


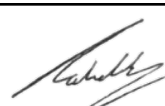


# TASKEEN HEALTH INITIATIVE

## PERFORMANCE MANAGEMENT AND APPRAISAL POLICY

Prepared By	Department: Human Resource	Date: 03rd June, 2022
Approved By COO/CEO	Signature: 	Date: 03rd June, 2022

Revision History Table			
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1.0	1st July, 2023	First Annual Revision	
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## **PERFORMANCE MANAGEMENT AND APPRAISAL POLICY**

### **POLICY STATEMENT**

The purpose of this policy is to establish a structured and transparent framework for performance management, appraisal, and annual increments, ensuring that employees receive constructive feedback, recognition for their contributions, and opportunities for professional growth. By aligning individual performance with the organization's strategic objectives, the policy aims to foster a culture of continuous improvement and accountability. It also ensures that salary increments are merit-based and fairly awarded, reflecting each employee's performance, contributions, and development within the organization.

### **SCOPE**

This policy applies to all full-time, part-time, and contractual employees, as well as consultants of the organization, across all departments and levels. It covers the processes related to performance evaluation, feedback, recognition, the determination of annual salary increments, and consideration for promotions.

### **SECTION I: PROBATIONARY PERIOD EVALUATION**

All new employees undergo a three-month probation period as specified in their employment contract. At the end of this period, their performance is evaluated to determine whether they will be confirmed as permanent employees or require an extension. Employees who meet performance expectations are confirmed, while those who do not may either have their probation extended for further evaluation or be released from the role.

#### **1. PROBATIONARY PERIOD EVALUATION PROCESS**

- The probation period begins on the employee's official date of joining and lasts for three months.
- All new employees are informed about the probation duration and expectations during onboarding.
- During the probation period, supervisors monitor the employee's performance, behavior, punctuality, adaptability, and overall fit within the organization.

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- Optional mid-probation feedback may be provided by the line manager around the six-week mark to guide performance and address concerns early.
- One week before the end of probation, HR notifies the supervisor to begin the formal evaluation process.
- The supervisor completes a Probation Evaluation Form, assessing the employee against predefined criteria such as work quality, communication, teamwork, and adherence to organizational values.
- A formal evaluation meeting is held between the supervisor and employee to discuss the assessment, share feedback, and allow the employee to respond.
- Based on the evaluation score, the supervisor recommends one of the following actions to HR:
  1. If the employee scores 60% or above, they are confirmed in their position and granted a predefined salary increment as per company policy.
  2. If the employee scores below 60%, the probation period is extended in accordance with company policy, typically by 1 to 3 months.
  3. In cases where performance is significantly below expectations and improvement is unlikely, the supervisor may recommend termination of employment.
- If the probation period is extended, a new evaluation is conducted at the end of the extension period, following the same formal review and decision-making process.
- HR reviews the recommendation, finalizes the outcome, communicates the decision to the employee in writing and in a meeting, and updates personnel records accordingly.

## **SECTION II: YEARLY PERFORMANCE EVALUATION**

All confirmed employees of the organization—whether full-time, part-time, contractual, or consultants—are subject to an annual performance evaluation conducted every January. This yearly appraisal is a structured process designed to assess employee contributions, achievements, and alignment with Taskeen's organizational goals over the preceding 12 months. Evaluations are conducted against predefined Key Performance Indicators (KPIs) established by line managers at the beginning of each year and reviewed in consultation with HR.

The primary goals of the annual evaluation include providing constructive feedback, identifying areas for development and corrective action, determining eligibility for salary increments or promotions, and ensuring accountability and professional growth. The outcomes of this process directly influence compensation adjustments, role elevation, and developmental interventions.

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## 1. PROCEDURE

1. HR initiates the evaluation cycle by sharing Performance Evaluation Forms with line managers, copying employees and the HOD via email.
2. Line managers and employees complete their respective sections of the form.
3. One-on-one feedback sessions are held between managers and employees to discuss performance outcomes and future objectives.
4. Completed and signed forms are submitted to HR for review.
5. HR finalizes evaluations and determines eligibility for increments, promotions, or placement on a Performance Improvement Plan (PIP) or advisory letter.
6. Results and salary adjustments (if applicable) are communicated formally via email. Annual increments are applied effective from January 1st 2025 on a pro rata basis.

## 2. 360-DEGREE EVALUATION FOR SENIOR MANAGEMENT

For all employees at the Manager level and above, a 360-degree performance evaluation will be conducted in addition to the standard annual performance appraisal process. This holistic approach is designed to provide well-rounded feedback by gathering insights from various stakeholders who interact with the employee across different functions and levels.

### 2.1. Key Features of the 360-Degree Evaluation Process:

- **Participants:** Feedback will be collected from a combination of direct reports, peers, cross-functional colleagues, and supervisor.
- **Method:** HR will facilitate the process through Google Form to ensure consistency.
- **Evaluation Criteria:** The assessment focuses on set kpis, leadership qualities, communication, collaboration, decision-making, accountability, emotional intelligence, and overall strategic impact.
- **Final Review:** HR consolidate all feedback and ratings. The COO/ CEO then conducts a one-on-one session with the employee to discuss key strengths, blind spots, and developmental opportunities.

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### 3. ANNUAL SALARY INCREMENT CRITERIA

For Psychologists/Counselors/Helpline Coordinator		For Other Employees	
Score	Increment Percentage	Score	Increment Percentage
60 - 64	5%	60 - 69	5%
65 - 69	7.5%	70 - 79	7.5%
70 & above	10%	80 & above	10%
*Employees scoring below 60% will receive an advisory notice and be placed on a Performance Improvement Plan (PIP) for one month.			

**Note:** Employees who demonstrate exceptional performance may be considered for an extra increment of up to 15% based on their evaluation score. To be eligible, the employee must have an evaluation score of at least 85%. The line manager must provide a written justification for the additional increment, which must be approved by the Head of Department (HOD).

### 4. PROMOTION

- A promotion refers to any advancement in an employee's role, which may include an upgrade in job grade, a change in position, or the assignment of additional responsibilities. Promotions are based on performance, organizational needs, and the availability of suitable roles and are intended to recognize and reward employee growth and contributions.
- Employees who are promoted to a higher position will receive a salary adjustment based on the pay scale of the new role.
- If the promotion is mid-year, it will be considered based on performance and availability of a vacant position.
- Promotion-based salary adjustments take effect from the date of the promotion.

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## **5. PROMOTION CRITERIA**

At Taskeen Health Initiative, promotions are a key part of employee growth and organizational development. To ensure a transparent, merit-based process, promotions are awarded based on the following criteria:

### **5.1. Performance**

- The employee consistently meets or exceeds the performance standards and Key Performance Indicators (KPIs) established for their current role.
- Demonstrates exceptional quality of work, efficiency, and the ability to achieve results with minimal supervision.

### **5.2. Skills and Competency Development**

- Possesses the required technical, functional, and behavioral competencies for the higher role.
- Actively engages in professional development.

### **5.3. Leadership and Initiative**

- Exhibits leadership potential by taking initiative, mentoring others, leading projects, or supporting team objectives.
- Demonstrates sound decision-making, problem-solving capabilities, and proactive contribution to departmental or organizational goals.

### **5.4. Cultural Alignment**

- Consistently demonstrates behaviors aligned with Taskeen Health Initiative's core values including integrity, compassion, inclusivity, respect, and accountability.
- Fosters collaboration, promotes a positive work environment, and embraces organizational changes and initiatives.

### **5.5. Readiness for Increased Responsibility**

- Has successfully handled responsibilities or projects that are broader or more complex than those required for their current role.
- Exhibits strategic thinking and the ability to contribute to larger organizational objectives.

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### 5.6. Tenure and Experience

- A minimum period of service in the current role is typically required, generally ranging from 6 to 12 months.
- Exceptional cases may be considered for early promotion based on outstanding performance and organizational needs.

## 6. PERFORMANCE IMPROVEMENT PLAN (PIP)

A Performance Improvement Plan (PIP) is a structured and time-bound process designed to support underperforming employees in achieving required performance standards. It outlines specific performance gaps, measurable goals, and targeted support to facilitate improvement.

### 6.1 Procedure

- If an employee consistently fails to meet expectations or falls below performance benchmarks, the Head of Department (HOD) and Line Manager initiate the PIP process and formally notify the employee.
- A one-on-one meeting is held with the employee, Line Manager, and HR to communicate concerns, clarify expectations, and define areas for improvement.
- The Line Manager develops a written action plan outlining measurable performance goals, timelines, and any required support.
- Bi-weekly review meetings are conducted by the Line Manager to assess progress, provide feedback, and make necessary adjustments to the plan.
- All review discussions are documented, noting progress, challenges, and any revisions to the action steps.
- Final evaluation outcomes:
  - **Successful:** The employee meets the set expectations and exits the PIP.
  - **Unsuccessful:** May result in extension of the PIP, reassignment, or termination depending on the circumstances.

The duration of a PIP ranges from a minimum of 1 month to a maximum of 3 months, based on the severity of performance gaps and improvement required.

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## 7. PERFORMANCE RATING SCALE

Rating Scale	Description	Definition	Outcome
<b>S – Significantly Above Target</b>	Exceptional Performance	Exceeds all expectations consistently	Eligible for Promotion, Extra Increment, or Job Rotation
<b>A – Above Target</b>	Exceeds Expectations	Consistently meets and exceeds most expectations	Considered for Promotion or Increment
<b>M – Meets Target</b>	Fully Performing	Achieves expected standards and job goals	Increment to be given (if applicable)
<b>P – Partially Meets Target</b>	Below Acceptable Standards	Needs improvement in some areas	No Increment, Advisory Letter, or Job Rotation Consideration
<b>D – Did Not Meet Target</b>	Unsatisfactory Performance	Fails to meet job expectations	Recommended for Advisory Letter or Termination

## 8. CONFIDENTIALITY AND DOCUMENTATION

- Completed evaluations become part of the employee's official personnel file.
- Performance evaluations are confidential and will be reviewed by the department head or designated management official.

## SECTION III: EMPLOYMENT CHANGE

Employment change refers to any modification in an employee's existing terms of employment within the organization. This may include transitioning from full-time to part-time status (or vice versa), shifting between remote, hybrid, or on-site work arrangements.

This policy applies to all active employees of Taskeen. It is designed to ensure that such transitions are managed in a structured, transparent, and equitable manner, balancing individual career aspirations with the organization's operational needs.

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## 1. ENTITLEMENT

- **Eligibility for Transition:**

- Employees must have completed a minimum of one year of continuous service at Taskeen. For less than one year the decision would be based on case by case depending on the operational requirement and relevant approvals.
- Applicants must provide a genuine reason for requesting a shift to a different form of employment, which should be well-documented and substantiated during the application process.
- The feasibility of an employment transition is contingent upon the specific nature of the job and the current operational needs of the organization to ensure alignment with Taskeen's strategic objectives and operational functionality.
- Employee performance will be thoroughly assessed to determine suitability for the proposed change, considering factors such as job competency, achievement of performance goals, and overall contribution to the team and company.

- **Part-Time Employment:**

- Employees opting to shift from full-time to part-time status may not reduce their working schedule below 50% of a full-time workload. Certain positions may have different criteria based on departmental needs.
- Employees hired or transitioned into part-time roles may engage in external employment only within the remaining percentage of their available capacity, based on a 100% total work allocation. Any such engagement must be formally disclosed to Taskeen through an undertaking form to ensure transparency and avoid potential conflicts of interest. Exceeding the allowable limit or failing to disclose external work arrangements will be considered a serious violation of employment terms and may result in immediate disciplinary action, including termination of employment.

- **Remote Work\*:**

- Employees residing within 30 to 50 km radius of the office may be considered for a reduction in required in-office days, subject to fulfilling other specified eligibility criteria and obtaining necessary managerial and HR approvals.
- Employees residing 50 km radius or beyond will generally be hired to work remotely, provided they can demonstrate the ability to maintain effective communication, responsiveness during working hours, and are available for occasional onsite presence when required by the organization.

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- **Reversion of Employment Status:**

- Employees wishing to revert to their previous employment status after the six-month period will have their adjustments to benefits handled on a case-by-case basis.
- Adjustments to benefits will not be implemented immediately.

## **2. PROCESS**

1. Employees must have a detailed discussion with their direct line manager covering the reasons for the change, expected outcomes, and any potential impact on the current role and team.
2. Employees must formally submit their request via email to the Human Resources department. The email should include all pertinent details of the proposed employment change, with the line manager and HOD in CC.
3. The request must first receive approval from the line manager. Upon approval, it will be forwarded to HR and the HOD for evaluation and final approval.
4. Upon securing necessary approvals, HR will review the employee's records to verify eligibility and initiate the formal process to implement the change. This includes updating employment records, adjusting schedules and contracts, and communicating the change to relevant parties.
5. Employees who transition their employment will undergo periodic reviews to ensure they meet departmental objectives and maintain high standards of Taskeen's services. Adjustments may be made based on feedback from supervisors, performance metrics, and client satisfaction.

## **3. TERMS AND CONDITIONS**

- Decisions regarding changes in employment or mode of employment will be based on the company's operational needs, the employee's qualifications, and performance history.
- The management reserves the right to conduct relevant assessments as part of the process.
- Adjustments to benefits for employees who transition their role or mode of employment will be reviewed and potentially modified annually.
- The clause regarding remote work applies exclusively to psychologists in the Wellness Department, reflecting Taskeen's commitment to accommodating the specific requirements of their professional roles.

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(\*) applies exclusively to employees of the Wellness Department. It does not extend to employees of other departments unless explicitly stated by management.

## **SECTION IV: PERFORMANCE EVALUATION FOR INTERNS AND TRAINEES**

Interns and trainees play an important role in Taskeen's workforce development, and while they are not eligible for increments or promotions under the regular appraisal cycle, their performance is still subject to formal review to ensure they meet learning objectives and maintain professionalism during their tenure.

### **1. PERFORMANCE EVALUATION PROCESS**

- At the start of the internship or traineeship, the supervisor sets expectations, learning goals, and deliverables.
- Mid-term feedback may be provided informally to guide performance and make early corrections.
- A formal evaluation is conducted at the end of the internship or training period using the Intern/Trainee Evaluation Form.
- The final evaluation helps determine eligibility for:
  - Certificate of completion
  - Internship extension
  - Consideration for full-time employment
- Evaluation feedback is shared during a one-on-one session between the supervisor and the intern/trainee, and the completed form is submitted to HR for recordkeeping.

### **2. STEPS FOR ONBOARDING INTERNS AND TRAINEES AS EMPLOYEES**

Interns or trainees who perform well and express interest in continuing with Taskeen may be offered regular employment through the following structured process:

#### **1. Need Assessment and Interest Confirmation**

The department must identify a suitable vacancy and verify the intern's/trainee's interest in a long-term role at Taskeen.

#### **2. Performance Evaluation and Score Criteria**

The evaluation score must be 60% or above for employment consideration, and the supervisor must consult with the HOD and HR during this stage.

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**3. Mutual Agreement and Probation Terms**

If the intern and supervisor agree to proceed:

- HR schedules a discussion with the intern/trainee to confirm interest and explain employment terms.
- **Probation periods will apply as follows:**
  - Three-month internship: Serve a 1-month probation period.
  - Two months or less: Serve a 3-month probation period.
  - Trainee psychologists: Serve a 1-month probation from the Date of Joining (DOJ) as a regular employee.
- Upon successful completion of probation, the employee will be confirmed and become eligible for Taskeen's standard employee benefits.

**4. Documentation and Recommendation**

The supervisor submits the final evaluation form to HR, clearly recommending the intern/trainee for onboarding as a regular employee.

**5. Offer Letter and Hiring**

HR issues an Offer Letter via email to the intern/trainee and initiates the formal hiring process.

**6. Notice Period for Trainee Psychologists (During Probation)**

If a trainee psychologist resigns during probation, they are required to serve a minimum notice period of one week.

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