**Project Follow Up Tool – Introductory Note**

The Project Follow Up – or PFU – is a tool that has been developed by Tdh to support its delegations in tracking progress of their project implementation, facilitate reporting and orient activity programming. It is a mandatory tool and is intended for project managers on all HAD bases.

**The PFU tool objectives are to:**

* Organise team work;
* Ensure proper planning of all operational project components;
* Track the progress against project targets (activities, indicators, beneficiary reach);
* Liaise with and report to Tdh senior management and headquarters;
* Act as the reference document for indicators’ reporting.

**Process:**

The process is made up of 5 main phases, with several stakeholders involved. One key feature of the PFU tool is to ease Project Managers into the responsibility of properly understanding and following up their indicators. To this end, the commitment of different stakeholders is needed to ensure the success of the PFU.

It is recommended that each mission discusses with their desks who are the best position for each step, providing that:

* The person responsible for reaching targets and implementing activities is the person responsible for the PFU tool. It will usually be the Project Manager, but in some delegations, the ProgCo will be eventually the main owner of this process. This person has to specific responsibilities regarding the tools:
* Ensure that the PFU Tool is properly calibrated, based on realistic targets, SMART indicators and standards indicators;
* Ensure reliable reporting, means of verification, and accountability on reported numbers and information;
* Ensure ownership and coordination with other stakeholders (M&E, HR, Log, Admin, Partners);
* Guarantee that the PFU Tool used for effective project steering.
* M&E staff will be supporting the process, as well as the development and deployment of the tools and M&E activities around the project, but is not in charge of the tool[[1]](#footnote-1);
* All the steps presented in the flowchart below are followed (calibrating, updating, compiling and analysing, reviewing and giving feedback, ensuring appropriate action);
* The tool is sent every 15th of the month to headquarters.

An example of a detailed process is presented in annex to help the mission navigate the responsibilities regarding the PFU.

**Flowchart:**

**Highlights on the tool:**

* The PFU Tool is first and foremost a project management tool, that should enable several actors involved in Project Cycle Management to communicate around the project, to steer the project, take any remedial action, plus ease project reporting,
* Reported numbers are considered reliable numbers and the data should be consistent. This means that means of verification effectively exist behind the numbers, and that everybody should be able to extract the same numbers from the same beneficiary calculation method.
* The tool is not ready to use, it will require some calibrating and verification during the first use, to ensure that all needed information is there and that the few formulas are still coherent. All stakeholders in the process will need to pay extra attention to ensure that the tool is well calibrated.
* Compilation: It is not required by HQ that all PFU files are compiled into one, although the mission can decide to compile the different PFU according to what makes more sense in their delegation.

**Prerequisites:**

To ensure that the PFU tool will fulfil its objectives:

* The different steps of the project cycle, and the principles of indicators monitoring have to be understood at PM level. The tool follows the project management logic as laid out in Tdh manuals (consult [www.tdh-qa-unit.com](http://www.tdh-qa-unit.com))
* There are functioning databases (or another beneficiary counting system). The tool itself won’t be capable of producing sound numbers. Although, it will foster a virtuous circle to do so.
* Means of verification are collected and archived. The data that is input manually by the PM into the PFU tool has to be grounded in the reality of the activity achieved.
* Simple Excel functions are understood at PM level.

**ANNEX – Example of possible process for the mission:**

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| **What** | **Who** | **When** |
| 1. **Calibrate**    * Fills in all necessary project information    * Fills in indicator list    * Update work plan    * Set targets – –    * Assist PM in setting indicators calculation modalities and targets    * Quality Check – Insures that the tool has included all the information needed (eg. reporting deadlines) and that is of quality | * + PM with support of Coordo Prog   + M&E according to PM and according to M&E plan   + Coordo Prog | During Operational Programming phase (project launch) |
| 1. **Regular updates**     * Workplan    * Indicator tracking table    * Main events | * + PM or Coordo Prog | By the 5th of every month |
| 1. **Check, global picture and first feedback – Sharing**     * Spot checks of data and MoV    * Ensures overall coherence of data when checking monthly the PFU for all projects if there are several field offices    * Shares the tools with delegate, field co and HQ | * + Coordo Prog, Support by M&E   + Coordo Progr, Support by M&E | By the 10th of every month, together with the sitrep |
| 1. **Review – feedback – advise**   In country   * + Check main events   + Check workplan   + Check indicator tracking table   HQ   * + Check if project is on track according to timelines, reporting timelines or potential issues to be discussed with donors or with the teams   + Check major outputs delivery   + Check outcome indicators | Field   * + Field Co   HQ   * + Desk team   + Thematic Specialists | By the 15th of every month, via skype or email |
| 1. **Follow up – decisions**    * Check that feedback is provided and taken into account by PMs.    * Ensure appropriate action is taken | * + Coordo Prog with PM |  |



**ANNEX: What Other functions contributing to the PFU tool?**

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| FIELD   * Programme Coordinator. He/she has a multifold role: 1) ensuring global coherence for a thematic area in a project, guarantee quality-coherence with thematic strategies; 2) Help PMs in operational planning and follow up on targets in efficient way, on the job capacity development of PMs 3) flag issues and help readjust; 4) Is the ‘transition belt’ between the PM, the Field Co and delegate, and HQ (Thematic experts and ope). In some delegations, he will be the main owner of the tool, depending on the set up. * Field Coordinator (Head of base): can check the PFU files as starting point to get a clear idea of the project implementation progress and issues in his/her area of intervention. Ensures that Monitoring activities are on track. * The Delegate: officially accountable. Has to ensure that PFU tool is used as required. Can refer to the PFU to ensure that work plans are being implemented and help readjust if needed. Uses the information when meeting with donors and for delegation steering. * Reporting officer: can refer to the tool to ensure that reporting deadlines are respected and to check on reliability of data to build the reports.   HQ   * Deputy Desk: follow up on project indicators, on internal operational reporting and in charge of regular communication with project teams, ensure deadlines and contractual obligations are fulfilled * Thematic experts: look at the indicators and raise any concern/question. Advise. Needs the information for steering purpose. |

1. The M&E staff is in charge of developing the M&E plan, another required tool at Tdh. [↑](#footnote-ref-1)