

# Tip Sheet



RESOURCE  
& SUPPORT  
**HUB**



## Top 10 tips for conducting safe project monitoring visits

Most organisations who manage and implement projects will need to conduct project monitoring and evaluation activities over the course of the project cycle.

This might be:

- to track progress
- to measure impact or achievements
- in response to a donor request, or a concern that may have been noted by a staff member, volunteer, or community member.

Monitoring includes remote activities such as receiving reports, activities records and financial reports. Face to face visits may also take place, involving interviews and focus group discussions with community members and project participants, as well as on site document reviews and spot checks. This guidance note has been developed to support staff of organisations who are planning on conducting a visit to communities to monitor an existing project to do so in a safe and ethical way.

### Things to remember

- ✓ Monitoring should be for more than just donor compliance but also for learning and project improvement
- ✓ Only collect what is needed and useful
- ✓ Do no harm should be a central principle for all MEL activities
- ✓ Risks assessments must be carried out prior to any community visits
- ✓ Any disclosures made during the course of the visit must be reported through the agreed channels
- ✓ All activities should be conducted in a **safe and ethical way**
- ✓ **Informed consent** should be sought for all data collection activities, including informal conversations with project participants (beneficiaries)
- ✓ Any data that is collected during monitoring visit must be **stored safely and used securely**

### Definition box :

**Monitoring:** the systematic and routine collecting and analysing of information about a project over time.

**Informed consent:** requires giving sufficient and appropriate information about the research (or monitoring activities) to allow respondents to make a meaningful choice about whether to participate or not, and ensuring there is no explicit or implicit coercion which may influence their decision.

**Do no harm:** is to avoid exposing people to additional risks through our action. It requires us to take a step back and look at the context in which we are working to mitigate potential negative effects our actions may have<sup>1</sup>. This implies to the researchers and data collectors as well as the respondents and participants.

<sup>1</sup> Humanity & Inclusion, 2018. [Incorporating the principle of 'Do No Harm': How to take action without causing harm. Reflections on a review of Humanity and Inclusion's practices.](#)

## Planning a visit



- ✓ **Be clear on the purpose of your monitoring visit.** Be sure to communicate the purpose to the project staff you will be visiting in advance of your arrival.
- ✓ **Identify any risks that might arise as a result of the project visit.** Anticipate and mitigate risks by developing a risk assessment for your visit.
  - Which **groups** of people do you want to speak with, are any of them particularly vulnerable or children and young people? Are there any specific risks for them?
  - Do you intend to address any **sensitive topics** during your visit that might increase safeguarding risks for participants - including violence, abuse and exploitation?
  - Could any of the community groups you speak with experience **backlash or retaliation** as a result of participating in the project or discussing issues with you?
- ✓ **Ensure all staff undertaking the visit are aware of the code of conduct** and have received safeguarding training.
- ✓ **Make sure you know who the safeguarding focal point is** before your project visits.
- ✓ **Ensure everyone is aware of how to report any incidences that may be disclosed during the visit.** Any disclosures that are made during the course of the monitoring visit must be reported through the proper channels.
- ✓ **Identify the different groups of stakeholders you want to meet and what questions you want to ask.** These might include staff and volunteers, partners organisations, local government, community members and beneficiaries and ensure they are informed before you visit.
- ✓ **Check that your questions are necessary.** Are there other ways of collecting the same data?
- ✓ **If you plan to speak to children or young people you may need additional safeguards.**
- ✓ **Local support services should be identified prior to the visit in case any safeguarding concerns are raised during interviews or discussions with participants.** What is the reporting pathway? What and where are the local support services for referral?

## During the visit



- ✓ **Processes should be empowering and consultative,** for both project staff, volunteers and community members. Everyone involved in the project should be part of monitoring processes, and the outcomes must be useful for them.
- ✓ **Ensure that support is available for any participant if they are affected by anything during the visit.** Have you considered special requirements for children or people with disabilities?
- ✓ **Ensure any sensitive questions are asked in a private setting with a same sex researcher.** If you are unable to speak privately (perhaps due to COVID-19) consider using codewords to discuss sensitive topics or highlight if they are at risk.
- ✓ **Ensure the groups and individuals you speak to can access the location for the meeting and are not expected to wait unnecessarily or travel at unsafe times.**
- ✓ **Single sex groups focus groups should be facilitated by someone of the same sex.** Individual interviews should also be conducted by same sex researchers.
- ✓ **Ensure informed consent is received for any participation, images or quotes that are collected.** Explain their involvement and consent in a way that is easy and understandable, and how the information will be used. Have you explained that they can stop engaging at any time? If you are working with children, ensure you gain consent from a parent or carer.
- ✓ **Ensure you have informed participants how, and to whom, they can report a complaint or concern about the project or the monitoring visit when you have left,** and how will it be responded to.
- ✓ **Be sure to thank everyone for their participation and engagement with your visit.**

## Data protection and confidentiality



- ✓ **Ensure confidentiality, privacy and anonymity** by anonymising data collected and removing any identifiable elements to personal experiences.
- ✓ **Ensure there are no risks to confidentiality posed by the data storage systems on site.** How is data stored at the project site? Are paper copies of project records, which might include names stored securely in a locked cabinet or drawer? Are digital copies stored and password protected on project computers and laptops?
- ✓ **Consider whether it is necessary to note down a community members name** during a monitoring visit – this is rarely necessary. Identity should be protected for all participants.
- ✓ **Never ask for anyone to disclose any confidential information.**

## After the visit



- ✓ **Prepare a summary of your visit and reflections and findings** to share with whom you spoke.
- ✓ **Ensure all your notes from discussions are securely stored** or destroyed if no longer needed.
- ✓ **Review any data collected relating to safeguarding concerns and report any areas of concern to the safeguarding focal point.** Are you asking any questions about violence, sexual assault, sexual harassment, exploitation or corporal punishment?