



APC
ASSOCIATION FOR
PROGRESSIVE
COMMUNICATIONS

HUMAN RESOURCES MANUAL

Version 15

July 2018



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01

INTRODUCTION

- 1.1 ABOUT THIS MANUAL
- 1.2 APC EMPLOYMENT AND CONTRACTS

1.1 About this manual

This manual outlines APC's human resources policies and procedures. If you notice that a human resource issue is not addressed adequately by this manual, please bring this to the attention of the designated human resources coordinator (HRC).¹ The procedure for updating the manual depends on the nature of the changes requested. Changes for clarification are added by the HRC in consultation with the executive director and operations director, but changes in HR policy need to be approved by the management team, and in some cases, by APC's board of directors.

1.2 APC employment and contracts

1.2.1 APC as a USA employer

APC is registered in the State of California, in the USA, as a 501(c)3 non-profit with tax exemption. APC complies with all relevant federal and state law applicable to both 501(c)3 requirements, and as an employer registered in the USA.

1.2.2 USA-based staff

Every month, APC reports salaries, benefits and expense payments for USA-based staff to a California-based specialist agent called "Paychex". Paychex calculates all deductibles and manages reporting requirements to the USA Internal Revenue Service (IRS) (and other bodies as appropriate), and APC transfers the net pay to the employee.

In January of each year, staff living in the USA will receive a W2 which is used for tax submission to the IRS.

The HR officer will arrange a meeting with new staff prior to the first monthly salary payment to discuss how this arrangement works and details specific to the staff person.

1. At the time of this edition of the manual this is Misty Tanner – misty@apc.org.

1.2.3 Non-USA-based staff

All other staff (non-USA-based staff) are technically self-employed (the term may differ from country to country) for tax purposes.

Staff members are responsible for complying with tax requirements in the country where they are tax-resident. APC provides annual statements of earnings for all staff and can provide some advice for staff in relation to submitting annual tax returns, but they are not tax specialists and cannot provide legal advice. Staff are all encouraged to seek advice in the country where they are tax-resident from professionals who can provide such advice

1.2.4 Contracts

APC staff are issued with contracts as long as the organisation is secure in the knowledge that there is funding to meet contractual obligations, including salary payment, for the specified period. APC offers two different types of staff contracts: fixed term and renewable.

1.2.4.1 Renewable contracts

Renewable contracts are issued to staff whose work is ongoing and where funding is secure for 12 months or longer. Staff on renewable contracts are entitled to an equipment and office allowance, healthcare and retirement benefits, 25 days annual leave (taken at their full-time equivalent, or FTE), 12 paid public holidays, sick leave and personal care leave.

1.2.4.2 Fixed-term contracts





Fixed-term contracts are used when appointing people to work on specific projects or tasks that have clear beginning and end dates, usually when the duration of the project or tasks involved is 12 months or less.

Staff on fixed-term contracts of less than 12 months do not normally qualify for healthcare or retirement benefits (see section 5.1) but do qualify for an office expense allowance and equipment allowance (see sections 5.2 and 6.1).

Staff on fixed-term contracts are granted 15 working days annual leave at their FTE and 12 paid public holidays prorated to the term of their contract. On contracts of six months or longer, sick leave can also be granted (see section 15.3). The policies and procedures in this manual refer primarily to staff on renewable contracts. When they refer to fixed-term contracts this is noted accordingly.

02

HOURS OF WORK

-  2.1 WORK WEEK
-  2.2 FLEXTIME
-  2.3 TIME OFF IN LIEU (TOIL) FOR TIME WORKED BEYOND NORMAL WORKING HOURS
-  2.4 TIME TRACKING

2.1 Work week

At full-time equivalent or 1.0 FTE, normal working hours are 40 hours per week, which includes a daily one-hour (paid) lunch break. Staff members working less than 1.0 FTE (full time) are entitled to paid breaks based on that ratio, as follows:

FTE	1.0	0.9	0.8	0.75	0.7	0.6	0.5	0.4	0.3	0.25	0.2	0.1
Hours per week	40	36	32	30	28	24	20	16	12	10	8	4
Hours per day	8	7.2	6.4	6	5.6	4.8	4	3.2	2.4	2	1.6	0.4
Minutes of daily break	60	54	48	45	42	36	30	24	18	15	12	6

2.2 Flexitime

APC supports the principle of flexible working time. However, certain positions require fixed schedules, and thus certain staff members are not entitled to flexitime. Staff must negotiate their schedule with their manager.

2.3 Time off in lieu (TOIL) for time worked beyond normal working hours

APC does not pay overtime. All staff are expected to work beyond normal working hours from time to time as needed. In recognition of this, APC has a generous leave policy (25 working days per year) including additional days of leave when the organisation closes over the year-end period. This amounts to at least six weeks of vacation leave per year. In addition, APC provides paid leave for 12 public holidays per year (see 15.2.1).

2.3.1 When working extra hours is necessary

Sometimes working extra hours is necessary and can be predicted. Whenever possible, extra work hours should be discussed, agreed on and authorised by the relevant manager, prior to the additional time being worked. This could include:

- Extra work needed around an upcoming event or a substantial task
- Part-time staff needing a temporary increase in FTE for a certain period related to a particular task or activity.

In situations where overtime is frequent, consistent or routine, the staff member must raise the issue with their manager in a timely fashion, in order to discuss and agree on a permanent change to remedy the situation.

This could include agreeing on:

- A permanent FTE increase (if the person is part-time and budget is available)
- Adjustments to the job specifications
- Delegation of tasks to someone else on a permanent basis.

2.3.2 Additional time worked during meetings

During APC meetings, staff who are on part-time contracts will be paid full time for the duration of their participation in the meeting, unless APC's financial circumstances at the time make this impossible.

Adjustments to pay will be automatically included in payroll for full staff meetings or team meetings. Part-time staff may also be paid full time for participation in other meetings if financial circumstances allow, but this must be discussed and agreed on beforehand with their manager. The manager should then inform the finance staff of the adjustments to be made in payroll.

2.3.3 Time off in lieu (TOIL) for weekend work

All staff, part-time and full-time, will be granted TOIL for weekend work at a one:one ratio – i.e. one day in lieu for each weekend day worked.

Staff on part-time contracts will also receive pay making up the difference between their FTE and one full day for each weekend day worked. For example:

- I am on .5 FTE and have worked two weekend days during a staff meeting. I take two days TOIL at my normal FTE (0.5) and receive pay for two days at 0.5 FTE in my next salary payment.
- I am on .6 FTE and have worked one weekend day during a staff meeting. I take one day TOIL at my normal FTE (0.6) and receive pay for one day at 0.4 FTE in my next salary payment.

TOIL is not given for work-related weekend travel. Please see the section on travel time for more information.

In all cases, staff should agree which days they will take off as TOIL with the relevant manager, and TOIL needs to be claimed using the leave form.

The form should be sent to fatima@apc.org, copying karenb@apc.org, and the TOIL should be used within two weeks of the extra time having been worked.

2.3.4 Travel time

APC does not pay for weekend travel time. Wherever possible, travel should be arranged during a week day. A “travel day” can be taken after a trip and should be discussed with the relevant manager.

2.4 Time tracking

APC staff are required to keep track of their time using APC’s online time-tracking system.² Doing time tracking is a requirement from some of APC’s donors, helps us analyse how we spend our time, and provides the information we need for APC’s internal charging system (ICs). Please see Appendix A for more information.

2. APC has adopted an open source application called Kimai as a staff time-tracking application (www.Kimai.org). Kimai was permanently implemented on 1 November 2012.

03

REMUNERATION POLICY³

- 3.1 JOB CATEGORIES
- 3.2 APC SALARY RANGES
- 3.3 POST ADJUSTMENT
- 3.4 RECOGNITION OF INDIVIDUAL CONTRIBUTIONS AND PROMOTIONS
- 3.5 SALARY PAYMENTS AND LOANS

3. The current remuneration policy was adopted by the APC board in March 2004. Changes to the remuneration table were approved by the board in July 2009. The APC base salary range had decreased through the years and a document was presented to the board in July 2009 which resulted in APC salary ranges being increased by 5% in May 2010 and 3.05% on 1 January 2012. From this adjustment onwards the board agreed that the APC base salary range would be increased by the percentage that UN professional salaries increased. Each year in January the HR officer checks the UN website <https://icsc.un.org> and advises management on any base salary increase.

APC's remuneration policy is designed in response to the fact that APC employees live in many different countries, and aims to ensure, as far as is possible, that salaries for similar positions have similar value in terms of local cost of living.

The three most important considerations that underpin APC's remuneration policy are:

- i. Ensuring a level of internal equity in pay (between staff members based in different countries)
- ii. Ensuring, as far as is possible, a level of external equity (with other international organisations and salaries in the local market)
- iii. Accommodating the fact that staff members change their country of residence from time to time while employed by APC.

APC's remuneration system is based on that used by the United Nations (UN),⁴ which combines a base salary with a post-adjustment factor to arrive at a total salary.

The post-adjustment factor is updated and applied monthly as a multiplier to the base salary, thereby adjusting for different costs of living and exchange rate fluctuations. More information on this can be found below in 3.3.


The base salary ranges will change from time to time, up or down, based on the UN's annual salary adjustments. Health and retirement benefits are calculated as a percentage of the midpoint of each range.

When the UN base rates are adjusted, APC's base salary ranges are adjusted by the same percentage.


Base salaries are determined by the level of responsibility and required skills and experience associated with job categories and specific positions in those categories. If a change in responsibility is substantial there may be a change in job category. The table below provides a guide to which responsibilities are generally associated with each job category.

4. www.un.org/Depts/OHRM/salaries_allowances/salary.htm#pa

3.1 Job categories


 Executive director

The executive director (ED) holds overall responsibility for working with members, staff and the board to develop and implement APC strategy and for mobilising the resources needed to do so. The ED reports to the board and is an ex-officio member of the board. The ED manages a team of managers and is responsible for representing APC and building APC's public profile.

 Director

Directors are responsible for leadership, development and oversight of broad areas of work at the APC-wide level, and for mobilising the resources needed to do so. They support the executive director and management team to develop and implement APC strategy and organisational development. They are or can be responsible for managing multiple staff and/or multiple teams and/or cross-programme units and supporting their development.

Manager: programme and management systems



Managers are responsible for developing and implementing APC strategy at programme or management systems level and for mobilising the resources needed to do so. They must manage the staff in their teams and support their development. They are responsible for developing and managing strategic partnerships for APC in their area of work. Managers have varying levels of responsibility in terms of resource mobilisation, managing staff and sub-contractors, number of projects, and size of budget.



Specialist

APC appoints a few specialists with specialised skills, qualifications and experience, such as accountants, legal experts and policy analysts with specialised expertise. When specialists provide accounting or legal services, the financial, statutory, legal and supervisory responsibilities vary but in general ensure that APC fulfils its statutory obligations rigorously. Specialists working in one or more of APC's key results areas are generally recognised experts in their area of specialisation with a highly developed skill set in and knowledge of that area.



Senior project coordinator

Senior project coordinators manage one large project (with project size defined by the number of countries and partners involved, and the size of the budget) or a sub-section of a programme or management system. They oversee the financial management and ongoing resourcing, development, implementation, monitoring and evaluation of the activities they are responsible for. They build and manage strategic relationships with relevant partners and donors and report to these donors on project activities. They supervise multiple staff and/or sub-contractors involved and are responsible for the performance management and development of staff reporting to them.



Project coordinator

Project coordinators coordinate one or more projects or activity areas within a programme or management system. They oversee the ongoing development, planning, resourcing, coordination, implementation, monitoring and evaluation of the activities they are responsible for. They build strategic relationships, manage project or work area finances, develop internal and donor reports, and supervise project sub-contractors or staff as needed.



Programme/administrative worker

Programme and administrative workers are responsible for general or specific support, often of an administrative nature, to other programme and management systems staff. Their responsibilities will range from office management to events support, research assistance, membership support and communications and outreach. Their regular duties could include developing, organising, maintaining and updating databases, contact lists, websites, documentation and/or administrative documents such as contracts and grant agreements.

3.2 APC salary ranges⁵

Category	Range (FTE), excluding benefits, in USD		Midpoint	Benefits allowance	Benefits as a percentage of midpoint ⁶
	Min	Max			
Executive director	55,620	80,340	67,980	8,160	12.0%
Director	43,260	67,980	55,620	7,230	13.0%
Manager: programme and management systems	37,080	49,440	43,250	6,710	15.5%
Specialist	37,080	49,440	43,250	6,710	15.5%
Senior project coordinator	30,900	43,260	37,080	6,120	16.5%
Project coordinator	24,720	37,080	30,890	5,560	18.0%
Programme/ administrative worker	18,540	30,900	24,720	4,945	20.0%

3.2.1 Locating individual salaries within a range

When an appointment is made, individual starting base salaries are positioned within the range of the relevant job category based on skill, qualifications, experience, responsibility and location. New staff would mostly be appointed at the low end of the range for their job category.

3.2.2 Base salary increases

APC applies an across-the-board percentage increase in base salaries and salary ranges in line with the UN remuneration system it follows. The UN issues a memo on 1 January of each year, indicating the percentage increase to be applied. This is normally within the range of 1% to 3%.

A recommendation for an increase in base salary can be made by a supervisor, usually after a performance assessment, if an individual's responsibility, experience and skills have changed significantly. Base salary increases are made in steps of USD 500. An increase could consist of more than one step.

3.3 Post adjustment

The cost of living varies significantly between countries. Post adjustment (PA) is designed to compensate for differences in living costs, thereby providing the same purchasing power for

5. Revised ranges were approved by the APC board in January 2017. Annual percentage increases applied in line with the UN system are incorporated in the APC remuneration system and as such, the board does not need to approve these.
6. While the salary ranges will change from time to time, up or down, based on the UN's annual salary adjustments, the percentage of midpoint used to calculate benefits should remain fixed.

staff members in all countries. PA applies to all contracts of six months or longer that involve 20 hours or more per week (0.5 FTE and up).

APC uses the PA factors used by the UN, developed by the International Civil Service Commission (ICSC).⁷ These factors are calculated every month and allow for changes in local cost of living and currency fluctuations. The PA factors which APC uses are adjusted on a monthly basis in line with the PA factors developed by the ICSC.

Examples of PA multipliers from February 2018:

Country	PA multiplier
Argentina	40.0
Australia	42.3
Canada, Toronto	62.8
Czech Republic	45.7
India	34.6
Malaysia	32.0
Mexico	31.9
Portugal	38.1
South Africa	21.3
Uruguay	46.4

APC uses the PA factors of employees' countries of residence. If there are several PA factors for one country or the staff member does not reside in a UN-specified region or city, the lower of the factors available for the country applies.

If an employee changes their country of residence at APC's request, or directly for work purposes, the PA will be adjusted to that of the country to which they are moving. If the move is for less than three months, and for personal reasons, it will not be adjusted. If the move is for longer than three months, and for personal reasons, it will be adjusted after the first three months.

The PA will be applied to 100% of the base salary.

3.4 Recognition of individual contributions and promotions

APC recognises the individual contributions made by its staff and is committed to the principle of acknowledging individuals directly for their contribution towards meeting and exceeding both specific job objectives and APC's overall organisational goals.

Individual contributions are recognised through various mechanisms, including a systemic change in financial recompense (i.e. a permanent salary increase as opposed to a once-off performance bonus), changes in job profile providing opportunities for growth and development, new work areas of specific interest, and internal promotion (when this is appropriate and possible).

APC's performance assessment process provides the opportunity to discuss these issues. The process involves conversations between the staff member and their manager and includes feedback from peers. See section 8 for more details.

3.5 Salary payments and loans⁸

3.5.1 Monthly salary payments

Generally, APC pays monthly salaries by bank transfer, in advance, on the 15th of the month. The exact date may change if the 15th falls on a weekend or public holiday, or in the case of a new staff member's first pay period.

APC pays for bank charges incurred by its own bank, but staff are responsible for costs issued by their banks. Bank charges may be eligible as tax deductions and advice should be sought locally on this.

3.5.2 Pay slips

An annual pay slip including totals of salary, benefits, expenses and reimbursements will be provided to all staff at year end. This is often required for annual tax submissions.

3.5.3 Early salary payments and loans

APC recognises that staff members may, on occasion, require temporary financial assistance to meet essential living expenses.

APC does not provide loans or pay salary advances but will consider early payment of a monthly salary.

In no circumstance should any staff member be permitted to habitually make use of this facility to offset the need for regular monthly financial budgeting.

Requests for early payment of salary should be directed to the responsible manager for consideration. Whether requests are granted depends on the nature of the request.

If approved, an email authorisation from the responsible manager should be forwarded to the finance department for processing. The PA factor used will be that valid at the time that the early payment is made. No PA adjustment will be made subsequently.

8. Applicable to all APC staff members on 12-month contracts.

04

TAXATION

All staff, except for USA-based staff, are responsible for complying with tax law in the country where they are tax-resident.

APC will provide whatever support it can to assist with national tax submissions and queries related to self-employment, including provision of an annual pay slip for staff which includes totals of salary, benefits, expenses and reimbursements.

However, all staff are encouraged to use a local tax advisor or advice centre to provide specific expertise in relation to tax queries, which can be complex, and vary from country to country.

For example:

- Some or all benefits and allowances could be classed as taxable income in your country, or could be tax deductible.
- Life insurance policies and long-term savings accounts are unlikely to be taxable but retirement insurance, pension plan payments and health insurance may have tax deduction benefits in your country.

The general rule is to assume that all benefits and allowances may be taxable and should be added to tax totals when reported to local government, unless you have professional tax advice that suggests otherwise.

05

BENEFITS AND ALLOWANCES

- 5.1 RETIREMENT AND HEALTH INSURANCE (BENEFITS ALLOWANCE)
- 5.2 OFFICE EXPENSE ALLOWANCE
- 5.3 TRAVEL ALLOWANCES

5.1 Retirement and health insurance (benefits allowance)

Retirement and healthcare benefits apply to all staff who are on 12-month renewable and fixed-term contracts.

Leave, benefits and other allowances are adjusted when FTE is increased/decreased for periods of more than a calendar month.

The benefits allowance is a fixed percentage of base salary, prorated to FTE (see section 3.2).

Retirement and healthcare benefits that meet the criteria below will be reimbursed based on proof of expenditure. All payment requests must include supporting documentation which must be submitted via the online payment request system in PDF format. Unused benefits allowance cannot be carried over to a new year.

5.1.1 Health insurance

It is a condition of employment for staff members employed on a 12-month renewable contract to have some form of health insurance, either through their own healthcare scheme, a partner's healthcare scheme, or a state-provided scheme. Reimbursements will be made upon submission of the health insurance policy documents. Health insurance policies held by staff members in their names, but which include partners and children as other dependants, are eligible.

5.1.2 Other eligible medical and wellness expenses

In addition to health insurance, staff can claim for other types of expenses incurred by the staff member, such as:

- i. Medical expenses which health insurance does not cover in full, such as contact lenses, eyeglasses, physiotherapy, psychotherapy or counselling, certain dental expenditures, etc.
- ii. Natural or alternative treatments which medical insurance or public health systems do not cover, such as homoeopathy, reflexology, acupuncture or massage.
- iii. Expenditure on wellness programmes or activities such as yoga, exercise classes, Pilates, etc.
- iv. Ergonomic furniture used at your workplace/space including standing desks, ergonomic chairs, stools, supports and so on.

Reimbursements will be made upon submission of proof of expenditure, which must include the name of the staff person.

Expenses incurred by partners and children of staff members are not eligible.

5.1.3 Retirement insurance

Contributions to the following types of policies and schemes are eligible and can be claimed with supporting documentation, which should include a copy of the policy and evidence of contribution:

- Public or private policies or schemes that are specifically intended to provide retirement insurance
- Life insurance policies
- Long-term savings plans/bonds of a minimum five years
- Long-term healthcare policies/income protection policies.

5.2 Office expense allowance

All staff members will receive up to USD 100 per month for expenses such as office supplies (e.g. toner and paper) and communication costs (internet and telephone), prorated to their FTE. APC could from time to time ask for proof of expenditure.

Staff responsible for centralised APC administration and filing (e.g. financial management and the executive director's office) will be reimbursed for any additional office expenditure required for APC work based on proof of payment.

Staff on long leave or parental leave will not receive the office expense allowance.

5.3 Travel allowances

Wherever possible, APC will pay for the costs of staff to participate in work-related events. Where staff advance personal funds to pay for travel costs, these will be reimbursed upon submission of supporting documentation.

Please refer to the APC travel policy for more details.⁹

9. https://finance.wiki.apc.org/index.php/APC_Travel_Policy

06

EQUIPMENT ALLOWANCE, PURCHASE AND INSURANCE

- 6.1 EQUIPMENT ALLOWANCE
- 6.2 EQUIPMENT PURCHASE
- 6.3 INSURANCE OF EQUIPMENT
- 6.4 LOSS OR DAMAGE TO APC PROPERTY AND DATA BACK-UP

6.1 Equipment allowance¹⁰

APC acknowledges the need for staff members to be reimbursed for expenses incurred through purchasing, fixing and insuring computers and related hardware. On 1 July 2006 APC introduced an equipment allowance based on an amount of USD 2,500¹¹ spread across a three-year period. This amounts to USD 70 per month,¹² which is added to monthly salary payments, prorated to the relevant FTE.

It is the responsibility of the staff member to utilise the monthly allowance for equipment and insurance of this equipment or save it for the purchase of a new computer, modem, external hard drive, router, etc. when needed. In the case of an emergency, where a staff member urgently needs to replace his or her computer, a one-off advance payment will be made available. If a staff member resigns before the end of the three-year period, the prorated amount of the advance will be paid back to APC or deducted from the final salary payment.

As the benefit has a three-year cycle, APC expects to see that staff are using this allowance to keep their equipment up to date and insured accordingly.

All staff members qualify for this benefit, prorated to their FTE. Staff on long leave or parental leave will not be paid this allowance.

6.2 Equipment purchase

APC's policy on computer equipment requires that staff members supply and insure their own computer equipment. The equipment allowance described in 6.1 contributes to related costs.

10. Introduced from 1 July 2006.

11. Based on an estimate of the value of a new notebook computer including an extended warranty/maintenance plan.

12. $2500/36=70$.

6.3 Insurance of equipment

APC does not take any responsibility for insuring computers or other equipment which staff members utilise for APC work against theft and accidents unless the equipment is the property of APC. Laptops should be insured for travel. APC will reimburse staff members for the cost of the travel insurance if the equipment belongs to APC, provided that proof of insurance is submitted. Staff are responsible for insuring their own computer equipment, while at home and when undertaking APC-related travel.

APC will also not insure furniture/office/computer equipment owned by APC if it has a purchase price of USD 1,500 or under. In the case of equipment that is owned by APC (with a purchase price of USD 1,501 and over) and kept by specific staff members, the staff member is responsible for its safety and should ensure that the equipment is insured in its country of location. APC will refund the staff member upon submission of proof of insurance.

To keep track of APC property, finance staff should maintain a register of assets regardless of whether said assets are capitalised and/or insured or not. All staff who purchase equipment with APC funds are required to forward details regarding the equipment, including cost and date of purchase, to the finance team.

6.4 Loss or damage to APC property and data back-up

Should equipment costing less than USD 1,500 be lost or damaged while in the care of a staff member, he or she would be required to replace the equipment or contribute to its replacement cost, depending on the circumstances of loss or damage. APC staff are required to back-up work-related data stored on their laptops on at least a monthly basis.

07

TRAINING AND DEVELOPMENT POLICY

■ 7.1 PROCEDURES

■ 7.2 CRITERIA

APC promotes the continuous development of its staff in the interests of:

- Keeping the knowledge and skills of APC staff members at optimal levels
- Enabling the organisation to operate at maximum efficiency
- Retaining motivated and committed staff members who continuously look to upgrade and enhance their knowledge and skill base.

To this end, APC is committed to the principles of mentoring and developing the knowledge, capacities and skills of staff members and providing an environment that is sensitive to effective succession planning.

Authorisation of training courses depends on the availability of funds. The calculation of these available funds should also include the cost of replacement staff to continue the work of the staff member who is being trained.

The responsibility and accountability for staff development fall equally between APC and individual staff members. Staff members are expected to initiate, participate in and commit themselves to their own development. Training and development support in terms of this policy will be considered with reference to individual staff members' proven commitment and loyalty to APC as well as their overall performance effectiveness.

Where APC considers it necessary for a staff member to attend a specific training course in order to ensure a higher level of knowledge and/or skill, with direct relevance to their specific job responsibilities within APC, all costs will be borne by APC and time spent on the approved course will be regarded as working hours if it takes place during working hours.

7.1 Procedures

- The manager is required to identify the need for specific training through a process of monitoring the performance of the respective staff member, based on the requirements of the job and the organisation. The staff member will participate in the process of identification and selection of an appropriate course.
- Details of cost, dates, venue and course content should then be sourced and assessed with regard to appropriateness, current work load, organisational priorities, etc., in order to make a recommendation.
- The recommendation, which must include a monitoring and evaluation process, must be submitted by the manager to the ED for approval and authorisation.
- Formal authorisation will be confirmed in writing and will include any necessary conditions deemed appropriate by management.

7.2 Criteria

Only staff members on renewable contracts with at least six months of service are eligible to apply for training support. The following criteria will apply when applications are considered:

- Motivations explaining the full details of the costs, duration, course content, examination requirements and classes, including recommendations of appropriate monitoring and evaluation, must be submitted in the first instance to the manager, and thereafter to the ED for final authorisation.
- Length of service and employee performance will be considered when determining the degree of financial support provided.
- Previous financial support for training and development from APC will be considered before granting a further award.
- The study programme should not interfere with normal working hours, except in the pre-arranged circumstances.
- The acquisition of further qualifications does not necessarily imply an increase in salary.

Training and development needs can also be raised during the performance assessment process (next section).

08

PERFORMANCE ASSESSMENT

APC is committed to providing an enabling and empowering environment in which its employees have the utmost opportunity to realise their professional potential and achieve individual and organisational results.

APC has developed a formal performance assessment process, which encourages ongoing and sustained performance delivery and professional growth. The performance assessment applies to all staff members on 12-month contracts. For short-term contractors a review should be done before they are offered a subsequent contract or their contract is renewed or extended.

The process is initiated by the staff person, around four to six weeks prior to annual contract renewal. They identify, in consultation with their manager, a group of peers they work closely with, who they would like to be involved in their assessment. This group should ideally comprise four to six persons and be representative of APC's programme and system teams.

The next steps and actions, which should be timelined, are identified during the assessment process and should then be monitored during the following 12 months, accompanied by regular, more informal check-ins. A more detailed performance assessment process document can be requested from your supervisor.

09

PROBATION ASSESSMENT

A probation assessment takes place four months after a staff person begins working with APC. It uses the same general framework as the performance assessment (section 8), with the exception that the manager leads the process and manages the feedback loop, which is then shared with the staff person as a basis for the probation assessment.

After the probation assessment, a letter is sent to the new staff person informing them of the outcome of the probation.

10

CONSULTANCY WORK

APC endeavours to attract consultancy work as a means of moving towards self-sufficiency. Consultancy work, where sourced, will be assigned to the appropriate staff member depending upon the particular skills required as well as the workload of the staff member at that point in time. In these cases, fees generated by external consultancy work will be paid directly to APC. If staff members want to undertake individual consultancy work during their periods of leave, this can be negotiated with the ED and between 20% and 40% of the fee will be paid to APC, depending on the degree of use made of APC time and resources.

11

ADDITIONAL WORK

Staff members who are on 100% full time equivalent (1.0 FTE) contracts are not permitted to engage in any other form of employment or be engaged in any other capacity with outside organisations without the prior written consent of the ED. In cases where permission is granted, and where the activity is undertaken during APC time, any remuneration received by staff members for this activity must be paid to APC. In addition, staff members are required to declare any interest in any business, undertaking or institution.

12

VALUES, PRINCIPLES OF PARTICIPATION, CODE OF CONDUCT

APC staff are expected to uphold APC's values and principles. APC has developed a set of principles that guide our interactions and communications with one another, online and offline. Please refer to APC's code of conduct and ground rules for meetings on [apc.org](https://www.apc.org).¹³

13. <https://www.apc.org/en/node/34626/>

13

SEXUAL HARASSMENT POLICY

The APC sexual harassment policy applies to all APC staff, members, partners and contractors. There are many forms of behaviour which can violate APC's values. Sexual harassment is one such form. APC has a zero-tolerance policy in relation to all forms of sexual harassment. Please refer to the APC sexual harassment policy on [apc.org](https://www.apc.org).¹⁴

14. See: <https://www.apc.org/en/node/34626>

14

ANTI- DISCRIMINATION POLICY

APC is committed to a work environment in which all individuals are treated with respect and dignity. Everyone has the right to work in a professional atmosphere that promotes equal employment opportunities and prohibits unlawful discriminatory practices, including harassment. Therefore, APC expects that all relationships among staff will be free of bias, prejudice and harassment. Please refer to the APC sexual harassment policy on apc.org.¹⁵

15

LEAVE POLICIES

- 15.1 ANNUAL LEAVE
- 15.2 OTHER TYPES OF LEAVE
- 15.3 SICK LEAVE
- 15.4 PARENTAL LEAVE
- 15.5 LONG LEAVE
- 15.6 LEAVE APPLICATION PROCEDURE

15.1 Annual leave

The number of leave days to which a staff member is entitled is based on the type of contract and the length of the contract's term (for fixed-term contracts).

15.1.1 Staff members on 12-month renewable contracts

Staff members on 12-month renewable contracts are entitled to 25 working days of leave at their FTE per year. Leave is accumulated at the rate of 2.083 FTE days per month.

Accumulation of leave begins on the first day of employment, but an employee is not eligible to apply for and take annual leave until they have completed the 120-day probation period. Leave is to be taken at a time convenient to APC and agreed upon prior to the leave period by the individual staff member's supervisor.

The leave cycle consists of a calendar year, i.e. 1 January to 31 December. A balance of no more than seven leave days at the staff person's FTE can be carried over into the next leave cycle. The staff member will forfeit any untaken leave in excess of this number of days. Leave may not be paid out in cash, except upon termination of contract or resignation.

15.1.2 Calculating your leave if you are not full time

All staff on renewable contracts are entitled to 25 working days of paid leave per year (five weeks). This is based on the accrual of leave at 2.083 (x your FTE) days per month. The number of days of leave is always 25, but the FTE at which the leave is taken – and paid – changes according to the FTE.

If you are employed full time (100%) this equates to 25 days at 1.0 FTE. If, for example, you are employed part time at 50%, this equates to 25 days at 0.5 FTE.

15.1.3 Calculating your leave when your FTE increases/decreases

All staff on renewable contracts are entitled to 25 days of paid leave per year irrespective of whether they are full or part time. The number of days of leave is always 25, but the FTE at which the leave is taken – and paid – changes according to the FTE.

If your FTE increases for one month or more, the leave you accrue for that month (or more) should be taken at the FTE of the increase.

If you carry forward any of your allowed seven days of leave from one leave cycle to the next, APC staff will calculate the adjustments that need to be made to ensure you are paid correctly for those leave days.

15.1.4 Staff members on fixed-term contracts

Staff members on fixed-term contracts for six months or longer are eligible to accrue annual leave on a prorated basis based on an annual allocation of 15 days. The 15 days will be prorated based on the duration of the contract and the person's FTE. Staff on contracts for less than six months accrue no leave. However, if a contract of less than six months is extended, then leave will be accrued from the date of the extension onwards until the contract ends.

15.2 Other types of leave

15.2.1 Public holidays

All staff on renewable and fixed term contracts are entitled to up to 12 paid public holidays in a full calendar year. All countries have statutory public holidays. However, some countries have more statutory holidays and others fewer, some countries have paid statutory holidays and others do not, some countries pay for more statutory holidays than others, and holidays can be for a diversity of reasons including religious, secular, political, historical, sporting and/or other reasons.

To create parity among APC staff and allow for self-nomination and identification with public holidays, APC grants all staff members (full and part time) up to 12 public holidays per year. As with other leave, staff are required to apply and request approval for public holidays. This is necessary to keep track of the number of public holidays that staff are entitled to. If a public holiday falls in a staff member's base country while the staff member is in a different country for personal (non-work) reasons, they are not entitled to apply for a paid public holiday that day.

Any statutory holidays in excess of this can be taken, but must be taken as vacation leave or unpaid leave and must be referred to the ED and operations director for approval.

15.2.2 Family responsibility leave

All staff members are entitled to paid family responsibility leave of three days per leave cycle, in the event of the serious illness of the staff member's child or close family member. The staff member must provide a medical certificate or documentary proof to substantiate the absence. Any unused leave entitlement lapses at the end of the leave cycle in which it accrues.

15.2.3 Compassionate leave

Five working days will be granted when a staff member has suffered the loss of a family member or close relative. Annual and family responsibility leave can also be requested and bundled into compassionate leave in the case of additional compassionate leave being needed. Additional time may be requested on a case-by-case basis. The executive and operations directors will authorise in these instances, as either paid or unpaid leave. The application form should be completed as per usual practice.

15.2.4 Study leave

When a course of study has been approved by APC as being relevant or related to the staff member's position with APC, paid study leave will be granted for up to a maximum of 10 days per year. Documentary proof of the dates must be submitted with the application for leave.

15.3 Sick leave

15.3.1 Definition of sick leave

Sick leave is time off that you request because you are ill. Sick leave also covers times when staff members have to undergo prescribed medical treatment.

Limitations on paid sick leave are shown below. Please note that sick leave accumulates over the years. If you run out of sick leave you must take unpaid leave.

Staff members can apply for sick leave for hospital, doctor or dentist appointments scheduled for part of a working day (for a full list of acceptable appointments please refer to 15.3.4). However, employees are encouraged to arrange such appointments outside of working hours if possible to minimise disruption to the working day.

Leave applications should be for half (0.5) a day or more, so even if the appointment requires only two hours away from work, a half day of sick leave would be recorded. It is preferable to arrange with your manager to make up for the time taken off for shorter medical appointments or treatments.

If time off for appointments will require regular treatment and regular time off from work, sick leave can be requested. A doctor's letter explaining why the treatment is necessary should be provided. However, the risk of running out of sick leave should be considered.

15.3.2 Paid sick leave limitations

Staff members on 12-month contracts are entitled to paid sick leave. Forty-two calendar days (six weeks) of paid sick leave will be granted in every three-year cycle of 36 consecutive months of service. A cycle commences with the date of engagement. Sick leave may not be accrued from one leave cycle to the next.

Only 10 days of paid sick leave are allowed in the first year of the three-year cycle. If the maximum entitlement is exceeded, the ED has the discretion to grant further paid or unpaid sick leave after considering factors such as length of service, previous sick leave record, performance, etc.

For protracted illnesses that extend beyond the sick leave allocation, the staff member will be required to apply for disability insurance through their personal insurance or national government and take unpaid leave.

Staff members on fixed-term contracts are entitled to sick leave on a prorated basis. Short-term contractors (less than six months) can negotiate unpaid leave in case of illness.

15.3.3 Administration of sick leave

If you are unable to work due to illness, you must notify the person to whom you report within 24 hours as to the reason and probable duration of your absence. A medical certificate is required for any absence due to medical reasons that exceeds three consecutive days. Staff members are required to complete a sick leave form on their return to work, and to attach the medical certificate if required (scanned or faxed).

15.3.4 List of acceptable paid sick leave appointments

- Acupuncture
- Registered medical doctor/specialist
- Registered dentist/dental hygienist
- Psychotherapy by a licensed practitioner
- Optometrist/optician
- Treatment by a registered nurse practitioner, e.g. blood tests, basic physical exams
- Licensed therapists, e.g. physiotherapists, chiropractors, hearing and/or speech therapists.

Note on massage: Staff are not entitled to apply for sick leave to undergo massage therapy by unlicensed practitioners even though they are entitled to claim for the cost of such treatments from their health benefits allowance.

15.4 Parental leave

“Parental leave” includes leave for pregnancy, maternity, paternity, birth or adoption. APC’s parental leave policy exists to provide benefits to all employees on 12-month renewable contracts.

Parental leave is granted for a period of four consecutive months, during which time the staff member shall receive 100% of their monthly remuneration and standard benefits, excluding office expenses and the equipment allowance. Leave in excess of the stipulated period can be negotiated but cannot be guaranteed and will be classified as unpaid leave. All other conditions of employment and benefits (such as annual salary review and/or salary band adjustments and annual leave accrual) remain in place during parental leave.

Staff who have been with APC for less than 12 months qualify for parental leave on a prorated basis. For example, if they have worked for APC for six months they will qualify for two months of fully paid parental leave.

Any benefit received by the employee from the government during this period shall be offset against the APC remuneration.

Applications for parental leave must be made in writing three months prior to the commencement of leave.

The staff member may commence parental leave at any time from four weeks before the expected date of birth.

If two staff members have a child together, a special arrangement will need to be negotiated.

Given the fact that parental leave is paid, should an employee resign from APC during the first two years after the birth or adoption of the child, they will be required to repay an amount of the package received while on parental leave, as follows:

Period from date of birth/ adoption of child	Repayment of package received by employee
First year	100%
12-18 months	50%
18-24 months	25%
24-plus months	No obligation

15.5 Long leave

APC offers long leave to staff members who have been employed by APC for seven years or longer.

Provided that APC's financial situation and workload allow for it, after seven full years of service, a staff member is entitled to a sabbatical for a three-month period at 33% of their current remuneration or for a period of two months at 50% of current remuneration. Office expenses and equipment allowances will not be paid during this time.

Long leave must be applied for and granted at least two months prior to the start of this type of leave.

Staff who resign from APC within one year of their sabbatical will need to repay a portion of the salary payment received during the sabbatical.

15.6 Leave application procedure

Applications for all of the above types of leave need to be made at least two weeks in advance, preferably earlier, with the exception of long leave, which needs to be made at least eight weeks in advance. Leave applications can be made using the following procedure:

- i. The staff member and supervisor negotiate and agree on the timing of the leave days being requested.
- ii. Once the timing of the leave days is agreed on with the relevant supervisor, the staff member submits a leave application form to their supervisor, copying the leave administrator (currently fatima@apc.org) and operations director (currently karenb@apc.org).
- iii. The supervisor approves the leave application, copying the leave administrator.
- iv. The operations director records the leave on the APC leave calendar and the leave administrator records it in the individual's leave records.
- v. Staff members who go away on leave are required to provide their supervisor with emergency contact details before their departure.

APC leave application form

Date of application:

Name of staff member:

Staff member's FTE:

Type of leave:

First working day away:

Last working day away:

Total number of days taken:

16

NO SMOKING POLICY

It is a condition of employment that staff members do not smoke inside any offices of APC or in APC meetings.

17

NEW EMPLOYEE ORIENTATION PROCESS

One of the most important processes for new staff is for existing staff to provide new employees with warm welcomes and accurate information about the organisation. Some people find starting a new job to be stressful. However, a good orientation programme can ensure a smooth transition into the new job.

APC is currently reviewing its orientation process and the revised process outline will be incorporated into the manual when the review is completed.

In the interim, managers will inform new staff about the details of their orientation process, which will be phased and will take place over a three-month period after the new staff person starts working with APC.

18

TERMINATION PROCEDURE

One week's written notice is required by either party to the other during the first month of employment. Thereafter, one calendar month's written notice is required for all staff members, excluding management. Managers and in some cases specialist positions are required to give two calendar months' written notice.

19

DISCIPLINARY CODE AND PROCEDURE¹⁶

APC recognises that a disciplinary code and procedure are necessary to ensure that acceptable standards of behaviour are maintained in the organisation and that all employees receive fair and consistent treatment in situations in which these standards are violated. For discipline to be maintained fairly, all employees should know what constitutes misconduct and the procedure that will be followed when dealing with misconduct.

The disciplinary code and procedure are based on the following principles:

- APC makes use of corrective and progressive discipline with the aim of providing employees with the maximum opportunity, through greater understanding and acceptance, to correct unacceptable standards of conduct and performance.
- Punitive action should only be taken when prior corrective action has proved ineffectual or when an offence is so serious that the relationship of trust between the parties is destroyed.
- Discipline is the prerogative of management only.
- As far as it is practical, similar offences committed in similar circumstances will be treated equally through similar disciplinary action subject to aggravating or mitigating circumstances which may exist.

Full details of the disciplinary procedure, and all forms and templates, are available on the policies wiki.

16. Based on South African labour law.

20

GRIEVANCE PROCEDURE¹⁷

— 20.1 STAGES OF THE PROCEDURE

APC recognises the importance of having effective communication channels through which difficulties and problems in the work situation can be effectively resolved. APC encourages and supports an informal approach, wherever possible and applicable, in which problems are dealt with honestly, pragmatically and with a strong emphasis on constructive resolution.

In instances where an informal approach either fails to resolve a problem or is inappropriate in the circumstance, it is in the mutual interest of APC and its staff members to abide by a formal grievance procedure which is capable of solving staff dissatisfaction. APC's formal grievance procedure seeks to resolve grievances as speedily as possible, and as close as possible to the source of origin.

A grievance, for the purposes of this procedure, is any dissatisfaction (except for an appeal in response to a dismissal) in connection with a staff member's work and employment situation that is formally brought to the attention of APC management. Grievances that occur as a result of disciplinary action taken by APC will be dealt with in terms of the appeal procedure in the disciplinary procedure.

There is to be no victimisation of or prejudicial action against any staff member using this procedure.

17. Based on South African labour law.

20.1 Stages of the procedure

Please note that any of the time limits set out in the various stages of this procedure may be extended by agreement of the parties concerned.

Stage one: Immediate manager

- i. The staff member must first raise any grievance with their direct manager, who will endeavour to resolve the matter without delay.
- ii. If the manager does not settle the matter to the satisfaction of the staff member, or makes inadequate progress towards resolving it, the staff member may, together with a fellow employee who may accompany them, raise the matter further with the ED.
- iii. The ED will endeavour to resolve the issue, consulting where necessary with other staff members and management.

Stage two: ED

- i. Where a staff member has a grievance against their direct manager, a grievance may be formally lodged, using the grievance form,¹⁸ with the ED.
- ii. In cases where the direct manager is the ED, grievances may be lodged directly with the chairperson of the board.
- iii. On receipt of a completed grievance form, the ED will arrange a meeting with the staff member and their manager,¹⁹ and will attempt to resolve the matter.
- iv. The ED will consider all aspects of the grievance, the evidence surrounding it and the action and findings of the manager. The ED will first attempt to achieve a consensus view, but in any event will try to resolve the grievance in discussion with the aggrieved staff member and, where appropriate, will attempt to conciliate and mediate between the parties to the grievance.
- v. The ED will consult all parties involved in the process thus far and may call for any additional information that is considered necessary.
- vi. The ED will inform the parties of their decision within five working days.

Full details of the disciplinary procedure, and all forms and templates, are available on the policies wiki.

18. Please see the Grievance policy and forms on the policies wiki.

19. Please see the Grievance policy and forms on the policies wiki.

Appendix A:

HOW TO USE KIMAI

- 1. ABOUT KIMAI
- 2. WHY ARE WE DOING THIS?
- 3. WHAT KIMAI IS NOT FOR
- 4. THE LOGIC OF THE NEW KIMAI
- 5. GUIDE TO USING KIMAI

1. About Kimai

Kimai is an open source time-tracking application, server-hosted with a web interface. You can read more about it at their site: www.Kimai.org.

The concept is simple: you pre-define users, tasks, projects and customers, and use a kind of stopwatch to start and end tasks. In the past four years we have made it way too complicated. We have been using Kimai since late 2013 and have generated a lot of experience. We have over-complicated the configuration of Kimai with too many tasks, and too much time is spent trying to identify which task fits which bit of work we're doing at any given point in time – and it just doesn't work for people who are constantly multi-tasking.

What we've done with the July 2017 re-launch is really simplified the configuration and we hope, for those of you who have used the first version of Kimai, that you find this one a whole lot easier.

2. Why are we doing this?

The main reason we are doing this (at all!) is to respond to external requirements, and also because we feel it is good practice to keep track of the time we spend working, and on what. There are a number of specific reasons:

a) Knowing how much time we spend on funded projects and some consultancies and invoicing those projects/consultancies.

For any funded project, or any consultancy where APC is expected to keep track of time spent on work, we need to be able to do this – keep track of time spent on work! We then invoice the project (effectively) using the time spent by staff, as a basis for calculating a charge to the project. If we don't have this information, we have no supporting information to back up our charges to a project, should we need to do so come audit time.

This year the following fall into this category:

AfriSIG
All Women Count (AWC) – FLOW II EROTICS South Asia
IDRC Gender mapping
IMPACT
Irights (IGF Academy)
Mamacash WRP core work
Movement Building
TBTT – Womanity
UNESCO Internet indicators

For some projects we can only charge for time that is documented – and we are legally bound to do so via project contractual agreements. The IMPACT project, funded by the European Union, is a good example. For others, we have more flexibility – but it is much easier if we can all get (back) into the practice of tracking our time, consistently.

Example: If the project budget says that Karen will work 10 days over three months for the project, @USD 100 per day = USD 1,000, but Kimai records show that I have worked seven days over three months for the project, then APC can only claim USD 700, and APC loses USD 300.

This may be due to the fact that the time was actually not spent on the project, but sometimes, it is simply that the time is not tracked.

When APC gets a new consultancy, or funded project, we need to add it to Kimai – so please request for this to be added in the Slack channel #help-kimai, so we can create it.

Demonstrating that we aren't double charging projects for staff time

This is completely related to audit requirements, and nothing to do with monitoring people's clock-in and clock-out times!

Auditors expect us to be able to demonstrate that a staff person's time isn't being charged to more than one project (or non-project work) at a time – double-dipping if you like.

They expect to see, fairly simply – at a glance – that Karen worked 35 hours this week (excluding meals), and it was spent like this:

UNESCO consultancy contract work – 10 hours

AfriSIG fundraising – 10 hours

Staff contracts – 10 hours

Documentation for Kimai – 5 hours

Total = 35 hours

They also need to see that if we were to add up all of the hours for UNESCO for all staff, they would match the budget.

3. Why are we doing this?

It is *not* a staff time monitoring tool – and I hope everyone will use this application, and understand our commitment to using it, in the spirit it's intended. Managers are able to review the time their team members spend on projects and that is primarily so that they can make sure we are in a position to charge a project fully for staff time.

Please share any comments or questions in the Slack channel #help-kimai.

4. The logic of the new Kimai configuration

a) About users, customers, projects and tasks

The new Kimai uses the following components:

Users – Every staff person has a username and password. Users are tagged with their APC team, and their manager is able to see all of their team's entries.

Customers – Just one – APC – and no one needs to worry about using this component in any way – it is a fixed category.

Projects – This is one of the two most important categories. Here you will see:

- All of our current funded projects and consultancies (if you don't, please let me know).
- All of our teams (which aren't of course projects, but they are for the purposes of Kimai): CIPP, Comms, Finance (Maya, Fatima), GAPS (Anriette, Deborah), NetDev (Chat, Karel), Ops (Karen, Shawna, Eunice, Misty), Tech (Adolfo), WRP.

I've added names in some of the teams – pre-empting where you might have questions. WRP and CIPP are clear, I think, but there is crossover with some teams. So for the purposes of Kimai, please use the teams above, when we come to look at core work.

Tasks – This is the major change in the configuration.

We now only have four (4) tasks:

Leave
Travel
Work – core
Work – project or consultancy

Here's a snapshot of how Kimai will look for most staff (managers will see an additional column with the team members' names) – and I have completed a *sample* day for a CIPP staff person (3 July) as well as adding a leave day (2 July – Sunday, I know, but I wanted to keep everything in July!) and a sample travel entry:

Date	In	Out	h/m	Wage	Customer	Project	Task	Tracking Number
03.07.	07:00	08:00	1:00	0.00	APC	CIPP	work - core	
03.07.	06:00	07:00	1:00	0.00	APC	CIPP	work - core	
03.07.	04:00	06:00	2:00	0.00	APC	CIPP	work - core	
03.07.	01:00	04:00	3:00	0.00	APC	PAB/SIG	work - project or consultancy	
02.07.	12:00	16:00	4:00	0.00	APC	CIPP	travel	
01.07.	20:30	03:30	7:00	0.00	APC	CIPP	leave	

b) Use of projects and tasks

Projects are divided into two types, as noted above:

- i) Funded projects or consultancies
- ii) Everything else! – which we are bundling into projects named after teams, and which we consider “core” work.

When you start work, you should select a “project” (in the Kimai sense of the word) based on whether the work is one or the other of the above. There may be times when you are unsure, and the best thing to do is just ask your manager.

If you work full time on a project, i.e. all of the funding for your salary comes from one project, then all of your work can be tracked to that project. Very few staff are in this position – please check with your manager or coordinator, if you’re unsure.

Don't worry or panic that you might be tracking work incorrectly – i.e. work tracked to “core” if it should be a project, or vice versa – as when we come to generate a charge for the project, we can review and correct at that time – and we do make sure we check in on things like that.

The most important thing is that all of your time is tracked.

Tasks are now four only:

- Leave
- Travel
- Work – core
- Work – project or consultancy

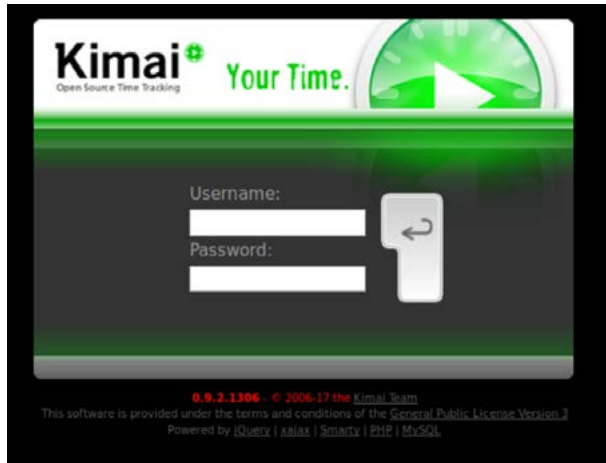
- We don't need people to track meal breaks – so a standard working day for 1.0 FTE will be seven hours. Try to make sure your time per day adds up to seven hours – I know, many of us work much longer, and you should of course track all hours. So, work out what your standard work day should be in hours, depending on your FTE, less meal breaks.
- Please track all leave to your team “project” – we will allocate to projects when we do the internal charges as necessary.
- Track travel to projects if the project is funding the event – otherwise, track to core.
- Work – project or consultancy – use this for any work you know is funded by a project or consultancy.
- Work – core – use this for everything else.

The next section explains more about how to use these new combinations of projects and tasks – and to recreate those six entries above on 1, 2 and 3 July.

5. Guide to using Kimai

a) Logging in

1. Go to time.apc.org



2. Enter your username and password (please write in the #help-slack channel if you need help with resetting) – and hit ENTER.

b) Overview of the Kimai interface

Settings



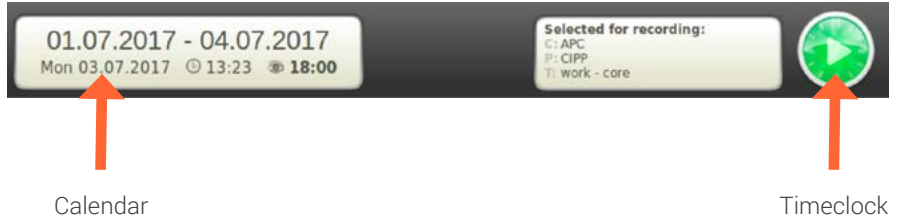
On the top left hand you will see a spanner (wrench). Mouseover the spanner and select Preferences.

Please go into your preferences, set your time zone and your own personal password – if you want to change it. This example uses a test user called “CIPptest”. Have a look around settings – there aren’t many, but it’s worth being aware of what is there.

It is very important that you set your time zone correctly, as if you don't, Kimai might create tasks in a time zone other than yours, and you won't see them in your list of tasks

The timeclock

You will see a clock at the top right-hand corner of the screen – this is your stopwatch. When you select a project and task, it will turn from green to red, and will only turn back to green when you complete a task. We'll come back to that later.



In the top middle of the screen there is a field containing date ranges. Clicking on the dates takes you to a calendar – like all of those calendars we use online for flight bookings, events scheduling and so on. Setting dates here will determine what date range of tasks you will see on the screen directly below, and is also used when we export information to a CSV file to generate charges for projects.

The task dashboard

The screenshot shows a table with the following data:

	Date	In	Out	h/m	Wage	Customer	Project	Task	Tracking Number
🟢	03.07.	07:00	08:00	1:00	0.00	APC	CIPP	work - core	
🟢	03.07.	06:00	07:00	1:00	0.00	APC	CIPP	work - core	
🟢	03.07.	04:00	06:00	2:00	0.00	APC	CIPP	work - core	
🟢	03.07.	01:00	04:00	3:00	0.00	APC	PA&RUG	work - project or consultancy	
🟢	02.07.	12:00	16:00	4:00	0.00	APC	CIPP	travel	
🟢	01.07.	20:50	03:50	7:00	0.00	APC	CIPP	leave	

Directly under the preferences, calendar and stopwatch is a panel listing your tasks. The range you see (date range) is determined by how you've set your calendar. I've created those seven tasks as part of this guide, but will take you through creation of a new task below in Section 5 (c).

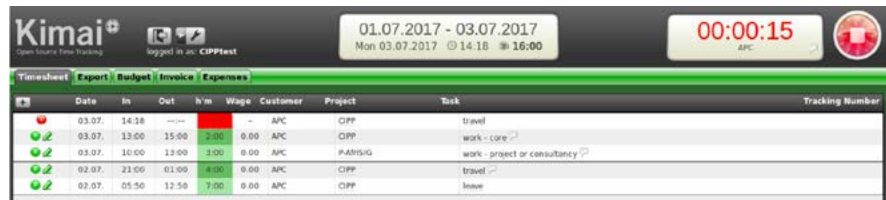
Along the top of the task dashboard are five tabs:

- Timesheet – what we're looking at here.
- Export – takes you to a dialog allowing you to export tasks according to various factors (date range, project, task) and in different formats (CSV, XLS and PDF). Most staff don't have to worry about this either – and if you do, we'll be in touch.
- Budget – don't worry about it – we have never used it and don't intend to.
- Invoice – as with budget.
- Expenses – as with budget.

c) Creating your first task

This step assumes you've logged in (5a above).

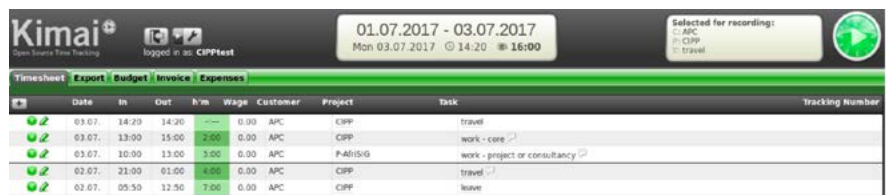
- i. Select a project – You “select” by clicking the open circle next to the project that you are working on.
- ii. Select a task – You select a task in the same way as you select a project.
- iii. Start the clock – Click on the clock (right hand top corner). It will change from green to red, and you should see a new timesheet task has been created



Time	Date	In	Out	h/m	Wage	Customer	Project	Task	Tracking Number
03.07.	14:18	---	---	---	---	APC	CPP	travel	
03.07.	13:00	15:00	2:00	0.00	0.00	APC	CPP	work - core	
03.07.	10:00	13:00	3:00	0.00	0.00	APC	P.AntSIG	work - project or consultancy	
02.07.	21:00	01:00	4:00	0.00	0.00	APC	CPP	travel	
02.07.	05:50	12:50	7:00	0.00	0.00	APC	CPP	leave	

If you can't see your new task, chances are you haven't set your time zone correctly. Go to preferences and check.

- iv. Stop the clock – When you've finished this “task” click on the clock again, and it will change from red to green – and you will see your completed task in the task dashboard.



Time	Date	In	Out	h/m	Wage	Customer	Project	Task	Tracking Number
03.07.	14:20	14:20	---	---	0.00	APC	CPP	travel	
03.07.	13:00	15:00	2:00	0.00	0.00	APC	CPP	work - core	
03.07.	10:00	13:00	3:00	0.00	0.00	APC	P.AntSIG	work - project or consultancy	
02.07.	21:00	01:00	4:00	0.00	0.00	APC	CPP	travel	
02.07.	05:50	12:50	7:00	0.00	0.00	APC	CPP	leave	

- v. Add a descriptive comment to your task.

As our tasks are now very few, and very broad, you will want to add a note to your task, which briefly describes the work you've done, e.g. “meeting with manager”, “travel to Geneva for HRC”, “Skype call with xxx”, “writing report”, etc.

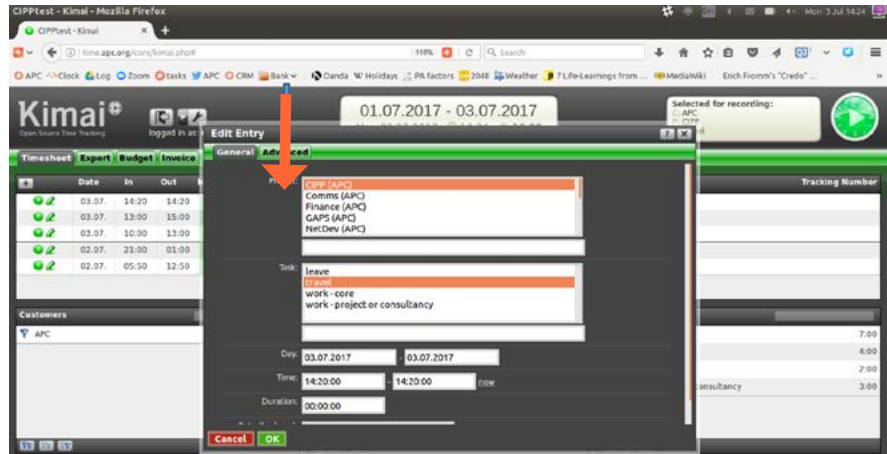
The comments can be as brief or extensive as you like. This information will be used in internal charge forms when we charge projects, so the note should be clear, but it can be brief.

You add comments by clicking on the pencil next to the task.

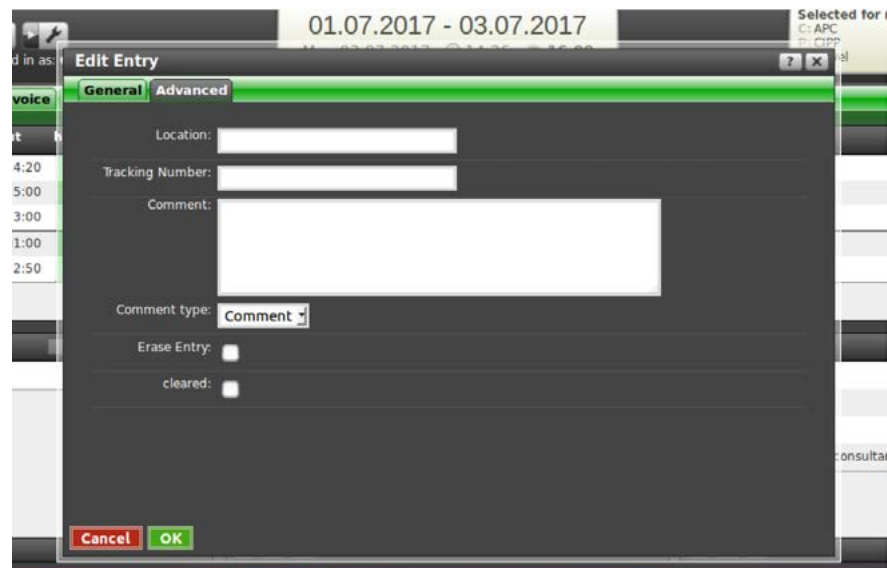


Time	Date	In	Out	h/m	Wage	Customer	Project	Task	Tracking Number
03.07.	14:20	14:20	---	---	0.00	APC	CPP	travel	
03.07.	13:00	15:00	2:00	0.00	0.00	APC	CPP	work - core	
03.07.	10:00	13:00	3:00	0.00	0.00	APC	P.AntSIG	work - project or consultancy	
02.07.	21:00	01:00	4:00	0.00	0.00	APC	CPP	travel	
02.07.	05:50	12:50	7:00	0.00	0.00	APC	CPP	leave	

This opens a dialogue box that looks like this:



Click on the Advanced tab, which takes you to this dialogue box:

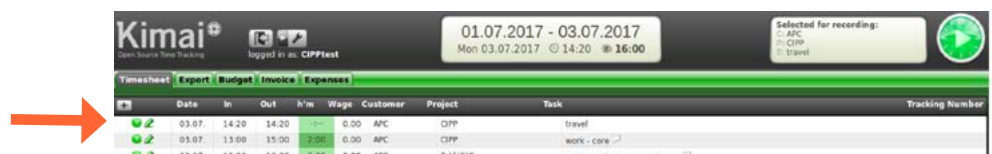


Add a comment to describe your work in the Comment box – no need to worry about anything else here.

d) Other useful bits and pieces

Repeating or editing an existing task

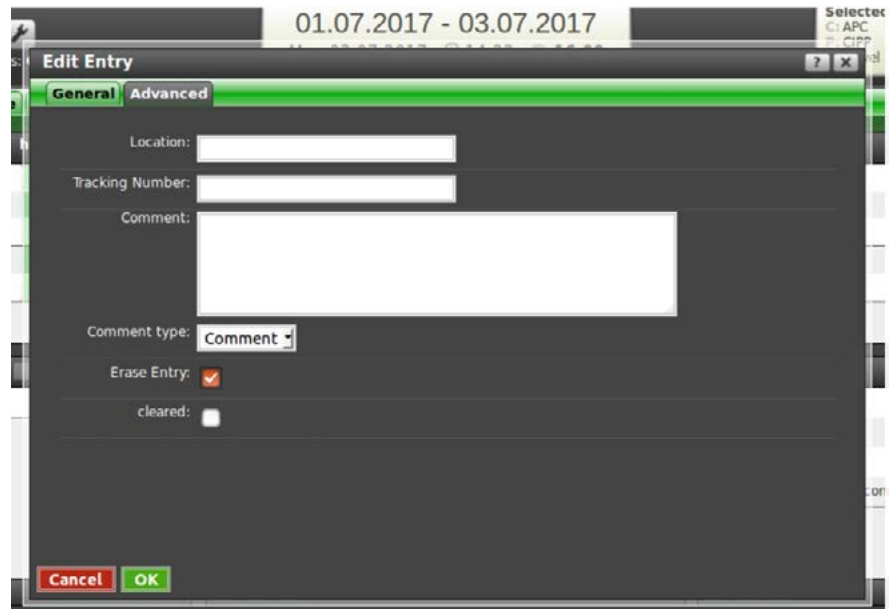
When you are doing the same task often, or even if you want to use an existing task and edit it (which is what I use for most new tasks), you can “reuse” an existing task by clicking on the small round green button (next to the green pencil) on the same line as the task.



You stop the task by clicking on the clock as you would for any task, and you can add a comment, or edit an existing task, by going to the comment box described above.

Deleting a task

In the Advanced tab there is a check box to “erase an entry”. This is useful for when you’ve made mistakes, when you’ve edited tasks and want to clean them up a bit – any instance when you want to edit a task.



Adding a time period to a task

Sometimes, you may want to retrospectively add a task, and know that you spent, say, three hours on it. But not exactly when, what time, etc.

It is easier sometimes to use the “duration” field in the edit entry dialogue box, in these cases (and several others I’m sure you’ll find). You don’t have to worry about what the actual time was – we all live in a 24/7 UTC world ;) – and sometimes it’s hard to work this out, especially if you’ve been travelling, in different time zones, etc., so here’s what you do:

- i. Create your task (simply select project, task, start and stop the clock).
- ii. Click on the pencil next to your new task, which opens this dialogue box.
- iii. In the duration field, add the number of hours/minutes for the task (I’ve added six hours). The time field will auto-calculate in a logical sense. There is no need to edit either of the time fields. It will “find” six hours in the day that haven’t already been used by another task, and use this as the time then, and now. This is a very easy way to manage leave, travel and any other tasks where you can add “chunks” of time.

This is also a good way to create a “round-up” task to complete your day’s work. For example, if you have tracked five hours of your seven-hour day in a project, and have done bits and pieces of all kinds of non-project work in between (programme, team, APC-wide

– all of those things we are now defining as “core”), just create a task under “work – core” and give it a two-hour duration. Kimai will work out the rest.

The screenshot shows the Kimai time tracking interface with the following fields and values:

- Project:** A dropdown menu with options: CIPP (APC), Comms (APC), Finance (APC), GAPS (APC), and NetDev (APC). The 'CIPP (APC)' option is highlighted in orange.
- Task:** A dropdown menu with options: leave, travel, work - core, and work - project or consultancy. The 'travel' option is highlighted in orange.
- Day:** Two date input fields, both containing '03.07.2017'.
- Time:** Two time input fields containing '08:20:00' and '14:20:00', followed by a 'now' button.
- Duration:** A duration input field containing '06:00:00'. An orange arrow points to this field from the left.

There are a lot more tips we could share – and can start doing that in the Slack #kimai-help channel.

Please do post there for any feedback and additional questions.

