

## FMSI PROJECT MONITORING

# Principles and procedures of Project Execution and the role of FMSI in Monitoring & Control

### General Principles of Project Execution

A sound project management can be described as the activities of planning, organizing, securing, managing and monitoring the necessary resources and work to deliver specific project goals and objectives in a shared, effective and efficient way.

Project participants should focus their efforts on producing tangible outputs, i.e. deliverables. However, the reality is that project deliverables are merely a means to an end, as the real purpose of a project is to achieve outcomes which will contribute to the achievement of the project objective, i.e. produce measurable benefits.

Therefore, it is important for everyone involved in a project's management and execution (managers and team members) to understand the relationship between project outputs, outcomes and benefits, and to clearly identify them in the framework of the contract between the Donor and the implementing actor. This allows the project participants to make sure that they are working on the right things, following the proper procedures, not losing sight of the project's original purpose and Donor's rules and avoid producing deliverables with little (or no) value to the Donor, or expenditures that are considered ineligible.

During the implementation, the Project experts execute the work as was defined in the project plans. The purpose is to produce the project deliverables (outputs) as per the project donor's expectations. All project deliverables need to have been produced and accepted by the Donor side, as defined in the application Form.

Performing regular quality checks of interim results, ongoing communication with all project team members, as well as the continuous exchange among of all those involved in the project is fundamental to implement successfully.

### Monitoring & Control by FMSI

The objective of monitoring project performance is to know if the project is progressing as it should. FMSI tracks the project dimensions (scope, schedule, cost and quality), monitors risks, project change and overall project performance, and should be able to report on and forecast the project's evolution to project Donor. The project timeline/workplan will be the detailed implementation plan that sets out key activities, outputs and results, together with associated timelines. The workplan will be the key tool in supporting implementation. Changes to tasks (i.e. required effort or start/end dates) which have an impact on the overall project schedule are compiled and incorporated into the project timeline/workplan. If the schedule is at risk or considerable delays are foreseen, corrective actions need to be devised, agreed and implemented. If this happens, Donors should also be notified.

Specific objectives of Monitoring & Control performed by FMSI:

- A) To guarantee that projects are achieving the results (outputs and outcomes) as set out in the funding proposals;
- B) To demonstrate the contribution the intended results of the project (outputs and outcomes) to positive long-term effects to local society (impact);
- C) To check project-level understanding and application of the Donor's procedures of reporting;
- D) To contribute to the application of principles in the areas of child safeguarding and protection;

- E) To check the financial management, so that budget and spend are monitored throughout project implementation

Information on activities implemented as well as financial information needs to be reported quarterly. FMSI and the implementing actor will be expected to communicate with each other regularly via e-mail and on a monthly basis through project meetings as further explained below.

## 1. MONITORING EXECUTION: internal communication and project meetings

Having led numerous projects, FMSI understands that communication is key to effective project delivery. Therefore, communication will happen regularly throughout the duration of the project, via e-mail and via virtual meetings (skype), providing plenty of opportunity for all project members to come together to report, discuss, plan and progress project activities. It will also include a variety of communication methods to ensure all project members are able to collaborate effectively.

**Initial meeting:** This is an informal meeting, usually between the Project Manager, FMSI and others who could potentially contribute to the implementation of the project. The goal of this meeting is to introduce any pre-project information and discuss the next steps.

The result of this meeting is a better understanding of the context of the (future) project, as well as a decision to move forward. Lessons learned from previous similar projects can also be used as input to this meeting.

**The kick-off meeting:** it serves as the way to align the team's understanding of the project goals with actual plans and procedures. It serves the following purposes:

1. Establishing the management framework, including key phases, objectives, stakeholders, success criteria, deliverables etc.
2. Clarifying the governance structure, including management responsibilities and roles, reporting procedures, controls, governance documentation etc.
3. Initiating planning activities, including key milestones, sequence of tasks, prioritization, task dependencies etc.

**Regular Project Meetings:** they serve the purpose of review and updates on the project including key phases, objectives, stakeholders, success criteria, deliverables. They need to be scheduled, organized and conducted many times (usually on a monthly basis) during the course of the project implementation process.

Naturally, to cope with any slippage in delivery, Project Meetings will be moved, as required, to align with project activity ensuring maximum impact of each meeting.

## 2. MONITORING EXECUTION: Quarterly reports to FMSI - implementation activities

Internal reports are an important input for project control and decision making. The purpose of internal report is to document and summarize the status of the project's progress so to ensure that project tasks are carried out as scheduled in the application form and that project deadlines are achieved. FMSI must regularly monitor the reports and track the difference between planned, actual and forecasted activities/deadlines. The reports may also contain agreed project indicators and metrics for evaluating progress. They should therefore be properly archived during project implementation. Formats are provided by FMSI. The reports are due on the date indicated by FMSI and could be further discussed during the project meetings. Beware: although they are also an input to its completion, Internal reports are not the formal project reports requested by the donor. These need to be prepared separately.

**Please note that all documentation and records concerning the implementation must be reviewed, organized and securely archived.**

### 3. MONITORING EXECUTION: Quarterly reports to FMSI - spending control

The project requires the implementing actor to record, report and retain financial information. A part of the quarterly monitoring by FMSI is to provide reports and related financial evidence so that budget and spending can be monitored throughout project implementation. The purpose of cost control is to manage the project costs so that they are in line with the cost/effort baseline and overall project budget constraints. FMSI will provide a financial template to regularly monitor the budget and track the difference between budgeted, actual and forecasted costs. If the project budget is at risk, corrective actions need to be devised, agreed and implemented. If considerable cost overruns are foreseen, these need to be justified, reported to and approved. If the budget is at risk or considerable underspending or overspending are foreseen, FMSI corrective actions need to be devised, agreed and implemented. If this happens, Donors should also be notified.

**Please note that all cost documentation and records (invoices, bank transfer, payrolls, bank statements) must be reviewed, organized and securely archived.**

#### Procedure application – Actions and output:

Task	Who	When	Output
Definition of the project timeline/workplan	FMSI and Project manager and team members according to the application form	At the beginning of the project	Project timeline/workplan
Project meetings scheduling and organization	FMSI Project manager and team members	On a monthly basis according to participants availability	Project meetings minutes
Provision of Internal report format	FMSI	At the beginning of the project	Internal report format
Completion of internal reports and submission to FMSI	Project manager and team members	As established in the contract	Internal report filled in
Check and approval of the internal report	FMSI	By max 30 days after the submission	Feedback and approval on the internal report