# **GENERAL TOPICS FOR CONSIDERATION WHEN DEVELOPING THE** **TERMS OF REFERENCE** **FOR PROJECT MONITORING VISIT**

# **Objectives of the Visit**

* List the main objectives of the project monitoring visit

# **Scope and Project Visit Schedule**

* Fill in the below project visit schedule table with the requested details. Add rows as appropriate.
* If already used and available, a separate project visit schedule containing all these required details can alternatively be attached.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Day 1 DATE (dd.mm.yyyy) | | | | |
| Time | Location | Activity / Meeting conducted | Participants | |
|  |  |  | Name and Organization | Position, Responsibility or Expertise |
| Day 2 DATE (dd.mm.yyyy) | | | | |
| Time | Location | Activity / Meeting conducted | Participants | |
|  |  |  | Name and Organization | Position, Responsibility or Expertise |
| Day 3 DATE (dd.mm.yyyy) | | | | |
| Time | Location | Activity / Meeting conducted | Participants | |
|  |  |  | Name and Organization | Position, Responsibility or Expertise |

1. **LIST OF** **OTHER CBM TOPICS OR AREAS OF SCRUTINY THAT CAN BE CONSIDERED DURING A PROJECT MONITORING VISIT.**

Please note that this is not a mandatory list of topics to be addressed during the project monitoring visit. This should only be helpful guidance in case it is decided by the visiting CBM staff that there is need to focus on any of these particular listed topics.

1. **Technical Implementation**

* Report on overall technical implementation incl. technical quality, capacities, strengths, weaknesses or challenges.
* As aligned with the relevant Initiative (CBID / IEH / IHA), ensure that identified actions from Initiative perspective are addressed during the visit and any follow up actions integrated into the PMVR template Section C. ACTION PLAN.
* For any questions on technical implementation please liaise with the relevant Initiative (CBID / IEH / IHA) colleagues.

1. **Sustainability**

* Report on challenges / progress made as per sustainability strategies or related activities outlined in the Project Plan.
* Distinguish between different types of project sustainability:

1. Organizational sustainability e.g. governance, creation of internal financial, technical and human resources.
2. Programmatic sustainability e.g. community ownership and government commitment.
3. Financial sustainability e.g. new opportunities for income generation, diversification of donor base, potential financing of components by local/national government.
4. Environmental sustainability practices and responsibility.

* If there are no pre-planned sustainability strategies or activities in the project plan, inform which measures will be taken to work towards lasting project outcomes and change. Specify if this requires any project adjustments.
* For any questions on sustainability, please liaise with relevant CBM colleagues involved in planning of the project.

1. **Cross-cutting Themes**

* Liaise with the different CBM teams and Advisors responsible for these cross-cutting topics prior to the visit to clarify details and additional requirements.
* Make a reference as appropriate with regards to project’s progress and status regarding:

1. Disability Inclusion and Gender Equality.
2. Safeguarding of Children and Adults at risk
3. Safety & Security

* If relevant information on these themes is already available in other reports, do not duplicate but provide a reference or link to the respective report. In such a case, the reporting here should focus on the verification of information provided in the submitted reports including any identified challenges or divergences from agreed plans / approaches / strategies / budget.

1. **Project Risk Management**

* The reporting here should only be a verification of whether the existing risk register is still valid, if any risks have materialized or any developments are noted that require update of the risk register and additional mitigation actions.
* If the existing risk register is no longer valid, the detailed reasons (why it is no longer valid) should be provided here. To avoid any duplications, all other needed updates and proposed amendments to the risk register should be done within the risk register document and not here.
* The summary of actions (e.g. project risk register to be updated/discussed) should be outlined in the PMVR template Section D. ACTION PLAN.
* For detailed questions or guidance on the Project Risk Management requirements, please liaise with the Portfolio & Partner Service Management team within Finance and Operations Development division.

1. **Partner and Project Capacities including Capacity Development Needs and Priorities**

* Report on the partner / project’s strengths, weaknesses, or challenges in areas of governance, human resources, data management and M&E system, relationships with other implementation stakeholders etc.
* Outline any partner / project capacity strengthening activities identified or recommended during the visit that need to be conducted for purposes of improving project management, staff knowledge and skills, better understanding of CBM standard requirements etc.
* The capacity development activities can be conducted by CBM staff or other commissioned external consultants and can cover a wide range of topics as agreed between CBM and the Partner. Most important is that identified capacity development activities need to be an agreed priority, justifiable and realistically aligned with either the available budget or additionally allocated budget.
* The PMVR template Section D. ACTION PLAN should be used to summarise capacity development needs / actions.

Note: If the information to be reported in this section should be, or is already, part of Partner Assessment (PA) Action Plan, do not do any additional reporting here. Instead provide a reference to the respective updated PA Action Plan available on the partner profile in NAV. This avoids duplication of information.

* For any questions on partner and project capacities and needs, please liaise with relevant Regional Hub Office colleagues responsible for partner and project capacity development.

1. **Partner, Project & Target Groups feedback, cooperation and reflective learning**

* Project visits are an opportunity to jointly reflect on the partnership with CBM.
* This can include Partner’s feedback concerning mutual project implementation with CBM, general support provided by CBM to the Partner and CBM accountability to the Partner and target groups.
* Reporting can cover both positive and negative feedback or experiences as sources for lessons learned/good practice.
* PMVR template Section D. ACTION PLAN must be used to outline actions from the feedback, if any.
* Partner /Project staff and target groups must be proactively informed of the official confidential CBM feedback and complaints mechanism channel [www.cbm.org](https://www.cbm.org/about-cbm/reporting-channels-and-safeguarding/?cookieLevel=accept-all&cHash=266ba69f5461294dd1e9315c6d7a2978) in case of any concerns, complaints, compliments or suggestions about the standards of service provided by CBM, its staff, volunteers or anyone directly involved in programme delivery.

End of Document- [Go back to top](#_top)