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1. INTRODUCTION

Evidence Action is a learning organization committed to constant improvement, creativity and agility. Some of our core values are to 'iterate again' and 'challenge convention' to ensure sustainability in an increasingly complex and changing operating environment.

Evidence Action supports staff development because of its benefits to our staff, as individuals, and to the organization in achieving its objectives. For the individual employee, Evidence Action's investment in professional development helps to foster employee engagement and satisfaction and helps the employee to grow and contribute better. For the organization, investing in professional development helps to ensure that we have the skills needed to reach our strategic goals, and prepares staff to step into new roles.

The overarching goal of learning in Evidence Action is to optimize organizational performance to ensure quality services for our beneficiaries whilst also providing a means for individuals to develop skills and expertise for career advancement in Evidence Action.

Learning in Evidence Action needs to be aligned with the organization's strategic goals/priorities and in an environment of cost consciousness, to effectively balance the strategic, long-term needs of the organization with the career aspirations of individual staff.

However, it is in the interest of Evidence Action to ensure that all Evidence Action employees receive proper and relevant learning to perform their designated duties efficiently and with a minimum of difficulties. This policy outlines the learning principles to ensure a fair, transparent and cost-effective approach to the provision of learning opportunities for employees in the African region.

2. LEARNING PRINCIPLES

Evidence Action's learning principles are guided by the [Global Learning and Development Philosophy](#). The leadership is committed to fostering a culture by which we make decisions about Learning and Development by emphasizing the following principles:

Prioritize Learning through Experience

We believe that learning isn't a single event, it's continuous. And some of the most impactful learning happens when working and interacting with others in the workplace. Structured learning is important, but it is not the primary way in which people achieve high levels of performance. We prioritize learning through on-the-job experiences and focus on skills that will positively impact our organizational priorities.

Emphasis on High-Leverage Skills

We understand there is a volume of skills someone could learn in their career journey. We focus on “high-leverage skills,” the skills that are both critical to an individual’s success for their role at Evidence Action and syncs with their individual development objectives. We prioritize learning that aligns with our competencies of Rally Together, Find Solutions, and Embrace Improvement and take into account learning interventions that allow for immediate application and impact in a given role.

Evaluate Needs and Determine ROI

When investing in learning and development initiatives, we conduct training needs assessments to identify the learning areas that are most needed and which will help us make the most progress on achieving our organizational objectives. We are purposeful with our investment and adhere to “economize without compromise” in our evaluation of the value of the initiative. We prioritize choices that allow us to remain cost-effective, sustainable, and maximize our impact.

Assess the Impact

Learning should be personally energizing and serve a team-wide purpose. We use surveys and gather feedback to assess the effectiveness, applicability, and impact of our learning efforts. We analyze performance of individuals and teams in relation to impact of learning on their skills, productivity and achievement of organizational objectives. Tools like the annual engagement survey, self-assessments, mid/end of year performance reviews, provide useful data to make informed choices about future investments in learning and development.

Global Standards; Regional Empowerment

The Global People and Culture team serves as a thought partner for learning and development and focuses on initiatives that support managers. Where appropriate, the Global team may establish organization-wide standards and/or essential courses that align with our philosophy. Regional teams are responsible for adapting these standards to the specific needs and context of their teams. Regional, country, and program teams have ownership of individual learning budgets and training delivery to ensure local needs are met.

3. ROLES AND RESPONSIBILITIES

Learning is an active and continuous process. Promoting the learning and development of employees while developing a learning culture within the organization is a shared responsibility of different actors.

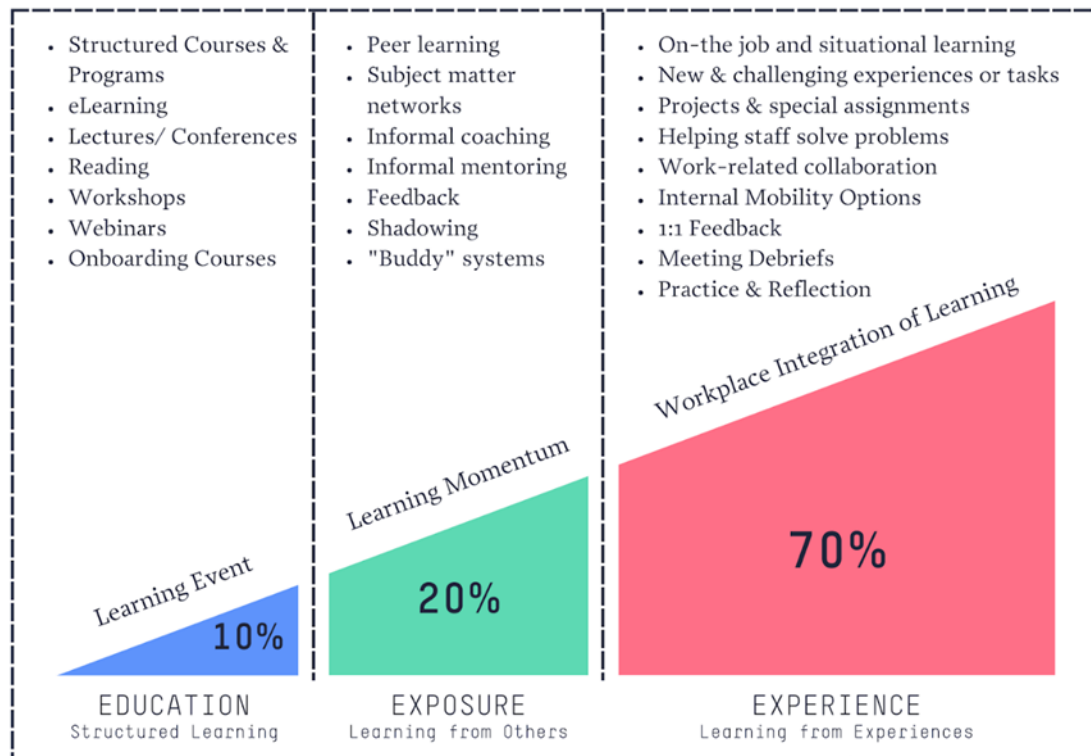
Below are the specific responsibilities outlined as follows: -

- **The People and Culture Global Office** – responsible for providing the overarching philosophy and framework to implement learning and development initiatives. Facilitate learning opportunities that benefit large stakeholder groups across all regions (e.g, Leadership Peer Group, Managing Well course)
- **The Regional and Country Leadership Groups** are responsible for providing the budgets and supporting resources to ensure achievement of learning initiatives that support the needs of the organization and employees.

- **Technical and administrative line managers** are responsible for identifying learning and capacity-building needs, and providing appropriate solutions to ensure their teams have the necessary skills and support to carry out their roles and develop within Evidence Action. Line managers are responsible for ensuring learning needs are submitted to the People and Culture team based on their continuous discussions captured on their work and development plan.
- **Individual employee** - Learning is a personally driven initiative, it is an employee's responsibility to take ownership of their learning. They are encouraged to proactively seek creative ways to enhance their personal and professional development. They are to actively seek information on learning interventions that are relevant to improve their job performance (in collaboration with their line manager) and to engage in learning for their work enhancement and development
- **The Regional and Country People and Culture Department** is responsible for providing technical guidance to employees and line managers as needed and for the administration support for learning through internal or external resources. The People and Culture department shall assist to monitor the learning budget and ensure prioritization of the budget to organizational learning needs.

4. METHODS OF LEARNING IN EVIDENCE ACTION

Evidence Action shall strive to implement the **70:20:10 learning model**. 70% of learning initiatives will focus on experience, 20% on exposure and 10% on education.



The different learning methods that can be used include: -

- 1. E-LEARNING** – E-Learning is training facilitated by electronic media and educational technology. Evidence Action Academy will be utilized for induction training and other different e-learning courses. Staff are also encouraged to use other forms of e-learning available to them from time to time e.g. LinkedIn learning.
- 2. WORKSHOPS** – A workshop is a brief and intensive type of training course intended for a relatively small group of learners and focusing on techniques and skills in a particular field.
- 3. MENTORING** - This is a scenario where an experienced and more knowledgeable staff in a specific field guide and advises one with less experience and skill in that area. Staff can be mentored by their line managers in their specific technical areas, or any other staff in the organization where they need to improve on general business, team management or leadership skills.
- 4. COACHING** - Partnership of two parties (a coach and coachee) in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. Unlike a mentor, a coach does not necessarily have any expertise in a specific role, rather in unlocking someone's potential whatever that role is. Coaching is therefore usually non-directive.
- 5. SELF-DIRECTED LEARNING** - Self-learning implies that the employee will learn by themselves while reading a document, book, protocol or when applying skills, knowledge or attitudes acquired in formal training. The employee is expected to study the information and to apply the newly acquired knowledge in his/her work.
- 6. JOB ORGANIZED INTERNAL TRAININGS** – Evidence Action expects managers to provide technical training to staff in their area of specialization. For example, a Finance Manager is expected to

provide finance training to finance staff and provide finance/donor regulations/budgeting and budget monitoring training to both program and support staff.

7. **ON-THE-JOB LEARNING (70% LEARNING)** - On-the-job learning is a formal learning and development process during which a staff member acquires knowledge, skills, and attitudes while carrying out their job, either through peer(s) or through a line manager. The staff member can immediately apply learning, gaining competency in the real work environment and dealing with the tasks and challenges that they will meet during a normal working day. This learning is specific to the job, avoids additional costs of providing off-the-job training or losing working time. This includes job shadowing, coaching and mentorship, staff exchange/ secondment etc.
8. **JOB SHADOWING/MIRRORING** - The simple act of observing more experienced colleagues followed by guided application of learning can accelerate competency acquisition; activities such as conversing, exchanging feedback, cooperating on tasks, working in acting capacity and offering mutual support when formally monitored and evaluated will deepen and solidify the learning process.
9. **EVIDENCE ACTION INTERNAL/ GLOBAL-LED TRAININGS AND WORKSHOPS** - Staff shall express interest or be selected by relevant management to attend global/departmental Evidence Action training such as inductions, seminars, and workshops as per the organizational guidelines including available budget, keeping in view the relevance of individual activity. Such appointments shall be validated by the country P&C Leads and Country Directors/ EVP to ensure fairness in the process.
10. **PROFESSIONAL COURSES (INCLUDING CERTIFICATION AND ACCREDITATION COURSES)**

These are learning programs offered by external learning institutions that align to the specific technical or soft skills needed for the staff to perform their job. The content in this kind of learning is not curated to Evidence Action context, but useful for in depth technical learning in a certain field.

11. **STAFF EXCHANGE, SECONDMENTS AND TRANSFERS** – Secondments is the temporary loan or attachment of an employee to another office/ program for a specific purpose, for a defined length of time and for the benefit of all concerned. A transfer is similar to a secondment, but permanent in nature. Evidence Action endorses the use of exchange opportunities for staff in appropriate circumstances. Although there are various benefits for all parties involved, the primary objectives for exchange are:

- § **Employee development within the job:** Exchange as a mean to improve an employee's performance in his/her original job to gain insights, additional skills through different contexts
- § **Career development:** staff exchange as a means to enhance the level and/or scope of responsibility that an employee can bear in his/her original office/ program. Staff exchange is not a method that should be used to address staff shortages and thus is not demand driven.

5. LEARNING NEEDS ANALYSIS

- i. Learning needs analysis will be an ongoing process and not a stand alone event managed by the People and Culture Department. An annual learning and needs analysis will be conducted alongside the performance management yearly cycle and process. The line managers are responsible for having

key discussions with staff to understand their learning and development needs and this will be captured on each staff performance review based on identified needs. The People and Culture Leads will supplement this with gathering organizational/ team learning needs through management discussions and focus groups.

- ii. The learning needs analysis process is important to align the organizational priorities outlined in Global, Regional and Country strategies, and identify gaps in employee performance and the personal development of employees. These are grouped into three areas:
 1. Organization and functional upskilling (Upskilling based on identified organizational and departmental/ functional needs/ gaps. This will also include management/ leadership groups learning needs)
 2. Technical upskilling (technical skills needed to develop in one role including to enable one to accept additional relevant responsibilities)
 3. Soft skills upskilling (Learning interventions to upskill non-technical areas and general business competencies)
- iii. Priority will be given to learning and development opportunities that have a direct link to the organization's priorities and strategic objectives. The development and training needs discussed from the performance review sessions will also be considered subject to the availability of the budget. Staff need to note that the Organization reserves the right to approve/ disapprove of a capacity-building requirement in light of budget availability and time commitment if this will affect the staff's delivery in their current role.
- iv. The training needs assessment process is jointly conducted between the staff, line managers and Head of Department in collaboration with the P&C team to provide technical expertise and guidance. A learning needs framework shall be adopted by the People and Culture team to guide this process. An annual training calendar should be concluded by the Regional Office and Country Offices P&C team by the end of January for every year.
- v. The data obtained from the learning needs analysis (From performance review sessions and the training needs assessment) will be used to develop a yearly learning and development plan and will be used to collaboratively align the allocation of resources and budget. This shall be shared and worked on collaboratively with the Regional and Country Leadership for approval.
- vi. The learning and development strategy shall be monitored regularly to reflect the changing needs within the organization.

6. BUDGET ALLOCATION AND COST EFFECTIVENESS

- i. All learning and development opportunities are subject to the constraints of available budget, resources and operational requirements. Learning initiatives must be provided in the most cost-effective way. The regional and each country office shall set aside an amount of money for staff development every year and include it in the Master budget for the following year. The Grants and Finance team in collaboration with the Country Managers shall endeavor to include the capacity-building budgets in the donor proposals.

- ii. The country and regional offices will allocate the L&D budget yearly in line with the budget guidelines and the capacity-building needs of the country/region.
- iii. Although staff development is important for Evidence Action, it is key to note that there are more needs than resources; and thus funding will be prioritized based on organizational and operational needs.
- iv. Organizational and functional/ departmental needs will always be prioritized to individual capacity-building needs for cost-effectiveness purposes.
- v. Where payment for external training is needed, this will be done for employees on standard contracts only i.e. 1 year + contracts. Staff who are on short-term contracts will participate in Evidence Action in the country and online workshops and seminars.

7. APPLICATION PROCEDURE

The process captured below shall guide the application procedure for all learning interventions:

Although agreed learning initiatives during the Performance Management process are captured on the yearly learning plan and shared with the senior management to reflect an average cost of all training, the grant of approval for training that needs organizational financing shall be based on the application in line with guidelines and thresholds elaborated below.

All staff engaging in self-requested professional training will commit to remain with Evidence Action for a minimum 12-month period. Should the staff exit voluntarily (exit initiated by the staff and not Evidence Action) before 12 months the Organization will recover the training cost on a prorated basis as follows. I.e.

Duration	% to be recovered
In 1 month	100%
In 2 months	92%
In 3 months	83%
In 4 months	75%
In 5 months	67%
In 6 months	58%
In 7 months	50%
In 8 months	42%
In 9 months	33%
In 10 months	25%
In 11 months	17%
In 12 months	8%

1. While Evidence Action prioritizes experience and exposure type learning interventions, we do recognize that in certain instances, staff may need to take formal training programs outside the organization for their technical upskilling. Evidence Action shall cater for such courses based on availability of budgets and organizational priorities. The ceiling for such training courses

sponsorship will be **USD 500** for an individual staff. The staff should discuss such an opportunity with their line manager and second level manager. The line manager should confirm that; -

- The training is identified as a need in their development needs and agreed upon through mutual discussion with staff.
 - Liaise with Country P&C and Country Director (or Regional P&C for regional staff) to confirm the budget for the training.
 - If these conditions are met, then the line manager and second-level manager should approve the training and forward the training application request to P&C for approval. The P&C will forward to the Finance team for approval and disbursement.
 - The learning application form will be used for these requests.
2. Academic courses such as degrees, masters and diplomas shall not be catered by Evidence Action.

7. Employee Accountability and Knowledge Sharing

Employees who have received approval for attending external training courses will provide either proof of attendance, a certificate of completion, or a copy of transcripts/grades. Pre-course objectives should be discussed between the staff and line manager with proposed action steps after the learning intervention, as well as post-objective follow-up, shall be instituted.

Knowledge sharing shall be encouraged within the organization after a learning intervention has occurred, departmentally or within the region. This can be done through sharing the content, or conducting one or a series of learning hours with the relevant team to enhance the knowledge sharing.

Reviewed By

Karen

Date:

13/05/2024

Karen Olege

Associate Director, People and Culture – Africa Region

Approved By



Date:

13/05/2024

Paul Byatta

Executive Vice President – Africa Region

Training Application Form

Section A: Personal Details

Name.....	Present position.....
Department.....	Supervisor/ Line manager name:
Duration in that position.....	Job level.....
Date of application.....	

Section B: Training opportunity applying for)

Title of Learning Program:

.....

Venue:

.....

.....

Duration: From To

.....

Total fee payable (if any):

.....

Amount applied for

.....

Was the need for training identified in the Performance Appraisal? Yes ☐ No ☐ (please attach the latest Performance Appraisal)

What are the objectives of the training? State both personal and professional objectives.

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How will your department benefit from this training?

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.....
Have you been sponsored /funded by Evidence Action before for any staff training? Yes ☐ No ☐

If yes, give the following details: Type of the course, duration, cost etc.

.....
.....
.....
.....

Did you complete the course/training /program?

Yes ☐ No ☐

(If yes, attach result slip /transcript /report if applicable)

If not, why?

.....
.....
.....

*** Please attach an admission letter, fee structure or sponsorship letter and any other supportive documents.*

Section C: Line Manager's comments

☐

Recommended

☐

Not recommended

Please give reasons for your recommendations/ otherwise.

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If the learning opportunity is being funded by the program /Unit, please provide charging details:

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Amount approved

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Supervisor's Name:

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Signature:

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Date:

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Section D: Head of Department/ Second Level Manager comments

☐

Recommended

☐

Not recommended

Please give reasons for your recommendations

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Amount approved

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Manager's Name:

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Signature:

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Date:

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Section E: People and Culture Department's Comments

☐

Recommended

☐

Not recommended

Please give reasons for your recommendations

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Amount

approved.....

Name:

.....
.....

Signature:

.....
....

Date:

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.....

Section F: Regional/ Country Director's Comments

☐

Recommended

☐

Not recommended

Please give reasons for your recommendations

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Amount

approved.....

Name:

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.....

Signature:

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....

Date:

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.....

Section G: Finance Department

☐

Approved

☐

Not approved

Please give reasons for your decision

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Name:

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Signature.....

....._

Date

.....

...

For financial use only

Amount to pay:

.....

Charging details:

.....

Payee's Name:

.....

Signature.....

....._

Date

.....

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Training Bond

- i. Evidence Action views professional development and training as an investment in the individual staff member's career advancement, and as an activity of mutual benefit to both the organization and the employee. Evidence Action requires all employees benefiting from a training opportunity to remain with the organization for at least one year from completion of the learning program to allow the organization to benefit from this upskilling. By this arrangement, there is a mutually acknowledged agreement between Evidence Action and the employee that the employee will continue working for Evidence Action after the training opportunity, and that if the employee leaves before the end of one year, he/she will reimburse to Evidence Action all or part of the costs of the training as specified below.
- ii. This bond will be applied to employees who leave Evidence Action of their own will. It does not apply to employees whose contract is not renewed or terminated.
- iii. The bond will only apply to self-requested learning programs; and not any program that is required as mandatory by the organization.
- iv. The amount of the training bond will include any workshop fees, travel costs, per diems, and other associated expenses paid by Evidence Action to facilitate an employee's attendance at a training event.
- v. By completing, signing and submitting a training application form, an employee will be deemed to have accepted the terms of the training bond in the learning and development policy.
- vi. The calculation of the repayment terms of the training bond will be as follows:-

Duration	% to be recovered
In 1 month	100%
In 2 months	92%
In 3 months	83%
In 4 months	75%
In 5 months	67%
In 6 months	58%
In 7 months	50%
In 8 months	42%
In 9 months	33%
In 10 months	25%
In 11 months	17%
In 12 months	8%

I..... agree to the provisions of the Learning and Development policy and training bond in regard to Evidence Action's sponsorship to capacity building program.

Signed.....

Date.....