

evidence
action /



Internal Mobility Policy
Africa Region

INTERNAL MOBILITY POLICY

TABLE OF CONTENTS

1. INTRODUCTION	2
2. DEFINITIONS.....	2
3. SCOPE	3
4. ELIGIBILITY CRITERIA	3
5. PROCEDURE.....	4
5.1 PROMOTION	4
PROMOTION APPROVAL GUIDELINES.....	5
5.2 LATERAL TRANSFER.....	6
5.3 COMPETITIVE INTERNAL RECRUITMENT	7
COMPENSATION GUIDELINES.....	9
APPENDIX.....	12
HOW TO APPLY INTERNALLY	12

1. INTRODUCTION

This policy contains guidelines that will be applied when a staff moves from one job to another within Evidence Action. It outlines the requirements needed for such moves and the considerations for salary determination. The policy also contains guidelines on determining salaries for new entrants into Evidence Action.

Evidence Action cares deeply about creating pathways for our staff to build their careers within the organization as it is a powerful mechanism to support organizational and individual growth.

Employment changes benefit the organization, staff, and managers in the following ways:

- **Organization:** High quality internal candidates can increase their scope and/or fill urgent openings in the organization and their internal knowledge and skills can be quickly leveraged. This allows Evidence Action to increase our impact and hone in on employees' available skill sets.
- **Staff:** The opportunity to explore new roles internally give staff the flexibility to grow in their careers and deliver more impact during their time at Evidence Action. It can also improve job satisfaction, support staff's personal needs, and help achieve their learning goals.
- **Managers:** Having an Employment Change Policy allows us to maintain an on-going talent pipeline, drive staff engagement, and reduce turnovers if staff are seeking external opportunities. Typically, an internal role is filled in half the time as an external role which allows more time to complete department priorities.

2. DEFINITIONS

At Evidence Action, staff have the opportunity to move into new roles in the following ways: promotion, lateral transfer, or a competitive internal recruitment.

Internal mobility may occur when:

- A job opening is advertised internally as well as externally or a position opens up and Evidence Action wants to fill it from within,
- And the employee has consistently good performance evaluations and their manager deems them ready for the next step in their career.

This table outlines classifications for a promotion, lateral transfer, or a competitive internal recruitment:

Employment change	Definition	When
Competitive internal recruitment	Refers to the competitive internal recruitment process where there is an opportunity to fill a job vacancy with an existing employee. An external process for the same role can still take place while an internal recruitment process is happening.	There are 2-3 potential candidates within your department or the organization that meet the minimum requirements of the available role.

Employment change	Definition	When
	Competitive internal recruitment processes require prior budget approval.	
Lateral transfer	<p>Refers to the lateral movement of an employee from one position to another one at the same job level.</p> <p>It is unlikely the employee will receive a salary increase, but if scope is slightly increased then there may be a salary adjustment in line with established pay scales, job level and responsibilities.</p>	<ul style="list-style-type: none"> • Business needs change • Department or org restructuring • Employees in support roles rotate to fill urgent resourcing gaps (Job Rotation)
Promotion	<p>Refers to the upward movement of an employee from one position to another higher one, with a likely salary increase in line with established pay scales, job level and responsibilities.</p> <p>Promotions require prior budget approval.</p>	<p>There is only 1 potential candidate within your department or the organization that meets the minimum requirements of the available role.</p> <p>OR an employee is currently in the role and the scope increase and their performance warrants the promotion.</p>

3. SCOPE

This policy applies to all employees who have completed at least one year of service at Evidence Action. Opportunities for employment changes become available when new job positions are created or when existing positions fall vacant. Where required skills and competencies are available internally, Evidence Action will strive to fill vacant positions internally.

Employees may have an employment change within the same department or to another department.

4. ELIGIBILITY CRITERIA

Evidence Action supports mobility of employees based on availability of the position, their performance record, availability of budget and workplace conduct. The following criteria must be met to be considered for an employment change:

- The vacancy for the position to which the staff moves into must already exist and a budget secured for the position.
- Employees must have completed **at least two years in the organization with at least one year of tenure in their current role** with Evidence Action.
 - Regional P&C Leads can approve exceptions as needed upon consultation with the Executive Vice President.
- High performance level
 - For a promotion, a rating of at least Exceeds Expectations (**rating 4**) on the employee's last performance review.

- For a lateral transfer or competitive internal recruitment process, a rating of at least Meets Expectations (**rating 3**) on the employee's last performance review.
- Has not received a rating of *Less Than Expected or Needs Improvement* (rating 1 or 2) in the last two performance evaluation cycles.
- Meets the minimum qualifications of the new role.
- Has not received a disciplinary notice or warning in the last two years.
- Has expressed personal motivation and willingness for a change in responsibilities.

In accordance with our organization's values, Evidence Action will not tolerate employment changes that are based on:

- Discrimination
- Fraternization
- Favoritism
- Nepotism
- Subjective opinions unsupported by performance evaluations or metrics.

Managers should follow the procedures outlined below to ensure they clearly communicate with staff, complete required documentation, and align with P&C.

5. PROCEDURE

Employment changes are based on the criteria as listed above. With this, there are different procedures for each employment change type that employees and managers must follow.

5.1 PROMOTION

Promotion of an employee to the next level will entail a significant and permanent change in role remit and require a modified job description.

Managers will evaluate their business needs towards the end of every year, and will request promotions for their team members following this process: -.

- Ascertain availability of the position and budget through vacancy or creation of a new position following business needs. Creation of new positions should be approved by the Executive Vice President prior to a promotion being considered.
- Ascertain that the criteria for promotion for the proposed staff has been met as per Sections 2 and 4 above.
- Meet with employee(s) to discuss their career goals and/or aspirations for a promotion. This step is optional if the manager feels that the conversation may set unwarranted expectations with the staff.
- Manager should complete the [Internal Mobility Request Form](#) and draft an updated Job Description to share with the local P&C representative. If the position has fallen vacant, the manager may utilize the current role's JD and enhance it if required. The manager should utilize the Job level framework and Competency Framework when drafting the job description.
- Meet with P&C to ensure the criteria for promotion is met and ensure internal calibration is conducted in terms of role scope given the new level.

- Arrange a brief interview with the employee to confirm their potential and interest in the new role and review the promotion requirements. The secondary line manager may be part of the interview if applicable.
- Country P&C representative to finalize the promotion in consultation with the Country Director.
- For Level 5 and above roles, the Country P&C representative will hold a consultation with the Regional P&C, Sub-regional Director and EVP to receive final approval.
- P&C and the manager should update all relevant systems with the shifted employee details.

Things to note

1. Fulfillment of the minimum criteria does not automatically qualify the employee for a promotion.
2. In the event that a promotion affects the existing structure, An approval should first be sought from the Executive Vice President prior to discussion with the employee when the role is on the technical track and specific Country Director for in-country roles upon consultation with the Sub Regional Director.
3. Promotions are eligible only from one job level to the next immediate job level. Two step promotions must go through an external recruitment process and demonstrate that the internal staff was best preferred from the pool of candidates considered.
4. Interns and casual workers are not eligible for promotions or lateral transfers, but are free to apply for any positions advertised internally or externally.

PROMOTION APPROVAL GUIDELINES

Promotions into Country Positions Level 2 – 4

- Proposals for these positions will be made by the employee's supervisor/manager to the Country P&C representative and Country Director.
- Final approval by the Country Director.

Promotions into Country positions Level 5 and above

- Proposals for these positions will be made by the employee's supervisor/ manager to the Country P&C representative and Country Director/Lead.
- Final approval by Sub regional Director, Regional P&C and EVP.

Sub regional/regional & technical track positions

- Proposals for these positions will be made by the employee's supervisor/ manager to the Regional P&C.
- Final approval by the EVP, Africa.

GRS positions

- EVP to be informed of any promotions.

Other conditions

1. Unless tied to a newly open position or a position that has fallen vacant, promotion proposals must be tied to the performance review period at the end of year/beginning of the year.
2. The proposed change/s must already be captured on approved departmental/country staffing structures and plans.
3. The proposed roles and changes in salary must be funded through an approved budget.

4. Any role not directly funded from the program budget (e.g., funded via organizational funds) will require EVP approvals.

5.2 LATERAL TRANSFER

Lateral transfers can occur when either 1) business needs change, 2) a department or the org restructures, or 3) an employee moves into (or out of) a rotational role for a set period of time. Lateral transfers allow Evidence Action to have a more flexible workforce.

Country, department, or program leadership can request lateral transfers.

To implement a lateral transfer for an employee, the sending and receiving managers should follow this process:

- The receiving manager should outline the desired job, location, duration of the assignment (permanent transfer or rotational), and expected outcomes of the role in a job description format.
- The receiving manager should discuss the role with the sending manager for further alignment and to determine how the employee's current role will be completed prior to the new rotational agreement.
- The sending manager and receiving manager should meet with P&C to discuss implications of the transfer.
- The employee, sending, and receiving manager should meet to discuss the possibility of job rotation or role shift, the assigned duties, time frames, schedules, hours, etc., so that details can be negotiated and arranged. A lateral transfer can be denied if it cannot be balanced with the needs of Evidence Action.
- The receiving manager should complete a [Internal Mobility Request Form](#).
- Finalize the lateral transfer with P&C and receive final approval.
- P&C and the receiving manager should update all relevant systems with the shifted employee details.

Where lateral transfer result into an employee permanently moving into the new role, the following conditions must be met:

- The role must be opened for a competitive internal recruitment process for a period of 5-10 working days to give other potential internal candidates equal opportunity.
- Upon completion of the internal recruitment process, successful candidates shall resign from their current role and complete clearance with the current department before transitioning to the new department.
- The role vacated by the successful candidate will then be opened for backfill.

More information for rotational roles:

Onboarding Support: Receiving managers must ensure rotational employees are properly onboarded and integrated into the role/team. Entering a job while lacking the required knowledge, skills, and context to perform well will decrease motivation and increase the time required to reach optimum productivity level.

Performance reviews: Employees in a rotational role will still receive a performance evaluation at the regular time. The new and current managers should collaborate as appropriate on the review. The manager who has managed the employee for a majority of the time during the review period will be responsible for timely completion of the report's performance evaluation.

Budget: The receiving department will be responsible for the salary of the rotational role and payment of travel expenses (if needed), unless other payment arrangements are made and agreed to by both teams.

5.3 COMPETITIVE INTERNAL RECRUITMENT

When there are multiple qualified employees for an available position a competitive internal recruitment process should take place. The competitive internal recruitment process is set up to be fair, confidential and efficient. Internal candidates can expect to receive support from the Recruiter and/or Hiring Team.

Hiring managers can request a competitive internal recruitment process for their open role.

The competitive internal recruitment process includes the following:

Action	Owner	Details
1.Role is posted internally	Recruiter and Hiring Manager	<p>The role will be posted internally for 5-10 working days on Workable. This will be accompanied by an internal notification to geographical relevant staff from P&C.</p> <p>If the role is not posted externally and no suitable internal candidates are identified within the advertisement period, , the role will be open to external applications.</p>
2.Review the Workable Referrals page	Candidate	<p>Review the Internal Job Board to see all open roles; expression of interest deadlines are also listed. Candidates can also request a short informational interview with the Hiring Manager for open roles.</p>
3.Submit application	Candidate	<p>Submits application packet directly through the Workable Referrals page - 'Apply' link (instructions here).</p> <p>Depending on the role, candidates may be required to submit work samples.</p>
4.Recruiter and Hiring Manager Review	Recruiter and Hiring Manager	<p>On a rolling basis, the Recruiter and Hiring Manager review each internal candidate's profile, including their latest annual reviews, and determine which candidates to advance to the interview process. They will be checking if the internal candidate meets all eligibility requirements.</p> <p>If selected, the Recruiter will then reach out to internal candidates with a timeline, expectations and request for any additional documents. In some cases, internal candidates may be asked to complete a performance task before being invited to the final round interview.</p>
5.Candidate	Hiring Team,	<p>Candidate submits exercise materials (if required) and completes an</p>

Action	Owner	Details
Assessment(s)	Candidate	interview with a panel of interviewers that includes the Hiring Manager and interviewers. P&C will provide feedback for candidates not selected. For some roles, a joint meeting may be held with the candidates to explain selection criteria and why they were not successful.
6.Reference Check	Hiring Team	After the final interview and before an offer is made, the hiring team will conduct a reference check with the candidate's current manager. The candidate will be informed ahead of time.
7.Offer	Hiring Team	Interview panel determines if they will make an offer to an internal candidate. Hiring Manager will offer to review the process of any internal candidates that are declined - offering feedback on how they did in the process and answering any questions. If the candidate is selected - an offer letter is sent.
8.Transition Meeting	New manager, Current manager New hire	New manager arranges a meeting with the new hire (candidate) to determine the timeline for the handover and what needs to be done to facilitate the transition. This meeting should occur before a start date is finalized. Recruitment will provide guidance and support as needed.

More information:

Confidentiality: The internal application process will be kept confidential. All expressions of interest, application materials, interview performances and offer details will be only accessible by the Hiring Team, Recruitment/P&C, and the Recruiter for the role.

While we highly encourage internal applicants to inform their manager that they would like to explore other opportunities, the candidate's manager will not be notified of the candidate's intent to transfer; communication between the hiring team and candidate's manager will only take place at the reference check stage. The candidate will be notified of this communication prior and any other additional team members granted access will be communicated to the candidate.

Should the candidate's manager be a part of the role's Hiring Team, then Recruitment/P&C will not be able to keep the internal candidate's application confidential. However, to minimize bias, Recruitment/P&C will ensure there are multiple reviewers to evaluate the candidate throughout the interview process.

Salary and Benefits: If selected, internal candidates will receive an offer letter that details the salary and benefits for the new role. In cases where the new role results in a change in job level or contract type (e.g. from permanent to temporary), the candidate will sign a new offer. In some countries where it is legally required, the candidate may need to resign from their current role before transitioning to their new role. Please consult your in-country P&C team to find out which applies to you.

Timelines: While we encourage roles to be posted internally, it is not required. The Recruitment team and Hiring Managers will discuss if the skills needed for the role can be found internally, in addition to the job market and technical requirements for the role to determine if the role will be posted internally, externally, or both.

Transition period: Most internal roles will require a transition period where the staff member is transitioning out of their current role and taking on responsibilities in their new role. This requires alignment between the staff member, their current manager and their new manager, who should negotiate around an appropriate timeline putting the interests of the organization first and foremost. A transition period of 4-6 weeks is recommended. The transition does not typically start at the time of offer, but instead an agreed upon date.

Note: Meeting the minimum requirements for the internal role does not automatically qualify the employee for an offer.

COMPENSATION GUIDELINES

Purpose

Implementation of consistent and appropriate practices are instrumental to Evidence Action's ability to attract, motivate, and retain qualified employees, and to ensure compliance with appropriate rules, regulations, and laws.

The success of our compensation program hinges on our ability to appropriately compete with external labour markets, to recognize and reward exceptional performance, and to maintain a shared understanding of internal equity and fairness.

Determining new hire starting salary

All new hire salaries will be evaluated based on their relevant knowledge, skills and experience as it relates to the minimally required knowledge, skills and experience of the position to which they are applying.

salaries for a new hire should be at the minimum of the payband, and where flexibility is required, not exceed the midpoint of their salary range. The recruitment team will screen candidates and ensure that we are only engaging candidates who are within the range of the minimum and midpoint of the bands. This allows the new employee an opportunity for future growth within the salary range. Other factors to consider:

- **Job value:** Each job is assigned a job level, based on the job description and the analysis of industry pay rates for similar jobs. Additional consideration may be given for jobs with hard to find skills and/or the job's overall value to achieving the organizational goals. Africa region has staff in two categories either Country staff or Technical Track staff.
- **Individual value:** The value that the individual brings to the job based on their relevant skills and experience. Less skilled and experienced applicants should be paid lower in the range, while more skilled and experienced applicants would be paid higher in the range, though not always above the midpoint or at the max of the pay band.

- **Internal equity:** A review of salaries of current employees in similar positions will be completed to ensure internal equity.

Please Note: Any starting salary above the midpoint of the salary band will require justification and review by the Associate Director P&C and approval by the Executive Vice President

Job Promotion Salary Adjustments

When an employee moves from their current position to a different position that is assigned to a higher pay band, this is considered a promotion. A promotion generally warrants an increase in base salary to recognize additional skills and/or responsibilities of the employee and to ensure that pay for the new position is consistent with market and internal equity.

Determination of Promotional Increases

- Promotional increases will be typically **between 10%-20%**, depending on the increased level of responsibility and other key considerations. This will be a consultation process between P&C and the line manager.
- A promotional increase must bring the employee to **at least the minimum** (entry level) of the new salary band – this is the first criteria for salary increases for promotions.
- Where the employee's salary already exceeds the minimum salary of the new band, additional assessment criteria will be applied in consultation with P&C and the EVP.

CRITERIA	ASSESSMENT FACTORS		
	Modest Increase (10% - 13%)	Moderate Increase (14% - 16%)	Significant Increase (17% - 20%)
<i>Degree of Increase in responsibilities</i>	Minimum (Up to 20% increase in responsibility)	Moderate (21% - 40% increase)	Significant (Over 40% increase)
<i>Internal Equity: Current salary relative to others in similar positions/dept</i>	High	About the same	Low
<i>Demonstrated ability to perform the duties of the new job</i>	Within the learning curve	Consistently Demonstrates	Consistently Exceeds

A promotional increase in salary will therefore consider the following;

- an employee's skill, knowledge, experience, performance,
- degree of increase in responsibilities,
- current salary relative to others in the new pay grade and in similar jobs,
- and ability to perform the duties of the new job.

Please Note: Any promotional increase outside of this threshold will require additional justification by the functional/program lead, review by P&C and approval by the EVP.

Lateral Transfer Salary Adjustments

Lateral transfers shall not include a salary adjustment as the staff will be moving to similar responsibilities. Should the staff be moving to a higher level or more responsibilities, the promotion guidelines shall be utilized. Any exception to this guideline will require additional justification, an internal equity review, and approval of the EVP.

Other Salary Adjustment Factors

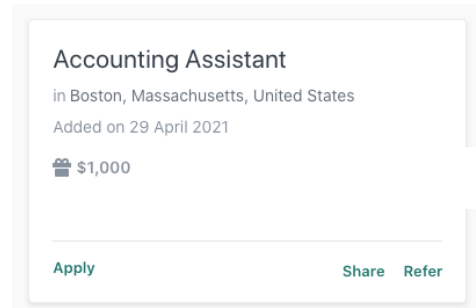
A salary adjustment is an increase in the salary or pay given to an employee that is not linked to a significant change in duties, responsibilities or scope of work e.g., merit increase etc. When making salary adjustment decisions, it is important to consider;

- employee performance to reward increased productivity and performance improvements
- available resources, salary caps, and other budget and donor restrictions to ensure that the increase is allowable and that funds exist to cover it. (When conducting budget analysis/implication, it is important to factor in the full cost to company for the position. Typically this would include changes in fringe benefits, eg pension, gratuity, etc)
- Larger value proposition for working at Evidence Action and serving in the new role, including organizational principles on compensation in general.

APPENDIX

HOW TO APPLY INTERNALLY

1. To submit an internal application (an application for a job at the company you currently work for), sign in to [Evidence Action's Workable Referrals website](#).
2. Find the job that you want to apply for and click the Apply link at the bottom left.



3. Alternatively, click on the job title to review the job details and the option to apply will appear at the bottom right.

- Hands-on experience with MS Excel and accounting software (e.g. QuickBooks)
- Ability to handle sensitive, confidential information



4. Fill out the application form that appears and submit the details. You'll receive an application confirmation via email. Your application will be sent to the job's hiring team for review.

Last Review Date: 3rd March 2024

Reviewed By

Karen 3/3/2024

Karen Olege

Associate Director People & Culture

Approved By



Paul Byatta

Executive Vice President – Africa Region

Evidence first.

We are led by the facts. We go where the data takes us. Robust, rigorous evidence informs our choices and decisions.

Economize without compromise.

The biggest impact at the lowest cost is what we are after. We ensure value for money for all our stakeholders, but know there is no substitute for quality.

Think big, act urgently.

We are unrelenting in our pursuit of results at scale. We know that poverty does not wait. We act so that the best ideas deliver benefit to millions.

Challenge convention.

We ask “why” and “why not” in equal measure. We are sincere in our skepticism and incessant in our search for solutions.

Iterate, again.

Iterate, again. We reflect constantly and adapt accordingly. We test, measure, and improve to ensure impact. If we can do something, we can do it better.

Passion throughout.

Passion throughout. We are driven to lessen inequality, to improve lives. We take action, converting impatience into impact.