**Annex 2.5 Performance Standards for Administrative Positions[[1]](#footnote-1)\***

Successful program and administrative staff at R4D excel along a number of key performance dimensions. While the dimensions of performance remain the same for staff at all levels, performance standards along each dimension change depending on the seniority of the individual. This document provides a summary of the key performance dimensions and standards along each dimension for staff at different levels of seniority.

 **Seven Dimensions of R4D Performance**

1. **Task and team management**, including proactive planning and prioritization, reliable and timely delivery, efficiency, flexibility and adaptability, and resourcefulness in problem solving.
2. **Communication**, including structure, clarity, fluency, and creativity of written documents and presentations, effective facilitation of groups, and clarity and enthusiasm in oral communications.
3. **Analysis**, including logical structuring of information and analytical questions, effective issue-identification, critical reasoning, quantitative analysis, and ability to synthesize information.
4. **Thought-leadership**, including development of new ideas and approaches, creation of new knowledge, and reputation as an expert on key topics both internally and externally.
5. **Entrepreneurship**, including initiative in identifying and pursuing opportunities for existing projects as well as for new areas of work, development of relationships that lead to new opportunities, and engagement in new business development.
6. **Teamwork and leadership**, including positive attitude, responsiveness, active listening, inspiring and motivating others, effective coaching, judgment and integrity, and contribution to overall R4D efforts (e.g., recruiting, fundraising, community service, social).
7. **Partner engagement**, including responsiveness to external stakeholders (funders, clients, partners, governments, vendors,) ability to negotiate difficult situations and work with challenging partners, and long-term relationship development.

**Performance Standards: Staff Accountant; Sr. Staff Accountant; Budget, Grants and Contracts Mgr**

|  |  |  |  |
| --- | --- | --- | --- |
| **Dimensions** | **Staff Accountant** | **Sr. Staff Accountant** | **Budget, Grants and Contracts Manager** |
| **Task and Team Management**  | * Completes weekly, monthly, quarterly transactional financial tasks in a timely and efficient manner while meeting deadlines and other parameters established in the Financial Policies and procedures
* Performs data entry of all finance related transactions (A/P and A/R) in to the accounting system accurately and on a consistent and timely basis
* Performs analysis of accounts to resolve accounting discrepancies and disputes with minimal errors
* Monitors and provides analysis of contract payments to insure accuracy of payment
* Effectively manages record keeping for the Finance Office
* Prepares invoices for contract and grant revenue and reimbursements due to R4D and enters into accounting software accurately and with minimal errors; forwards invoices to the appropriate funder or requestor
* Performs monthly reconciliations of credit card accounts accurately and on a consistent and timely basis
* Performs monthly bank account reconciliations accurately and on a consistent and timely basis
* Performs monthly reconciliation of all relevant expense accounts (e.g., balance sheet, fixed assets, depreciation etc.) accurately and on a consistent and timely basis
* Prepares monthly journal entries accurately and with minimal errors on a consistent and timely basis; and submits them for review to supervisor
* Prepares monthly Accounts Payable and Accounts Receivable Aging reports.
* Assists with monthly and year-end close by ensuring that all relevant reconciliations and journal entries are completed accurately and on a consistent and timely basis
* Assists with preparation of annual audit schedules. Prepares and assists with documentation as appropriate
 | * Effectively supervises, and reviews the work of staff accountant including, but not limited to reconciliations, accounting transactions, and recording of revenue and expenses
* Provides mentoring in a supportive and collegial manner
* Manages and coordinates the monthly and year end closing processes and annual audit, ensuring timely and accurate reporting in accordance with GAAP and R4D financial policies and procedures
* Prepares timely monthly, quarterly and annual financial statements and ensures that they accurately depict the financial condition of the organization
* Completes monthly reconciliation of salaries and benefits accurately and on a consistent and timely basis
* Ensures that the monthly journal entries are completed accurately on a consistent and timely basis; and that they are regularly (monthly) reviewed by the CAO
* Ensures timely month-end closings on a consistent and regular schedule
* Develops and recommends revisions to the R4D financial procedures and policies
* Exercises excellent judgement
 | * Develops and reviews budgets for proposal submission in a consistently accurate and timely manner
* Prepares timely monthly, quarterly and annual financial statements and ensures that they accurately depict the financial condition of the organization
* Develops and distributes accurate and complete quarterly labor cost forecast reports to ensure the organization’s expenditures are in line with budget limits
* Liaises with Managing Directors and Program Directors to ensure that across programs there is financial continuity, accuracy, and adherence to key processes such as clear cost and revenue accounting, reporting and compliance
* Monitors and coordinates all phases of grant and contracts programs and restricted contributions from award through close out, including grant and contract administration, reporting, and compliance with approved budgets, contract terms, and legal or regulatory requirements
* Guarantees grants and contract budgets align with institutional budgets and forecasts
* Works with finance team and program staff to ensure that key processes and systems are in place to manage grant risk assessments, donor financial compliance, and reporting management processes
* Closely monitors grant performance for major institutional donors
* Reviews all proposed grant and contract applications prior to submission to ensure consistency with proposal requirements; accuracy in the calculation of salaries, direct and indirect expenses; compliance with established regulations; and makes recommendations to program staff for revisions when appropriate
 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Analysis**  | * Appropriately and accurately verifies source documents for accuracy, completeness, authorization and coding to insure compliance with GAAP and R4D policies and procedures.
* Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality.
 | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality. Prepares comparative financial reports and analyses variances
* Strong qualitative and quantitative analytics with relatively infrequent errors or shortcomings in quality. Able to coach others effectively on analytical skills
* Draws appropriate conclusions from analysis
 | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality. Prepares comparative financial reports and analyses variances
* Strong qualitative and quantitative analytics with relatively infrequent errors or shortcomings in quality. Able to coach others effectively on analytical skills
* Draws appropriate conclusions from analysis
 |
| **Communication** | * Proactively recommends accounting policies and procedures to supervisor and CAO
* Is able to appropriately review and proofread work products so that minimal review is required by supervisor
* Effectively communicates with supervisor, co-workers and program staff and R4D management
* Effectively participates in team and staff meetings
* Communicates effectively with vendors, bank representatives and outside agencies as needed
 | * Effectively and proactively develops and recommends accounting policies and procedures
* Effectively communicates with supervisor, co-workers and program staff and R4D management
* Effectively participates in team and staff meetings
* Communicates effectively with vendors, bank representatives and outside agencies
 | * Effectively and proactively develops and recommends relevant grants and contracts management related accounting policies and procedures
* Effectively communicates with supervisor, co-workers and program staff and R4D management
* Effectively participates in team and staff meetings
* Communicates effectively with relevant funders, clients, vendors, and outside agencies.
 |
| **Thought-leadership** | * Viewed by internal team members as knowledgeable about key R4D accounting procedures and policies
* Advises supervisor and R4D program staff on changes in accounting standards and policies as appropriate.
* Engages in creative thinking
* Recommends new approaches to workflow to improve effectiveness and impact
 | * Viewed by internal team members as knowledgeable about key R4D accounting procedures and policies - - seen as an expert
* Advises supervisor and R4D program staff on changes in accounting standards and policies as appropriate
* Engages in creative thinking
* Recommends new approaches to workflow to improve effectiveness and impact
 | * Viewed by internal and external team members as knowledgeable about R4D budgeting, grants and contracting procedures and policies - - seen as an expert
* Advises supervisor and R4D program staff on changes in funder requirements relevant to R4D’s grants and contracts portfolio.
* Engages in creative thinking
* Recommends new approaches to workflow to improve effectiveness and impact
 |
| **Entrepreneurship** | * Develops creative new ideas for project work and effectively takes steps to execute
* Develops and suggests ideas that streamline accounting tasks and processes and deliver more timely and accurate financial reporting
* Reflect strong customer service orientation in approach to job duties and responsibilities
 | * Develops creative new ideas for project work and effectively takes steps to execute
* Develops and suggests ideas that streamline accounting tasks and processes and deliver more timely and accurate financial reporting
* Reflect strong customer service orientation in approach to job duties and responsibilities
 | * Develops creative new ideas for project work and effectively takes steps to execute
* Develops and suggests ideas that streamline R4D’s grants and contracts management task and processes and delivers timely and accurate budget and financial reports
* Reflect strong customer service orientation in approach to job duties and responsibilities
 |
| **Teamwork and Leadership** | * Works to create a mutually responsive team environment
* Provides assistance to R4D staff by providing advice and explanations regarding R4D accounting policies and procedures in a cheerful and collegial manner
* Responds to staff and vendor inquiries to resolve accounting discrepancies and disputes in a in a cheerful and collegial manner
* Actively supports other teams when appropriate
* Exercises good judgement and strong personal integrity
 | * Works to create a mutually responsive team environment within the Finance office
* Provides guidance and oversight to Staff Accountant in an effective and collegial manner
* Provides assistance to R4D staff by providing advice and explanations regarding R4D accounting policies and procedures in a cheerful and collegial manner
* Works to create a mutually responsive team environment
* Responds to staff and vendor inquiries to resolve accounting discrepancies and disputes in a in a cheerful and collegial manner
* Actively supports teams-mates
* Exercises good judgement and strong personal integrity
 | * Works to create a mutually responsive team environment within the Finance team
* Provides assistance to R4D staff by providing advice and explanations regarding R4D budget, grants and contracts policies and procedures in a cheerful and collegial manner
* Works to create a mutually responsive team environment
* Responds to staff and funder inquiries to resolve relevant discrepancies and disputes in a in a cheerful and collegial manner
* Actively supports team-mates
* Exercises good judgement and strong personal integrity
 |
| **Partner engagement** | * Effectively interacts with external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
 | * Effectively interacts with key external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
* Identifies areas of follow-up with partners and stakeholders and takes the lead on some areas of follow-up
* Manages the development of funder progress reports/updates
 | * Effectively interacts with key external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
* Identifies areas of follow-up with partners and stakeholders and takes the lead on some areas of follow-up
* Manages the development of funder progress reports/updates
 |

**Performance Standards: Operations Manager and Chief Administrative Officer**

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| **Dimensions** | **Operations Manager** | **Chief Administrative Officer** |
| **Task and Team Management**  | * Effectively supervises the Operations Program Associate on a day to day basis. Assigns work duties and delegates responsibilities as appropriate.
* Organizes office operations through the coordination of the R4D time reporting system, supporting onboarding new hires and ensuring administrative services are provided to R4D staff efficiently and effectively
* Ensures that finance and administrative records in an organized and easily retrievable manner
* Flexibly adapts to changes in priorities
* Develops and recommend policies and procedures
* Delivers completed end-products on time with minimal support and guidance from supervisor
* When problems arise, independently proposes next steps and/or options for resolution
 | * As a member of the organizations’ senior management team, the CAO, supervises and manages the organizations’ operations functions and team members
* Provides expert level internal and external coordination, management, and oversight of all financial, human capital, procurement, information technology and general administrative activities at R4D
* Provides expert level oversight of R4D’s key financial management activities including financial reporting and internal controls. Ensures compliance with applicable accounting standards and principles and financial information and system functional standards
* Responsible for all matters relating to R4D’s budget planning, formulation, presentation, execution, reporting and financial management systems
* Oversees the development of annual budget submissions R4D’s management and Board ensuring that the submissions are consistent with R4D’s strategic goals and mission
* Oversees R4D’s procurement and grants, building management as well as facilities, business insurance and other records and other logistical and support functions
* Supports the strategic planning of the organization by defining the financial resources needed and likely to be available in the near and long-term
* Participates in organization-wide problem-solving and decision-making
* Expert oversight of R4D’s financial, HR and IT
* staff, including Manager of Finance and Accounting; Budget, Grants and Contracts Manager, Office Manager and external IT support
* Responsible for the administration of personnel benefits programs; manages development, implementation and communication of finance, procurement and HR policies and procedures
* Facilitates administration and implementation of training and development program for R4D staff
* Exhibits superior technical and professional knowledge in financial management, human resources, procurement, information technology and general administrative operations
* Exhibit superior management skills including the ability to inspire, motivate, and influence Operations staff to deliver effectively on performance goals and related efforts and projects
* Expert capacity for collaborative leadership across all individuals -- staff, vendors and outside advisors.
* Act as a change agent by generating and fostering senior management support for innovative workforce programs and initiatives that align with R4D’s strategic goals and objectives. Work closely with R4D management and provides advice and guidance regarding Operations related activities
 |
| **Analysis**  | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality. Undertakes cost comparative analysis activities to ensure that R4D is receiving the best price point and service
* Makes ongoing recommendations to supervisor regarding the improvements of services
* Draws appropriate conclusions from analysis
 | * Develop mechanisms and metrics for tracking organizational expenditures and recommends cost-saving measures
* Presents and explains the strengths and weakness of the organization’s financial position to senior management and Board of Directors by presenting the annual budget, quarterly reports and the annual audit report
 |
| **Communication** | * Effectively and proactively develops and recommends policies and procedures
* Is able to appropriately review and proofread work products so that minimal review is required by supervisor
* Effectively participates in team and staff meetings
* Effectively communicates with supervisor, co-workers and program staff and R4D management
* Effectively leads staff trainings
* Effectively communicate policies and procedures to staff
* Effectively communicates with outside vendors
 | * Works collaboratively with program and management staff to ensure the organizations finance, HR, IT and procurement goals, policies and objectives are clearly communicated and understood
* Responsible for communications of R4D’s operational goals and strategies to a wide range of stakeholders, including but not limited to employees, board members, peer organizations, vendors, clients, contractors and members of the public
 |
| **Thought-leadership** | * Viewed by R4D staff as knowledgeable about key Administrative issues
* Recommends new approaches to workflow to improve effectiveness and impact
* Creates new knowledge within project area
* Actively demonstrates this expertise outside to internal and external audiences
* Engages in creative thinking
 | * Lead, advise, explain and participate in organizational decision-making and discussions that impact the ongoing future, direction and reputation of the organization
* Serve as the chief strategist for internal and external finance, HR procurement and Administration; advising, the organization’s senior leadership and staff
 |
| **Entrepreneurship** | * Develops creative new ideas for project work and effectively takes steps to execute
* Actively develops relationships with vendors
* Develops and suggests ideas that streamline Administrative and IT areas, tasks and processes
* Reflect strong customer service orientation in approach to job duties and responsibilities
 | * Develops and recommends creative new ideas for improving and enhancing work flow in the Operations space (HR, IT, Procurement, Finance and general administration)
* Builds relationships beneficial to R4D with external vendors to harness value and realize cost savings for R4D in all areas of Operations
* Develops and suggests ideas that streamline Operations functions and assures that R4D staff have the tools needed to be successful across all program areas
* Helps R4D management think strategically about relationships with prospective funders, clients and vendors to ensure that the organization achieves its mission goals and realizes the best value and benefit from the relationships
 |
| **Teamwork and leadership**  | * Works to create a mutually responsive team environment.
* Responds to staff and vendor inquiries to resolve Operations related discrepancies and disputes in a in a cheerful and collegial manner
* Provides guidance and advice, as needed, to help staff contribute and develop their skills
* Provides guidance and oversight to Operations PA in an effective collegial manner
* Actively supports other teams when appropriate
* Actively supports teams-mates
* Exercises good judgement and strong personal integrity
 | * Collaborates with the entire management team to strengthen R4D as an institution
* Reflects strong customer service orientation in approach to job duties and responsibilities
* Exercises good judgement and strong personal integrity.
 |
| **Partner engagement** | * Effectively interacts with key external partners and stakeholders in a cheerful and collegial manner
* Identifies areas of follow-up with partners and stakeholders and takes the lead on some areas of follow-up
 | * Expertly manage, maintains and fosters successful relationships that advance R4D’s reputation and relationship with its vendors, clients (contractors), funders, bank/financial institutions
 |

**Performance Standards: Human Resources Manager**

|  |  |
| --- | --- |
| **Dimensions** | **Human Resources Manager** |
| **Task and Team Management**  | * Effectively manage R4D performance management systems and provide guidance on best practices related to performance feedback.
* Effectively manage all aspects of talent management and staff development programs at R4D
* Manage the staffing and recruitment process (domestic and international), including, but not limited to, creating job descriptions, posting jobs, screening resumes, establishing interviewing strategies, counseling managers on candidate selections.
* Effectively manage internal job posting process
* Proactively assist managers in successfully handling employee relations issues.
* Provides sound and effective advice to R4D management on organization compensation policies and annual compensation process.
 |
| **Analysis**  | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality.
* Undertakes cost comparative analysis activities to ensure that R4D is receiving the best price point and service for HR related products and services
* Makes ongoing recommendations to supervisor regarding the improvements of services
* Draws appropriate conclusions from analysis
 |
| **Communication** | * Effectively communicates with management, staff and external partners about current and emerging HR issues relevant to R4D
* Effectively manage and oversee recruitment communications process with candidates, and conducting and analyzing exit interviews.
* Effectively manage internal job posting communications process
* Effectively communicate to management and staff R4D’s policies on employment matters such as performance issues, employee relations, coaching, etc.
* Recommends appropriate HR policies and policy revisions to R4D management
* Advise management of employee relation issues and advise on appropriate resolution
* Effectively lead HR related staff trainings and develops related content for trainings.
 |
| **Thought-leadership** | * Viewed by R4D staff as knowledgeable in all aspects of human resources management.
* Recommends new approaches to streamline systems and procedures to improve effectiveness
 |
| **Entrepreneurship** | * Actively develops relationships with external partners/counterparts
* Develops and suggests ideas that streamline tasks and processes
 |
| **Teamwork and leadership**  | * Contributes to a collegial workplace environment
* Actively supports other teams when appropriate
* Is seen as responsive and exercises good judgement and strong personal integrity
* When problems arise, independently proposes next steps and/or options for resolution
 |
| **Partner engagement** | * Establishes and maintains an effective network of contacts outside the organization to ensure effective liaison in support of the organization’s HR needs and objectives.
* Effectively interacts with external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
 |

**Performance Standards: Administrative Coordinator, Program Coordinator, Executive Assistant**

|  |  |  |  |
| --- | --- | --- | --- |
| **Dimensions** | **Administrative Coordinator** | **Program Coordinator** | **Executive Assistant** |
| **Task and Team Management**  | * Completes with guidance from supervisor, a wide range of administrative project activities, including but not limited to managing time and scheduling on behalf of manager, coordinating manager’s travel and related logistics, prioritizing and resolving conflicts and competing demands
* Coordinates in an efficient and timely manner scheduling of manager’s meetings, circulation of meeting agendas and documents and maintenance of manager’s and/or team’s files
* Accountable for smooth operation of systems within team including ensuring that the manager’s files are organized and easily retrievable and that they adhere to R4D policies and procedures
* Prioritizes own work, with help of manager
* Anticipates needs of team and flexibly adapts to changes in priorities
* When problems arise, seeks appropriate guidance
* Ensures appropriate use of resources (e.g., when purchasing travel and office-related goods and services)
 | * Completes, with guidance from team members, a wide range of administrative project activities, including but not limited to project accounting, proposal and project support, coordinating events, background research, web stats, developing PPT presentations, drafting consultant contracts
* Assists technical and program staff in the development of project work plans and accompanying budgets
* Prioritizes own work, with help of manager
* Anticipates needs of team and flexibly adapts to changes in priorities
* When problems arise, seeks appropriate guidance
* Ensures appropriate use of resources (e.g., when purchasing travel and office-related goods and services)
 | * Effectively manages time and scheduling on behalf of President including coordination of President’s travel and related logistics, prioritizing and resolving conflicts and competing demands
* Coordinates in an efficient and timely manner scheduling of Board meetings, circulation of meeting agendas and documents and maintenance of official board files
* Accountable for smooth operation of systems within executive office including ensuring that the President’s files are organized and easily retrievable and that the executive office adheres to R4D policies and procedures
* Ensures quality of documents requiring President’s approval or signature
* Drafts/finalizes correspondence on behalf of President and prepares minutes of meetings as needed
* Flexibly adapts to changes in priorities
* Delivers work on time with minimal support and guidance from supervisor
 |
| **Analysis**  | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality.
* Makes ongoing recommendations to supervisor regarding the improvements of services
 | * With help from team members, logically structures information
* Undertakes comparative analysis activities to ensure that R4D is receiving the best price point and service related to conferences, meetings, internal office resources.
 | * Able to perform in the key areas of job responsibilities with relatively infrequent errors or shortcomings in quality
* Makes ongoing recommendations to President with a view to streamlining processes and improving systems in Executive Office liaising with others as appropriate
* Independently responds to diverse inquiries and makes appropriate decisions when multiple courses of action are possible
 |
| **Communication** | * Effectively communicates with management, staff and external partners
* Relays and processes sensitive and confidential information under manager’s direction inside and outside the organization with the utmost discretion
* Is able to appropriately review and proofread work products so that minimal review is required by supervisor
* Effectively participates in team and staff meetings
* Effectively communicates with supervisor, co-workers and program staff and R4D management
* Knowledgeable of R4D administrative policies and procedures
* Effectively communicates with outside vendors
 | * Assists in planning events, including conference calls, webinars, conferences, and meetings
* Identifies opportunities to highlight team work in internal and external communications;
* Writes fluently, but may require editing
* Contributes effectively in internal team meetings
 | * Effectively communicates with management, staff and external partners
* Relays and processes sensitive and confidential information inside and outside the organization with the utmost discretion
 |
| **Thought-leadership** | * Viewed by team as knowledgeable about key Administrative issues
* Recommends new approaches to workflow to improve effectiveness and impact
 | * Actively seeks to learn about R4D’s areas of technical work
 | * Viewed by R4D staff as knowledgeable with respect to time management and other administrative issues pertaining to the President
* Recommends new approaches to streamline systems and procedures to improve effectiveness within executive office
 |
| **Entrepreneurship** | * Develops creative new ideas for administrative work and effectively takes steps to execute
* Actively develops relationships with vendors
* Develops and suggests ideas that streamline Administrative areas, tasks and processes
* Reflect strong customer service orientation in approach to job duties and responsibilities
 | * Contributes creative ideas for specific tasks and follows up on them
* Supports proposal development by reviewing monthly project expenditures against budget and update financial tracker. Coordinate monthly expenditure reviews with the program team. Alert program team to necessary contractual or management actions based on that review.
* Suggests areas for process improvement and helps to implement
 | * Actively develops relationships with external partners/counterparts
* Develops and suggests ideas that streamline tasks and processes
 |
| **Teamwork and leadership**  | * Contributes to a collegial workplace environment
* Actively supports other teams when appropriate
* Is seen as responsive and exercises good judgement and strong personal integrity
* When problems arise, proposes next steps and/or options for resolution with supervisor
 | * Actively seeks advice and guidance from manager and other team members
* Proactively requests inputs from team members
* Provides effective support to manager and team
* Responsive to internal stakeholders
* Provides occasional support to other teams when needed
* Actively participates in R4D activities and volunteers to participate in planning or execution of some activities (social, community service, etc.) that contribute to positive R4D environment
* Maintains positive attitude about work
* Exercises good judgement and strong personal integrity
 | * Contributes to a collegial workplace environment
* Actively supports other teams when appropriate
* Is seen as responsive and exercises good judgement and strong personal integrity
* When problems arise, independently proposes next steps and/or options for resolution
 |
| **Partner engagement** | * Establishes and maintains an effective network of contacts outside the organization under supervisor’s direction to ensure effective liaison in support of the supervisor’s needs
* Effectively interacts with external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
* Identifies areas of follow-up with partners and stakeholders and follows-up with supervisor direction
 | * Coordinates with external stakeholders on administrative matters in a highly professional and reliable manner
* Viewed as responsive to requests of partners and other external stakeholders
* Effectively communicates about R4D in a positive way
 | * Establishes and maintains an effective network of contacts outside the organization to ensure effective liaison in support of the President’s needs
* Effectively interacts with external partners and stakeholders (funders, clients, partners), in a cheerful and collegial manner
 |

1. Created and used by the Results for Development Institute. Last update as of January 2014. [↑](#footnote-ref-1)