



Quality standards Checklists

Quality standards and the Project Cycle Management Checklist

Tearfund has identified a set of corporate Quality Standards in support of our vision and the delivery of our strategy. The eight standards summarise all of the relevant external and internal accountability and quality standards, codes, guidelines and principles to which we are committed, including the Core Humanitarian Standard (CHS). They exist to save time and ensure quality, meaning that new partners and staff can quickly get up to speed with Tearfund's expectations and commitments to quality simply by familiarising themselves with these standards.

This document covers some of the key questions to ask as you seek to include the Quality Standards in each phase of the project cycle.

- Phase one - Understanding the situation
- Phase two - Project design
- Phase three - Approval and governance
- Phase four - Preparation
- Phase five - Implementation and monitoring
- Phase six - Evaluation
- Phase seven - Project closure



Project cycle management – a Roots guide

- A comprehensive, practical guide for people doing relief and development work. It is useful for anyone working on a project, including project managers and field staff. The principles in the guide can also be used by leaders as they manage and develop their organisation.
- This guide explains what good project cycle management looks like following the different phases in the project cycle. The guide provides tools to use in each phase, with examples of how to apply them, using a scenario adapted from a real-life project.

Visit learn.tearfund.org/en/resources/series/roots-guides/project-cycle-management-a-roots-guide to download this resource.

Tearfund Quality Standards



Behaviours

We expect the highest standards of behaviour in all of our work, and stand against all forms of exploitation, abuse, fraud, bribery or any other conduct that is incompatible with our values. We strive to transfer power to those we serve; to transform our own, our partners' and communities' attitudes and practices on inclusion, conflict sensitivity, accountability, gender and learning.



Impartiality and targeting

We are committed to impartiality, providing support to those most at risk, regardless of race, ethnicity, religion, ability, gender, age, sexuality or nationality. We target our work based on need, while staying sensitive to conflict dynamics, and proactively support those who would otherwise be marginalised or excluded, in particular children, the elderly and those living with disability.



Accountability

We are committed to ensuring that all our work is based upon effective communication with, participation of, and feedback from the communities we work with. All interventions aim to be transparent and based upon continuous learning. We also hold ourselves accountable to our partners, donors, supporters and colleagues, and to all others we relate and interact with.



Gender

In all our programmes, we actively seek to challenge gender inequality and harmful beliefs and practices, working towards gender justice. We are committed to progressing gender equality, to the restoration of relationships between men and women, boys and girls, and to ensuring their equal value, participation, and decision-making in all aspects of life.



Empowerment

We are committed to community-led, participatory approaches to development and humanitarian response for sustainable impact, based on root cause analysis. We encourage participation from all members of a community, and support those we work with to have control over their own development, from local development activities through to national advocacy.



Resilience

We are committed to helping people understand, reduce and manage the risks they face as well as to address the causes of vulnerability. This includes supporting people and communities as they develop resilient livelihoods, strengthen social cohesion, improve access to services, pursue environmental sustainability, reduce disaster risk and adapt to climate change.



Protection

We are committed to supporting people in restoring relationships and forming safe and secure communities. We prioritise the protection of all – especially children and adults at risk – from physical, social and psychological harm. We assess risks and seek to act in ways that minimise people's exposure to danger or abuse. Community members are the best actors in their own protection, so we support their actions to stay safe, find security and restore dignity.



Technical quality

We are committed to the high technical quality of all of our work and the work of partners, through meeting relevant national and international standards aligned with communities' own priorities. We learn to improve, replicating good practice that has demonstrable positive impact.

Phase one - Understanding the situation

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Before carrying out assessments, do staff fully understand the values of the organisation in order to reflect them in their interactions with communities – showing dignity and respect, and acting with compassion and sensitivity? ☐ Do staff know what types of conduct are unacceptable?
	☐ Will you explain in your community meetings your commitment to impartiality (providing assistance without regard for race, religion, ability, age, gender, sexuality or nationality) and the importance of targeting the most vulnerable? ☐ Will the assessment include an analysis of the different ways in which people have been made vulnerable as a result of the problem you are addressing? ☐ Will you agree with the community the criteria for identifying those who are most vulnerable?
	☐ Will you get the consent of the community to carry out the assessment? ☐ Will you be open with the community about your organisation, your programme, and the purpose of the assessment? ☐ Will you ensure the full participation of all groups within the community in the assessment, including those who are less visible, for example those with disabilities? ☐ Will you invite the community to ask questions, ensuring that the assessment is a two-way conversation?
	☐ Will you gain an understanding of the existing roles of men and women – their daily schedules and workloads, and the common attitudes towards men and towards women? ☐ Will your assessment gather the perspectives of women, men, boys and girls (including those with disabilities) through separate focus group discussions? ☐ Will your assessment identify the ways in which vulnerability has increased for men and women as a result of the problem you are addressing?
	☐ When doing assessments, will you assess capacities as well as vulnerabilities? ☐ Will you check how approaches can be made sustainable after the funding stops? Will it be possible to adapt them to meet other needs that your project is not designed to meet? ☐ Will you find out what government services are in place or planned and think through how to support them where appropriate?
	☐ Will your assessment identify the root causes of vulnerability: whether official policy, cultural traditions, climate change, or other factors? ☐ Did you consider carrying out an environmental impact assessment?
	☐ Will you consult the communities to identify the threats to them, and their vulnerabilities and negative coping strategies?
	☐ Do you have a clear understanding of your areas of specialism and technical strengths as an organisation and will this guide the questions asked in your assessments? ☐ Will you refer to the Sphere Handbook and other relevant standards and codes of good practice to help identify the questions to ask? ☐ Will you gain a clear understanding of the priorities expressed by the community and see which areas you have the technical experience and capacity to support?

Phase two - Project design

Quality Standards checklist (Page 1 of 2)

Tearfund Quality Standard	Checklist for context phase
	☐ Are you identifying types of staff misconduct, such as fraud and discrimination, that could be risk areas during the lifecycle of the project? ☐ Have you set aside time and money to carry out refresher and induction training on staff conduct?
	☐ Have you considered the amount of funding or materials available for distribution in comparison to the level of need, so that meaningful assistance is provided to those who have been targeted, and the assistance is not spread too thin? ☐ Have time and funds been set aside for ongoing community consultations? ☐ Have the beneficiary selection criteria been agreed with the community, and communicated to staff and to the community, so that everyone knows what to expect? ☐ Are you using actual household size to determine the level of assistance provided to different targeted families, rather than relying on an average household figure? ☐ Are you using a multidimensional vulnerability scoring approach, taking into account different types of vulnerability, to ensure that the most vulnerable get selected?
	☐ Do you have structures in place to invite ongoing participation from the community, such as beneficiary committees, public meetings, stakeholder interviews, focus groups, and consultation with representative groups – such as disabled person's organisations – which are truly representative of the community as a whole and include vulnerable groups that might traditionally be overlooked? ☐ Have you agreed with the community the best ways of making this information available (eg information boards, leaflets, public meetings) so that all groups within the community have access to it? ☐ Have you gained the consent of the community to carry out the project, including signing a Memorandum of Understanding with the community council where appropriate? ☐ Have you set aside a budget line for accountability, to cover staff and associated costs? ☐ Have you set aside a budget for accountability training for the rest of the team and planned the training?

Phase two - Project design (Continued)

Quality Standards checklist (Page 2 of 2)

Tearfund Quality Standard	Checklist for context phase
	☐ Have you designed individual project activities in a way that is appropriate to the target group of men or of women – in light of their daily routines, livelihood activities, domestic duties etc? ☐ Has the project been designed to enhance the safety of women and children, eg in relation to the physical location of project services or the time of day that meetings are held? ☐ Are your indicators gender-sensitive?
	☐ Does the design of the project increase the capacities identified in the communities? ☐ If relevant, are you promoting skills and/or livelihoods development or other sustainable coping mechanisms? ☐ If relevant, are you supporting and/or empowering the community to advocate to change unhelpful policies and practices?
	☐ Does the planned response prioritise building social capital? ☐ Will you carry out a risk assessment? ☐ Does the planned response take into account the risk of a disaster occurring? ☐ Does the project design prioritise environmental and economic sustainability? ☐ Is the project designed to address long-term vulnerabilities? ☐ Did you budget for an environmental impact assessment?
	☐ Have you developed your project design in a way that avoids causing harm to the community members? ☐ Have you considered developing your project design in a way that reduces existing threats of harm to the community members, reduces their vulnerability to harm and increases their capacity to protect themselves? ☐ Have you ensured that your project is conflict-sensitive (see conflict sensitivity assessment on page 144)? ☐ Will you identify and analyse the potential risk of any kind of harm to beneficiaries and project staff during the lifecycle of the project?
	☐ Do the project staff have the technical support needed to guide project implementation – whether through advisors, consultants, or qualified staff on the ground? ☐ Have you referred to the Sphere Handbook when including technical minimum standards and indicators in the project design? ☐ Is any other agency meeting or planning to meet identified needs?

Phase three - Approval and governance

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Are clear procedures in place to investigate allegations of unacceptable conduct by project staff?
	☐ Do staff know what to do if community members point out that the wrong people have been included in or excluded from any part of the project?
	☐ Have tasks related to beneficiary accountability been included in the job descriptions of design, monitoring and evaluation (DME) staff, field staff and project staff?
	☐ Is there a good overall balance of men and women on the team? ☐ Are community committees or structures that will be overseeing the project going to include both men and women (including those with disabilities)? ☐ Will community committees or structures overseeing the project ensure meaningful participation?
	☐ Is there agreement between community members and the project team that the communities are expected to participate in the project throughout its lifecycle?
	☐ Are you working with local churches and other faith groups where they exist, to strengthen and support their role in the community and the project?
	☐ Will you ensure that your staff have at least a basic understanding of what is needed to ensure the protection of all, especially children and the most marginalised and vulnerable adults, from physical, social and psychological harm?
	☐ Have arrangements been put in place to ensure quality control when working with contractors? ☐ Have you put arrangements in place to coordinate with other stakeholders working in the same locations, for example local government, other NGOs, churches?

Phase four - Preparation

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Do your organisational systems and processes reduce as much as possible the risk of fraud, bribery and other forms of unacceptable staff conduct through the lifecycle of the project? ☐ Who will be monitoring and conducting learning in regards to staff conduct during the implementation of the project?
	☐ Have the communities been given enough time to give feedback on provisional beneficiary lists?
	☐ Have you agreed with the different groups within a community how they would like to give feedback to the staff during the project? ☐ Have you established an appropriate mechanism to receive feedback from beneficiaries and the wider community, which reflects the preferences of the community, for example a comments box or an office drop-in time? ☐ Have you ensured communities have safe access to the feedback mechanism? ☐ Have you agreed with the community what type of information about the organisation, your standards, project plans, progress reports and feedback procedures will be made publicly available? ☐ Is the whole community aware of the feedback mechanism and how to access it?
	☐ Is the gender of staff appropriate to the specific activities that need to be carried out, recognising that some roles are only appropriate for men and some for women? ☐ Will the structures in place to invite ongoing participation from the community, such as beneficiary committees, public meetings, stakeholder interviews and focus groups, encourage and facilitate the participation of women and children as well as men? ☐ Have you set aside budget for reasonable accommodation to support people with disabilities to participate in the project?
	☐ If relevant, is there an exit strategy for when the project has been completed and has it been communicated to the affected communities?
	☐ Have you assessed the knowledge and skills of the project staff concerning protection and its key elements? If the assessment highlights a need for internal training and/or capacity strengthening, plan and budget for it. ☐ Have you ensured project plans reflect a commitment to the protection of all from physical, social and psychological harm, especially children and the most marginalised and vulnerable adults? ☐ Have you ensured specific risks to protection are managed and reduced where possible? ☐ Have you ensured activities are properly supported with time, staff and resources?
	☐ Have you planned recruitment, procurement and so on to ensure the response is timely?

Phase five - Implementation and monitoring

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Is induction and refresher training for staff on the organisation's values and policies being carried out throughout the lifecycle of the project? ☐ Are the communities we serve aware of what constitutes unacceptable conduct by staff? ☐ Do the communities know how to report unacceptable conduct? ☐ Have staff members been identified and trained to carry out investigations into unacceptable conduct when required? ☐ If there are reports about unacceptable conduct by staff, are they investigated in a timely manner?
	☐ Are you monitoring the project to ensure that the selection criteria continue to be appropriate and you are reaching the most vulnerable?
	☐ Are you changing project plans in light of the feedback received? ☐ Are representatives of the community involved in addressing complaints and resolving disputes? ☐ Are you ensuring feedback is given, received and responded to in a timely manner? ☐ Are you recognising the difference between sensitive and non-sensitive feedback? ☐ Are you referring feedback that is out of your project's scope? ☐ Are you keeping a record of the feedback received, the responses given and project decisions made? ☐ Are you ensuring the records can only be accessed by designated team members and that beneficiaries' confidential data is protected?
	☐ Are you measuring and monitoring the impact of the project on both men and women (including those with disabilities) and keeping data on men and women separate (disaggregated)? ☐ Are you consulting women and girls (including those with disabilities) about their safety and security throughout the project?
	☐ Are you monitoring to ensure that your project is not creating dependency?
	☐ Do the communities have access to information about their risks? ☐ Are you monitoring the project to check that vulnerabilities are being reduced and capacities are being built and not undermined? ☐ Is the project being monitored to observe and manage its environmental impact?
	☐ Do you consult beneficiaries to assess their views, opinions and perception in terms of safety, dignity, access and participation throughout the project? ☐ Do you monitor to ensure your programme does not have a negative impact on communities?
	☐ Are you monitoring the technical quality of the project and making technical adjustments where needed?

Phase six - Evaluation

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Where project staff interacted directly with communities, have you considered asking the communities if they are satisfied with the way they were treated by staff throughout the project?
	☐ Do the community members know why they were or were not selected as project beneficiaries? ☐ Do the community members believe the most vulnerable were indeed selected to participate in the project?
	☐ Do the community members feel that they had access to relevant information about the project? ☐ Are the community members satisfied with the influence they had over the project throughout its lifecycle?
	☐ Are men and women's perspectives (including those with disabilities) considered when evaluating the impact of the project?
	☐ Do the community members say that they feel empowered/not disempowered as a result of your project?
	☐ Are the communities saying they are better able to cope with future shocks as a result of the project?
	☐ Do the community members feel that the risk of harm to their safety, security and dignity increased or decreased due to your intervention?
	☐ Did the communities find the response appropriate to their needs? ☐ Did the communities find the response timely?

Phase seven - Project closure

Quality Standards checklist

Tearfund Quality Standard	Checklist for context phase
	☐ Have you documented any lessons learnt about the behaviour of staff?
	☐ Have you documented any lessons learnt about impartiality and targeting?
	☐ Have you informed the communities of the date your feedback mechanism will stop? ☐ Have you documented any learning that has to do with community engagement and accountability?
	☐ Have you documented any lessons learnt on gender?
	☐ Have you documented any lessons learnt about empowerment? ☐ Are any long-term systems required to provide ongoing financial input that will ensure project sustainability, such as village contributions, local government support or user fees?
	☐ Have you documented any lessons learnt about resilience?
	☐ Have you documented any lessons learnt about protection?
	☐ Have you documented any lessons learnt that have to do with technical quality?



learn.tearfund.org

Tearfund, 100 Church Road, Teddington, TW11 8QE, United Kingdom

☎ +44 (0)20 3906 3906 ✉ publications@tearfund.org

Registered office: Tearfund, 100 Church Road, Teddington, TW11 8QE. Registered in England: 994339.
A company limited by guarantee. Registered Charity No. 265464 (England & Wales) Registered Charity
No. SC037624 (Scotland) (0422)

tearfund