



Toolsheet

Project Management
Toolbox

How to fill and use the PM Box?

2021

Updated 2023

The objectives of this tool sheet are :

- **Support the deployment of the PM Box and facilitate its use** by the project teams
- Remind the **objectives of the tool** and its importance in the **process of continuous improvement of the quality of projects**
- Provide guidance to **facilitate its completion and regular updating**
- **Share Good practices** to contribute to the improvement of its use in project management.

Summary (click on the title of a section for direct access to its content)

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What is the PM Box?

The PM Box (Planning and Monitoring Box) is the main tool offered by HI to project managers for planning and monitoring their project.

It is a tool that **adapts to all types of projects and contexts** (emergency and development). It is intended to be a **dynamic** and **flexible** tool, allowing project managers to facilitate the **planning and monitoring of their project**, while ensuring a certain level of **quality of interventions**. Project managers are therefore **free to adapt the content of the tool according to the nature of their project and their needs**, in order to make it a real project management tool. To assist them in adapting the tool, project managers can call on the MEAL department of their programmes.

The PM Box is fully in line with the **PQP policy**, and its use contributes directly to the respect of the minimum commitments of the criteria **Compliance** (Documentation, Regulations, Communication), **Effectiveness** (Results, Adjustments, Technicality), **Efficiency** (Responsiveness, Optimisation), **Relevance** (Lessons learned), **Change** (Empowerment, Effects) and **Partnership** (Involvement).

It is composed of 13 spreadsheets, of which 4 are **essential** and 8 are **recommended**.

When to use the PM Box?

The PM Box is a dynamic tool for planning and monitoring project implementation, so it must be used from the inception phase to the completion of the project.

Which actions at which stages of the project cycle?

Inception phase: setup

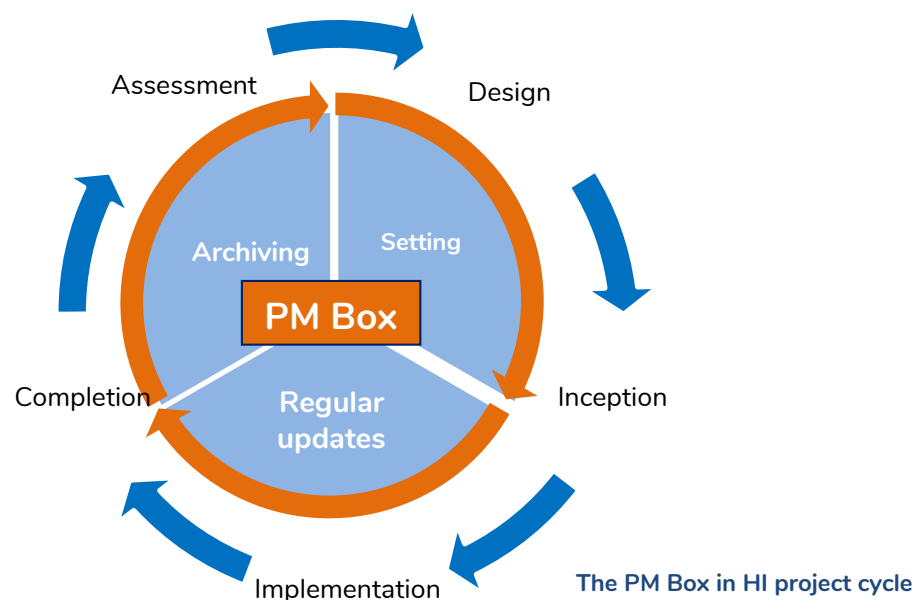
- Download the template on the [Project Management Toolbox](#)
- Adapt the template to the project and the needs of the project manager
- Fill in the tool based on available information (project proposal) and together with other departments (HR, finance, logistics, MEAL)

Implementation phase: update

- Regularly update (e.g. before each project review) the different spreadsheets together with the different departments

Completion phase: archiving

- Last update of the tool
- Archiving according to the process defined at program level



How to fill and update the PM Box?

General principles for initial setup and update

#	Spreadsheets	Objectives	Initial setup	Update frequency (recommended)	
				Short projects, ≤ 12 months	Long projects, 12 months
1	PM Board	Synthesize and visualize key information for monitoring and steering the project	N	Every month (Project reviews)	Every 4 months (Project reviews)
2	Project Info (P-Square)	Summarize essential information about the project and its history	Y	Every month (Project reviews)	Every 4 months (Project reviews)
3	Activity planning	Plan all activities, sub-activities, resource requirements and deliverables for the implementation phase of the project	Y	Every month (at least for the next month)	Every month (at least for the next month)
4	Indicators	Collect data and facilitate monitoring of project indicators	Y	Every month (Project reviews)	Every 4 months (Project reviews)
5	Supply	Plan and monitor project supply	Y	Every month (Project reviews)	Every 4 months (Project reviews)
6	Self-evaluation	Identify the strengths and points for improvement of the project based on the HI quality framework criteria	N	At mid-term	At least once a year
7	Milestones plan	Identify and track key project milestones and anticipate potential changes	Y	Every month (Project reviews)	Every 4 months (Project reviews)

8	Human Resources	To provide an overall picture of human resources assigned to the project and anticipate possible Human Resources changes or needs.	Y	Every month (Project reviews)	Every 4 months (Project reviews)
9	Risks	Identify and manage risks and assumptions that may impact project implementation	Y	Every month (Project reviews)	Every 4 months (Project reviews)
10	Stakeholders	Understand the reality and complexity of the relationships between the project's stakeholders and encourage the participation of each entity	Y	Every month (Project reviews)	Every 4 months (Project reviews)
11	Deliverables	Manage the various deliverables expected from the project	Y	Every month (Project reviews)	Every 4 months (Project reviews)
12	Recommendations	Consolidate and follow up on recommendations made during various exercises (project reviews, internal/external evaluations, follow-up missions, etc.)	N	Every month (Project reviews)	Every 4 months (Project reviews)

1. PM Board

Setting

No initial setting for this spreadsheet. All the graphs and indicators are automatically calculated following the update of the other spreadsheets of the PM-Box and the table located at the bottom of the spreadsheet.

Update

Once all the other spreadsheets have been updated, copy the values contained in cells O45 to O96 and paste them into the column corresponding to the last project review (columns B to M).

The data reported in the table are immediately visible in the dashboard graphics.

Use of information

- Facilitate the preparation of project reviews and coordination meetings
- Identify potential alerts and/or points of attention to be discussed with the departments concerned or during a project review
- Monitor key indicators during the implementation phase and analyze trends

Good practices

- Ensure that the various spreadsheets are updated prior to project reviews to facilitate the preparation of meetings
- The dashboard can be presented periodically during team meetings by the project manager to facilitate its appropriation and understanding

2. Project Info (P-Square)

Setting

The data in this spreadsheet is taken directly from P-Square and Navision and is extracted from P-Square. To obtain the data, you need to :

- Create the project in P-Square and fill in all the required fields
- Create the project in Navision (see with Finance)

Once the data has been entered into Navision and P-Square, it is possible to extract it in Excel format from the P-Square website.

Then insert the downloaded tab in this location in the PM Box and keep the name 2. Project Info (P-Square).

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- If updates have been made to P-Square, perform a new extraction in Excel format, and insert the downloaded tab again in this location in the PM Box.

Good practices

- Click on the link in the resource box to go directly to the P-Square project sheet
- Perform an update before each project review
- Ensure that the data used in the PM Board (budget, project start and end dates) are always in the right cells
- Use the information in this spreadsheet as a basis for discussions with the various departments

3. Activity Planning

Setting

During the inception phase, fill in the spreadsheet using the information from the validated project proposal, in order to fill in :

- The list of activities (column C)
- The planning (columns L to W for year 1). Project managers are free to add/delete years according to the duration of their project, and to choose a different planning (weekly or fortnightly).

For each planned activity, specify :

- The person(s) responsible and contributors (column D and E)
- The date of completion of the activity according to the timetable validated by the donor (column K)
- The necessary technical (column H), logistical (I) and other (J) support that will be useful for filling in spreadsheet **5. Supply** and **11. Deliverables**, as well as to facilitate the planning of technical support for the project

Update

- Remember to update the date (red box at the top right of the spreadsheet)
- Update the status of each activity (column F & G) by choosing the corresponding status from the drop-down list
- Update the planning of activities if necessary (delays, postponement, cancellation of certain activities)
- Add comments to facilitate follow-up

Good practices :

- To meet the minimum commitments of the PQP Policy, keep the activities suggested in the document for the inception phase (lines 8 to 12) and for the planning, monitoring and evaluation of the project (from line 36)
- When planning partner capacity building activities, refer to the Partner Capacity Analysis Tool and related Action Plan to include them in the overall planning of activities. A toolsheet is available on partner capacity analysis which includes the format to use for partner's capacity analysis ([Toolsheet](#))
- Detail activities as necessary by creating additional lines to plan each step contributing to implementation
- For complex activities, use the Activity Terms of Reference ([HILibrary form](#))
- You can use the spreadsheet **7. Milestones plan** to identify the key milestones for each result and to perform a simplified global follow-up

4. Indicators

Setting

The spreadsheet is divided into 2 parts:

- **Monitoring plan (columns B to H)**: linked to the project monitoring plan developed with the MEAL department
- **Data collection and monitoring of indicators (columns I to AK)**

Once the project proposal has been validated, the project manager and the MEAL Focal Point will jointly develop the monitoring plan for the project. Using the information from this monitoring plan, fill in columns B to H (copy and paste the information).

Where relevant, fill in the baseline situation (column J) and monthly targets for each indicator in the "Data collection" section.

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- Update the monthly monitoring of each indicator
- If necessary and according to the progress of each indicator, update the monthly targets
- Update the status of each indicator (column I) to allow the update of the dashboard in Spreadsheet **1. PM Board**

Good practices

- Elaborate the monitoring plan with the MEAL focal point before filling in this spreadsheet to ensure the consistency of the information reported, and facilitate the filling in by copying/pasting the information from the monitoring plan

5. Supply

Setting

The spreadsheet is divided into 2 parts:

- **Resource plan (columns B to K):** linked to the resource plan and supply plan developed with the logistics department
- **Supply follow-up (columns L to T)**

Resource plan: the first columns of the spreadsheet (B to K) must be filled in during the design and project inception phases. In close collaboration with logistics, project managers must list all the resources needed to implement the project activities, and plan their procurement (frequency / desired delivery date / amount allocated). This step is essential in order to facilitate the development of the procurement plan by logistics.

As the resource plan proposed in the PM Box is similar to the logistics one, it is possible to copy/paste the information from the logistics resource plan in order to include it in the PM Box spreadsheet and thus track the supplies.

Monitoring plan: the following columns (L to T) are useful for project managers to monitor supplies on the project, plan purchase requests and anticipate possible delays. There are no initial settings to be made on these columns, they will be filled during the regular update, based on information provided by logistics.

Update

- For each new purchase request, include the purchase and service request (PSR) reference in column L
- Update the revised delivery date and final amount when confirmed by logistics
- Update the status of each supply in the S column

Good practices

- Develop the resource plan with the support of logistics to take into consideration possible constraints and logistics supply times
- Anticipate as much as possible all requests for purchases and services (PSR)
- Keep logistics informed of updates made in the spreadsheet to ensure consistency with the information contained in the supply plan
- Detail and specify as much as possible the requested resources to facilitate the development of the logistics supply plan and to facilitate the preparation and validation of the purchase and service requests (PSR)
- Update the spreadsheet in close collaboration with logistics and on a regular basis in order to anticipate purchase requests and possible delays in supplies

6. Self-evaluation

See toolsheet available on the **Tab 6. Self-evaluation**, or in the Project Management Toolbox : [Organize and conduct a self-evaluation](#)

7. Milestones plan

Setting

Planning and milestone follow-up allows for quick, simple, objective and measurable follow-up of project progress. This spreadsheet is complementary to spreadsheet **3. Activity planning** and should be filled in on the basis of the information contained in this spreadsheet, in order to identify the key stages for each result and to report them in column B. In the inception phase, define a target for the achievement of each milestone (column C).

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- For each milestone, update the expected or achieved completion date in column D

Good practices

- Identify 1 to 3 milestones per outcome and objective. This should be defined according to the respective weight of each result and the desired level of monitoring. Make sure that the milestones defined cover the main issues of the project
- For multi-year projects, identify 1 milestone per year of the project, which will facilitate the milestone follow-up
- A milestone must correspond to a critical moment in the project (e.g.: completion of a deliverable, a particular event) to avoid confusion between several milestone

8. Human Resources

Setting

During the inception phase, fill in the spreadsheet with the information from :

- the project proposal
- information provided by human resources

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- During the project, update any information that has changed.
- Before each project review, remember to update the **red** circled cells in the human resources table (columns B and C) to update the data on spreadsheet **1. PM Board**

Good practices

- Update this spreadsheet continuously to avoid losing information and time during the global update of the PM Box
- It is possible to include in this spreadsheet the consultancies planned on the project

9. Risks

Setting

During the inception phase, fill in this spreadsheet based on the information contained in the project proposal (risks and assumptions of the logical framework), together with the security department and based on the risk analyses carried out as part of the project (e.g. safeguarding risk analysis). For each risk identified, define :

- the risk category (column C)
- presence in the logical framework (column D)
- The probability of the risk (column E)
- Impact on the project if the risk is realized (column F)

For each risk, identify the most appropriate response by detailing:

- The chosen strategy (column H)

- The chosen action (column I)
- The person in charge of its implementation (column J)
- The deadline for implementing the action (column K)

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- Update the status of each action (column L)
- If necessary, update the risk analysis (columns B to F) and responses (columns H to J)

Good practices

- It is recommended that this spreadsheet be completed and updated together with the security department, in order to jointly validate the risk analysis and the formulation of the proposed actions
- It is recommended that the safeguarding risk analysis tool be used at the project level to identify specific safeguarding risks and identify appropriate actions
- For the actions decided (columns H and I), remember to include them in the overall planning of the project activities (spreadsheet **3. Activity planning**) to allow for monitoring of the implementation

10. Stakeholders

Setting

During the inception phase, fill in the table below the graph with information on the project stakeholders (beneficiaries, partners, local and international organisations, authorities, etc.)

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- If necessary, update the information for each partner

Good practices

- Once the table is completed, refer to the chart to define the communication strategy with each stakeholder
- If necessary, include elements of communication with project stakeholders in the activity planning

11. Deliverables

Setting

During the inception phase, and based on the information in the project proposal, define with the techniques the deliverables expected from the project. For each deliverable, detail the information in the table.

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- If necessary, update the information in the table and inform the techniques

Good practices

- Where relevant, include expected deliverables in Spreadsheet **3. Activity planning**, linked to the corresponding activity, to ensure proper monitoring of implementation

12. Recommendations

Setting

During the inception phase, record in the table relevant recommendations from previous phases of the project or from other projects that may be useful in the implementation of the project

Update

- Remember to update the date (red box at the top right of the spreadsheet).
- Update the table after each project event in order to report all the recommendations made: self-evaluation, interim evaluation, project review, analysis of the capacity of partners, report of support missions from headquarters/field, capitalization document, internal/external study report, report from the feedback mechanism and complaint management
- Update the follow-up column (column J)

Good practices

- Include actions in Spreadsheet **3. Activity planning** to ensure proper follow-up on the implementation of recommendations