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## People, Processes and Technology Plan: Update

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For: **Information**

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## Executive summary

1. This year marks the final year of implementation of the People, Processes and Technology Plan (PPTP). The plan aims to enable IFAD to maximize its contribution to the 2030 Agenda by equipping it with the appropriate human resource capacities and capabilities, efficient corporate processes and the required technological solutions to deliver effective development results.
2. By the end of 2022, all workstreams are expected to complete their planned work. Efficiencies and benefits have started to materialize and are expected to be achieved when fully embedded into IFAD's processes, systems and work practices.
3. Significant progress has been made across all workstreams during the first two years of implementation. Management has reviewed both the positive progress and the lessons learned so far, and, to ensure a successful outcome, has identified the following focus areas for the remainder of the implementation period:
  - The thrust of implementation activities will continue to focus on the six priority areas that are key to IFAD's operations – project procurement, loan disbursement, upskilling/reskilling, the separation programme, document processing and automation.
  - The importance to the project's success of close engagement between the Executive Management Committee (EMC), as steering committee, the PPTP working group, business owners, IFAD staff as a whole and the Executive Board, backed up with effective change management and communications. At its January 2022 planning retreat, the EMC reaffirmed its strong commitment to achieving the plan's goals and successfully completing implementation.
  - Strengthened focus on improving the tracking and maximizing the achievement of benefits. The working group is proactively tackling challenges in terms of benefits monitoring and introducing measures to address the issue of staff availability. The system improvements and technological solutions introduced have been complemented and reinforced by efforts to promote cultural changes and shifts in behaviour.
  - Strengthening how PPTP coordinates with and enables other ongoing reforms (e.g. Decentralization 2.0).
  - The upcoming internal audit of the PPTP by the Office of Audit and Oversight will provide important insights into the plan's implementation.

## **I. Update on high-priority items**

### **A. Project procurement**

1. Project procurement is a significant activity in every IFAD project. At present, IFAD borrowers enter the proposed procurement activities into an offline plan. IFAD staff then carry out manual checks on compliance with IFAD and national guidelines. Such checks involve extensive exchanges between teams and are very time-consuming. The People, Processes and Technology Plan (PPTP) investment will fund a custom-built online procurement plan (module 1 of the end-to-end system) for use by IFAD and beneficiary government procurement teams. The system will automatically validate procurement thresholds and dates, and guide borrowers in the realistic planning of their activities.
2. Technical work kicked off in January 2022 with the first delivery of foundational components at the end of the first quarter, with completion of module 1 foreseen in Q4 2022. A change management plan is being developed to ensure a successful roll-out, including training of both IFAD and beneficiary country teams. The new system will significantly improve the management, value for money and oversight of project procurement activities. It will reduce institutional risk, increase transparency, improve planning and decision-making, and bring IFAD into line with its peer organizations. Management estimates that the new system will reduce the time to create and review each procurement plan by an estimated 20 per cent for both IFAD and borrowers.

### **B. Loan disbursement**

3. The business process re-engineering (BPR) exercise identified significant areas for improvement in the loan disbursement process. The modifications in the IFAD Client Portal (ICP) platform will integrate analytical fiduciary work for financing to countries and refinements more closely with the operationalization of the risk-based assurance modality and use of country systems. The updates will allow IFAD to focus on cash-based controls and new anti-money laundering and anti-fraud checks for all disbursements. The PPTP targeted capacity investment (TCI) is funding two components in phase 1: (i) ICP disbursements; and (ii) liquidity management. Technical development is now under way, following the validation of the detailed business requirements. Liquidity management is on track for delivery at the end of Q2 2022, while ICP disbursements will be delivered in Q4 2022.
4. To help manage these changes effectively, related amendments to the supporting policies and procedures are being developed in parallel. These include changes to the "letter to the borrower", updated financial controls and updates to internal guidance. Benefits will most likely start being realized from 2023. However, on the financial control side, which has advanced piloting of the new streamlined controls, substantial efficiencies have already been noted in speed of review and approval of withdrawal applications, allowing for a shift of focus onto higher risk areas.

### **C. Document processing**

5. In February 2022, IFAD entered into an agreement with the United Nations to use the editing and translation support tool eLUNa, which will bring under one umbrella the multiple translation, terminology, reference checking and editing tools currently used. Training on eLUNa has begun for staff in the Office of the Secretary (SEC). The benefits generated by implementing all the document processing recommendations can only be quantified after an adequate implementation period has passed, but savings are currently estimated at 1,700 hours per year (based on 2019 word levels).
6. The new guidelines for the preparation of governing body documents were approved by the Board in December 2021 and are already in use. SEC is undertaking a communication campaign to inform IFAD staff of the new

requirements on word counts and additional changes, including the length of annexes and the forthcoming revised document templates. Qualitative benefits expected from the campaign include improved process awareness and compliance, and reduced rework. The issue of documentation arriving in SEC over the agreed word limits has been of particular focus as it leads to time-consuming back-and-forth with originators and clearers, causing delays and additional work for editors and translators. The PPTP working group will support measures to instil a cultural change at IFAD to address this issue.

#### **D. Upskilling, reskilling and the separation programme**

7. In December 2021, the Decentralization 2.0 (D2.0) field staff upskilling cluster was added to the Upskilling for Operational Excellence Plan. The curriculum is aimed at ensuring business continuity and an adequate level of capability in regional offices and IFAD Country Offices to support D2.0 implementation. Two modules – on procurement and the Grants and Investment Projects System – were rolled out in February 2022.
8. Under the Operations Academy (OPAC), all country directors have successfully obtained project procurement certification, strengthening a critical capability for successful country programme delivery. Under OPAC, learning is delivered in a targeted way, based on the job requirements, with mandatory certification training – a whole new approach to training at IFAD. The table in annex IV provides a summary of progress in the overall upskilling plan.

##### **Separation**

9. To date, 24 staff have signed mutually agreed separation agreements, 19 funded by TCI and five through IFAD regular budget funds. Five additional separations are under consideration for 2022.
10. Agreements signed by nine General Service (GS) staff members have enabled IFAD to:
  - Abolish two GS positions as a result of D2.0;
  - Transfer three internal GS staff members impacted by D2.0 to avoid job loss;
  - Free up three positions where transfers for internal GS staff affected by D2.0 are being considered to help ensure no job loss;
  - Keep on hold a position that is currently under review for possible continuation/abolishment beyond 2023.
11. Out of the 15 agreements signed by Professional staff:
  - Nine are at P-5 level, allowing IFAD to attract candidates in support of IFAD's diversity agenda and to increase women's representation in senior positions.

#### **E. Automation**

12. PPTP has provided IFAD with a unique opportunity to invest in piloting new technologies to work more effectively. Of the 11 pilot cases identified by staff during 2020 for transaction automation, nine have now been deemed successful by the business owners and fit for purpose for business uptake: staff have favourably commented on ease of use, accuracy and 24/7 availability.
13. In 2021, PPTP work pivoted to strategic automation initiatives with data at the centre. Work focused on building a secure platform for all IFAD personnel to help them address a wide array of user data needs by incorporating a self-service approach. This "data lake" is a central repository for structured and non-structured data, both corporate and external. The platform is coupled with analytics and visualization tools to further enhance its usefulness, while a wide-ranging training programme aims to build the skills that IFAD needs to take advantage of the data

and tools. The platform also supports advanced analytics tools, like artificial intelligence, which demand extensive investment in training and computation, and yield results over time.

14. The platform is now in the beta-testing phase. Specific teams are being trained on how to use the tools and are already producing their own dashboards. During this phase, several use cases are being developed to address specific IFAD challenges in the areas of knowledge management and predictive analytics. Active outreach within IFAD is ongoing to involve more beta testers, identify further use cases and improve the offering based on feedback. The dedicated training programme during the pilot addresses the differing skill levels of participants to ensure that all become autonomous in developing their own analytics. The next step will be to open the platform for general release in IFAD.

## **II. Workstream updates**

### **A. People**

#### **Performance management**

15. As part of the efforts to change the performance culture in IFAD, the performance management (PM) process was revamped in 2021, leading to revised PM policies and procedures.
16. The majority of managers voiced their appreciation for the renewed PM process during briefing sessions and human resources clinics, finding that it facilitates continuous management and development of staff, allows for equitable treatment of performance and is useful for career development. This continuous PM process has improved the identification and management of underperformance and the result at Q1 2022 shows two completed and two ongoing performance improvement processes.
17. Implementation of the redesigned PM process has been supported by supervisors' training and 46 human resources clinics that, according to survey data, were found useful by 97 per cent of respondents. The redesigned process is expected to identify high-performing staff members on completion of the 2021 performance evaluation system cycle in April 2022. From this, IFAD will recognize and reward high performers, whose performance track will feed into IFAD's integrated talent management processes, strengthening the performance culture.

#### **Job audit**

18. To date, 386 out of 790<sup>1</sup> positions (49 per cent) have been audited by the United Nations Global Centre for Human Resources Services (OneHR). After completion of Programme Management Department positions, priority was given to the Financial Operations Department and the Strategy and Knowledge Department to support the ongoing D2.0 efforts. In the context of D2.0 implementation, the job audit is proving essential in aligning staff responsibilities with the proposed regional structure in the new job profiles.

### **B. Processes**

#### **Travel**

19. The recommendations for the travel process area are complete. The travel dashboards are being used by budget holders and assistants to monitor their expenses, and by the travel team to analyse trends and identify further opportunities for corporate enhancement. While quantitative results have been more difficult to measure during the pandemic as travel plans were highly subject to changes and cancellations, among the benefits generated by the improvements are some 944 hours saved on expense report errors across the organization (at

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<sup>1</sup>The 810 positions referred to in EB 2021/133/R-23 have been reduced because 20 positions within the Independent Office of Evaluation of IFAD are not subject to the exercise.

2019 travel volumes). Implementation led to the use of new and innovative tools, greater accuracy, reduction of paper and manual processes, advanced planning and monitoring instruments. Overall, the BPR generated a completely new and dynamic approach to IFAD corporate travel that supports decentralization and the emergencies associated with the pandemic.

#### **Recruitment and consultant management**

20. New functionalities have been added to the new talent management platform, making it an ever-more integrated system enabling IFAD to select, hire, evaluate and manage its talent in line with the organization's evolving needs.
21. One example is the current work on the reassignment platform to enable application, talent assessment and talent matching during the 2022 reassignment exercise. The new system draws data from staff members' talent profiles – the new online, self-managed repository that tracks the academic background, skills and professional experience of all IFAD staff. The system then matches that information with the electronic job profiles, the newly designed descriptions of functions, responsibilities and requirements of each role in the organization.
22. In addition, further enhancements to the candidate gateway pillar of the platform are being designed and implemented, further streamlining the consultant management process. The new features include the automation of workflows to reduce the approvals needed, in line with the relevant delegation of authority framework. Also new are an enhanced portal allowing consultants to upload and update mandatory documents, an improved evaluation of consultants' services, and an enhanced repository of consultants' profiles. The latter provides a single reference point for managers to search and select their experts, with rosters created by specialization and specialized rosters of already vetted consultants.

#### **Supplementary funds**

23. IFAD is currently developing operating procedures to document processes, requirements and procedures for the mobilization and management of supplementary funds. These will include the development of a responsible, accountable, consulted and informed matrix to outline the roles and responsibilities of managers and staff in different divisions. The tentative target is to finalize the procedures by the end of Q2 2022.

#### **Internal and external communications**

24. In this area, the Communications Division has: (i) focused on laying the groundwork for new internal communications pathways; and (ii) substantially modified pathways and launched new ones, leading to more effective external communications. Examples include, for internal communications, progress being made in creating and/or updating guidelines to help divisions move towards a self-service model for their internal communications, while on the external side, more powerful communications, with media training sessions held in February with a group of directors, senior managers and technical specialists.

#### **Enterprise risk management**

25. TCI funding has enhanced enterprise risk management in an integrated manner, with adoption of the Enterprise Risk Management Policy and Risk Appetite Statement (RAS). By benefiting from revision of metrics and data availability for risk appetite reporting in the Corporate Risk Dashboard, the Office of Enterprise Risk Management remains focused on continuously enhancing the oversight of IFAD's main risk drivers and on fostering comprehension of the RAS across the Fund and its Member States.
26. The Operational Risk Management Unit is currently working on capturing information and data on operational incidents and related losses across the organization. This will allow for the creation of a reliable database on which to build increasingly effective risk assessment and impact analyses. It is expected that

remaining funds will support additional efforts to automate data processing and reporting.

### **C. Technology**

27. As mentioned above, the delivery of the talent management platform in July 2021 was a significant PPTP milestone, enabling culture and process changes. An agile approach has been taken in the design and launch of the final consultant management recommendations, which allows for a rolling release of activities completed, ensuring more efficient planning of resources and better user acceptance of the enhanced features. The project will be completed in Q3 2022.
28. The remaining technology-enabled recommendations in travel have now been delivered; these include automated reconciliation of ticket costs, which will reduce manual work.

## **III. Change management and communication**

29. As PPTP entered its final year, the working group aimed to build on the good practices of previous years and consider how to ensure a successful finish to the plan. In mid-January, the group met for a day-long strategic planning meeting. A week later, at the Executive Management Committee (EMC) retreat, Senior Management and the working group reviewed implementation progress and considered the challenges to be met in the months ahead. The EMC underscored its strong commitment to the success of the plan, particularly citing Senior Management's engagement during the final year of implementation.
30. In addition to keeping up implementation momentum, from the second quarter of 2022, the focus will be on achieving and tracking benefits and addressing the challenges of staff availability for implementation and related training on new systems. During 2022, AUO will undertake an internal audit of the PPTP. The working group looks forward to this timely intervention and will incorporate recommendations from the audit into the PPTP approach for its final year, particularly in relation to addressing challenges.
31. The PPTP also supports other reforms, for example D2.0, through mandatory courses to strengthen in-country delivery as part of OPAC. Efforts have also been made to complement technological solutions through efforts to promote positive cultural changes and shifts in behaviour. This has included a proactive campaign and incentives to ensure adherence to word limits of Board documents, and enabling staff to produce their own dashboards without recourse to IT experts through the strategic automation data platform.
32. Finally, as reported in the December 2021 update, a series of promotional videos has been shot publicizing individual staff experiences of how the PPTP reforms have improved their daily working practices. The series will be presented on the IFAD intranet.

## **IV. Implementation arrangements**

### **Timeline**

33. The implementation timeline is laid out in annex II. The scheduled deliverables are broadly on track, although the completion date for the job audit has been moved to Q4 2022 to ensure that the initiative supports D2.0 and the workplace culture initiative, which are being carried out in parallel.

### **Performance against key performance indicators (KPIs)**

34. An update of progress made on the KPIs is set out in annex III. Most indicators are broadly on track and some have exceeded targets: no.23, "Staff engaged in automation", is nearly double the target of 5 per cent – with 9.5 per cent engaged; and no.24, "Automation pilots mainstreamed", is currently exceeding the target by a factor of three.



35. Challenges with meeting KPIs include:
- The foreseen BPR benefit of 15,000 hours saved is expected to be achieved, but over a longer timeframe. Specifically, some business owners have indicated that benefit achievement will start during 2023 after a suitable period of time to embed new processes, systems and work practices.
  - In relation to the training of supervisors in the new PM approach, 90 per cent of supervisors had received training by Q4 2021 versus the 100 per cent target. Similarly, 179 staff have obtained upskilling/reskilling training versus the KPI target of 250 by Q4 2021. The remaining cadre of staff/supervisors will be trained by end-2022.
  - Finally, the KPI to reduce the number of days to fill Professional vacancies is currently above the target reduction, from 100 to 90 days. The PPTP has also reduced the time spent on the recruitment administration by the Human Resources Division (HRD) – but functional adjustments to using the new systems are still ongoing. In addition: (i) the consistently high volume of recruitment across the organization; and (ii) the insufficient staffing capacity in HRD during a period of significant reforms, as also highlighted by the McKinsey human resources study, are critically affecting the number of days it takes both HRD and hiring managers to finalize selections.

## **V. Key risks and mitigating actions**

36. After two years of implementation, many of the risks initially identified<sup>2</sup> – like staff buy-in to a new reform and potential problems with the overlap in a replenishment year – are less of an issue. The commitment from the EMC to support and engage closely with the plan bolsters risk mitigation and change management during the final year of implementation. In particular, EMC and middle management support will be required to help achieve and capture benefits, and support the establishment of new systems. Many individual benefits are identified but depend on other activities to be realized; for example the time savings from the TCI-funded online project procurement plan are part of the wider end-to-end procurement system under development. Furthermore, benefits can only fully be realized once staff have learned how to use the new systems and follow revised procedures – both of which take time.

## **VI. Budget update and usage**

37. The final tranche of TCI funds, amounting to US\$2.315 million, was approved at the Board session in December 2021, bringing the cumulative total of TCI funds to US\$11.855 million for the period 2020–2022. As at 10 March 2022, actual usage amounted to US\$8.85 million, leaving US\$3 million available for the remainder of 2022. See annex I for current usage.
38. To enhance the overall impact of the PPTP, the remaining balance of TCI funds is focused on the six priority areas. Management is reviewing remaining balances to assess the possibility of repurposing funds to these specific areas.

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<sup>2</sup> See EB 2020/129/R.3/Rev.2, table 3.

## Targeted capacity investment (TCI) budget usage as at 10 March 2022

(Thousands of United States dollars)

	TCI allocated					TCI actual usage	TCI available	
	2020	2021	2022	Re-allocations	Total			Amount
<b>People</b>	<b>Strategic workforce planning</b>							
	Development of divisional strategic workforce plans	320	-	-		320	319	1
	Targeted upskilling/reskilling	385	355	310		1 050	555	495
	Staff separation programme	500	1500	705		2 705	2 000	705
	<b>Employee value proposition</b>	-	-			-	-	-
<b>Performance management</b>	<b>Dedicated management training and support for supervisors</b>							
	Dedicated management training and support for supervisors	100	100			200	196	4
	<b>Business process re-engineering</b>							
<b>Processes</b>	Implementation of first 43 recommendations	1 300	-		-2	1 298	1 298	-
	Enhancing business process maturity	350	-		-270	80	80	-
	Analysis and implementation of remaining recommendations	800	950	1 200	272	3 222	1 832	1 390
	<b>Enterprise Risk Management Framework (ERMF)</b>							
<b>Technology</b>	ERMF integration	600	160	100		860	760	100
	Implementation of Talent Management Platform	450	200			650	633	17
	Implementation of business process re-engineering technology changes and solutions	570	240			810	564	246
	Analysis and piloting of automation use cases (strategic and data-driven)	-	660			660	621	39
<b>Totals</b>	<b>5 375</b>	<b>4 165</b>	<b>2 315</b>	<b>-</b>	<b>11 855</b>	<b>8 858</b>	<b>2 997</b>	

## Revised implementation schedule 2020-2022

	2020				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>People</b>												
Strategic workforce planning: development of divisional plans												
Targeted upskilling/reskilling training												
Job audit												
Review of existing Staff Rules and Human Resources Implementing Procedures to enhance employee value proposition and for termination/separation grounds												
Redesign of the end-to-end performance management process												
Support for performance management redesign												
Dedicated management training and support for supervisors												
<b>Processes</b>												
<b>Original 68 BPR recommendations</b>												
• Implementation of 18 quick wins												
• Implementation of additional 25 recommendations												
• Implementation of remaining 25 recommendations												
Business process maturity assessment and follow-up actions												
<b>Additional BPR recommendations</b>												
• Analysis of new business processes (in addition to the initial seven)												
• Implementation of selected recommendations												
<b>ERMF integration</b>												
<b>Technology</b>												
Talent Management Platform: design, testing, roll-out and post-launch support												
Implementation of 24 phase-1 business process re-engineering technology changes and solutions												
BPR project procurement – foundational and module 1												
BPR loan disbursement – workflow updates & liquidity reporting												
Validation of potential cases for automation (deep-dive analysis)												
Implementation of pilots of automation use cases (transactional)												
Implementation of pilots of automation use cases (strategic/data-driven)												
<b>Investment in IFAD Country Office upgrades*</b>												

\* To be funded from administrative resources, not the targeted capacity investment.

## Progress against key performance indicators – as at mid-March 2022

Indicators	Targets	Baseline	Status	Timeline
<b>Outcome indicators</b>				
1. Staff engagement index (Global Staff Survey [GSS])	80%	GSS 2018: 72%	TBD	2021
2. Decrease in capability gaps	25% gap reduction	Skills gap survey 2019	On track	2022
3. Percentage of job offers accepted as a percentage of offers made	>95%	92%	97%	2021
4. Staff successfully exiting underperformance cycle	> 90% of staff underperforming		On track	2022
5. Decrease in time to fill Professional vacancies (days)	90 days	100 days	131 days	2021
6. Decrease in total overtime expenditure per year	15% reduction	2019: US\$300,000	On track	2022
7. Staff hours saved per year	15,000 hrs/year	2019	On track – although over a longer time frame	2023 – not 2022
8. Increase in staff perception on the efficiency of internal procedures and processes	50%	GSS 2018: 27%	On track	2023
9. Reduction of relative costs of institutional functions, services and governance	25%	2019: 27%	On track	2022
<b>Output indicators</b>				
<b>Strategic workforce planning</b>				
10. Targeted staff with capacities upskill or reskill	250 staff		179 staff members in critical roles have completed at least one training under the upskilling programme. End date Q4 2022	Q4 2021
11. All positions reviewed (job audit)	100%		On track: 49% completed to date	Q4 2022
<b>Performance management</b>				
12. Performance management process redesigned	Completed		Completed	Q4 2020
13. All supervisors trained in performance management	100% directors and supervisors		90% completed - those remaining can take the e-learning version (part of the mandatory training for supervisors)	Q4 2021
14. Tailored performance management system in place	Completed		Completed	Q1 2021
15. Underperformance management handbook released	Completed		Completed	Q4 2020
16. Review of the rebuttal process finalized	Completed		Completed	Q4 2020
<b>Employee value proposition</b>				
17. Review of compensation mechanisms within policies finalized	Completed		Completed	Q4 2020
<b>Business process re-engineering</b>				
18. Quick-win reforms completed (18)	100%		Completed	Q4 2020
19. Additional prioritized reforms completed (25)	100%		90% complete: remaining system changes to be completed in 2022	Q4 2020
20. Review of additional business processes completed	Completed		Completed	Q4 2020
21. Implementation of selected recommendations	100%		In progress. System changes to be completed in 2022	Q4 2021
<b>ERMF</b>				
22. Regular quarterly risk reporting in place and actions followed up	Quarterly risk reporting		Complete – Corporate Risk Dashboard launched	Q1 2021
<b>Automation</b>				
23. Staff engaged in automation	5% of Professional staff		Completed (9.5%) and continuing to grow	Q4 2020
24. Automation pilots mainstreamed	25%		Exceeded – currently 82% to date	Q4 2021

## Upskilling for Operational Excellence Plan – progress update by cluster

Cluster	Progress (2021-2022)*
Operations Academy (OPAC)	<ul style="list-style-type: none"> <li>• OPAC dedicated intranet page launched</li> <li>• 299 trainings assigned, of which 228 are completed (76%)</li> <li>• 18 courses are currently under development</li> <li>• IFAD Development Practices Community (a forum where operational practices can be discussed) launched</li> <li>• 211 staff involved</li> </ul>
Finance Academy	<ul style="list-style-type: none"> <li>• 293 trainings/certifications assigned, of which 158 are completed (54%)</li> <li>• 105 staff involved</li> </ul>
Leadership & Management Academy	<ul style="list-style-type: none"> <li>• 393 trainings/certifications assigned, of which 225 are completed (57%)</li> <li>• 225 staff involved</li> </ul>
Tailored Functional Training	<ul style="list-style-type: none"> <li>• 340 trainings/certifications assigned, of which 238 are completed (70%)</li> <li>• 288 staff involved</li> </ul>
D2.0 Field Staff Upskilling	<ul style="list-style-type: none"> <li>• Specific training curricula developed for each job role</li> <li>• 21 trainers nominated internally from 8 divisions</li> <li>• Trainings officially launched in end January, 2022</li> <li>• 1,090 trainings assigned, of which 42 completed (4%)</li> <li>• 54 Staff involved</li> </ul>

\* As of mid-February 2022.