1. **INSTRUCTIONS**

Read the following instructions before conducting the project monitoring visit:

1. Refer to the [Quick Process Reference Guide for Monitoring and Reporting](https://cbm365.sharepoint.com/sites/ProMis-Live/GuidanceLibrary/02%20Projects%20and%20Programmes/20%20Implementation%20and%20Monitoring/QPRG%20Monitoring%20&%20Reporting.pdf) for project monitoring visit timelines, steps and responsibilities.
2. This Project Monitoring Visit Reporting (PMVR) template is applicable for both onsite and virtual project monitoring visits.
3. CBM project monitoring visit enables stakeholders to examine the progress of project implementation, verify delivery of outputs and achievement of results, verifying submitted written reports, identifying successes, challenges or divergences from the set project plan, checking compliance standards or requirements are being met and discussing any project support needs.
4. In line with 3-Way Working, the Terms Of Reference (TOR) for the project monitoring visit should be contextually developed together with the CBM Initiatives who actively provide technical input or take part in the visit. Fundraising team should be consulted or made aware of the project monitoring visit.
5. The TOR for the project monitoring visit should also be approved via agreed 3-Way Working. [Refer to this document (Section A only)](https://cbm365.sharepoint.com/:w:/r/sites/ProMis-Live/_layouts/15/Doc.aspx?sourcedoc=%7BD5564CCA-4288-4326-8CC6-4E750BCF7BFD%7D&file=Project%20Monitoring%20Visit%20Reporting%20English%20Annex.docx&action=default&mobileredirect=true) containing general topics for consideration when developing TORs.
6. Partner / Project staff must be briefed in a timely manner (e.g. via TOR) about the visit by relevant CBM staff.
7. If applicable, CBM staff conducting the visit should request a pre-departure Health, Safety and Security briefing from the respective Health, Safety & Security Unit or Regional Hub Office/Country Office Security Focal Points before the visit.
8. Reporting via this PMVR template is mandatory and ultimately represents the Executive / Management summary. Section C. SUMMARY OF PROJECT MONITORING VISIT KEY FINDINGS and Section D. ACTION PLAN of this PMVR template should ideally be maximum 3 pages in total. This provides for a simplified and lean report summarising key findings and actions.
9. [Refer to this document (Section B only)](https://cbm365.sharepoint.com/:w:/r/sites/ProMis-Live/_layouts/15/Doc.aspx?sourcedoc=%7BD5564CCA-4288-4326-8CC6-4E750BCF7BFD%7D&file=Project%20Monitoring%20Visit%20Reporting%20English%20Annex.docx&action=default&mobileredirect=true) containing a list of other CBM topics or areas of scrutiny that can be considered during a project visit. It is not realistic to attempt to check everything with one visit, so project monitoring visits should be adapted on a case-by-case basis by the staff carrying out the visit to facilitate focus on the most important issues.
10. Guidance is provided for all sections / questions in this PMVR template. For any further guidance, liaise with the responsible CBM teams or designated subject-matter contacts prior to the visit as needed.
11. The guidance provided within each section / question in this template should ultimately be deleted and instead replaced with the requisite reporting. This A. INSTRUCTIONS section should also be deleted in the final report. This is important to avoid unnecessary lengthy reports.
12. Use of brief bullet points is encouraged at all times to keep reporting clear and concise.
13. Duplications of reporting already done elsewhere in other CBM Partner / Project reports must be avoided within this PMVR template. Use reference links or attachments instead.
14. The reporting in Section D. ACTION PLAN table should also be manually entered in the Task tab of the Project page in ProMIS
15. The final PMVR should be duly endorsed by the Partner and uploaded in the respective project’s Document library via the Project page in ProMIS.
16. **PROJECT DETAILS**

Fill in or copy-paste from last report.

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| --- | --- |
| CBM Office | Name of responsible CBM entity e.g. Regional Hub Office, Country Office or Initiative planning/conducting the visit. |
| Staff Name / Visitor(s) | Names of CBM staff conducting the visit, including work title and department. |
| Date of project monitoring visit | Start and End dates (dd.mm.yyyy). |
| Date of last project monitoring visit | Only month and year (mm.yyyy). |
| Project ID | Official project number as assigned in ProMIS. |
| Project Name | Official project name as assigned in CBM ProMIS. |
| Location of the project | Country name and City / Town / Administrative region / Area where project is located. |
| Project duration/period | Start and End dates (dd.mm.yyyy). |
| Project budget | Total approved (multi-year) budget amount for the project including any additional funds during the project period. |
| Project source of funding / Donor | Free funds  Legally Contracted Designated Funding – LCDF (includes free funds contribution). Please specify Back Donor name: |
| Contract Partner(s) | Official name(s) of CBM contract Partner(s) including names of any other non-contractual partners involved in the project, if any. |
| Type of Project Monitoring Visit | Onsite / Face-to-Face Project Monitoring Visit  Virtual / Remote Project Monitoring Visit (please mark in the box which medium has been used: phone/voice, video, photo camera) |

# **SUMMARY OF PROJECT MONITORING VISIT KEY FINDINGS**

* Refer to above INSTRUCTIONS no. 3, 8, 9, 10, 12 and 13.
* This section also represents the Executive / Management summary. Please ensure that the most important findings are well summarized here and any recommended / agreed actions are concisely outlined in Section D. ACTION PLAN below.
* CBM project monitoring visit enables stakeholders to examine the progress of project implementation, verify delivery of outputs and achievement of results, verifying submitted written reports, identifying successes, challenges, or divergences from the set project plan, checking compliance standards or requirements are being met and discussing any project support needs. This section should therefore concisely capture all these performance-, process-, result- and compliance monitoring findings and discussions.
* Clearly and briefly inform if project is on track to set objectives, expected results and if related indicators are measured. Focus on examining and reporting the extent to which a project is being delivered as per intended project plan via assessing ongoing project activities and determining whether the program is adequately reaching its targets.
* Use this [Region Country Partner Financial Compliance Checklist](https://promis.cbm.org/resource-library?folderPath=02%20Projects%20and%20Programmes%2F20%20Implementation%20and%20Monitoring) from ProMIS Resource Library for reporting finance related findings during the visit. [Business Services Management](https://cbm365.sharepoint.com/sites/cbmnet/FinanceAndOperations/Pages/Regional-Finance-and-Compliance.aspx) team should be contacted for any questions.
* Don’t duplicate information from CBM standard written project reports here. Instead, focus on the submitted CBM standard written reports’ timeliness, quality and verification of the reported information therein. Refer to the following CBM standard written project reports and project deliverables prior to the visit:

1. Project Logframe, Activity Schedule and Project Budget
2. Project Risk Register
3. Narrative Reports
4. Standard Indicators Data Collection Forms
5. Quarterly Project Financial Reports
6. Payments/ Transfer confirmations
7. Financial Year-End-Closing Reports
8. Financial Audit Reports
9. Evaluation Reports
10. Last project monitoring visit report

1. **ACTION PLAN**

Refer to INSTRUCTIONS no. 8, 12 and 14 above.

Fill in below table with recommended and agreed actions in line with above Section C. SUMMARY OF PROJECT MONITORING VISIT KEY FINDINGS, including responsible persons and by when the actions are to be done.

|  |  |  |
| --- | --- | --- |
| **Actions**  (Recommended and agreed) | **Responsible**  (Name, position, entity e.g CBM, Project, Partner or External stakeholder) | **Timeframe for action**  (Deadline) |
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