

## Basic Guidelines to Start at Samagra

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Welcome to Samagra! This document enlists the basic guidelines to be kept in mind as you work at Samagra.

### Things to remember when in Delhi Office

1. **Office Conduct:** Maintaining professionalism is of utmost importance at Samagra. Below is a list (not entirely limited) of things that we must keep in mind as our basic code of conduct:
  - a. Starting our day at 9:30 am on weekdays from all locations including and not limited to Guesthouse, Government Office, Delhi Office etc.
  - b. Adhering to the **Dress Code** when at work ([refer Annexure 1](#))
  - c. Taking the first flight in on Mondays and last flight out on Fridays, to and from program locations
  - d. For a cab location like Chandigarh (which involves train travel as per policy), reaching by 11:00 am on Mondays and leaving on Friday evenings post all meetings
  - e. Marking all leaves on the prescribed system without fail
  - f. Responding to group requests / calls-to-action without need for any reminders
  - g. Closing the loop on all communications coming your way
  - h. Being conscientious and doing all of the above on our own without waiting for anyone to point out
2. **Office Coordinator:** Raju Ram is our Delhi Office Coordinator. He can be contacted on 8860091992 for arranging tea/ coffee/ lunch and any logistical requirements
3. Always remember to wipe the whiteboards after use
4. Last one in the office must ensure all electronics are turned off (lights, fans, ACs etc) and all doors are locked
5. **The norm is to work from the office when in Delhi.** Please align with your immediate manager in advance if you need to work from home
6. **Account submission box:** Ensure to drop off service bills and reimbursement papers in the dropbox every month end
7. **Stationery:** All basic stationery will be available in the office. Incase of any requirement, reach out to the Office Coordinator
8. **Late Stays for team members:** If meetings at Delhi office extend beyond 8 pm you can choose to travel back through the cab provided by the empanelled service provider/Uber/Ola (and avoid travelling by bus/metro in late hours) at company's expense

### Things to remember when at Government location:

1. **Holidays:** Rather than compulsorily following the Government holiday calendar, you can align with your team for shifting leaves to get more long weekends. Please refer to Samagra [holiday calendar](#) and [leave policy](#) for further details
2. **Expense Management:** Save all original bills for reimbursement. Rules for Happy reimbursements and Expense management can be accessed [here](#)
3. **Accommodation:** Accommodation at Government site will be provided by Samagra. It will be a bachelor accommodation at the pre-assigned Samagra guesthouses

4. **Travel** to government locations will be provided by the company. Please refer to [Air Travel Guidelines](#), [Train Guidelines](#) and [Cab Guidelines](#) for details regarding travel bookings

### Steps to follow to update your email signature

1. Download and save the [signature logo](#)
2. In your Samagra inbox, go to Settings >> General >> Signature
3. Paste the following [template](#) in the text box. Enter relevant details within <> only in the “Name”, “Designation” and “Mobile number” fields. Do not alter anything else in the template
4. Press enter after “Instagram”
5. Click on “Insert Image” and upload the logo
6. The logo may appear enlarged, click on it and select the size as “Medium”
7. Save changes

This is how your email signature should look like:

**Garima Sood**

**Outreach Associate | +91 9910068723**

**Samagra | Transforming Governance**

**Address:** [9/5 Sarvapriya Vihar, New Delhi-16](#)

**Website:** [www.samagrategovernance.in](#)

**Follow Us:** [LinkedIn](#) | [YouTube](#) | [Instagram](#)



*10 years of creating impact at scale...*

*NOTE: The email signature should be replicated exactly as indicated above and should not be tweaked/edited for any internal/external email communications.*

### Guidelines for setting up official virtual background for online meetings

Please use the virtual background shared [here](#) for all online meetings

Annexure 1

## SAMAGRA DRESS CODE

### BUSINESS FORMALS

**Where to wear:**

- Program locations (9:30 AM onwards)
- External meetings in Delhi office (including video calls)
- District visits



#### MEN

- ✓ Front button collared shirt
- ✓ Trouser (not necessarily pleated)
- ✓ Blazer/Nehru jacket/Long coat/Muffler
- ✓ Polo neck sweater/Pullover/Cardigan
- ✓ Loafer/Oxford/Chelsea boot
- ✗ Bold prints/Flashy colours
- ✗ Accessories/Piercing
- ✗ Tight or ill-fitted garment
- ✗ T-shirt/Kurta/Jeans
- ✗ Denim or Leather jacket



#### WOMEN

- ✓ Collared shirt/Tops/Kurtis/Kurta/Saree/Suit
- ✓ Trouser/Business skirt or dress/Plain legging
- ✓ Blazers/Nehru jacket/Long coat/Shawl
- ✓ Polo neck sweater/Cardigan
- ✓ Pump/Belly/Ankle-length boot
- ✗ Bold prints/Flashy colours
- ✗ Clunky or Flashy accessories
- ✗ Tight or ill-fitted garment
- ✗ Tank top/Noodle strap top/Sweatshirt
- ✗ Denim or Leather jacket

### SMART CASUALS

**Where to wear:**

- Internal meetings in Delhi office (including video calls)
- Org Forums (Townhalls, Gurukul, Sanskar etc.)



#### MEN

- ✓ Mandarin/Polo/Round neck shirt or T-shirt
- ✓ Jeans/Kurta pyjama
- ✓ Denim or Quilted jacket/Sweatshirt
- ✓ Sandal/Sneaker
- ✗ Bold prints/Flashy colours
- ✗ Accessory/Piercing
- ✗ Tight or ill-fitted garment/V-neck shirt
- ✗ Shorts/Cargo pants



#### WOMEN

- ✓ Polo or Round neck T-shirt/Casual top
- ✓ Jeans/Skirt/Palazzo
- ✓ Denim or Quilted jacket/Sweatshirt
- ✓ Knee-length boot/Peep toes/Sneaker
- ✗ Bold prints/Flashy colours
- ✗ Clunky or Flashy accessory
- ✗ Tight or ill-fitted garment
- ✗ Tank top/ Noodle strap top/Crop top

### GENERAL NORMS



Men must ensure a trimmed hairdo & women must ensure a neat hairdo



Men must either keep a clean shave or a well-groomed & trimmed beard



Everyone must ensure wearing well-ironed clothes

## Google Account Management Policy: Email, Data and Groups

### Overview

Every team member at Samagra has a G-Suite business account. This policy pertains to the email, data and groups associated with these google accounts, and guidelines for their management at different levels of a team member life cycle.

### Email Management

This section is relevant at the time of a team member leaving the organization. Please note the following:

1. The email id of the exiting team member would be suspended on exit+1 week.
2. For extension on non-suspension of email account due to pending engagement deliverables, please share an approval email at [org@samagragovernance.in](mailto:org@samagragovernance.in) before the date of exit.
3. Suspended email ids of exit team member will be deleted in 2 months from date of exit.
4. Email data will not be transferred or stored in any drives for posterity.

### Data Management Process

#### Guidelines for Data Management

All data related to the firm (engagement / non-engagement related) shall be saved on [shared drives](#), an organizational structure within Google Drive. In case a shared drive needs to be set up, kindly follow [these](#) steps. Please note that all **government, funding partner and implementation partner data is confidential and a property of Samagra** and therefore must be handled prudently. Following steps must be followed by all managers and team members at different stages in Samagra:

#### For Team Members

1. When on an engagement:

Save all engagement related data in the team shared drive only.

2. While transitioning to another engagement:

Please save/transfer all data related to the previous engagement in the engagement-specific shared drive before transitioning out. Please ensure no data of previous engagement stays in the “My Drive” section of your google account.

3. While Exiting the organisation:

- a. All engagement related data must be saved either in a shared drive or [transferred](#) to the concerned manager before the date of exit.
- b. Ownership of all confidential files that can't be put on shared drive must be transferred to the concerned manager.
- c. All personal data must be transferred to the individual's local machine or google drive associated with personal email id. It must be deleted from the official drive.
- d. In case unassigned data related to old/inactive engagements remain in the drive; then the ownership of such key documents must be transferred to [archive1@samagragovernance.in](mailto:archive1@samagragovernance.in).
- e. Must ensure that the official google drive is empty and does not have any personal or unassigned official data. Any data left unassigned in the drive will be deleted after 2 months from their date of exit.
- f. **Must not delete** any official data from samagra drive.
- g. Must ensure before exiting that their local machines do not have any official data stored.

### For Managers

1. When on an engagement:

- a. Must ensure the usage of shared drive in the team.
- b. Must add new team members to the shared drive giving them appropriate access levels.
- c. Must revoke the access of transitioning/existing team members to the shared drive.

2. While transitioning to another engagement:

- a. Must hand over the access to the engagement shared drive to the new manager taking over the role.
- b. Must ensure to transfer all engagement/relevant data to the relevant shared drive before transitioning out.

3. While Exiting the organisation:

- a. Must transfer the ownership of all confidential files and collaterals to the new manager.
- b. Must hand over complete access of the engagement shared drive to the new manager.
- c. In case unassigned data related to old/inactive engagements remain in the drive; then the ownership of such key documents must be transferred to [archive1@samagragovernance.in](mailto:archive1@samagragovernance.in).
- d. Must ensure that their official G-drive is empty and does not have any personal or unassigned official data. Any data left unassigned in the drive will be deleted after 2 months of their last day.
- e. **Must not delete** any official data from samagra id or google drive.
- f. Must ensure that their local machines do not have any official data stored before leaving.

## Engagement Drive Structure

All engagement folders will have the following drive structure.

1. Stakeholder Engagement
  - 1.1. Government
    - 1.1.1. Cast of Characters
    - 1.1.2. Review meetings
      - 1.1.2.1. Divisional review meetings
      - 1.1.2.2. Department review meetings
      - 1.1.2.3. VCs
    - 1.1.3. CM
    - 1.1.4. Govt leader 1 (*Eg: Dr Garg for ADAPT, Dr Gupta for SH Emp*)
    - 1.1.5. Govt leader 2
  - 1.2. Funding partners
    - 1.2.1. Funding partner 1
    - 1.2.2. Funding partner 2
  - 1.3. Implementation Partners
    - 1.3.1. Partner organisation 1
    - 1.3.2. Partner organisation 2
  2. Team Processes
    - 2.1. Step back
    - 2.2. Weekly Planning (*This can just be a document/excel in place of the folder*)
    - 2.3. Monthly Planning (*This can just be a document/excel in place of the folder*)
    - 2.4. Weekly Review (*This can just be a document/excel in place of the folder*)
    - 2.5. Onboarding
    - 2.6. Handover
  3. Workstreams

- 3.1. Workstream 1
- 3.2. Workstream 2
- 4. District visits
- 5. Townhall & Sanskar
- 6. Outreach
  - 6.1. Engagement Overview
  - 6.2. Awards
  - 6.3. News articles & press conference
  - 6.4. Pictures & videos

#### Clarifications-

1. Please changes folder names to relevant names for your programme
2. Only the main folder is mandatory
3. Teams may further create sub-folders
4. If certain folders are not relevant to the team, please remove them
5. Only the latest versions of collateral should go on the new folder structure. WIP collaterals can be left in the old folder
6. Design, diagnosis and research related documents for a workstream can be part of respective workstream folder (#3)
7. Please ensure the file name has an intuitive ‘keyword’ which is easily searchable

#### **Group Management Guidelines**

G-suite provides a feature to create mailing groups which assists in smooth email communication within engagement teams or teams created for a specific vertical within the organisation. The list of current groups can be accessed [here](#).

For creation of new groups or addition/deletion of a member from existing groups, please reach out to [org@samagragovernance.in](mailto:org@samagragovernance.in).

#### **Support**

For any support/queries regarding the above, please reach out at [org@samagragovernance.in](mailto:org@samagragovernance.in)



# Guidelines for MS Office Subscription

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Every Samagra team member who is proficient with MS Office suite and mostly uses it for their everyday work, now has the option to take up a paid subscription which will open up many privileged features which are otherwise not available in the free version.

Please follow the below steps to subscribe:

1. Every team manager (Program Lead / Manager / Coordinator) can subscribe for the [MS office family plan](#) after aligning with Sanchita. It is priced at Rs. 6199/- annually for a maximum of 5 team members including oneself.
2. The Office Manager shall maintain a record of all purchased licenses, its members and decide on which license can be used by which team member.
3. In line with point 2, any team member who needs to renew / purchase a Microsoft Office license, should reach out to Office Manager on WhatsApp or at [org@samagragovernance.in](mailto:org@samagragovernance.in). The Office Manager shall check the available licenses and provide one to the team member.
4. This expense can either be charged by the team manager on their Happay card or be reimbursed through Happay expense.
5. Additionally, a team member will have to forego the license at the time of exit from the organisation.

This policy shall be in effect starting from 5th Oct 2020. Please refer to the [expense guidelines](#) for further details on the reimbursement process.

## Laptop Provisioning Policy

### Overview

This document lists the standard laptop provisioning policy, applicable to only Engineers and Graphic Designers at Samagra. All other team members at Samagra will be required to use their own laptops for official work.

### Laptop Model

- The firm will provide all team members, on the Engineering Track, with a 13" Macbook M2 Pro (16GB + 256GB SSD Storage) at the time of joining.
- The firm will provide all team members, playing the role of Graphic Designers under the Specialized Track, with a Dell G3 3500 Gaming 15.6" (10th Gen Core i7-10750H/8GB/512GB SSD) laptop at the time of joining.
- In addition to the laptop, team members on the Engineering Track can raise a request at [org@samagragovernance.in](mailto:org@samagragovernance.in) for a monitor if required.
- The cost for no other peripherals such as mouse, keyboard etc., will be borne by the firm.

### Terms & Conditions

- **Ownership**
  - Once the battery completes 1000 cycles, the firm will replace the laptop in exchange for the old laptop.
  - The ownership of the laptop will be with the firm. At the time of exit from the firm, the team member would need to hand over the laptop to the Org Development team.
- **Repair/Return**
  - The firm will bear the cost for only battery replacement/repair.
  - Laptops will be insured by the firm through standard insurance / warranty schemes of Apple / Dell.
  - For any other repair/maintenance that is not covered under insurance / warranty, the cost will have to be borne by the team member.
  - The cost of repair towards any damage to the laptop due on the team member at the time of exit from the firm will be adjusted from the final salary disbursal.

## Profit-Sharing Policy

The Profit-Sharing Policy defines the mechanics of **annual profit sharing in proportion to accumulated "Samagra Points"**. The sharing of profits based on the Samagra Points has been designed to incentivize tenure, performance, and growth / seniority of team members in the organization.

### Date of effect

This policy will come into effect from **FY 22-23**

To begin with it is valid till **FY 25-26**, when it may undergo revisions

### Qualifying requirements

Applicable for the designation of **Senior Consultant and above** as per tables laid out in the Annexure. This policy is applicable for the Consulting Track, X Track & CEO's Office Track.

### Samagra Points calculation

- Profit-Sharing has been devised as a function of 3 parameters:
  - Tenure in the firm
  - Annual performance rating
  - Designation of the individual
- Samagra Points will be awarded to team members during the March appraisal cycles every year
- Samagra Points will be accumulated over the years as per the following formula:
  - **Total Samagra Points = Samagra Points (up to previous FY) + (Rating\*Rating Multiplier)**
- 'Rating' will be the annual performance rating calculated as avg. of Sept, Mar ratings in that FY
- 'Rating Multiplier' will be a function of designation held at the time of appraisal in March cycle:
  - Refer to [Annexure](#) to see mapping of designations to rating multipliers

### Profit-Sharing mechanics

- At the time of appraisal discussions, team members will be informed of their rating
- Samagra Points can then be calculated by the individual based on the formula
- Once the appraisal cycle is complete across the firm, the total profit share for the year and the total of Samagra Points in the firm (across all team members) will be declared in April
- Individual share of profits can then be calculated by the individual as per the following formula:
  - **Individual profit share (for a given FY) = (Total Samagra Points of individual / Total Samagra Points in the firm)\*Total profit share (for a given FY)**
- There shall be no separate communication around individual share of profits
- There shall be no separate component of performance bonus in the annual compensation

### Process applicability in case of Vidya

In case a team member is pursuing their masters via the **Vidya** program:

- Team members will continue to retain their Samagra Points (if any) while pursuing their program
- No additional Samagra points will be awarded while they are pursuing their program
- Once the team members join back the firm, they'd start from the same Samagra Points

### **Profit-Sharing in case of new joinees**

For the first year of applicability of the Profit Sharing Policy for an individual:

- As a safeguard, team members would receive the maximum between the *performance bonus (awarded as 1x, 2x, 3x monthly compensation based on annual performance rating)* and *the profit share as per Samagra Points*
- In case of lateral hiring, at Senior Consultant level and above, the firm may choose to allocate some starting Samagra Points to a recruit at the time of joining

### **Profit-Sharing in case of exit from the firm**

- If the team member is eligible for a rating in the March cycle as per the exit policy, (s)he shall also be eligible for Profit-Sharing as per the above policy
- All Samagra Points will lapse when a team member exits the firm

### **Annexure: Designation Mapping across tracks**

*Table 1 - Designation Mapping*

*Please refer to [this sheet](#) for designation mapping across the tracks.*

*Table 2 - Multiplier Table*

*The multiplier for the consulting track designations is provided below. Multipliers for designations in other tracks will be mapped using the above sheet.*

#	Designation (Consulting Track)	Multiplier
1	Sr Consultant	<b>2</b>
2	Manager	<b>4</b>
3	Sr Manager	<b>8</b>
4	VP	<b>10</b>
5	Partner	<b>40</b>

## Referral Policy

1. A referral bonus in the form of an iPhone14 Mini - 256 GB or an iPhone 14 - 128 GB will be awarded to the referee once the candidate joins and has given his/her introduction PPT in the townhall.
2. This policy is only for referring to the positions of **consultants** and **associates**.
3. If one or more employees refer to the same candidate, only the firstreferrer will receive the referral rewards.
4. If the person's profile already exists in the Recruitment database, it will not be considered as a referral under this policy.
5. Rewards are subject to standard taxation.
6. To be eligible, the resume should be submitted only through the [referral form](#).

## Samagra's Policy for Prevention of Sexual Harassment at Workplace

### SECTION 1: DEFINITIONS

In this document, unless specified otherwise:

1. "Act" refers to the Sexual Harassment of Women at Workplace (Prevention, Prohibition and Redressal) [Act](#) 2013;
2. "Policy" refers to this document;
3. "Sexual Harassment" would mean such unwelcome sexually determined behavior by any person either individually or in association with other persons or by any person in authority whether directly or by implication such as –
  - a. Sexual heckling, forced and/or abusive proposition;
  - b. Unwelcome sexual overtures over electronic media
  - c. Groping or brushing or unwelcome physical conduct against any part of the body and the like;
  - d. Displaying pornographic or other offensive or sexually colored derogatory pictures, cartoons, pamphlets, or sayings in public places;
  - e. Exposure of genitalia in public/workspaces;
  - f. Forceful physical touch or molestation;
  - g. Physical confinement against one's will and any other act violating one's privacy, such as stalking and voyeurism
  - h. Virtual online harassment;
  - i. Implied or explicit promise of preferential treatment in employment if connected with any sexual behavior
  - j. The implied or explicit threat of detrimental treatment in employment (if connected with any sexual behavior)
  - k. The implied or explicit threat about their present or future employment status (if connected with any sexual behavior)
  - l. Interference with the complainant's work or creating an intimidating, hostile, or offensive work environment (if connected with any sexual behavior)
  - m. Humiliating treatment likely to affect the complainant's health or safety (if connected with any sexual behavior)

- n. Any other unwelcome physical, verbal or nonverbal conduct of a sexual nature, as the case may be;
- 4. “Complainant” The Complainant refers to the individual filing the complaint. This includes anyone associated with Samagra in a full-time/part-time capacity as a permanent or temporary employee, contractor, client, partner, consultant, vendor, intern or volunteer who has experienced any of the above, irrespective of sex, gender, age, designation, marital status, or class.
- 5. “Respondent” refers to those who have been accused of perpetrating any of the above, irrespective of sex, gender, age, designation, marital status, or class. This includes anyone associated with Samagra in a full-time/part-time capacity as a permanent or temporary employee, contractor, client, partner, consultant, vendor, intern or volunteer. The respondent can also be an ex-employee,
  - (i) Often employees come in connection with third parties like vendors, consultants, customers, and such other non-employees who have a work-related association with the workplace/organization. If any such third party becomes the respondent, then the Respondent’s Employer must launch an inquiry upon receipt of a complaint or report to the police as appropriate. When such a third party constitutes the Respondent, the Complainant can either approach their Employer with a complaint or file a report with the police / the local committee / the respondent's IC committee with reasonable assistance from their employer.
- 6. “Organisation” refers to Samagra Development Associates P. Ltd;
- 7. “Employer” refers to the person(s) responsible for the formulation and administration of policies of Samagra Development Associates P. Ltd. irrespective of whether terms of employment exist or not.
- 8. “Samagra team member” refers to a person employed in or working as a consultant for Organisation for any work on a regular, temporary, ad hoc, or daily wage basis, whether for remuneration or not, or working voluntarily or otherwise, irrespective of whether the terms of employment are express or implied.
- 9. “Workplace” refers to any place visited by the Samagra team members (legally an employee or independent consultant at Samagra) arising out of or during employment, including transportation provided either implicitly or explicitly by the Organisation for undertaking such journey.
- 10. “Guest House” refers to any place provided by Samagra Development Associates for the boarding or lodging of one or more of its Samagra team members (legally an employee or independent consultant at Samagra).
- 11. “Internal Complaints Committee (ICC)” refers to any committee constituted by Samagra Development Associates under Section 4 of the Sexual Harassment of Women at Workplace (Prevention, Prohibition and Redressal) Act 2013.

12. “Crisis Situation” refers to any case of sexual harassment where the complainant has been subjected to physical harm (rape/assault/attacks of any kind) or has reasonable grounds to expect imminent physical harm from a harasser with sexual intent, and/or is unable to access such places/spaces as demanded by the organization for fear of their safety from such a harasser.

## SECTION 2: SCOPE

- 1) In response to The Sexual Harassment of Women at Workplace (Prevention, Prohibition and Redressal) Act, 2013 (hereinafter referred to as the Act) the Company has introduced a Sexual Harassment Policy (hereinafter referred to as Policy). This Policy is separate from and in addition to policies relating to anti-harassment or any such other policy.
- 2) This is a gender-neutral company policy and applies to all categories of employees, whether permanent or on contract, and at their workplace or client sites. All complaints will be dealt with a just and fair manner and may have serious consequences. The Company will not tolerate any form of sexual harassment engaged in by clients or by suppliers or any other business associates and is committed to taking all necessary steps to ensure the safety and well-being of all employees and associates. The existing Policy has been revised by incorporating the rules and procedures as mandated in the Act.
- 3) This is an internal policy for the organization and has been drafted as per the provisions of the Act. However, Policy has been extended to include an Independent consultant raising the bill to the company. As such, this policy is to be read in conjunction with the Act, and where there is a discrepancy, the Act shall prevail.
- 4) The jurisdiction of this policy extends to the following:
  - a) The organization’s Internal Complaints Committees;
  - b) The organization’s team members (Legally Employees or Independent Consultants) and employers insofar as they are in the organization’s workplace or Guest Houses.

## SECTION 3: INTERNAL COMPLAINTS COMMITTEE

- 5) The Company has instituted an Internal Complaints Committee (hereinafter referred to as ICC or Committee), for redressal of sexual harassment complaints and for ensuring unbiased and time-bound resolution of complaints in line with these [guidelines](#).
- 6) The ICC is responsible for conducting an inquiry into every formal written complaint of sexual harassment and making recommendations to the Company on the actions to be taken against the Respondent. The ICC will also be responsible for the preparation and submission of the annual report to be submitted to the District Officer or employer and maintain a record of such annual reports.
- 7) The ICC works to protect the interests of the Complainant, Respondent and Witnesses, confidentiality will be maintained throughout any inquiry process to the extent practicable and appropriate under the circumstances. The identities of the Complainant, the Respondent and Witnesses involved with the process is kept confidential. Anyone (Witness, Committee Members, Respondent or Complainant) who breaches this clause is liable to be penalized with consequences ranging from a fine of five thousand rupees to additional disciplinary action.

- 8) The ICC is committed to ensuring that no employee who brings forward a harassment concern is subject to any form of retaliation.
- 9) Any employee who retaliates against an employee who has reported in good faith, a sexual harassment claim, will be subject to disciplinary action, which may include dismissal. Any reprisal will be considered as a separate case of harassment. Anyone who abuses this procedure (for example, by maliciously putting an allegation knowing it to be untrue) would also be subject to disciplinary action including dismissal from service.
- 10) In the event that the Complainant or any Witness of the Complainant is being supervised by the Respondent or any of their Witnesses, then such reporting assignments will be changed to the extent possible by the Company the ICC has the power to issue such orders under interim protection.
- 11) As per Section 11(3) of the Act, “For the purpose of making an inquiry under sub-section (1), the Internal Committee or the Local Committee, as the case may be, shall have the same powers as are vested in a civil court under the Code of Civil Procedure, 1908 (5 of 1908) when trying a suit in respect of the following matters, namely:—
  - (a) summoning and enforcing the attendance of any person and examining him on oath;
  - (b) requiring the discovery and production of documents; and
  - (c) any other matter which may be prescribed.

Since IC has been provided certain powers of the Civil Court under the Law, as per which it can summon and enforce the attendance of any person. Therefore, for the purposes of the IC inquiry, the IC can examine anyone, whether they are part of the organization or not.

#### SECTION 4. DEFINITION OF SEXUAL HARASSMENT

- 12) During the inquiry into an incident, it is the impact or effect of the behavior on the Complainant and not the intent of the Respondent that is critical in the ICC taking up the case.
- 13) The following unwelcome acts or behaviors either occurring individually, as a combination of individual acts, or collectively may constitute sexual harassment at the workplace (whether directly or by implication) namely:-
  - a) Physical contact and advances
  - b) A demand or request for sexual favors
  - c) Making sexually colored remarks
  - d) Showing pornography
  - e) Any other unwelcome physical, verbal or non-verbal conduct of sexual nature
- 14) The following circumstances, among other circumstances, if it occurs or is present or connected with any act or behavior of sexual harassment may amount to sexual harassment:-
  - a) Implied or explicit promise of preferential treatment in the employment
  - b) The implied or explicit threat of detrimental treatment in the employment
  - c) The implied or explicit threat about the present or future employment status

- d) Interference with work or creating an intimidating, offensive, or hostile work environment
  - e) Humiliating treatment likely to affect health and safety
- 15) In addition to the above, the following acts below are also considered sexual harassment in the workplace. This includes but is not restricted to,
- a) Unwelcome sexual advances (verbal, written, or physical)
  - b) Sexually colored remarks, including but not limited to vulgar/indecent jokes; innuendos or taunts; letters, phone calls, text messages, e-mails with a sexual message, and sexually suggestive gesture
  - c) Showing pornographic content or the like
  - d) Any other unwelcome physical, verbal, or nonverbal sexually-oriented conduct, including but not limited to teasing, voyeurism, physical confinement
  - e) Unwelcome physical contact and advances such as touching, stalking, sounds that might have implicit/explicit sexual connotation/overtones

Ignorance of this Policy will not be considered an excuse during an incident.

## SECTION 5. RESPONSIBILITIES REGARDING SEXUAL HARASSMENT

- 16) All employees of the Company have a personal responsibility to ensure that their behavior is not contrary to this Policy. All employees are encouraged to reinforce the maintenance of a work environment free from sexual harassment.
1. Management & Team Managers' responsibilities
    - Create and maintain a working environment in which all employees feel respected
    - Be alert to observe any inappropriate conduct or comments
    - Refer to the Internal Complaints Committee by this Policy, when instances of sexual harassment which occur within the workplace are brought to their attention
  2. Employees' responsibilities:
    - Read and understand the Policy document
    - Take reasonable care not to offend co-workers and associates through one's actions or behavior
    - Take responsibility to discourage unwelcome conduct that is offensive, degrading, or humiliating
    - Know who is on the Committee
    - Cooperate in the inquiry of complaints when called to do so
    - Maintain confidentiality at all times if you are involved in or have access to information related to any complaint that is raised

## Samagra Entry & Exit Policy

### Overview

The objective of the policy is to cover the norms governing the entry or exit of any team member at Samagra. The policy aims at protecting the team member's rights and at the same time the interest of the organization. All team members involved at any stage of the exit should be aware of and adhere to the contents of this policy.

### Scope

This policy applies to all team members - permanent employees as well as those with at least 1-year contractual commitment to the firm.

### Probation

Every new team member will be put on probation for the first 3 months of their service in the organization counted from the date of joining. At the end of the third month, the team member will be informed whether or not s/he has successfully crossed the probation period based on his/her performance.

The team member can take upto 3 leaves during the probation period, the remaining leaves will be accrued and can be availed post the probation. The 3 leaves will include planned / emergency/ sick leaves etc but will not include wedding/maternity/paternity leaves. Leaves are to be planned in advance in consultation with the concerned manager to the extent possible. Leave encashment is not applicable if exit takes place within the probation period.

Incase of termination or resignation during/at the end of probation period, the applicable notice period will be of 1 week (5 working days). No leaves will be permitted during notice period.

### Types of exit

1. **Self-initiated:** The team member voluntarily resigns from the organization.
2. **Firm-initiated:** The firm initiates the termination of a team member on account of non-performance, unauthorized absence (absconding) or on behavioral grounds.

Version 3: Last revised in March 2023

## Eligibility for Mid-year Appraisal

In case of self-initiated exit, team members who resign on or before **30th September** will not be eligible for mid-point appraisal.

For those availing the Vidya program, team members whose date of leaving is before **1st September** will not be eligible for year-end appraisal & bonus (profit sharing in case of Sr Consultant & above).

## Eligibility for Year-end Appraisal

In case of self-initiated exit, team members who resign on or before **31st March** will not be eligible for year-end appraisal & bonus (profit sharing in case of Sr Consultant & above).

For those availing the Vidya program, team members whose date of leaving is before **1st March** will not be eligible for year-end appraisal & bonus (profit sharing in case of Sr Consultant & above).

### Exit process:

1. The team member must first discuss and align with the Program Lead upon deciding to exit from the organization.
2. Post that, an exit request must be raised on [Zoho people](#) to intimate the Org Development team regarding the resignation and the last day of work.
3. The team member will be expected to ensure compliance to all pre and last day formalities as per the [exit checklist](#) - marking in the checklist as and when formalities are completed; dropping a mail at [org@samagragovernance.in](mailto:org@samagragovernance.in) on the last day post completion of all formalities.

### Notice Period:

1. Notice period criteria in case of **self-initiated exit** as well as **firm-initiated exit**;
  - a. Program Associate or equivalent role: **1 month**
  - b. Program Coordinator / Program Manager or equivalent role: **2 months**
2. The **notice period** in either of the two cases (self or firm initiated) could be **shorter** based on mutual alignment between the team member and Program Owner, and the program situation.
3. Team members in the role of Program Associate / Program Coordinator / Program Manager or any other equivalent role **can take upto 5 leaves** (*if available in the team member's leave balance in line with the leave policy*) while serving the notice period. These leaves are to be planned in advance in consultation with the concerned manager to the extent possible

## Samagra - Group Health Insurance

### General Details

The purpose of this document is to cover the highlights of the Group Health Insurance Policy and document the process for onboarding and claim

- Group Health Insurance policy
- Addition and Deletion from Insurance
- Downloading Health Card
- Claim Process
  - Cashless Claim
  - Reimbursement Claim
- Important POCs

### Group Health Insurance Policy

Samagra provides health insurance for all the team members working with the firm. Currently, Samagra has taken the ICICI Group Health Insurance. Below are a few highlights about the policy coverage. For detailed information the policy document can be accessed [here](#).

### Policy Highlights

- ❖ The policy covers only team members and not dependents.
- ❖ The total coverage amount is INR3,00,000/-
- ❖ COVID19 related hospitalization expenses are also included under the policy (with certain exclusions such as home / institutional quarantine etc.)
- ❖ Pre-existing diseases will be covered (with few exclusions as mentioned in policy document)
- ❖ No capping on room rent (Single private room)
- ❖ No waiting period
- ❖ Policy will expire on the termination of team members engagement with Samagra
- ❖ Cashless treatment facility available at empanelled hospitals across locations.

### Addition and Deletion Process

The registration of new joinees at the time of joining and removal of exiting team members at the time of leaving from the policy shall be taken care of by the organization.

## Downloading Health Card

The following steps can be followed by all team members to download their health card from the ICICI Lombard site.

1. Go to the ICICI Lombard portal: <https://ilhc.icicilombard.com/Customer/iCard>
2. Select the "Corporate" option
3. Fill in the Emp/Consultant ID(refer this [sheet](#)), Date of Birth (only provide DOB and not age) and Company Name (Samagra).
4. Save the soft copy as well as print a hard copy of the card for using at time of hospitalization.

## Claim Process

### Cashless Claim

- ❖ All empanelled hospitals will have cashless hospitalization facilities available.
- ❖ To check the empanelled hospital in different cities refer [here](#).
- ❖ The health card needs to be provided at the TPA helpdesk at the empanelled hospital and the rest will be coordinated between ICICI Lombard and the hospital.

### Reimbursement Claim

If a hospital is not empanelled with ICICI Lombard, then the insured has to pay the hospital and later get the cost reimbursed from the insurer.

- ❖ Fill the appropriate claim form (follow this [link](#))
- ❖ Attach all original hospital bills, procedural bills and doctors prescriptions
- ❖ Courier the docket to local ICICI Lombard office
- ❖ Incase unable to figure out the local office, speak with one of the POC's

## Important POCs

### Insurance Coordinator:

Name: Secure Now

Contact: 9696683999

Email: [support@securenow.in](mailto:support@securenow.in)

### Samagra Coordinator:

Name: Sanchita Dasgupta

Contact: 8800664286

Email: [sanchita@samagragovernance.in](mailto:sanchita@samagragovernance.in)

List of Holidays for 2023**			
#	Day	Date	Holiday
1	Jan 26, 2023	Thursday	Republic Day
2	Jan 27, 2023	Friday	
3	Mar 8, 2023	Wednesday	Holi
4	Aug 14, 2023	Monday	Independence Day
5	Aug 15, 2023	Tuesday	
6	Aug 30, 2023	Wednesday	Raksha Bandhan
7	Oct 2, 2023	Monday	Gandhi Jayanti
8	Oct 23, 2023	Monday	Dussehra
9	Oct 24, 2023*	Tuesday	
10	Nov 12, 2023*	Sunday	Diwali
	Nov 13, 2023	Monday	
11	Dec 25, 2023	Monday	Christmas
12	Apr 7, 2023	Friday	Good Friday
	Jun 29, 2023	Thursday	Bakrid
	Nov 14, 2023	Tuesday	Bhai Duj
	Nov 27, 2023	Wednesday	Guru Nanak Jayanti
*Date of actual festival/day			
**1st Jan 2024 (Monday) to be considered for 2024 holiday calendar			
Optional: Any one out of the four can be availed as the 12th Holiday			

## Samagra Leave Policy

### Overview

The purpose of this document is to enlist all the types of leaves **Samagra team members (permanent / contractual) across designations** are eligible for and detailing out the process of availing appropriate leaves whenever required.

### Types of leaves

As a full-time Samagra team member across designations, one is entitled to the following paid leaves in the calendar year (January to December of a given year):

- **Public Holidays:** At the beginning of every calendar year Samagra will release the holiday calendar consisting of around 12 holidays (as applicable) planned in advance by the management (*Refer to the [holiday calendar](#) to view list of holidays for current calendar year*).
- **Planned/Emergency Leaves:** Every team member is entitled to 22 days of planned/ emergency leaves in a calendar year, which can be availed at any point in the calendar year. These leaves are to be planned in advance in consultation with the concerned manager to the extent possible.
  - At the end of every calendar year, out of 22 only 15 leaves are encashable and can be carried forward.
  - Carry forward balance at the end of the year will be calculated as follows:
    - $15 - x$  ( $x$  = no. of leaves taken from January to December)
  - Team members can avail a full / half day leave as per their requirement.
  - Maximum unavailability in one go (on account of leaves) can not be more than 2 weeks. These 2 weeks are inclusive of weekends / public holidays / leaves.
  - Leaves would be allocated on a pro-rata basis if one joins in the middle of the calendar year.
  - Leaves can be accumulated and carried forward upto a total of 45 days. Leaves accumulated in excess of 45 days will be encashed in the next applicable payment cycle.
  - In case a team member's leave balance at the end of the calendar year runs in the negative, adjustments will be made in the salary of the team member at the end of the calendar year, if not earlier.
  - In case a team member leaves in the middle of the calendar year, leaves availed will be adjusted against leave quota calculated on a pro rata basis till that point in the year. If at the time of exit, the leave balance runs in the negative, adjustments will be made in the last due salary pay-out of the team member.
  - In case a team member exits the firm before completing 3 months from the day of joining, they will not be eligible for leave encashment.

- **Transition Leave:** A team member, who transitions to another program in a given year after spending at least 9 months full-time on the previous program, is eligible for upto 5 days of transition leaves (paid leaves).
  - It can be availed only either before joining the next program or sometime within 3 months of joining the next program.
  - It should be availed in one go and cannot be spread out during the eligible period.
  - It must be availed independently and cannot be clubbed with any other leave.
  - Transition leaves lapse in case not utilized within the prescribed time period.
- **Wedding Leave:** Every team member can avail upto 3 weeks (15 working days) of paid wedding leave whenever applicable. It can be clubbed along with Public or Planned Leaves. It must be planned and aligned at least 90 days in advance.
- **Maternity Leave:** All female team members who have worked for at least 80 days within the past 12 months are entitled to 26 weeks of continuous paid maternity leave whenever applicable. It can be clubbed along with Public or Planned Leaves.
- **Paternity Leave:** All male team members who have worked for at least 80 days within the past 12 months are entitled to avail upto 4 weeks of paid paternity leave within 6 months of the delivery date. The leaves can be availed together or in parts. It can be clubbed along with Public or Planned Leaves.
- **Sabbatical (Unpaid):** Any long leave more than 2 weeks (including weekends/public holidays) excluding wedding, maternity, and paternity leaves, will be considered as sabbatical. Sabbatical is a long time to be away from your job. The management will need to plan for your absence and your return to work accordingly.
  - A team member who has completed atleast 1 year of continuous service in the organization is eligible for a Sabbatical.
  - Maximum 6 weeks of Sabbatical can be availed.
  - Sabbatical cannot be clubbed with any other type of leave.
  - It must be planned and approved by the respective Program Lead and CoS (Chief of Staff) atleast 90 days in advance over email. Upon approval, the team member can apply for Sabbatical via Zoho.
  - A sabbatical must be taken in one continuous period. It cannot be split into several shorter periods or encashed at the time of exit.
  - During the sabbatical period, your leaves will not accrue.

For the purpose of law and rules as applicable, the above leaves are including casual leave/sick leave and privilege leave and have been renamed and incorporated in accordance with the company culture.

### Leave Application Process

The following process should be followed for leave application-

- Align with your manager (in person or on phone) on leave dates as per the prescribed timelines.

- Apply for leaves on [Zoho people](#) portal as per the available leave category. Only incase of Transition and Sabbatical Leaves raise a ‘Leave Grant’ request for it to be available as an additional leave category whenever applicable.
- Follow the User guide to navigate through the application

### Attendance

- An employee attendance record will be maintained to keep track of leaves availed by employees each month.
- There will be a reminder to log all leaves by 23rd of the month on Zoho. Any remaining unrecorded leaves must be filled in by the 23rd of each month.

### Leaves during Probation Period

- Maximum of 3 leaves can be availed during probation period; the remaining leaves will be accrued and can be availed post the probation.
- These will include planned / emergency/ sick leaves etc.
- These leaves are to be planned in advance in consultation with the concerned manager to the extent possible.

### Leaves during Notice Period

- Team members in the role of Program Associate / Program Coordinator / Program Manager or any other equivalent role can take upto 5 leaves (*if available in the team member's leave balance in line with the leave policy*) while serving the notice period. These leaves are to be planned in advance in consultation with the concerned manager to the extent possible

We strongly encourage everyone to leverage their annual leave allowance, in consultation with their managers, to get personal time away from work for rejuvenation for quality time with closed ones.

## Vidya: Samagra Graduate Study Support Program

Vidya is designed to financially support graduate level study that Samagra team members decide to undertake. This document lays out the policy details.

### Date of effect

Vidya will come into effect from Apr 1, 2022 .

### Programs covered

- All graduate programs, including, but not limited to MBA, MPA, MPP, MS, MA across disciplines
- Graduate programs provided by both Indian and foreign universities are covered
- Duration of the graduate program may vary between 10 to 24 months

### Qualifying requirements

- All Samagra team members who have undergone at least two appraisal cycles at the firm
- All Samagra team members whose rating was 3 or above in each of the last two appraisal cycles

### Financial support

- Team member would receive monthly support for the complete program duration
- Monthly support would be the same as the last drawn monthly compensation
- Time off before or after the graduate program would be treated as sabbatical (unpaid leave)
- No other financial component (including but not limited to performance bonus, profit-sharing) besides the monthly compensation would be applicable during the program duration
- Those having Samagra Points from before would retain their points during their program and continue accumulating more after joining the firm back

### Application process

- Team members can apply for Vidya between 3 to 12 months before the start date of the program
- In order to apply for Vidya, team members must submit this [form](#) which captures details like course, duration, university along with 2 essay-type questions:
  - How will the program add value to the mission at Samagra upon your return?
  - What are your long term (post 5 years after Masters) goals?
- An email must also be dropped to the CEO's office and PO informing them about the application
- Within 1 month of form submission, a conversation will be held with the CEO / Chief of Staff to discuss the application and arrive at a final decision shortly after

### Commitment to the firm

- The team member would return to the firm at the same compensation and same designation held before leaving
- If the funding support has been sought for a period equal to or less than 12 months, then the team member will be obligated to work with the firm for at least a period of 12 months post their graduate program

- If the funding support has been sought for a period more than 12 months, then the team member will be obligated to work with the firm for at least a period of 24 months post the graduate program
- The team member will be expected to serve the above mentioned time period at the firm right after the completion of the program i.e., the team member shall not engage professionally with any other firm in the break
- In case the team member fails to complete the above commitment, he / she shall be liable to pay 1.5 times the amount that was provided by the firm as financial support
- Before the team member leaves for the program, there shall be a discussion to align on activities that they may undertake on campus to contribute to the firm, including not limited to:
  - Authoring articles / doing research with professors on any of the Samagra programs
  - Sharing learnings and experiences from Samagra at the campus and vice versa
  - Facilitating recruitment of students from the cohort for Samagra

#### **Process applicability**

- Team members will not undergo any performance appraisal while pursuing their program
- Team members will continue to retain their Samagra Points (if any) while pursuing their program
  - No addition will be made to Samagra Points while they are pursuing their program
- Upon returning from their program, team members would start with the same Samagra Points

For any queries, please feel free to contact the CEO's office.

## Samagra Core

Samagra Core captures the intrinsics of the organization



### What drives us

**Mission:** Articulates Samagra's goal and the reason for its existence.

*Our mission is to improve the quality of life of citizens through better governance.*

Supporting collateral: [Slide](#) | [Video](#) [35 mins]

### What defines us

**Values:** Define the ethos we practice as an organization in pursuit of the Mission.

*Our values are: Impact First, Excellence, Speed, Perseverance, Humility, Sustainability.*

Supporting collateral: [Slide](#) | [Detailed PDF](#) | [Video](#) [36 mins]

### How we work

**Engagement Model:** Describes the key characteristics of our programs.

*We initiate a program only when there is a strong pull from the government leadership on a topic. Our programs are ~2-3 years long with a clearly defined goal and corresponding success metrics. They involve a combination of administrative and technical initiatives. We focus on first catalyzing and then sustaining change in the system.*

Supporting collateral: [Slide](#) | [Video](#) [14 mins]

**Solution Approach:** Defines our approach to solutioning on programs.

*Our approach combines top-down management consulting for problem structuring with a bottom-up understanding of the governance ecosystem for solution design, and appropriately uses tech & data to enable implementation of solutions.*

Supporting collateral: [Slide](#) | [Video](#) [3 mins]

**Samagra Ways:** Capture our default ways of working on a day-to-day basis across programs.

*Our ways are: Creating heroes in the system, Making life simple for users, Generating momentum in the system, Micro/macro tech enablement, Getting hands dirty, Taking the MVP approach, Extensive pre-work for meetings, Taking things to a logical conclusion, Leaving nothing to chance, Taking people along, Not re-inventing the wheel and Leveraging data for driving initiatives.*

Supporting collateral: [Slide](#) | [Detailed PDF](#) | [Video](#) [30 mins]

### Who we are

**Culture:** Captures the common character of our team members.

*We have a culture of Meritocracy, Indian-ness, Self-improvement, Selfless-support, Impact-orientation, Ownership, and Nurturing; captured by the acronym MISSION.*

Supporting collateral: [Slide](#) | [Detailed PDF](#) | [Video](#) [50 mins]

**Samagra Mindset:** Defines the key characteristics of an effective governance consultant.

*An effective governance consultant is Optimistic, Assertive & bold, Ambitious, Focused on palpable change, Driven, True to commitments, Part of the solution, Growth oriented, Detail-oriented & Professional.*

Supporting collateral: [Slide](#) | [Detailed PDF](#) | [Video](#) [57 mins]

## Samagra Constructs

Samagra Constructs capture the methodology of attaining outcomes on our programs



## Inputs

### **Thoughtful Design**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Video](#) [7 mins]

### **Rigorous Implementation**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Video](#) [2 hr 40 mins]

*District Visits:* [MahaVakya & PanchSutras](#) | [Sample Excel](#) | [Video](#) [35 mins]

### **Program Processes**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Detailed Excel](#) | [Video](#) [47 mins]

*Effective Planning:* [MahaVakya & PanchSutras](#) | [Video](#) [1 hr 30 mins]

### **Professional Development (PD)**

Supporting collateral: [PD Framework](#) | [PD Compendium](#)

*Role Expectations:* MahaVakya & PanchSutras [PA](#), [PC](#), [PL](#) | Videos [PA](#) [1 hr 10 mins], [PC](#) [24 mins], [PL](#) [50 mins]

*Leveraging Gurukuls:* [MahaVakya & PanchSutras](#) | [Video](#) [33 mins]

## Outputs

### **Manifested Quality**

Supporting collateral:

*One-pager:* [MahaVakya & PanchSutras](#) | [Video](#) [1 hr 17 mins]

*Excel Tab:* [MahaVakya & PanchSutras](#) | [Video](#) [18 mins]

*Slide:* [MahaVakya & PanchSutras](#) | [Video](#) [1 hr 14 mins]

*Presentation Making:* [MahaVakya & PanchSutras](#) | [Benchmark Collaterals](#) [4] | [Video](#) [2 hrs]

*Meeting Management:* [MahaVakya & PanchSutras](#) | [Video](#) [2 hrs]

### **Data-backed Progress**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Program Dashboard Sample & Template](#) | [Video](#) [36 mins]

### **Stakeholder Championship**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Stakeholder Benchmarking Framework](#) | [Video](#) [1 hr 17 mins]

### **Actualised Impact**

Supporting collateral: [MahaVakya & PanchSutras](#) | [Video](#) [7 mins]

## Sustained Outcomes

### **Case Study**

Supporting collateral: [Slide](#) | [Detailed PDF](#) | [Video](#) [11 mins]

## Samagra Values

Value	Relevance of this value in Samagra context	Actions
<b>Impact-first</b>	Improvement in the quality of lives of citizens; impact core to Samagra's mission	Give maximum weightage to this parameter when making any decision
		Always shoot for impact rather than working in maintenance mode
		Don't get impatient if impact is not visible in short term
<b>Excellence</b>	Excellence required to solve the complex problems of governance; passion is not sufficient	Do everything (internal / external, big / small) with the lens of excellence
		Demonstrate excellence consistently such that it becomes your brand
		Remember: "When excellence becomes a casualty, mediocrity becomes the norm"
<b>Speed</b>	Government system is dynamic and lacks patience for long-term change; important to move fast	Move at a certain pace to minimise risk of not getting to the outcomes in time
		Keep creating wins for stakeholders to maintain their focus through the transformation journey
		Move fast but don't be too disruptive in driving change as the system may collapse
<b>Perseverance</b>	Sustained efforts over time required to drive state-wide transformation programs	Don't let set-backs deter your commitment
		Keep trying new things - pick up one battle at a time
		Acknowledge that transformation takes patience and time
<b>Humility</b>	Not the only good doers in the impact ecosystem; multiple entities doing their bit	Be grounded and speak to government stakeholders / implementation partners / beneficiaries
		Acknowledge the multiple factors that play a role in creating impact
		Keep government stakeholders and implementation partners at the forefront of the transformation
<b>Sustainability</b>	Enable the government to make long-term impact on citizens' lives and not a short-lived success story	Keep long term sustainability of initiatives in mind while designing / implementing an initiative
		Build ownership of government stakeholders right from the beginning
		Have a well-defined plan for smooth handover of program / initiatives to the government

Samagra Way	Meaning
<b>Creating heroes in the system</b>	<ul style="list-style-type: none"> <li>- Identifying and nurturing leaders within the government system aligned to program/ initiative goals and working towards achieving them</li> <li>- Creating opportunities to motivate and enable them to unlock their potential</li> <li>- Identify ways of publicly recognising and appreciating them</li> <li>- These 'heroes' will further influence and inspire others to work towards the same goals and increase overall impact on the field</li> </ul>
<b>Making life simple for the users</b>	<ul style="list-style-type: none"> <li>- Designing all outputs (solution design, forms, sheets, trackers, meetings) and initiatives and executing them with the end user in mind- basis context can be teacher, student, farmer, ITI trainee or government stakeholder, funder</li> <li>- Attempting to constantly understand the life of the end user better through conversations/ meetings with department officials and meeting end users during field visits to incorporate learnings in solutioning</li> </ul>
<b>Generating momentum in the system</b>	<ul style="list-style-type: none"> <li>- Enabling the system in converging efforts towards a common goal</li> <li>- Using interventions, events (state / division / district level) and strategies such as gamification to generate enthusiasm and momentum within the government ecosystem</li> <li>- Generating "critical mass" to get the "elephant" i.e, government system to overcome the inertia and move quickly</li> <li>- Energizing overall system especially on-ground officials to come up with innovative initiatives based on local context to further strengthen impact</li> </ul>
<b>Micro / macro tech enablement</b>	<ul style="list-style-type: none"> <li>- Leveraging easy to use/ low cost tools such as Google Forms, WhatsApp, Excel etc to drive initiatives</li> <li>- Building good tech products/ applications or getting them built through government to solve for complex problems innovatively</li> <li>- Focusing on tech enablement to create efficiency, standardisation and transparency in the system</li> </ul>
<b>Getting hands dirty</b>	<ul style="list-style-type: none"> <li>- Getting involved end-to-end and till the last level of detail</li> <li>- Experiencing on-ground situations that help come up with grounded solutions and demonstrating practicality of solutioning to stakeholders</li> <li>- Doing everything that is necessary to achieve the outcome of the engagement / initiative, while keeping the lens of sustainability on to ensure capacity building of government stakeholders</li> </ul>
<b>Taking the MVP approach</b>	<ul style="list-style-type: none"> <li>- Prioritising implementing a simple, minimum viable product (MVP) for a use case to get to the right solution faster (based on the philosophy of fail fast)</li> <li>- Demonstrating idea using MVP, evolving it over time basis feedback, resource availability and changing requirements</li> </ul>
<b>Extensive pre-work for meetings / events</b>	<ul style="list-style-type: none"> <li>- Preparing extensively for all meetings (Senior government leader/ junior government stakeholder/ funding partner ) including taking care of:           <ol style="list-style-type: none"> <li>Flow of the meeting</li> <li>Pre-alignment of key stakeholders</li> <li>Oral preparation for the meeting</li> <li>Collateral needed for different stakeholders and its timing during the meeting</li> <li>Key Decisions to be driven out of the meeting</li> </ol> </li> </ul>
<b>Taking things to logical conclusion</b>	<ul style="list-style-type: none"> <li>- Controlling the journey of an initiative till its end outcome is achieved</li> <li>- Ensuring the initiative sustains over time without the requirement of an external nudge</li> </ul>
<b>Leaving nothing to chance</b>	<ul style="list-style-type: none"> <li>- Planning and executing end to end for all forums (reviews, product launch, CM event etc.) accounting for all factors that can hamper the outcomes</li> <li>- Minimising assumptions and pre-empting all bottlenecks, externalities, risks</li> </ul>
<b>Taking people along</b>	<ul style="list-style-type: none"> <li>- Co-working/ co-opting government stakeholders and implementation partners at each step of the journey to leverage their expertise in designing &amp; implementing a solution effectively</li> <li>- Building a sense of ownership in them for sustainability of the initiatives</li> <li>- Keeping government stakeholders (juniors) in loop even if they are not aligned to the program / initiative</li> </ul>
<b>Not reinventing the wheel</b>	<ul style="list-style-type: none"> <li>- Leveraging best of what exists internally across Samagra teams and externally across the governance ecosystem (government / implementing partners / funders / domain experts)</li> <li>- Avoiding duplication of effort and building on top of what exists both at the program and initiative level</li> </ul>
<b>Leveraging data for driving initiatives</b>	<ul style="list-style-type: none"> <li>- Using data to evaluate progress at program/ initiative level on a regular basis</li> <li>- Using data for program/ initiative level decision making with internal/ external/ government stakeholders</li> </ul>

## Culture at Samagra

The culture at Samagra can be captured through the acronym MISSION (Meritocracy, Indian-ness, Self-Improvement, Selfless-support, Impact-orientation, Ownership, Nurturing). This document captures the essence and nuances of every word in the acronym to describe the prevailing culture at Samagra. A few key dimensions of how the culture manifests itself in the firm are also documented.

### Description of culture acronym - MISSION

- **Meritocracy:** Meritocracy is the basis of promotions, appraisals, incentives & responsibilities in the firm
  - Rewards and recognition of individuals are linked only to merit and no other criteria / condition
  - The firm does not support politics, favoritism or groupism in any matter concerning its people
- **Indian-ness:** The firm's theory of change, approach, knowledge and operations are rooted in India
  - The ways and model of working are organic & home-grown; not copied from western-consulting
  - The experiences, conduct as well as vocabulary reflect the firm's roots in the Indian context
- **Self-improvement:** Emphasis is on everyone becoming a better version of themselves; no comparisons
  - Processes have been defined and efforts are made to encourage & promote self-improvement
  - Everyone is benchmarked to an absolute competence/performance level; not relative to others
- **Selfless-Support:** Everyone receives genuine support upon reaching out to anyone else in the firm
  - Everyone goes above and beyond to lend a helping hand; without a doubt on intent
  - No one thinks that helping others could be detrimental to their own growth in the firm
- **Impact-orientation:** Macro and micro decision making in the firm is driven by impact; not financials
  - Passion for impact is the common thread in every individual at the firm; tying us together
  - Impact forms the basis of all discussions in the firm, including leadership meets
- **Ownership:** Everyone, across levels, demonstrates end-to-end ownership of targeted outcomes
  - Everyone has responsibility of certain outcomes even new joinees; it is not limited to tasks
  - In pursuit of outcomes as a firm / program / workstream, anyone can speak up across level
- **Nurturing:** The firm is invested in every team member; committed to nurturing strong leaders
  - The journey of self-improvement is supported actively through structured hand-holding
  - There is a focus on PD through 1:1 coaching, trainings, role-modeling, opportunity creation

# Samagra Mindset

**Context:** This document captures key characteristics of an effective governance consultant. These are important mindsets for everyone at Samagra to cultivate to be effective in our roles.

- 1 Be optimistic:** Effective governance consultants are optimistic by nature. They believe change is indeed possible, never mind the complexities and challenges. This optimism allows them to persevere in the face of adversity. However, while being optimistic, when it comes to implementation they assume Murphy's law will apply and therefore cover all their bases.
- 2 Be assertive and bold:** Effective governance consultants are assertive and bold. They 'speak up' in front of senior external stakeholders with a solution mindset if they have a point that can lead to better outcomes. They do not hesitate in insisting on an effective course of action even while taking people along. They also do not shy away from difficult 1:1 conversations if required.
- 3 Be ambitious:** Effective governance consultants think through outcomes which might seem far fetched to begin with but can be made feasible by pushing the envelope. They work towards step function change in governance but break it down into deterministic smaller steps. They do so with a sense of urgency fully realising that the best chance of transformation is at speed.
- 4 Be focused on palpable change:** Effective governance consultants are focused on creating impact on ground. They do not mistake inputs or outputs for outcomes. They do not consider a job done till there is a palpable change on ground. They stay connected with ground realities, and evolve their short-term / long-term strategies to achieve on-ground impact.
- 5 Be driven:** Effective governance consultants are intrinsically driven. It is their passion to create impact that keeps them going in the face of adversity. 'Making things happen' is their key trait. They also understand that the government may not always demand high quality from them, but they have made an internal commitment to always maintain a high benchmark.
- 6 Be true to commitments:** Effective governance consultants understand the principle of 'Under Promise and Over Deliver'. They set ambitious yet achievable targets and make it a point to not miss milestones. They stick to their commitment. They set clear expectations with all stakeholders on what is feasible and what isn't.
- 7 Be part of the solution:** Effective governance consultants are always in solution mode. They raise issues with the intent to find solutions. They have a solution-oriented mind that focuses more on potential solutions than on evident problems. They may not have a solution in all scenarios but they have the right attitude to discuss it and do what it takes to set things right.
- 8 Be growth oriented:** Effective governance consultants are not bound by self imposed constraints and are open to go out of their comfort zone. They look for opportunities to learn and take more responsibility because they want to become more effective in their work. They push their limits to realize their potential and achieve bigger goals.
- 9 Be detail oriented:** Effective governance consultants know that the devil is in the details. They are not here just to prepare macro strategies but to also make sure that they translate to outcomes. They think through fine details to ensure nothing is left to chance. However while doing so they keep the end objective in mind and do not miss the woods for the trees.
- 10 Be professional:** Effective governance consultants maintain a high level of professionalism proactively, irrespective of the environment. They demonstrate it in all aspects, from the basics - dressing up sharply, starting the day on time, ensuring punctuality, maintaining required boundaries with stakeholders etc. - to the more nuanced - respecting others, not holding grudges / moving on, not getting stuck with ideology, not seeking the slightest of favours etc.



# Thoughtful Design



## MahaVakya

**Make sure the program design is anchored in a MECE solution tree**

## PanchSutras

1. Try to define the goal as sharply as possible; ideally a single metric
2. Make sure a credible method of measuring the goal is set-up upfront
3. Pick the smallest set of feasible initiatives that ensure goal attainment
4. Design initiatives to generate field-level momentum towards the goal
5. Create a neat framework; identify macro milestones & key early wins

# Rigorous Implementation

## Rigorous Implementation

### MahaVakya

**Consistency & coverage of routines determines rigor of implementation**

### PanchSutras

1. Provide role clarity & sharply define corresponding key metrics for each cadre
2. Track & nudge (messages, calls etc.) using key metrics from the beginning
3. Own & drive implementation at the district-level through data, calls & visits
4. Cascaded data-backed reviews are the backbone of rigorous implementation
5. Clear goal & its measurement helps sustain rigor of implementation

## Providing Role Clarity

### MahaVakya

**Provide role clarity & sharply define corresponding key metrics for each cadre**

### PanchSutras

1. Keep expectations narrow with clear call-to-actions
2. Communicate repeatedly in the same language
3. Pick minimum (ideally 1-2) metric(s) for each cadre
4. Keep metrics binary & cascaded to the extent possible
5. Expectations & metrics can evolve, but avoid vacuum

## Tracking & Nudging

### MahaVakya

**Track & nudge (messages, calls etc.) using key metrics from the beginning**

### PanchSutras

1. Maintain detailed internal & simple external dashboards
2. Have a weekly routine for updating & tracking dashboards
3. Try to set-up direct comms. channels with all system actors
4. Nudge on key metrics using RYG / LBs on comms. channels
5. Nudge through 1:1 mgs / calls from the Government leader

# Rigorous Implementation

## Owning Districts

### MahaVakya

**Own & drive implementation at the district-level through data, calls & visits**

### PanchSutras

1. Divide districts amongst team members for implementation ownership
2. Constantly monitor data on your districts and drive nudges for them
3. Call some officials in each cadre from each of your districts once a month
4. Visit each of your districts once a quarter; 2 days in districts every month
5. Leverage insights from districts to make micro tweaks to comms / ops

## Driving Reviews

### MahaVakya

**Cascaded data-backed reviews are the backbone of rigorous implementation**

### PanchSutras

1. Leverage reviews to reiterate role clarity for each cadre
2. Reviews need to be data backed on key metrics for each cadre
3. Control agenda by centrally providing collateral for all levels of reviews
4. Find a way to reliably track compliance, attendance & quality of reviews
5. State and district levels reviews set the tone for the entire systems

## Goal Measurement

### MahaVakya

**Clear goal & its measurement helps sustain rigor of implementation**

### PanchSutras

1. Anchor implementation on a worthy goal / outcome
2. Establish a periodic way of measuring the goal
3. Try to make measurement cascaded across levels
4. Generate early wins to demonstrate feasibility
5. Incentivise goal attainment in a meaningful way

## District Visits

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### MahaVakya

District visit is a team / program level exercise, not individual / workstream level

### PanchSutras

1. TBD by the full team, back-to-back, over 1-5 days, in a representative set of districts
2. List hypotheses, plan associated agenda & create observation templates in advance
3. Have a pre-visit team session to discuss each hypothesis, the agenda & the templates
4. Plan logistics efficiently & double confirm interactions; sticking to agenda is very imp.
5. Have a post-visit team session to discuss findings on hypotheses & additional insights



# Program Processes



## MahaVakya

**Processes provide clarity and a sense of control to the program**

## PanchSutras

1. The one non-negotiable in team working is regularity of processes
2. All processes to be done as envisaged without tweaks / modifications
3. Days and slots for all processes to be finalized during monthly planning
4. Team and individual calendars to be worked around the processes
5. Quality of program processes determines quality of team functioning

# EFFECTIVE PLANNING

Visualizing Impact (VI) – 2 X ½ Days



## MahaVakya

**VI is the articulation of palpable change we are seeking in 6 months**

## PanchSutras for weekly review meeting

1. Think from the perspective of unambiguous evidence during a field visit
2. Think coverage and articulate as 'xx out of yy' for relevant system actors
3. Prioritise depth and coverage of impact as opposed to no. of initiatives
4. Include interim milestones critical for future impact; and stakeholders
5. Discuss and debate extensively within the team before finalising

# EFFECTIVE PLANNING

Quarterly Strategy Discussion (QSD) – ½ Day



## MahaVakya

**Objective of the QSD is to clearly identify the 'what' and 'who'**

## PanchSutras for weekly review meeting

1. TBD by the PL on the white-board with full-team in-person in one sitting
2. All milestones to be clarified and written on board basis pre-work by team
3. Macro milestones to be star marked & load balancing within team TBD live
4. All unknowns to be prioritised for generating clarity within the first 2 weeks
5. Macro milestones template & program dashboard to be updated same day

# EFFECTIVE PLANNING

Monthly Work Planning (MWP) - 4 Hours



## MahaVakya

**Objective of MWP is to clearly identify specific 'what' and '(by) when'**

## PanchSutras for weekly review meeting

1. TBD by the PL on the white-board with full-team in-person in one sitting
2. All commitments - org, external, team, personal - to be captured upfront
3. Milestones with dates & key meetings to be identified for each workstream
4. Front load; load balance across weeks; converge; keep 1 week buffer
5. MWP to be captured in excel and validated by PL the same day

# EFFECTIVE PLANNING

Weekly Planning Meeting (WPM) - 2 Hours



## MahaVakya

**Objective of WPM is to get micro clarity on 'what', 'how' and 'when'**

## PanchSutras for weekly review meeting

1. TBD by the PC with full-team in-person at a fixed slot on Fridays
2. Key meetings - org, external, team, 1:1 - to be identified clearly
3. Intra-week micro milestones for each workstream to be captured
4. 33% white-spaces for PCs & 25% for team members to be built-in
5. PL to be informed on key touch points required during the week

# EFFECTIVE PLANNING

Weekly Review Meeting (WRM) – 2 Hours



## MahaVakya

**Objective of WRM is to track progress & provide directional inputs**

## PanchSutras for weekly review meeting

1. TBD by the PL with full-team at a fixed slot on Fridays
2. Color coded monthly work plan with linked collaterals to be the anchor
3. All workstreams to be covered every week; collaterals to be reviewed
4. Directional inputs & decisions provided; deep-dives identified for later
5. Team members to prepare well for their updates; listen to all updates

# EFFECTIVE PLANNING

Weekly PS Meeting (WPSM) - 2-3 Hours



## MahaVakya

**WPSM is the forum to get visibility & contribute to all workstreams**

## PanchSutras for weekly review meeting

1. TBD in presence of the full team (with PL) at a fixed slot every week
2. Topics to be identified during the MWP & re-confirmed during the WPM
3. One-pagers with context, content & objective to be shared in advance
4. PS to be anchored by the workstream owners on the whiteboard
5. All team members to contribute actively irrespective of tenure



# Effective Program Associate



**MahaVakya:**

**Taking ownership and making progress are expected of an Associate**

**PanchSutras for being an effective Program Associate**

1. Own your workstreams – think ahead of others; be proactive
2. Make progress – seek clarity, flag issues in time, unblock yourself
3. Speak-up internally and externally; be on top of your pieces
4. Be up for things that come your way; take the program lens
5. Own your PD journey; constantly strive to get better



# PC Responsibilities

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## MahaVakya

**Run the program as per Samagra org constructs in letter and spirit**

## PanchSutras

1. Constantly providing micro clarity on the 'what' and the 'how'
2. Defining outputs & iterating on them till benchmarks are achieved
3. Co-working with stakeholders to achieve higher benchmarks
4. Supporting, role modelling and coaching team members
5. Sensing risks early and mitigating them in a timely manner

# PL GURUKUL

## PL Responsibilities

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### MahaVakya

**The buck stops at PLs on impact, stakeholders and team**

### PanchSutras

1. Deciding 'what' is to be done and ensuring progress against the same
2. Pushing the thinking of the team on 'depth' and on 'aspects to consider'
3. Quality control of outputs, meetings, forums etc. on an ongoing basis
4. Thought leadership with Government leaders and funding partners
5. Building future Samagra leaders in a conscious and focused manner

# Leveraging Gurukuls



## MahaVakya

**Make Gurukul videos and PanchSutras common vocabulary in the team**

## PanchSutras

1. Refer Gurukul notes every quarter to pick-up new learnings for practicing
2. Revisit a Gurukul video whenever it overlaps with a new PD focus area
3. Point team members to relevant Gurukul videos during coaching 1:1s
4. Anchor reviews / feedback on PanchSutras - outputs, meeting prep etc.
5. Make trees the default tool for top-down problem solving in the team

# Quality Outputs

One Pager



## MahaVakya

**Be user-centric and get basics right in v1, while keeping time for iterations**

## PanchSutras

1. Be clear on the objective of the one-pager
2. Dots alone should make the case completely
3. Each dash to support the corresponding dot
4. Quantify dots and dashes to the extent possible
5. Stick to one page and to single lines for dots & dashes

# Quality Outputs

Excel Tab



## MahaVakya

**Be user-centric and get basics right in v1, while keeping time for iterations**

## PanchSutras

1. Neat and consistent formatting
2. Use of colors / conditional formatting
3. Filterable columns and pivot-friendly table
4. Less but precise text; drop-downs wherever possible
5. Summary / so-what of the table not to be missed

# Quality Outputs

Slide

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## MahaVakya

**Be user-centric and get basics right in v1, while keeping time for iterations**

## PanchSutras

1. Action title to make only one specific point
2. Slide content to directly support the action title
3. Make it easy-to-read - structure, amount of text
4. Use visuals meaningfully; keep formatting tight
5. Avoid distractions; pre-empt potential questions



# Presentation Making



## MahaVakya

**Presentation making is a 6-step process that needs advance planning**

## PanchSutras

1. Storyline > Layout & Content > GD work > Completion > GD edits > Fine-tuning
2. Storyline is a self-contained narrative as one line action titles, with slides in mind
3. Layout hand-drawn or as sample slide; 'full' content on paper or slide or in excel
4. Send action titles & well-organized layout + content for each slide as per (3) to GD
5. Time split - 10% : 40% : NA : 30% : 20% ; ideally align with manager at every step



# Meeting Management



## MahaVakya:

Play-out the meeting in micro detail in your head multiple times beforehand

## PanchSutras for running effective meetings

1. Do the needful to make logistics favourable, or plan around them
2. Set expectations (beforehand), provide context (at start), share flow
3. Control attention – pace, no openings for distraction, pre-empt questions
4. Align the content, form, and timing of collaterals to the oral narrative
5. Practice repeatedly! Keep 3x the time for oral prep other than collaterals



# Program Dashboard



## MahaVakya

**Program dashboard is meant for driving workstreams (not for reviews)**

## PanchSutras

1. Limit # of key metrics; ensure they are representative of progress
2. There can be additional metrics that help with operational diagnosis
3. Include source, reliability, target, trend graph & achievement (R/G)
4. Track weekly / fortnightly / monthly based on data availability
5. Align on insights & action items as part of monthly PL review



# Thought Partnership



## MahaVakya

**Consistently think ahead & follow through to build thought partnership**

## PanchSutras

1. Pre-empt upcoming situations on workstreams / program with the stakeholder
2. Regularly provide visibility on the depth & quality of work being done by the team
3. Take relevant ideas (even if small) that are aligned with the stakeholder's style
4. Share relevant information about Samagra's broader work from time to time
5. Identify topics of interest & organise learning sessions on the same



# Stakeholder Benchmarking Framework | Govt. Leader



## Champion

### Wants the team for mission-critical mandates in future postings

- Backs the team in front of other senior stakeholders as her/his team
- Expresses unprompted appreciation for the team
- Consults the team for key decisions beyond the program



## Trust

### Does ‘whatever it takes’ to achieve program goals

- Goes above-and-beyond to drive program delivery
- Sometimes takes a leap-of-faith based on team’s suggestions
- Navigates tricky / sensitive situations on the program together with the team



## Alignment

### Maintains a good working rapport that allows progress on the program

- Ensures dedicated time for team discussions and Govt. reviews
- Moves ahead with logical initiatives that do not involve major risks
- Enables department support for the team



## Champion

### Is a supporter of the team within the department

- Appreciates the team in front of peers / seniors
- Helps the team navigate the department beyond own workstreams
- Consults the team for key decisions beyond the workstream



## Trust

### Does 'whatever it takes' to achieve workstream goals

- Goes above-and-beyond to drive workstream delivery
- Sometimes takes a leap-of-faith based on team's suggestions
- Appreciates the team for the support it provides for the workstream



## Alignment

### Maintains a good working rapport that allows progress on the workstream

- Ensures dedicated time for team discussions
- Proceeds with logical next steps that do not involve major risks
- Actively seeks inputs from the team to drive the workstream



# Stakeholder Benchmarking Framework | Funding Partner



**Champion**

## **Champions Samagra as an organization internally and in the ecosystem**

- Reaches out to us for new opportunities
- Calls out our contribution to programs / strengths internally and externally
- Supports us in positioning / navigating ourselves through her/his internal system



**Trust**

## **Trusts our judgement on the program and seeks inputs as thought partners**

- Leans on our judgement in tricky situations on the program
- Supports our bold initiatives on the program even if not fully aligned
- Takes our opinion in expanding / contracting / renewing the program



**Alignment**

## **Allows for smooth functioning of the program**

- Maintains a cadence of interaction to take stock of progress and align priorities
- Does not seek micro visibility on workstream / team member / day-on-day work
- Provides the leverage / support we may sometimes seek

## Characteristics of Samagra Case Study

This document captures what a case study means in Samagra's context. As part of our programs, a set of intervention(s) designed & implemented by us over time can yield into a case study, if it adheres to the five characteristics, defined in the form of vowels - AEIOU (At-scale, Executed, Impactful, Owned, Undisputed).

### Description of Case Study Vowels

- **At-scale (Contextual): It affects the entire target segment of beneficiaries/users statewide; irrespective of absolute size**
  - ‘Scale’ is defined as full coverage of the target segment of beneficiaries / users within the state as a unit
  - Thus, scale is contextual; it means statewide coverage of the full target segment irrespective of its absolute size

*E.g: Mission Prerna interventions (to improve foundational learning in the state) which affect all of the 4k mentors in UP are as much ‘at-scale’ as interventions which affect all of the 1.2cr students in UP*
- **Executed (Not WIP): It has reached its logical conclusion; while it may continue to be in implementation**
  - All the components of the intervention(s) have been implemented with a decent duration of stability
  - No component is in the design / development phase; ‘Launch’ by itself is not execution

*E.g: An intervention to embed tech device-enabled learning qualifies as ‘executed’ only after effective usage by students is cracked over time & not just on successful delivery of tech devices (tablets/phones) to students*
- **Impactful (2 dimensions): It could be a developmental outcome; or a new model/way of operating inside the govt.**
  - It has impacted the beneficiary’s quality of life; a tangible developmental outcome has been achieved

*E.g: The KALIA Scheme in Odisha is an inclusive income transfer scheme that has ensured direct benefit transfer to farmers (incl. the landless cultivators), enabling agricultural income growth*

  - It has impacted the status quo; a new ‘model of operating’ inside govt. with quality & rigor has emerged

*E.g: The CMGGA program in Haryana is a fellowship program that has altered the way in which young professionals work with the district administration to deliver good governance outcomes in the state at scale*
- **Owned (Clear effort): It should have been driven and anchored by the Samagra team**
  - There are clearly identifiable initiatives by the Samagra team that have attributed to the impact
  - Program stakeholders (govt./implementation/funding partner) acknowledge the team’s involvement

*E.g: Saksham Skills & Employment team in Haryana played a key role in driving the streamlining of Group C & D government recruitment end to end; from design to implementation of policy and process reforms*
- **Undisputed (Before-After): There is a clear before-after in the life of the beneficiaries/users; supported by data**
  - There is a clear difference in the outcome / process before & after the implementation of intervention(s)
  - The impact may be validated / triangulated by an independent evaluation or a credible ranking source

*E.g: Antyodaya Saral program in service delivery has received multiple awards / recognition by varied entities b/w 2020-22; Haryana topped the Citizen Centric Governance Index in 2021*

## Case Study Check-In

This document captures the process of validation & check-in of a Case Study in Samagra's context. This process is to be followed when a Program Team (PT) is confident that the Nominated Case Study stands against the characteristics of a Samagra Case Study, defined in the form of vowels - AEIOU (At-scale, Executed, Impactful, Owned, Undisputed). The five characteristics have been detailed in this [document](#).

### Process Overview

The image below captures the steps of the Check-In process:



### Gate 1: Presentation

On reaching Gate 1, PT shall pitch the Nominated Case Study to the CEO. Details are covered below:

Meeting Mechanics		
1	Objective	Pitch and discussion on Nominated Case Study for Check-In
2	Attendees	CEO, Full PT, PoC from CEO's Office, X Team PM ( <i>if req.</i> )
3	Duration	60 minutes
4	Collaterals by PT	1 presentation   2 one-pagers ( <i>details below</i> )

Agenda			
#	Topic	Collateral	Duration (min)
1	Presentation on Nominated Case Study	<p><b>1. Presentation (with relevant collateral):</b>            A synthesised summary of the Nominated Case Study, including:            i) Before-state (<i>insights from diagnosis, behaviours, baseline data etc.</i>)            ii) Design (<i>hypothesis, theory of change, scale etc.</i>)            iii) Implementation (<i>key milestones &amp; activities, goal measurement etc.</i>)            iv) After-state (<i>latest data on coverage, team involvement, palpable change etc.</i>)  <i>Supporting collaterals to be screened at relevant points while presenting</i></p> <p><b>2. Corresponding one-pager:</b>            Each dot to correspond to the 4 points given above  <i>Supporting collaterals to be linked at relevant points</i></p>	15
2	One-pager against Characteristics (A,E,I,O,U)	<p><b>3. One-pager on Characteristics:</b>            Each dot to correspond 1:1 to the <a href="#">Samagra Case Study Characteristics</a> (A,E,I,O,U)  <i>Supporting collaterals to be linked at relevant points</i></p>	15
3	QnA	-	25
4	Next Steps	-	5
		<b>Total Duration</b>	<b>60</b>

Please reach out to the CEO's Office in case of any queries.

## Performance Appraisal Process

Performance Appraisal happens **every 6 months at Samagra**, once in September and then in March. Promotions may happen in either of the 2 cycles. However promotion-linked increments will be communicated only at the end of the financial year (March end) and paid out in April.

Performance-linked bonus ([profit-sharing](#) in case of team members on the [Consulting Track and the Product Management Track](#) with the designation of Senior Consultant / Senior Product Consultant and above) is communicated in the March cycle and paid out in April end. In case of exits, eligibility for appraisal and performance-linked incentives is determined as per the [exit policy](#).

For those who are eligible for performance-linked incentives and promoted in September cycle, there will be a component of additional bonus which will be equal to *(revised compensation - old compensation)\*6*.

### **Performance Ratings**

Everyone is given a rating out of 5. The **net rating** shall be a whole number **1/2/3/4/5**. This is what the ratings stand for:

- 5 - Outstanding
- 4 - Exceeds Expectations
- 3 - Meets Expectations
- 2 - Below Expectations
- 1 - Look for other Opportunities

### **Performance Evaluation Parameters**

Performance appraisal will be conducted based on the **track and role of an individual**. The tracks and corresponding roles that exist in the firm have been defined below:

- A. **Consulting Track:** Includes roles of Program Associate, Program Coordinator, Opportunity Conversion Associate, Entrepreneur-in-Residence, Organization Development Associate and Recruitment and SI Associate
- B. **Product Management Track:** Includes roles of Product Manager, Program Coordinator in XT / DPG projects
- C. **Engineering Track:** Includes roles of Software Engineer, Engineering Maker and Engineering Coordinator.
- D. **Specialized Track:** Includes roles of Organization Development Coordinator, Outreach Associate and Coordinator, Data Scientist and Graphics Specialist
- E. **Support Track:** Includes roles of Process Associate - Central Team and Process Associate - Program Location
- F. **Leadership Role:** Includes roles of Program Lead in consulting programs, Program Lead in XT / DPG projects and Chief of Staff

For every track and role, **performance parameters** have been laid out. To access performance evaluation for relevant roles, please use the below sheets to understand the evaluation parameters and performance appraisal templates:

1. **Consulting Track:** [Evaluation parameters](#) | [Performance appraisal templates](#)
2. **Product Management Track:** [Evaluation parameters](#) | [Performance appraisal templates](#)
3. **Engineering Track:** [Evaluation parameters](#) | [Performance appraisal templates](#)
4. **Specialized Track:** [Evaluation parameters](#) | [Performance appraisal templates](#)
5. **Support Track:** [Evaluation parameters](#) | [Performance appraisal templates](#)

### Performance Appraisal Templates

- Those who are undergoing assessments for the first time, must make a copy of the relevant templates linked above and maintain it for future assessments.
- Those who have already undergone appraisal assessments earlier must sync their previous sheets with the revised templates linked above

### Performance Appraisal Process and Timelines

For those in the role of **Program Associate, Product Manager and Org Consultant**, following process and timelines shall be followed:

Timeline	Milestone
T	Performance Appraisal Process Kickstarts
T+7	Completion of Self-Assessment by every Samagra Team Member
T+14	Completion of Assessment by Program Coordinator (Qualitative)/Program Lead
T+28	Completion of Assessment and Normalisation by all Program Leads/Program Owners
T+35	1:1 Appraisal Conversation with Program Lead/Program Owner

# Guidelines for Graphics Design Request

The graphic designer facilitates engagement teams in creating high quality outputs and collaterals for key meetings and initiatives.

## A. Request Management Process

### Request for less than half a day work (approximately <5 hours)

1. Check the [Graphic Design Calendar](#) to assess availability
2. Fill this [form](#) as soon as you become aware of the requirement
3. Get in touch with the Graphic Designer on Whatsapp for a confirmation
4. Designer shall estimate work required and block slots on the calendar accordingly
5. Designer shall deliver the output as per date of output requirement (assuming input material is supplied as per committed timeline)
6. If there is a conflict in any of the above, the requester's manager shall discuss with other relevant managers and decide how to reschedule in those cases

### Request for more than half a day work

1. **Please plan such requests keeping a gap of 7 days between date of material supply and date of output requirement**
2. Fill this [form](#) as soon as you become aware of the requirement
3. Get in touch with the Graphic Designer on Whatsapp to schedule a call
4. Designer will discuss and confirm the date-time of completion for these requests over call
5. Designer shall deliver the output at max within 7 days of the date of material supply - he will block his own calendar in chunks (*not more than 2 hours in a given day*) spread over a span of days to complete such requests instead of spending a continuous block of time on such requests

### For Urgent Requests

This section is for urgent work (unplanned/critical/urgent) that can be completed within **at max 1 hour**. Please take note of the following instructions for such requests:

1. If expecting such new incoming urgent work, get in touch with the Graphic Designer on Whatsapp to schedule a call **before 7:00 pm**
2. Communicate the time of sending inputs and the time by which it is needed
3. The Graphic Designer shall confirm the time by which output can be completed; he shall take it up immediately or later in the day depending on its implication on other scheduled outputs

In case the urgent work requires  $\geq 1$  hour work (eg: 20 fresh slides/4-5 infographics), Graphic Designer will try to accommodate such requests and communicate time of completion. **But be prepared that the team may need to do it on their own in case the Graphic Designer is unable to accommodate the request due to other commitments.**

## B. Expectation from Requester on Type of the Request

1. Please provide content as per format specified in section D of this document
2. Provide adequate content for slide/infographic space utilization
3. Please submit the input material as per committed timeline

4. Make the minor edits (color/font size) yourself once you receive a design draft from the Graphic Designer
5. Leverage existing material listed below while creating a collateral. You can also use these to provide examples to Graphic Designer on the kind of output you want. Here's the list:
  - a. [Icons](#)
  - b. [Slide layout](#)
  - c. [Map Library](#)
  - d. [Logos](#)
  - e. [Engagement Templates](#)
  - f. [Infographics Library](#) (*available as base files in presentation mode for easy use*)
  - g. [Video Library](#)

### C. Feedback Process for Designer and Requester Teams

#### For Requester

Monthly feedback will be taken from Graphic Designer on his experience with engagement teams. In case of issue, it shall be escalated to the concerned manager. Then, it shall be the responsibility of the manager to take necessary action and in general, ensure team's compliance on the above mentioned guidelines.

#### For Designer

A [feedback form](#) shall be circulated on a quarterly basis with all teams for sharing feedback on process and quality of graphic designing. Managers are expected to discuss with the team and share feedback on behalf of the teams.

### D. Format for sending the material

Note: In case Hindi is the preferred language, then email the text in Hindi script (copy-pasteable)

#### PowerPoint presentation

- Email a single all encompassing .pptx file
- The file can consist of two kinds of slides: existing and new
- For old slides, just add that old slide in the .pptx file in relevant order
- For new slides, please add a hand-drawn image in the .pptx file in the relevant order
- Put selected images, screenshots etc directly on relevant slides
- Write comments in a 'square box' besides each slide (as applicable)
- Share any other overall inputs in the email text
- Share existing reference presentation(s), if any

#### Infographic/Poster

- Create hand-drawn image of the infographic/poster
- Select any relevant images, graphs etc that are to be used
- Email all the above files in a single zip folder
- Share overall inputs in the email text
- Share existing reference infographic/poster(s), if any

#### Logo

- Explain the requirement directly in the email text

#### Video editing

- Email the raw footage (ideally cut)
- Explain the requirement directly in the email text