



JOB PROFILE – RESEARCH AND LEARNING OFFICER

SECTION A: JOB TITLE

A.1 JOB IDENTIFICATION	
1. Job Title	Research and Learning Officer
2. Job Grade	D2

A.2 LOCATION OF POSITION	
Division	Operations
Department	Operations

A.3 REPORTING LINE	
Immediate Superior	
Operations Manager	
Number of Direct Report(s)	
N/A	
Number of In-Direct Report(s)	
N/A	

SECTION B: JOB PURPOSE, DUTIES AND RESPONSIBILITIES OF THE POSITION

B. 0 PREAMBLE				
The Southern Africa Trust is committed to fostering a workplace that upholds feminist principles, values and ethos. All staff and Board members strive to live and reflect these values and principles as articulated in our strategy and in our ways of working and relating, internally and externally.				
B.1 JOB PURPOSE				
This role is responsible for designing and implementing monitoring and evaluation systems, conducting research activities, and facilitating organizational learning to enhance program quality and achieve desired outcomes. The role will also focus on quality improvement processes. playing a crucial role in ensuring the effectiveness, efficiency, and impact of the programs and projects implemented by the Trust. The role also provides monitoring, evaluation, research and learning support and collaborates with country programmes.				
B.2 DUTIES OF THE POSITION				
NO.	KEY PERFORMANCE AREAS	INPUT (Methods Used)	Outcome (Expected Results)	Weighting
1.	Design and Implementation of Monitoring and Evaluation Systems:	<ul style="list-style-type: none"> • Designs and implements the Monitoring, Research, Evaluation and Learning systems and frameworks, working in collaboration with the Operations Manager and Management Team. • Develops comprehensive monitoring, evaluation, research and learning tools aligned with project objectives and donor requirements. • Designs data collection methodologies, indicators, and data management systems to track project progress and outcomes. • Ensures effective reporting, data collection, and monitoring systems are in place. • Leads the data collection processes, develops the monitoring, evaluation, research and learning plan, and performs other related monitoring and evaluation efforts for the Trust. • Develops and tests instruments for data collection; collects, analyses, and summarise field visit reports from programme technical staff and implementing partners for institutional learning. • Evaluates the integration of project design with the programme strategy and the impact of business and technical processes to the programme. • Provides technical assistance to Trust's staff members 	<ul style="list-style-type: none"> • monitoring, evaluation, research & learning framework, plan and tools • Reports, data collection systems • Impact Assessment reports 	30%

		<p>and partner organisations' staff in the utilisation and management of monitoring and impact assessment tools.</p> <ul style="list-style-type: none"> • Conducts portfolio reviews and program performance reviews to ensure program quality and performance • Conducts data quality reviews to ensure that all information required for submission to donors is collected in a valid, reliable, and timely manner. • Completes impact assessment, baseline, midline, and end-line surveys to assess the program's impact. • Designs learning approaches that enable analysis of data, context, and emerging experience, and iterative adaptive management for the program's technical approaches. • Provides necessary support to the program external evaluators and donor's data quality assessment team. 		
NO.	KEY PERFORMANCE AREAS	INPUT (Methods Used)	Outcome (Expected Results)	Weighting
2.	Grant Monitoring and Tracking	<ul style="list-style-type: none"> • Implements the Grantee Compliance Matrices; technical and contract management, and submit index score on the same to relevant manager, working closely with Grants Officer • Contributes to the development of the Grants' monitoring and evaluation framework and assists in its implementation including baseline data gathering, monitoring and evaluation strategies and systems to effectively project results • Monitors grantee's progress and reporting any deviations to develop grantee's capacity building plan • Reviews the electronic grants management and tracking system and prepare review notes, to resolve grants management matters that were not completely addressed • Creates 'electronic' grants management files and database for independent reviews by stakeholders, to assist in completing grants performance reports. 	<ul style="list-style-type: none"> • Monitoring and tracking processes and systems optimised • Quality monthly reports on monitoring and tracking • All grantees adheres to relevant compliance requirements • Effective legally complaint grantees contracts 	20%

<p>3.</p>	<p>Learning</p>	<ul style="list-style-type: none"> ● Designs and implement internal and external knowledge exchange and learning events to improve peer-to-peer learning, knowledge sharing and application. ● Ensures that programmatic learning and results are fully documented, shared, and used to drive adaptive management processes. ● Leads the collection, analysis, documentation, dissemination, and use of best practices and lessons learned. ● Develops and/or maintain strategic relationships with relevant stakeholders to promote effective coordination, collaboration, and dissemination of program learning. 	<ul style="list-style-type: none"> ● Effective peer-to-peer learning ● Clearly documented programmatic learning ● Strong stakeholder relationships 	<p>15%</p>
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NO.	KEY PERFORMANCE AREAS	INPUT (Methods Used)	Outcome (Expected Results)	Weighting
4.	Research Management	<ul style="list-style-type: none"> ● Strengthens the Trust's research management capacity to contribute to regional integration and policy direction. ● Supports the Trust team with research to inform policy development and operational plans ● Translates the research provided by external research providers into presentations and reports that are specific to the Trust's needs ● Develops relationships with top of the market researchers selected for research by the Trust ● Establishes a network and database of civil society research organisations and researchers that positively undertake and share principles of value for money as the Trust ● Develops and maintains effective relationships with appropriate Government policy researchers, staff and information sources. ● Initiates research on performance of Trust's policy interventions impact on regional integration and policy ● Prepares the Trust and other regional committees for high-level consultations by providing briefings and position papers based on research ● Liaises with donors in areas of policy to feed into joint Country Strategies of the respective 16 member states ● Attends regional and international networking of sector forums and conferences to keep abreast of new research developments ● Conducts policy briefings and discussion papers session to keep all stakeholders abreast of development in research and policy area working closely with the Management Team ● Provides advice to the Trust units on matters of research packaging ● Contributes to the development and implements action plans for future research work ● Prepares and present proposals for new research to source funds for research to support the Trust's mission. 	<ul style="list-style-type: none"> ● Appropriate research management capacity developed and maintained ● Enhance competence on business case and research proposal design ● Value adding reports ● Joint Country Strategies developed with donor partners of the 15 member states 	20 %

NO.	KEY PERFORMANCE AREAS	INPUT (Methods Used)	Outcome (Expected Results)	Weighting
5.	Knowledge hub management and growth	<ul style="list-style-type: none"> ● Establishes and maintains a knowledge hub by evaluating trends and establishing critical measurements ● Shares knowledge of hub development and associated risks and opportunities proactively to build competitive advantage and improved sustainability of the Trust ● Anticipates emerging knowledge hub trends; design improvements for internal and external control structure, and provide regular updates ● Contributes to the knowledge hub project development as part of the team ● Provides feedback to project stakeholders on an on-going basis regarding progress made on development a knowledge hub ● Supports contribution of ideas from the micro level work for the development of advocacy at the macro level while feeding macro level policy to inform work at the micro level ● Promotes rights-based approach in advocating for rights of the people living in poverty, gender equality and exclusion among others ● Capacity Build internal and external stakeholders for contribution to and use of the knowledge hub. 	<ul style="list-style-type: none"> ● Knowledge hub established ● Knowledge hub accessed ● Stakeholder input into knowledge hub 	15%

This job description is written at a specific time and is subject to change as the demands of the business and the role develops. The role requires flexibility and adaptability and the employees of the Trust need to be aware that they may be asked to perform tasks and be given responsibilities not detailed on this job description.

B.3 AUTHORITY OF THE POST

This outlines the authority the jobholder has to make decisions or to take independent action without reference to a superior. Limits of authority are included in the delegation of authority (DoA)

- Decision making with respect to critical development on monitoring, evaluation, research and learning
- Recommendation of appropriate course of action to Operations Manager and staff members with respect to specific areas of work
- Expending of resources allocated to the **section**, within and in line with policy
- Management of resources allocated to the **section** in line with organizational policies
- Act independently with reference to the Line Manager and in terms of the following legislations and regulations: -
 - All policies, procedures and strategies in line with legislative and statutory requirements
 - Companies Act, Employment Equity Act (EEA), Skills Development Act (SDA), Basic Conditions of Employment Act (BCEA), Labour Relations Act (LRA)
 - Any other legislation and national policies that has a bearing **poverty, inequality, and human rights development** with specific reference to:
 - Research
 - Knowledge Sharing
 - Women empowerment
 - Youth development
 - Gender
 - Climate change regulations
 - Value for money
 - Innovation
 - Risk taking
- Administrative processes and procedures on financial matters

B.4 KEY INTERNAL AND EXTERNAL INFLUENCERS

Internal	All staff Country Programmes
External	Programme Partners Sector Stakeholders Clients Public Government departments Suppliers

SECTION C: JOB SPECIFICATION

Skills relevant to a job include education or experience, specialised training, personal characteristics or abilities.

C.1 ESSENTIAL REQUIREMENTS OF THE POST State the minimum educational, qualifications and experience that are required to perform the job competently.	
Qualification	Post graduate qualification in development studies; Economics, Social Sciences or equivalent
Experience	5 – 8 years monitoring, evaluation, research and learning exposure Experience publishing research would benefit the Trust.

KEY COMPETENCIES:

Technical competencies	Skills	Values/Attributes
<ul style="list-style-type: none"> ● Demonstrated experience in indicator selection and monitoring, and data collection/analysis ● Database management experience ● Proven skills in building capacities of staff and local organizations in MER ● Demonstrated experience with quantitative and qualitative research methodologies ● Strong skills in developing and utilizing results frameworks, logical frameworks, or similar tools for project design, monitoring and evaluation ● Knowledge of international donors reporting requirements, including experience designing ● Implementing Monitoring and Evaluation Plans ● Understanding of research management legislation ● A good understanding of the policy development and implementation and the issues likely to impact on it ● Understanding of donor demands and policy with regard to gender to human rights and environmental issues and their application in developing countries ● Understanding the grants/donor demands on regional and international policies of the 15 member states ● Knowledge of the issues in the Trust's development environment ● Procedures Manual ● An understanding of the strategic delivery requirements of the Trust ● Understanding of poverty and inequality challenges and human rights development 	<ul style="list-style-type: none"> ● Interpersonal skills ● Sampling skills ● Qualitative and quantitative skills ● Data Collection ● Data management ● Data cleansing ● Data analysis ● Data presentation ● Research Design ● MERL Tools design ● Knowledge management ● Knowledge sharing ● Monitoring and Evaluation ● Partnership building and maintenance ● Networking ● Stakeholder engagement ● Facilitation ● Training ● Problem solving and analysis ● Decision making skills ● Planning ● Written and Verbal communication ● Organisational networking ● Strong negotiating skills ● Business acumen ● Numeracy skills - reconciliations and statistics ● Use of statistical programme ● Excellent presentation 	<ul style="list-style-type: none"> ● Accountability and ethical conduct ● Quality oriented ● Judgment ● Deadline-oriented ● Analytical ability ● Results Driven ● Organisational values ● Professionalism ● Attention to Detail ● Confidentiality ● Integrity ● Research orientated ● Working with Others ● Working through Others ● Servant Leadership

	and communication skills	
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SECTION D: APPROVAL OF JOB DESCRIPTION

TITLE	NAME	SIGNATURE	DATE
Operations Manager			
Incumbent			