

SOUL Organization for Development
Annual Performance Report

2017

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Introduction

This report highlights the achievements SOUL made on its executive plan for 2017- **Annex 1** – that was based on a balanced scorecard planning method, on which the organization focuses on the following dimensions with a specific goal for each:

- Financial Dimension: Ensuring financial sustainability for the organization
- Internal Processes Dimension: Development of an institutional framework
- Learning and Growth Dimension: Building qualified staff in all areas related to the organization’s scope of work
- Customer Dimension: Improving SOUL’s image among its customers

During 2017, the Organization focused on two core dimensions: First, the financial dimension, especially on controlling expenditure and rationalizing financial resources for the organization and projects under implementation. Second, internal processes dimension, notably in terms of planning and overseeing overall workflow of the organization due to their importance to the achievement of financial sustainability for the organization, improvement of its work, and raising the level of performance of its staff at all units.

The Second Section Addresses in the Following Aspects in Details:

1. Implementation Ratio of the 2017 annual plan compared to the planned activities
2. Implementation Ratio as per performance indicators with explanations for the implemented activities at the level of each dimension
3. Implementation Ratio at the administrative units compared to the average of planned implemented activities at the level of each unit.
4. Major unplanned activities implemented in 2017
5. Unimplemented activities in 2017 with the reasons of the non-implementation

First: The Organization Implementation Ratios of the 2017 Annual Plan Compared to the Planned activities

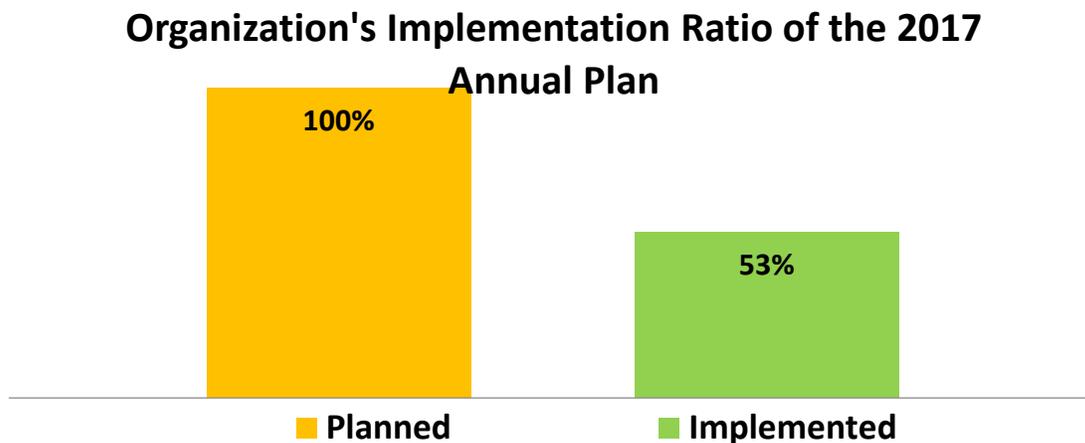


Chart No. (1)

Second: Implementation Ratio as per Performance Indicators with the explanation for Implemented Activities at the level of each Dimension and the average of implementation at each of the four dimensions

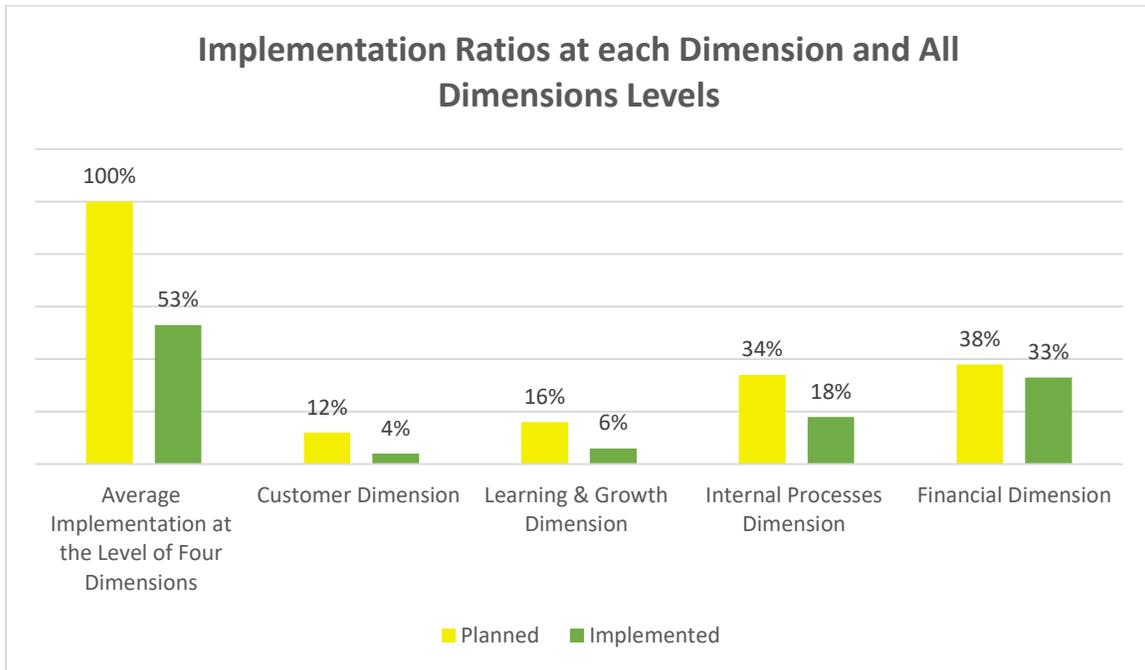


Chart No. (2)

Third: Overall Average of Implementation at the level of Units and Dimensions

In general, the average of overall implementation level of the plan for all units and four dimensions was as per the percentages illustrated in the chart below:

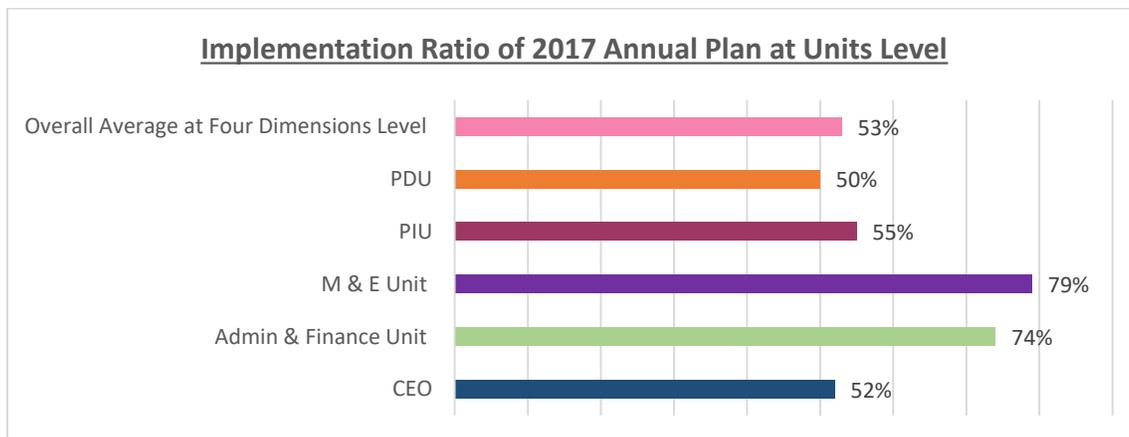


Chart No. (3)

Fourth: Main Unplanned Activities Implemented in 2017

As a result of the unstable situation due to the war in 2017, the Organization implemented some unplanned activities and the following are the most significant ones:

- Submitting 10 development and relief projects proposals – annex 4.
- Shifting the path and objectives of some activities of the projects to align them with the current situation in the country
- Recruitment of 40% of new staff members and reemployment of 30% of the staff who were laid-off in 2016 as per the staff turnover report of 2017 – Annex 9
- Pursuing austerity policy and suspension of non-core activities such as institutional development activities for the organization, building and developing organization staff, improving beneficiaries' satisfaction, and instead focusing on the implementation of other emerged activities of the projects.

Fifth: Unimplemented Activities in 2017 and the reasons for the non-implementation

The war that took place in the country in 2015 and continued until the end of 2017 has led to the following consequences:

- 1) The increase in the cost of basic services such as electricity, water, and lack of oil and diesel has affected the workflow
- 2) Donors have shifted their attention towards supporting relief projects and reduced their support for other areas
- 3) Lack of security in the country
- 4) The Organization was forced to adopt austerity policy and limited its developmental activities
- 5) Partners such as consultants and suppliers stopped providing their services to the Organization

The war has also affected the work of the organization and achievement of its institutional and developmental goals and hampered the implementation of the following activities:

- The insurance of the two vehicles owned by the organization in 2017
- Compliance to the projects closure procedures for all projects as per the projects management manual of the implementation unit
- Setting up a coding system for the Organization's assets and follow-up their movement according to the codes used
- Purchase of car tracking system to track the car of the organization
- Preparation of annual and semi-annual reports for the media activities and activation of the social media platforms of the Organization due to the lack of availability of a media officer
- Inability to activate the ERP system with all of its tools for all the new projects
- Development of an electronic procurement system appropriate for approved procurement procedures by the organization

- Listing employees by their training needs and nominating them to attend the courses that SOUL Organization is invited to as per the list
- Training on ERP system using the electronic material available
- Monthly meetings for the staff of the Organization to discuss the types of courses they attend online
- Modifying the evaluation mechanism based on 2014 outputs and results, taking into account adding questions that address the impact of relief projects on the target groups
- Conducting beneficiary's satisfaction survey in the third quarter of 2017 based on the new mechanism
- An updated accounting system appropriate for donor's reports

Planned Performance Indicators at the level of Each Dimension

Financial Dimension – Main Activities Implemented

The total planned indicators were 38% of the total indicators of the annual plan, of whom 33% were achieved and the total planned activities achieved for this dimension was 87%.

The following table (1) illustrates the main activities the Organization implemented on the financial dimension in 2017 in comparison to the planned activities for this dimension

Planned Performance Indicators	Main Implemented Activities
1. SOUL Community Center can cover its operational costs during 2017	1- SOUL Community Center was able to cover its operational costs during 2017 – Annex 3
2. 1. Azal Program dues to SOUL for Development Organization for the years 2014, 2015 and 2016 were approved by the program management and it was agreed to reschedule them to 2018.	2- Azal Program dues to SOUL Organization for the last three years t were approved
3. Achieve a surplus of at least 15% out of the implemented projects budget .	3- Control the budgets to ensure that project activities are covered without gaps, while providing emergency expenses to cover high prices and currency fluctuation - Annex 2.
4. 4. The budget of the approved projects should not be less than \$ 6,000,000 for the year and the relief and development projects should not be less than four.	4- Six project proposals on development and relief were developed – Annex 4

5. The ratio of adherence he to the budgets of the projects should not be less than 100% of the approved budget.	5- The ratio of projects adherence to its donor approved budgets was 100% - Annex 5.
6. Percentage of operating expenses used from the surplus shall not exceed 85% of the realized surplus	6- Preparation of SOUL Organization annual budget for 2017 and get it approved by the executive management of the Organization - Annex 6.
7. Provide information on the documentations and procedures required to register the Organization in Malaysia, Britain or Lebanon.	7- Not done
8. 8. All cars of the organization are insured at the end of 2017	8- Not done
9. Achieve a current ratio of 1.3: 1	9- Not done

Table No. (1)

As for the contribution of each unit to this dimension, the Financial and Administrative Unit ranked first as it implemented the largest number of activities (15.10%), followed by the Projects Implementation Unit (11.55%).

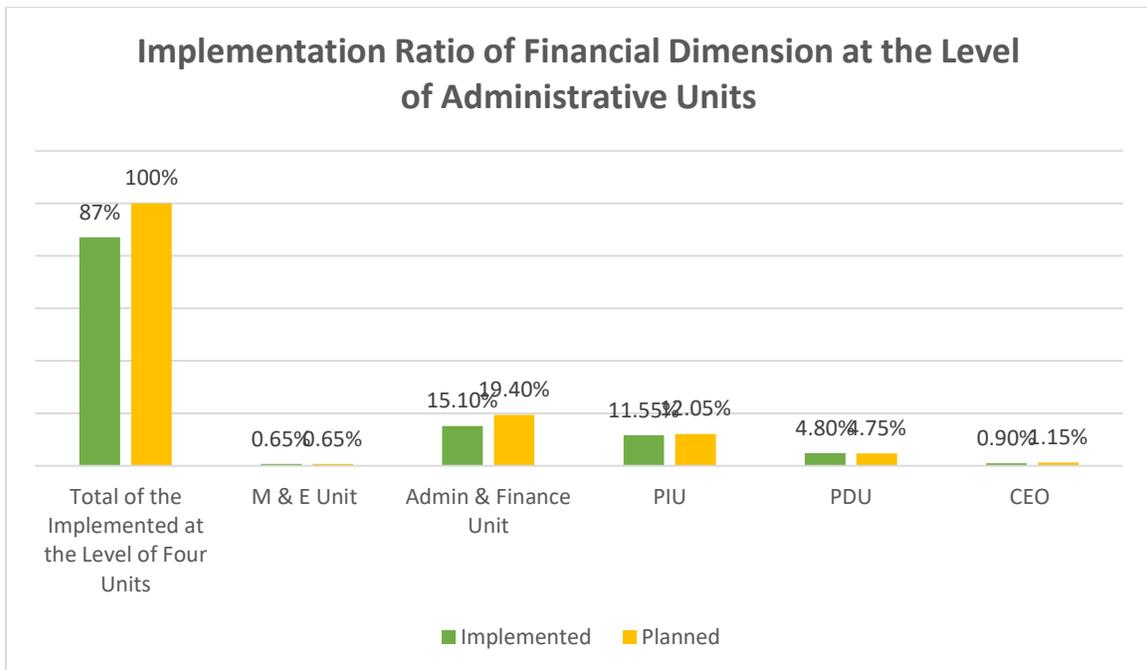


Chart No. (4)

Internal Processes Dimension – Main Activities Implemented

The total indicators planned in the internal processes dimension were 34% of the total indicators of the Organization annual plan. 17.6% of the planned indicators were implemented and the project implementation unit carried out most of them (6.6%). The overall achievement of the planned activities in this dimension for 2017 was 52%, as shown in Chart (5) below which also illustrates the contribution of each units to the overall achievement percentage.

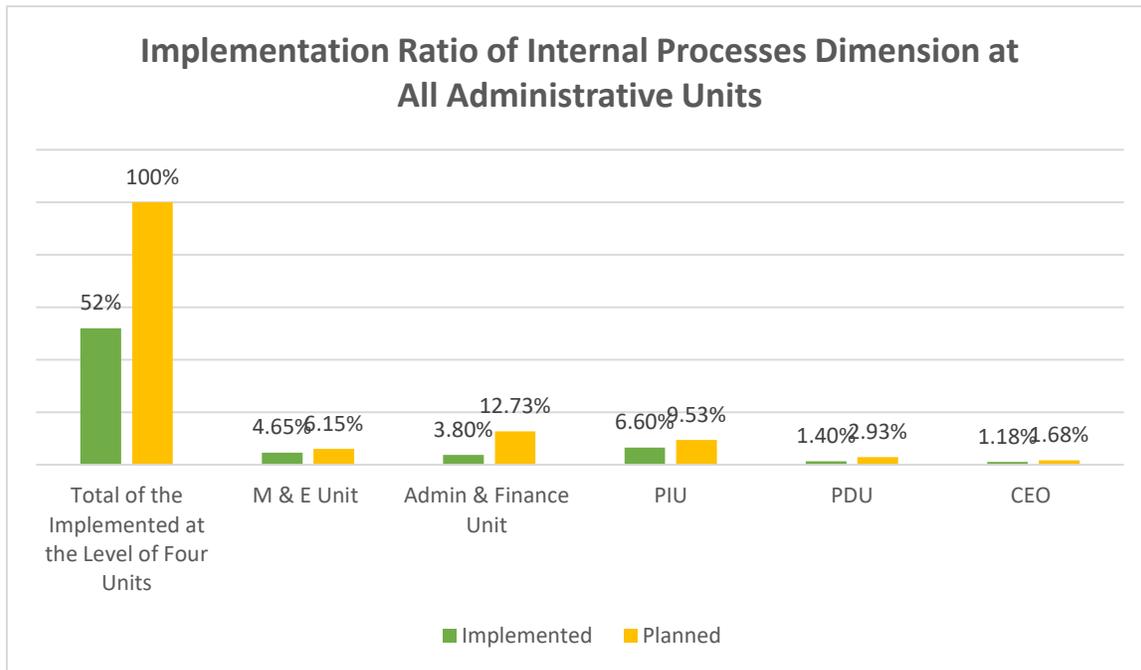


Chart No. (5)

The main activities carried out by the Organization on the internal processes dimension were as follows:

Planned Performance Indicators	Main Activities Implemented
1. Executive Annual Plan for the Organization and 4 plans for the four administrative units for 2018.	1. Preparation of the annual executive plan, including the plans of all the administrative units for 2018.
2. Administrative, technical and financial reports are submitted and reviewed every four months.	2. Provide administrative, technical and financial reports on the executive annual plan of the O Organization.
3. Provide evaluation reports of the projects implemented in 2017.	3. Follow-up the implementation plans of projects and submit monthly reports on the level of performance.
4. Provide technical and financial reports on the projects according to their timeframe.	4. 60% of this activity were completed

5. All administrative procedures at the end of an employee's term of office or upon an appointment of a new employee have a 100% adherence rate.	5. Apply the procedures of the Organization upon the expiry of employment contract of any employee in the Organization.
6. The Files of organization's database (2017-2013) are 100% up-to-date and functional.	6. Review the electronic archiving of the Organization's files from 2013-2017 and rearrange them according to the approved archiving system.
7. 100% manual and electronic archiving system certified and activated.	7. 85% of this activity has been completed
8. Add at least 2 members to the project proposal development team.	8. The team has been expanded and holds monthly meetings to discuss project proposals and work outputs.
9. The organization's assets database is 100% up-to-date and active.	9. 25% of this activity has been completed.
10. All projects are closed according to the project implementation unit manual.	10. Not done
11. 100% auto tracking system	11. The activity was carried forward to the 2018 plan
12. Active partnership with international organizations (WFP, WHO, UNDP, FAO, UNICEF, OCHA, Qatar Foundation, DIFD, EU, and embassies	12. 24% of this activity has been completed
13. Increase the rate of activation and modernization of the social media platforms of the Organization by 75% more than 2016	13. 36% of this activity has been accomplished (activation rate planned to increase followers of SOUL PAGE by 20% and completion rate of 7%)
14. The implementation rate of ERP system in projects is not less than 95%.	14. 23% of this activity has been completed
15. 100% advanced electronic procurement system.	15. 50% of this activity has been completed
16. 95% of the technological problems faced by employees are reported using the Help desk service.	16. 10% of this activity has been completed

Table No. (2)

Learning and Growth Dimension – Main Activities Implemented

The total planned indicators for the learning and growth dimension for 2017 were (16%) of the total indicators of the annual plan of the organization. (6%) was achieved and the Administrative and Financial Unit achieved the highest percentage (3.7%) out of the overall achievement in these indicators, while the average implementation of the activities planned in this dimension was 41% as shown in chart (6) below, which shows the contribution of each units in achieving the indicators of this dimension:

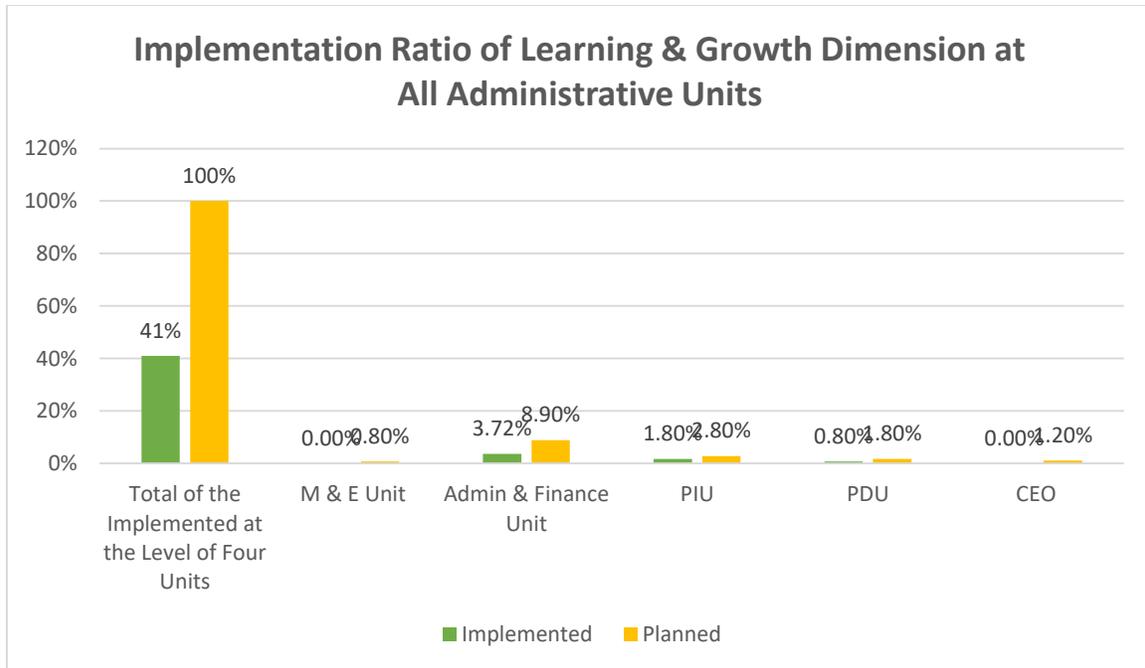


Chart No. 6

Main Activities Implemented by the Organization on the Learning & Growth Dimension were as follows:

Planned Performance Indicators	Main Activities Implemented
1. 1. Submit annual performance assessment reports for the Organization staff for 2017.	1. Assessment of all Organization's staff for 2017 through the updated / improved assessment system. (22% of this activity has been completed)
2. 1. At least 70% of the organization's staff attended training sessions based on the training needs assessment results.	2. 2. Make a list of training courses attended by staff in 2017 - Annex 7.
3. A list of e-learning sites in areas related to the work of the organization is active and available for staff use.	3. 25% of this activity has been completed.
4. 1. Provide a mechanism to strengthen the Organization institutional culture.	4. Not done.
5. Implementation of the incentive plan by 20%.	5. Not done
6. Updated accounting system in line with donor reports.	6. 6. Upgrade the accounting system (Unox Pro) to contribute to the process of issuing quarterly financial reports in the system.

Table No. (3)

Customer Dimension – Main Activities implemented

Only 12% of the total indicators of the Organization's annual plan were allocated to the customer dimension and only 4% of the planned activities in this dimension were implemented for 2017, while the average completion of the planned activities in this dimension was 33% as shown in Chart (7) below that shows the contribution of each units in achieving this percentage:

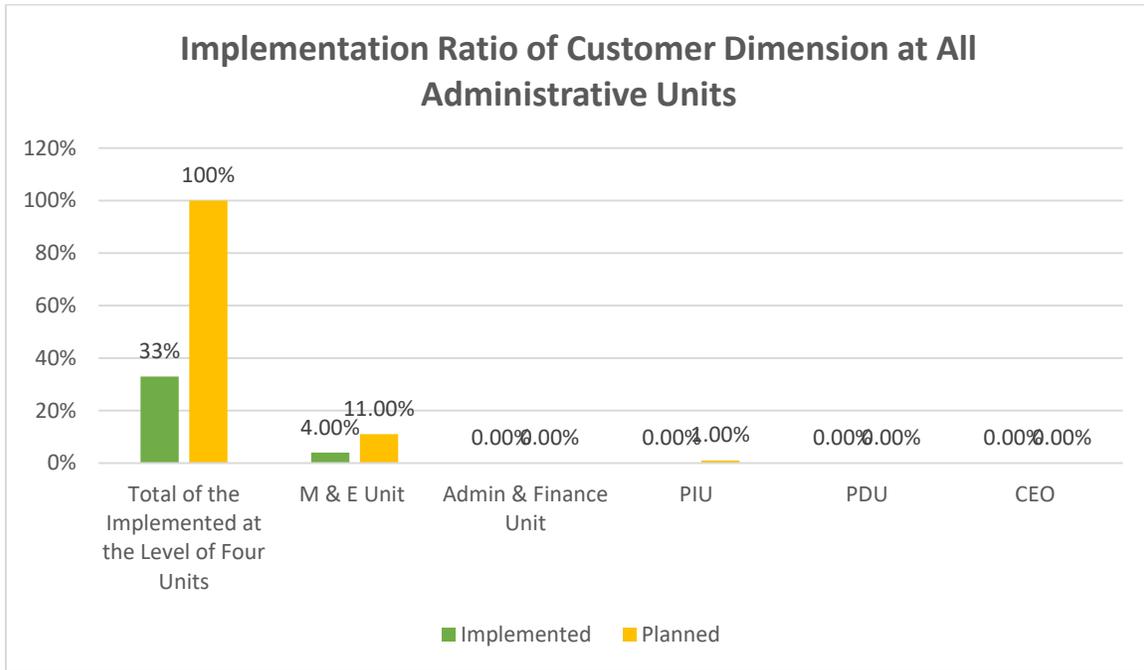


Chart No. 7

The Main Activities Implemented by the Organization on the Customer Dimension were as follows:

Planned Performance Indicators	Main Activities Implemented
1. Donors satisfaction should not be less than 95%.	1. Develop a report of the donors satisfaction level .
2. Satisfaction of partners is not less than 95%.	2. Analyze the results of the data to show the level of satisfaction among partners in 2016
3. Satisfaction of beneficiaries is not less than 90%	3. Not done

Table No. (4)

Recommendations

- Analyzing activities that were not implemented in 2017 and rescheduling them in 2018 based on their importance since the country's situation is not yet stable.
- Provision of quarterly reports on the Executive Annual plan to follow-up on the progress of activities.
- Achieving a surplus of at least 20% from the revenue.
- Development of a partnership with the Azal Program to implement joint projects.
- Increase the number of project proposals submitted and accepted during 2018.
- Re-activation of media role in the organization's activities and projects.
- Activating the monitoring and evaluation role of the projects plans as well as the Organization.
- Development of the travel allowance list and putting it into effect.
- Provision of a comprehensive proposal for the inclusion of employees in health insurance.
- Focus on the adoption of an accounting system to produce financial reports in an effective manner.