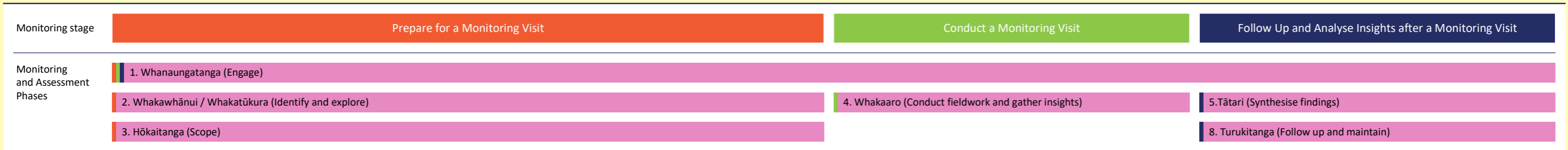


# Monitoring Cycle – Checklist

How the Monitoring stages relate to the Monitoring and Assessment Phases



## Monitoring Checklist

Monitoring stage	Prepare for a Monitoring Visit						Conduct a Monitoring Visit			Follow Up and Analyse Insights after a Monitoring Visit		
	6 weeks						5-7 weeks			4 weeks		
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7-8 / Week 7-9	Week 9 / Week 10-11	Week 10-11 / Week 12-13	Week 12 / Week 14	Week 13-14 / Week 15-16	Week 15 / Week 17
Key milestones	<ul style="list-style-type: none"> <li>First meeting – people, roles &amp; responsibilities assigned</li> <li>About Community Section 1 data analysed</li> <li>Calendar invites setup for team and facilitators (e.g. PLs, coding &amp; analysis wananga)</li> </ul>	<ul style="list-style-type: none"> <li>Dates confirmed for the whole of the visit</li> <li>About Community Sections 2-3 data analysed</li> <li>Contact made with each group for the monitoring visits</li> <li>Some dates for monitoring visit interviews confirmed</li> </ul>	<ul style="list-style-type: none"> <li>Travel forms received from team coordinator</li> <li>Monitoring visit times with monitored agencies, NGO, care providers and government agency confirmed</li> </ul>	<ul style="list-style-type: none"> <li>Plan on a Page Approved by Chief Monitor and then sent to governance</li> <li>Monitoring schedule drafted with some room for tamariki, caregivers and whānau visits to happen as confirmed</li> <li>Trello calendar available</li> <li>Flights booked</li> </ul>	<ul style="list-style-type: none"> <li>Agenda set for pre visit team hui</li> <li>Confirm coding and analysis process with monitoring team and CSI team</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring schedule completed</li> <li>Team run sheets confirmed including itineraries, timetables, responsibilities, venue details and key contacts</li> <li>Team is ready for the visit</li> </ul>	<ul style="list-style-type: none"> <li>Complete monitoring visits according to monitoring schedule</li> <li>Visit length 2 or 3 weeks depending on 3 year monitoring schedule</li> </ul>	<ul style="list-style-type: none"> <li>1-week duration (or 2 weeks if visit length prior is 3 weeks)</li> <li>Monitoring team prepare notes and begin analysing process</li> </ul>	<ul style="list-style-type: none"> <li>Complete monitoring visits according to monitoring schedule</li> <li>Visit length 2 weeks</li> </ul>	<ul style="list-style-type: none"> <li>Preparation of notes completed</li> </ul>	<ul style="list-style-type: none"> <li>Coding and Analysis Completed</li> </ul>	<ul style="list-style-type: none"> <li>Sharing back With community resources completed</li> <li>Complete sharing back with communities</li> <li>Monitoring Review (lessons learnt/ improvement recommendations)</li> </ul>
High level tasks and activities	<ul style="list-style-type: none"> <li>Calendar dates/times for coding, analysis, feedback development, OT &amp; community feedback, sharing back hui etc.</li> <li>Identify and calendar in facilitators for hui (analysis, sharing back etc.)</li> <li>Clarify PL role, who will lead korero ināianei and calendar-in</li> <li>Discuss each monitors strengths and areas of expertise</li> <li>Prep/confirm mihi, karakia and waiata for visit</li> <li>Team Coordinator organise Trello setup, accommodation and pencil in hire cars</li> <li>Confirm visit dates, resourcing and suggested dates for monitored agencies</li> <li>Start to calendar visit/hui dates &amp; sharing back dates for:                             <ul style="list-style-type: none"> <li>OT focus group</li> <li>monitored agencies</li> <li>government agency</li> <li>NGO/community</li> <li>shared care providers</li> <li>pre-monitoring visit team hui</li> </ul> </li> <li>Assign/confirm who is contacting connectors</li> <li>Develop <b>Plan on a Page</b></li> <li>Build <b>Monitoring Schedule</b></li> </ul>	<ul style="list-style-type: none"> <li>Team to continue to build on Week 1 tasks</li> </ul>	<ul style="list-style-type: none"> <li>Team coordinator to complete and action team travel form(s)</li> <li>Training needs for the team identified and a plan made by the manager</li> </ul>	<ul style="list-style-type: none"> <li>Manager to check people resourcing of the team matches the schedule and amount of visits and meetings happening during the monitoring visit</li> <li>Begin development of team run sheets</li> <li>Begin to focus on how the monitoring team will work during the time of the visit RE visit prompts, working in pairs and small groups to develop approach to monitoring visit (How will About Community information inform interviews?)</li> <li>Determine if everyone is on the same page RE prepare data, coding, analysis and feedback. Learn from each other regarding approach.</li> </ul>	<ul style="list-style-type: none"> <li>Finalise resourcing requirements</li> <li>Check/confirm with CSI who will be supporting the sharing back theming process</li> <li>Flights, accommodation and venues booked for monitoring visits and sharing back sessions</li> <li>Letter of grant and/or any koha required is sorted</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring visit team hui (kanohi ki te kanohi or jabber)</li> <li>Check all in place for the first visit (e.g. ID cards, briefing packs, contact details, Nga kete etc.)</li> <li>Travelling resource kit checklist and the kit itself confirmed</li> <li>Final adjustments to monitoring schedule and daily runs sheets</li> </ul>				<ul style="list-style-type: none"> <li>Send thank you emails to all those engaged with</li> <li>Identify any concerns or actions that need to be followed up post-engagement</li> <li>Have coding wānanga to begin coding and analysis. Check pairs/groups setup for this</li> <li>Complete notes for uploading into NVivo (scan interview notes and save in Objective)</li> <li>Confirm with CSI that coding is complete and uploaded in NVivo so they can complete the sharing back support documentation</li> </ul>	<ul style="list-style-type: none"> <li>Complete analysis and theming</li> <li>Complete analysis and begin sharing back resources</li> </ul>	