Checklist: Field Monitoring Visit Guidance

- **Before field monitoring visit:**
    i. Prepare a plan or Scope of Work (SOW) for each visit. This plan should include the field visit objectives, a draft schedule of activities, itinerary and courtesy visits, and a list of materials needed for the trip.
    ii. Discuss the field visit plan with your supervisor, relevant colleagues, and partners.
    iii. Partners to be visited should help finalize the details of the itinerary, courtesy visits, etc.
    iv. Ensure that you complete the administrative procedures required by your Country Program. These may include filling out an Advance Request Form or Travel Authorization Form, a Vehicle Request Form, a Purchase Order for an airplane ticket, etc.
    v. Bring copies of relevant project documents from the Master Project File. These documents may include the project proposal, Award Agreement, Results Framework, LogFrame/Proframe, Details Implementation Plan (DIP) documents, such as the updated Activity Schedule, the M&E plan, the updated project budget, the last progress report written by your own organization and the partner, action plans and the last field visit report.
    vi. Field data collection or supervision checklist list that corresponding to your field monitoring visit objectives or SoW
- **During the field monitoring visit:**
    i. Upon arrival, meet the partner and further discuss or revise the plan.
    ii. Make courtesy visits. Visiting local NGOs representatives and local authorities, even if there is not an immediate need, is very important! Local authorities often play a role in coordinating NGO activities in their area, and frequent interactions enhance communication, demonstrate respect and build relationships.
    iii. Refine the schedule of activities for the field visit, which may include:
        a. Meetings with project staff to discuss progress on activities, problems and challenges, and plans made or decisions taken to resolve them;
        b. Observations of project contexts or activities. Take advantage of the field visit to accompany partners in their current project activities. It is vital to speak with project participants and this should be part of any field visit.
        c. Emphasize the need to observe regular activities rather than special, orchestrated events. Take photos that can be used for progress reports or on the organization website;
        d. Discussions in the field with project participants to assess their views and opinions on project implementation;
        e. Meetings with financial and administrative staff to review receipts, cash books, check on project supplies or vehicles logs; and
        f. A final debriefing meeting with relevant staff of your own organization or partners.
- **After field monitoring visits:**
    i. Write up a brief field visit trip report, focusing on key findings and recommendations. See the trip report as a way of promoting dialogue about the site you visited, the sector in which activities are taking place, innovations you saw, and so on.
    ii. Consider sending a draft trip report to partners for their feedback. This will help you summarize information from the debriefing and ensure mutual understanding of the report's findings and recommendations. Any dialogue you have with partners about the draft will only help to strengthen the final version of the report.
    iii. Send a copy of the final trip report to partners and file it in the Master Project file. This helps you to document that adequate project monitoring took place. Documentation is important both for project continuity and may be a requirement for a project audit.
    iv. Continuous follow up on agreed action plan from the field monitoring visits

(Source: CRS Propack II, Page 196-197)