

**ACAL**

# **WORK INSTRUCTIONS MANUAL**

ISO 9001:2015 BASED  
QUALITY MANAGEMENT SYSTEM

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# TRAINING AND CONSULTANCY WORK INSTRUCTIONS

## TRAINING MATERIALS DEVELOPMENT

1. Training materials on any Management System based on ISO standard, or any other document that the firm is offering shall be developed on identification of the same as a product. In the development of the training materials the following steps shall be followed:-
  - a) Determination of the topics to be covered as per the requirements of the respective International Standard.
  - b) Building of capacity on the Standard/subject matter.
  - c) Research on the topics determined by the Business Unit staff.
  - d) Preparation of summary notes and power point slides for the topics.
  - e) Review and adoption of the materials by the Business Unit staff.
2. The respective BUH shall ensure production of sufficient copies of the training materials for any assignment at least 1 week before the training.

## ASSIGNING AND MONITORING OF PROJECTS

This shall start with the respective BUH confirming that a contract has been signed for a project or an agreement has been reached to start the project. The respective BUH shall assign the project to a Project Manager/consultant who shall have the responsibility of managing the project activities alone or with other who could be associate consultants.

The Project Manager/Management Consultant shall develop a budget and forward it to the respective BUH for review prior to it being forwarded to the CD/CEO for approval.

After the budget has been approved and a work plan validated as per the Service Delivery Procedure, the Management Consultant shall ensure effective monitoring of the project with the Client contact person and in liaison with the Senior Manager or BUH as applicable to ensure that client relations are maintained.

The Project Manager /Management Consultant shall ensure the timelines in the work plan are adhered to and shall inform the client and the respective BUH when activities within the plan are due or have been postponed.

After each engagement with the client, the Project Manager /Management Consultant shall ensure that the cost incurred is updated in the budget control sheet and ensure that the billing for the projects is done when this falls due as per the contract and service delivery procedure.

The BUH shall ensure that a Follow up Form, the project progress control sheet and the project budget sheet is updated after each activity is undertaken. The BUH shall report the progress in the next Management meeting.

# PLANNING FOR WEEKLY ASSIGNMENTS

This task shall start with the BUH ensuring development a weekly Unit work plan guided by:-

- a) Schedule of activities as per the Work plans,
- b) Requests from Clients,
- c) Terms of reference for each assignment, and
- d) Number of staff and expertise required.

In the event the BUH does not have the capacity in terms of numbers, he/she shall identify a competent associate consultant firm's in consultation with the CD. A contract shall be signed as the service delivery procedure.

The BUH shall ensure communication to the Business Unit staff of the approved work plan indicating the assignments, date of execution and the officer (s) to execute them. A copy of the same shall be forwarded to the DFO together with a field expenditure form for approvals in consultation with the CD at least 3 days to the date of assignment.

# PRE-REQUISITES FOR ANY ASSIGNMENT

Before setting off for any assignment, the Project Manager/ Management Consultant shall ensure the consultant or team leader does the following: -

- a) Collect the required financial and other resources as set out in the form after confirmation and approval against the work plan and project budgets.
- b) Packaging of the following;
  - i) A registration form
  - ii) Evaluation forms as applicable.
  - iii) Follow up form
  - iv) Tested required training equipment as enumerated in the field expenditure form.

# EXECUTING THE ASSIGNMENT

If there is an official opening of the training by the leaders of the client organization or an invited guest, the consultant/ team leader shall liaise with the Client contact person for this activity to take place within the set out time as per the programme.

In the course of executing the assignment, the consultant shall ensure that the participants register their presence in the registration form HR&ADM F 14.

The technical team (facilitators) shall take the participants through the sessions using any of the following delivery modes as applicable or a combination;

- a) Lecture/Presentations,
- b) Demonstration,

- c) Group work, and
- d) Role plays.
- e) Case studies
- f) Simulations

## EVALUATION AND CONFIRMATION OF ASSIGNMENT

At the end of the assignment, the consultant shall ensure participants are issued with evaluation forms **HR&ADM F 22** as applicable and requested to evaluate the facilitators, materials and other aspects of the assignment as set out in the form.

The consultant shall ensure filling of an Follow up form and confirmation by the client project leader by signing.

## AWARDING OF CERTIFICATES

As applicable, the Project Manager/consultant/ shall ensure that the names of participants are as they would like them to appear in the certificate .The Project Manager/consultant shall be responsible for errors in the names for the printed certificates

Project Manager shall be surcharged for errors in the certificates.

Participants in the applicable assignments shall be issued with certificates. The criteria for qualifying for the certificate shall be as follows:-

- a) A participant must have attained 75% attendance of the course, and
- b) **For ISO Standards related trainings (a)** above notwithstanding a participant must have fully attended the sessions on:
  - Requirements of the ISO standard;
  - Documentation sessions where applicable;
  - Passed examination as applicable;

1.7.1 The BUH in consultation with the Project Manager/consultant shall withhold any certificates for participants who do not fulfil the requirements as set out in 1.7.2 above. The BUH may recommend issuance of certificates of attendance instead of completion for participants falling short of the training requirements.

## POST ASSIGNMENT

After completion of any assignment, the Project Manager/consultant shall ensure;

- a) Project Budget Control Sheet is filled by the project manager,
- b) A report is produced and handed in to the BUH for review,
- c) The revised Report as applicable is forwarded to the SMFO for printing with clear instructions accompanied by a cover letter, packaged and dispatched to the client,
- d) Documents in cases of consultancy are finalised on, packaged in a CD / Printed and dispatched to the client.
- e) Advise SMFO on invoicing as applicable.

## CONTINUAL IMPROVEMENT

1. The BUH shall ensure periodical review of training material for continuing suitability. This review shall be informed by;
  - a) Introduction of new standards,
  - b) The changing environment,
  - c) New technologies, and
  - d) Errors in the current materials.
2. Quarterly, the Senior Manager in the unit shall ensure that the evaluation forms are analyzed, and discussed in the succeeding Unit meeting. The BUH shall ensure that all improvement recommendations are acted on and records maintained.
3. After project exit, the BUT shall ensure that the client issues ACAL with a letter of commendation/Completion certificate.
4. In the event of any Client complaints in the course of project execution, the BUH shall handle them and escalate to the CD/CEO as applicable. Any complaints from the client must be discussed in the next BUH meeting. Urgent issues must be escalated to CD and CEO soonest.

# RESEARCH WORK INSTRUCTIONS

## PLANNING FOR WEEKLY ASSIGNMENTS

1. This task shall start with the BUH ensuring development of a Unit work plan guided by:-
  - a) The project status control sheet that indicates assignment deadlines,
  - b) Objective (s) of the specific assignments,
  - c) Scope of new assignments vis-à-vis other on-going assignments, and
  - d) Number of staff and expertise required.
2. In the event the Unit does not have the capacity in terms of numbers and expertise, the BUH shall outsource from the firm's pool of associate consultants as per the service delivery procedure.
3. For new projects the project Manager shall develop the budget and forward to the BUH for onward transmission and concurrence with DFO.
4. The BUH shall communicate the developed work plan indicating the assignments, dates of execution and the officer(s) to execute to the Unit staff.

## PREPARATION OF DATA TOOLS

1. As per the work plan, the technical team leader shall develop and hand in tentative data collection tools (Questionnaires) to BUH for approval.
2. The team leader shall guide the technical team in designing the data collection tools considering: -
  - a) The questions to be asked as per the survey objective,
  - b) The question type for each question and specify the wording and response category,
  - c) Designing the questions sequence, and
  - d) Overall questionnaire layout.
3. The BUH shall approve the tool and ensure it is validated either through;
  - a) Piloting, or
  - b) Approval by the client in an inception report meeting with the client representative as applicable,
  - c) Review and approval by the client in writing where applicable.
4. Upon approval of final tool the team leader shall present to the BUH
  - a) A tentative project work plan

- b) A copy of the completed checklist for the requirements and
- c) A completed field expenditure sheet.



# SAMPLING AND DATA COLLECTION

1. Sampling of the respondents to any research shall be done by the team leader in consultation with the BUH and the Client. Considerations shall be made to ensure minimum random including: -
  - a) Target Population (Universe),
  - b) Desired level of accuracy,
  - c) Cost implications,
  - d) Survey objectives,
  - e) Level of sub-group analysis (Number of domains considered),
  - f) “Environmental” factors, and
  - g) Non-response factor.
2. In data collection quantitative data shall be the key area /job in any survey. The team leader shall coordinate the administration of questionnaires in accordance to the briefing received from the BUH. The project manager shall support all activities and ensure documentation at each stage. Depending on the type of the survey conducted, time, resources available or level of precision needed either of the following mode shall be applicable to data collection
  - a) Observation
  - b) Self completion of questionnaires
  - c) Telephone Interview
  - d) Face to Face Interview
  - e) Mailed questionnaire
3. In the case of qualitative research, the Team Leader shall:
  - a) Brief the team,
  - b) Coordinate respondent’s recruitment,
  - c) Make arrangements for the venue,
  - d) Coordinate the respective moderators, and
  - e) Organize for stimuli materials.
4. To minimize non random effects consistency, the BUH / Team leader shall undertake field checks using any of the following methods:
  - a) Back checks of a minimum of 10% of all interviews
  - b) 10% of all interviews to be accompanied by a team leader
  - c) Checking for 100% completeness of questionnaires
5. The BUH shall ensure that the field researchers protect research subjects from needless risk of harm or embarrassment and proceeding with their willing and informed cooperation. This shall encompass;
  - a) Protecting the confidentiality and privacy of the respondents.
  - b) Identifying secure interviewing environment.
  - c) Ensuring only one field researcher interviews a respondent.

- d) Properly presenting themselves to the client i.e. their name, the consultancy to be done and project context.
- e) Honoring the commitment to anonymity.
- f) Maintaining objectivity and exercise of professional integrity in performing and reporting the research.

## DATA PROCESSING

1. For data coding, the BUH shall ensure;
  - a) Coordination of coding and editing of all open-ended questions.
  - b) Where applicable most questions have prevalent categories determined during the pilot study.
2. For data capturing, the BUH shall ensure that;
  - a) Data capturing is done using Ms-Excel windows worksheets for easy management and longevity of the data after effective coding.
  - b) 10% of the questionnaires are re-entered and that the data is random by conducting run test for sampled surveys.
3. After data capturing the BUH shall ensure data cleaning, export to SPSS for analysis.
4. On data cleaning the team shall write the syntax for analysis and ensure;
  - a) The analysis is descriptive/influential in nature and contains only results for each item based upon the number of cases with valid data,
  - b) Production of a 'whole count,
  - c) Cross-tabulation of all the questions having demographics such as age, gender, social class, location (banners) as columns and the questions in the questionnaire as rows in the tables, and
  - d) The results are presented in tables and graphs with emphasis on graph analysis.
5. The BUH shall ensure data processing records are maintained. The shall include;
  - a) All questionnaires (after Data Entry) to be properly stored so that the client can always obtain either the original up to two years.
  - b) Data files.

## REPORT WRITING

1. After data processing the BUH shall ensure the project team leader prepares a research report based on the survey findings.
2. The Team leader shall write a narrative research report using a standard reporting template upon receiving the analyzed data. The reporting format shall entail:
  - a) Foreword/Preface,
  - b) Executive summary,
  - c) Introductions,

- d) Background,
  - e) Methodology, sample and timing,
  - f) Main findings, and
  - g) Conclusions and recommendations.
3. After production of the report the BUH shall ensure peer review of the same by the Unit staff. The following shall inform the review
    - a) Client requirements (ToR),
    - b) Quality,
    - c) Conformity of parts and, and
    - d) Effectiveness of the design, development, analysis, and presentation of the report
  4. The BUH shall ensure the inputs from the peer review are considered before handing over the report to the Graphic Designer for packaging and submission to client.

## PRESENTATION OF FINDINGS TO CLIENT

1. In the event a client requires a presentation, the BUH shall ensure the team leader prepares a PowerPoint presentation of the findings to be presented to the client for interpretation and understanding of the findings of the research .The presentation shall be dry run /rehearsed before presentation to the client.
2. The presentation format shall include:-
  - a) Background information (may be omitted in some instances),
  - b) Objectives,
  - c) Methodology and sample,
  - d) Main findings,
  - e) Conclusion, and
  - f) Recommendations.
3. On a date agreed with the client, the BUH/Team Leader shall make a presentation of the findings to the client and allow for suggestions by the client on what should be included in the final report that shall not affect the findings of the survey.

## CLOSING OF PROJECT

1. A project shall be considered complete when results of the survey have been reported to the client in the agreed format and the client has accepted the results.
2. To establish areas of improvement, the BUH shall ensure a customer satisfaction measurement tool has been sent to the client to get feedback on their satisfaction levels for the different levels of operations.
3. The BUH shall ensure that an exit certificate is issued by the client to ACAL.

4. The BUH shall ensure that all working files of a particular project are preserved for a period of at least two years.
5. Unless with the client's explicit permission or if syndicated or multi-client projects the following records to a project that shall remain the property of the client;
  - a) Briefs, specifications and other information provided by the client, and
  - b) Research data and findings from the project.
6. The records that shall remain the property of the firm include;
  - a) Proposals and cost quotations
  - b) Completed questionnaires, and
  - c) Contents of a report for syndicated and/or multi-client projects or services which shall be available for purchase or subscription.

# STRATEGY AND ORGANIZATIONAL DEVELOPMENT WORK INSTRUCTIONS

## ASSIGNING AND MONITORING PROJECTS

This task shall start with the BUH confirming that a contract has been signed for a project. The BUH shall develop a budget as per the service delivery procedure.

After the budget has been approved, the BUH shall ensure log in of the project in the project status control sheet by the Project Manager.

Once a work plan has been validated as per the service delivery procedure, the BUH shall ensure effective monitoring of the project with the Client contact person as well as the consultants for the project.

## PLANNING FOR WEEKLY ASSIGNMENTS

This task shall start with the Project Manager developing a weekly Unit work plan in liaison with the BUH guided by:-

- a) Scope of new assignments vis-à-vis other on-going assignments,
- b) Assignments in the project status control sheet,
- c) Objective (s) of the specific assignments, and
- d) Number of staff and expertise required.

In the event the Unit does not have the capacity in terms of numbers and expertise, the BUH shall outsource from the firm's pool of associate consultants and ensure a contract is signed as per service delivery procedure.

The BUH shall communicate the developed work plan indicating the assignments, dates of execution and the officer(s) to execute to the Unit staff. A copy of the same shall be forwarded to the CD for planning purposes.

## PREPARATION OF TOOLS

1. As per the work plan, BUH/Team leader shall develop the design tools informed by:

- a) Information checklist (documentation requirements),
  - b) SWOT analysis,
  - c) Strategic review tool, and
  - d) Stakeholder matrix, and
  - e) Any other tools necessary.
2. The BUH/Team leader shall review the tool with the client for acceptance. Any proposals made by the client shall be documented and the changes effected.
  3. Once the tool has been approved by the client, the BUH shall ensure that the project is executed as agreed.

## REPORT WRITING

1. After finalization of the document, the BUH shall ensure the Team Leader prepares a draft report.
2. The draft report shall then be presented to the Client and the following aspects shall be provided in the presentation.
  - a) Background/objectives,
  - b) Corporate objectives,
  - c) SWOT analysis,
  - d) Background,
  - e) The implementation matrix,
  - f) Financing plan, and
  - g) Question and answer session.
3. The Consultant shall then prepare the final report incorporating all the feedback received from the client during the presentation. The final report shall be reviewed by the BUH and forwarded to the client.
4. The project shall be deemed complete once the final report is send to the Client and accepted.

# RECRUITMENT WORK INSTRUCTIONS

## PREAMBLE

1. Once ACAL has been engaged formally the Project Manager (PM) shall develop the budgets as per the budgeting procedures
2. The Director shall ensure engagement of consultants and sign off contracts in liaison with DFO as per Service delivery procedure
3. The Director shall oversee the whole recruitment process including the interviews.
4. The PM shall in consultation with the Director Identify risks and mitigations; and ensure the rest of the steps are executed and documented as follows..

## PREPARATORY

1. Develop inception report, deliver to the client and get approval by the client
2. Develop internal work plan
3. Engage the client to get job descriptions and specifications
  - a) Develop draft advertisements and
  - b) subject it to internal approvals
  - c) Subject the advert to designing
4. Share the draft advert with the client and seek written approval
5. Engage with media house with clear instructions
6. Upon approval of the advert by the client,
  - a) prepare the portal content for our website
  - b) Before going live review the content to go to the portal
  - c) update the website upon internal approval
7. Advertise twice in two dailies of national circulations (unless otherwise advised)
8. In case of hard copies applications option establish an application's register to be maintained at ACAL's reception

# DEVELOPMENT OF TOOLS ,LONG LISTING AND SHORTLISTING

1. Convene the Consultant to develop shortlisting criteria based on the advert
2. Submit the shortlist to the client for approval and get written approval
3. Develop interview tools and seek approval from the client
4. Test emails each day to confirm they are working by sending an email to a G-mail or Yahoo address.
5. Register hard copies as they come at the reception
6. On the last day of applications close the emails by sending an email to Acal management
7. Download as you package them according to positions and names of applicants as applicable and populate the long list
8. In the case of the hard copies invite one consultant to close and sign the application's register
9. Upon completion of the long list, share with the client and get a written to continue with shortlisting
10. Execute the shortlisting as per the approved criteria
11. Share with ACAL Management for approval
12. Submit the shortlist report to the client and obtain written approval

## INTERVIEWS

1. Draft interview invite emails and seek internal approval
2. Develop the interview schedule and inform the candidates of their specific dates and time for their interview
3. Share the schedule with the client
4. Contact the candidates for confirmations and document any "opt outs" giving reasons as applicable
5. Invite the consultants for a preparatory meeting on the use of the interview tools and approach the interview and sign **Attendance Form**
6. On the interview day, register all candidates who attend and let them sign the **Registration Form**
7. Before they get to the interview room, review their original documents and populate the **Original Document's Review Forms**
8. Document activities of each day and share with the ACAL Management detailing those who came and those who did not come and their reasons thereof
9. In the event psychometric tests are required, they shall be executed as per ToRs by the outsourced service providers engaged by the Director.

## REPORTING

1. Upon completion of the interview sessions the consultants shall sit and moderate the results



2. Prepare the final report and share with ACAL Management
3. Submit the final report to the client as per the contractual requirements
4. Follow up with the client for the next course of action.
5. At each deliverable the PM shall ensure issuance of the invoice and follow up and update the Project status report

## **CLOSURE**

The PM shall ensure closure of the project by collecting a recommendation letter