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**Performance Management with Project Staff Checklist:**

**Areas of Special Focus**

# *INstRUCTIONS: Supervisors may use this checklist, as helpful, in coaching and assessing the performance of members of a project team (programming, finance, other operations staff who support the project, as well as heads of operations and heads of programming).* ***The points below do not cover all of the many responsibilities of different project team members; instead, they focus on aspects of project management that tend to present greater challenges or heavily influence project success.*** *Add to the list as useful to reflect project or context-specific challenges that you and staff you supervise should monitor during the performance year. Use this tool in conjunction with CRS’ comprehensive Performance Management System tools.*

# **Field officers / (senior) project officers**

**Project management**

* Are activities for which the officer is responsible occurring on time and per budget?
* Are they being done in a high-quality fashion, meaning with thorough preparation, implementation and follow-through?
* Is the officer identifying problems that might lead to delays or indicate a need for changes in the project schedule or methodology?
* Is the officer monitoring project dynamics, both positive and negative, and raising risks and issues with the project manager as appropriate?

**Partner and community/local government relations**

* Is the officer communicating respectfully and clearly?
* Is the officer working through activities and issues jointly and constructively with the partner and community?

**Reporting and MEAL**

* Is the officer contributing inputs that are complete and on time?
* Is the officer working effectively with partners to ensure partners deliver complete and on-time reports?

# **project Managers, Program managers, chiefs of party, deputy chiefs of party**

**Staff management**

* Is the manager identifying and meeting staff needs (capacity and resources to fulfill project responsibilities, overall well-being)?
* Is the manager tracking the staff members’ progress and results?

**Project management** **and development**

* Is the manager creating conditions for team and partner communication to maximize project impact, identify and manage risks and issues, find linkages between and among projects, and continually improve project approaches?
* Is the manager ensuring that project activities adhere to CRS project management standards?
* Is the manager ensuring the project stays on time, scope and budget?

**Partner and community/government relations**

* Is the manager ensuring that interactions are respectful and mutual at all levels of the institutional relationship?
* Is the manager working with the partner to address fundamental capacity-strengthening needs in addition to project-specific capacity-strengthening needs?
* Is the manager assisting field staff with any hurdles around work with local government and communities?

**Donor engagement and accountability**

* Is the manager identifying and communicating (first with other project staff, supervisor, and senior management team as appropriate, then with donor per agreed strategy) project successes and challenges?
* Does the manager understand and address the donor’s requirements and priorities (e.g., burn rate, leverage, recognition and branding, hitting beneficiary numbers)?
* Does the manager understand how to promote compliance with the donor’s requirements?

# **Head of programming, head of operations (Applicable Points FROM the PM/COP/DCOP list above, PLUS THE below)**

**Collaboration**

* Is the HoP/HoOps promoting effective communication and collaboration among project programming, finance, and other operations staff?

**Analysis, learning, and reporting**

* Is the HoP/HoOps regularly reviewing reports and helping staff improve the quality of project reporting?
* Is the HoP/HoOps supporting the project team to deepen their analysis of project data (from finance, programming, and other operations, e.g. supply chain) and improve the quality of project evidence-based decision-making?

**Program and management quality**

* Is the HoP/HoOps working with project staff to identify and address areas where support is needed to ensure compliance with CRS project management standards as well as donor standards and requirements for technical programming, project financial management, and other resource management?

# **Finance and OTHER operations staff**

**Systems**

* Are CRS and partner financial and other operations systems for the project set up and used according to CRS and donor policies and requirements?
* Do partners fully understand project financial and operations requirements and processes and the reasons for these processes?
* Has CRS supported partners to adjust templates or systems as needed to meet project requirements?
* Have partners received the necessary support to meet project operations requirements?

**Analysis and Reporting**

* Is the finance or other operations staff preparing clear and timely reports, in line with CRS and any donor requirements?
* Is the finance or other operations staff actively contributing to project analysis of risks and issues in the project operating context, both external and internal (related to planning, spending, resource management)?