

## Quarterly Monitoring Visit report

### Background information

<b>Project name(s)</b> – Please list all project names in instances where a partner is involved with more than one project:	
<b>Project number(s)</b> - Please list all project numbers in instances where a partner is involved with more than one project:	
<b>Partner:</b>	
<b>District / province:</b>	
<b>Report author(s):</b>	
<b>Date of report:</b>	

### Visit details

<b>Date of visit:</b>	
<b>Names and positions of Sightsavers staff present:</b>	
<b>Names and positions of partner staff present:</b>	
<b>Did visit include a field trip?</b> (delete as applicable)	YES / NO
<b>If YES, please give field location(s) visited:</b>	

### Visit objectives

**(NB: please insert any specific additional objectives as necessary)**

1. To review progress against any actions raised at the last monitoring visit
2. To review YTD outputs and activities against targets and the workplan
3. To review YTD expenditure against the project budget
4. To follow-up on actions from QSATs and check data submissions

### SECTION 1: Progress against actions from last monitoring visit:

Action(s) from last meeting (insert extra lines if necessary)	Completed? (Y/N)	Comments
1.		
2.		
3.		
4.		
5.		

## SECTION 2: Progress against planned activities

2.1. According to your detailed review of the **project workplan**, is progress against planned activities Green, Amber or Red, according to the definitions below? (tick one)

<b>GREEN</b> <i>(Progress is where it should be, and we have completed all the activities scheduled to date)</i>	<b>AMBER</b> <i>(We have had some challenges but activities scheduled to date are at least 75-80% complete)</i>	<b>RED</b> <i>(We have had major obstacles. Many of the scheduled activities are less than 75% complete.)</i>

2.2. What are the main points of interest? If/where progress on activities is behind schedule, what are the reasons behind it and what mitigating actions will you take?

## SECTION 3: Progress against planned outputs

3.1. According to your detailed review of project **output statistics**, is progress against planned outputs Green, Amber or Red, according to the definitions below? (tick one)

<b>GREEN</b> <i>(Project outputs are on track and by the end of the year should be on or above the targets set.)</i>	<b>AMBER</b> <i>(Project outputs are slightly off track but by the end of the year will be at least 75-80% of target)</i>	<b>RED</b> <i>(Project outputs are significantly off track, and may be seriously off target by the end of the year.)</i>

3.2. What are the main points of interest? If/where progress on outputs is behind schedule, what are the reasons behind it and what mitigating actions will you take?

## SECTION 4: Progress against planned expenditure

4.1. According to your detailed review of the **project budget**, is expenditure Green, Amber or Red, according to the definitions below? (tick one)

<b>GREEN</b> <i>(Expenditure is on track and within +/- 10% of planned levels for this point at the year.)</i>	<b>AMBER</b> <i>(Expenditure is slightly off track but by the end of the year will be within +/- 10% of planned levels)</i>	<b>RED</b> <i>(Expenditure is significantly off track, and by the end of the year will be over +/- 10% of plan.)</i>

4.2. What are the main points of interest? If/where overspend or underspend has occurred, what are the reasons behind it and what mitigating actions will you take?

## SECTION 5: Follow-up on Quality Standards Assessments (QSATs)

Have any thematic quality standards assessments (QSATs) been carried out which relate to the partner/project visited or do any improvement actions from the Country Office PCM QSAT relate to the partner/project visited? Please provide brief information below then update the assessment action plan(s) and notify PSMT

Project No(s).
QSAT Theme (e.g. Cataract, DR, etc):
Comments (e.g. QSAT actions followed-up and status, i.e. Actions complete; in progress; pending; not applicable, etc.)

## SECTION 6: Data Check

Select at least two project indicators from the most recent quarter and check the source data to confirm that outputs were accurately aggregated and reported to Sightsavers. Record comments and any other observations on data management below:

Project No(s).
Comments:



## SECTION 10: Key attachments

Attach and file relevant documents with this report, e.g.:

Document	Attached? <i>(tick once complete)</i>
Output statistics / monitoring framework	
Workplan review	
Budget review	
Case study <i>(optional - but please attach if you have one)</i>	
Data sheets	
QSAT action plan updates	

Signed and agreed by:

\*Signed and agreed by:

(Sightsavers)

(Partner)

Date:

Date:

\*If partner signature cannot be obtained on this report their agreement by phone / email is adequate (agreement by phone should be logged).