoring but for a qualitative evaluation.*

Competency Profile	Rating[4]	Comments
Skills:		
1. Decision Making		
2. Problem Solving		
3. Innovation		
4. Coaching & Staff		
5. Planning & Organization		
6. Self-Organization		
7. Strategic Communication		
8. Effective Communication		
9. Influence & Leadership		
10. Partnership		
11. Teamwork		
Attitudes:		
12. Self-Empowerment		
13. Uncertainty and stress management		
14. Empathy		
15. Proactivity		
16. Accuracy		
17. Commitment to organization		

[4] *For rating, refer to the Key Behavioral Indicators (KBI) set in the GSIF Competency Profile as per the **attachment** using the scale **3-2-1** or **New** (if too early to assess) as described in the table of the attachment.*

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SECTION 4: OLCGS SPIRITUALITY AND CHARISM

GSIF is a non-profit organization incorporated by the Congregational Leadership Team of OLCGS to assist local Provinces most in need of financial, capacity development and technical support, to establish or develop their mission. The GSIF's vision, mission and core values are inspired by the principles and practices of the Congregation: to promote human dignity and cooperation for fair and sustainable development. For mission effectiveness and for delivering the highest quality of service to the most vulnerables, it is key that GSIF staff develop an understanding and appreciation of the Spirituality and Charism of the Congregation so that the level of performance in result areas and in the competency profile is enriched by a sense of belonging and participation in the Congregation.

Employee's understanding of the Spirituality and the Charism of the Congregation of OLCGS which can be derived from:	**Rating[5]**	**Comments**
- *Heritage and history of the Congregation of OLCGS including an introduction of St. John Eudes, St. Mary Euphrasia and their lay partners;* - *The Good Shepherd Position Papers on Migration, Trafficking, Girl Child, Prostitution, Economic Justice and Integral Ecology;* - *Congregation Direction Statement;* - *Documents on Partnership and Co-responsibility for Mission;* - *Participation in relevant courses and activities such as Induction Courses on the Spirituality of the OLCGS, Foundress Day, ICAs, Assemblies, Chapters, etc.;* - *Reading materials that are mutually agreed upon by Line Manager and staff member.*		

[5] *Rate **3** for Deep Understanding, **2** for Sufficient Understanding, **1** for Basic Understanding, **N** for New (Too early to assess/review).*

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SECTION 5: PERFORMANCE SUMMARY

Taking into account the sections above, the staff member and the Line Manager agree on an overall rating of performance for the period. The overall rating is not necessarily a calculated average of all previous ratings, but could summarise overall performance as being: Exceeds Expectations, Meets expectations, Needs Improvement, New (Too early to assess/review).

Line Manager's comment on employee's overall performance rating (include comment on behavioural competencies)	
Employee's comments on overall performance rating (include barriers/frustrations/positives experienced/needs for performing more effectively)	

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SECTION 6: PERSONAL LEARNING AND DEVELOPMENT PLAN

Line Manager and Employee agree on a personal learning and development plan as appropriate.

	Learning Needs identified	Action Plan and Methods chosen	By when	Comments
KNOWLEDGE *(Know)*				
SKILL/EXPERIENCE *(Know how to do)*				
ATTITUDE *(Know how to be)*				

Date_____

Employee's Name and Signature _____

Line Manager's Name and Signature _____

Annex 8 - GSIF internal communication cycle

GSIF internal communication cycle