



Darwin Initiative

New Projects Workshop

Monitoring, Evaluation and Learning



Welcome!



Welcome to this interactive online workshop!

We hope you have had the chance to visit Miro and introduce yourself there – we will be using this platform shortly for some group work so please check now that you have access.

You might want to take a look there to see who else is in attendance.

Welcome!



**Andy
East**

BCFs Comms

**Victoria
Reilly-Pinion**

BCFs Programme
Manager

**Rachel
Beattie**

BCFs Consultant

**James
Kinghorn**

BCFs Consultant

**Peter
Hargreaves**

BCFs Consultant

NIRAS

NIRAS

NIRAS

NIRAS

NIRAS

Session Agenda



UK TIME	TASK	DESCRIPTION
2pm	MEL Plan	Presentation on Zoom then group work on Miro (groups will be allocated into Zoom breakout rooms)
3:15pm	15-minute break	Short break (either stay on the call or leave the meeting and come back)
3:30pm	Evidence for Reporting	Presentation on Zoom then group work on Miro (groups will be allocated into Zoom breakout rooms)
4:30pm	Finish	

General Housekeeping



Please keep yourself muted during the presentation.



If you have any questions, please use the "raise hand" feature (you can find this by clicking on the "Participants" button at the bottom of your screen) and we will invite you to unmute and ask your question. Otherwise please feel free to write in "chat".



We have some specific guidelines later on for how we plan to use Miro for the interactive exercises.



Camera up to you – but recommended for group work!

Introductions



Before we get started, we'd like to thank everybody who took the time to introduce themselves in advance.

If you could now visit the Miro board and take a look at everybody who is here today and to confirm you can access it if you haven't already tried.

...any volunteers to read out their indicators?



Developing a Monitoring, Evaluation & Learning Plan

Systematising the collection of evidence



Department
for Environment
Food & Rural Affairs



What is a MEL Plan?



- A document that helps to track and assess the results of the interventions throughout the life of your project
- A MEL plan identifies:
 - data collection tools for measuring variables
 - processes for data collection and data management
 - staffing and other resources needed to implement MEL activities
 - how resulting data and information will be used

Do we need a MEL Plan?

A well-thought-out MEL plan is an invaluable tool that can be used to guide project teams through the planning and implementation of MEL activities

- States how your project will measure achievements
 - Accountability
- Documents consensus
 - Transparency
 - Responsibility
- Guides MEL implementation
 - Standardisation
 - Coordination
- Preserves institutional memory



Reminder of key MEL terms



Impact: Higher level objective your project is **contributing** to – the Impact is beyond the scope of your project and will not be achieved within the lifetime of your project so you are not asked to measure your contribution towards this.

Outcome: The end state that **you** are trying to **achieve within the lifetime** of your project (and are accountable for). **Only one per project.**

Outputs: Observable, measurable change and tangible products/services delivered by project. Maximum of 5.

Indicator: How you measure change/quality at the Output and Outcome level. Should be SMART – Specific, Measurable, Achievable, Relevant and Timebound.

Means of verification: How you evidence achievement of Indicators.

What does a MEL Plan look like?



Monitoring Workflow	Rationale	Indicators	Baseline	Targets	Measure	Methodology	Frequency	Tools	Responsibility
Impact	The 130,000ha of WSP Forest are managed sustainably, supporting biodiversity and the livelihoods of 6,630 people, acting as a model for sustainable forest management in Cambodia								
Outcome	By March 2019, the strengthening of relationships between WSPWS key stakeholders (Government and local communities), enables the Sanctuary to harbour a stable population of five critically endangered bird species and increases human wellbeing in four surrounding villages.	0.1 Increased food security in four target villages (5,052 people), with a reduction in the percentage of households with sufficient food for less than five months of the year from 38% of households to 25% By end of Yr.3.	38% of households have sufficient food for less than five months of the year	25% of households have sufficient food for less than five months of the year	0.1 Participatory Rural Appraisal undertaken 2018 compared with 2014 (pre) and 2016 (start of project) baselines.	1. Conduct baselines 2. PRA 2018	Annual	1. Baselines 2. PRA	Livelihoods Programme Manager
		0.2 Stable populations of five Critically Endangered species within WSPWS by end of Y3.			0.2 BirdLife biodiversity team led species census results compared with 2016 baseline.		Annual	1. Species census 2016 baseline 2. Species census 2018	Biodiversity Senior Project Officer
Opout 1	Local consultation structures established at village and district level, equitably representing the views of constituents	1.a Seven Village Forums established with equal representation of women and men (50% women, 50% men).	0 Village Forums	7 Village Forums, equal gender representation	1.a.1 Meetings are held regularly and attendance list shows equitable participation of women and men, evidenced by equal sex ratio of women : men attending meetings 1.a.2 Dialogue in village meetings show enhanced understanding of management planning process over the three year project implementation period, evidenced by meeting minutes and participatory learning assessment survey at end of Yr.3	1. Quarterly consultation meetings with Village Forums 2. Endorsement at Commune level 3. Protocol for beneficiaries counting into database	Six-monthly	1. Beneficiaries database 2. Attendance lists 3. Meeting minutes 4. Village Forums establishment certificates 5. Gender representation strategy 6. Participatory Learning Assessment Survey	Livelihoods Project Officer
		1.b WSPWS Stakeholder Forum established and working effectively.	0 Stakeholders Forum	1 Stakeholders Forum, regular consultations, requests included in the zoning plan	1.b.1 List of attendees at stakeholder meetings includes representatives from all relevant interest groups including representatives from village forums. 1.b.2 Requests from village forum representatives on traditional-use are collected and presented to Provincial level authorities. These requests and the rice field maps are included in the WSPWS zonation process, evidenced by forum minutes and zoning plan.	1. Quarterly meetings with Stakeholders Forum 2. Endorsement at Commune level 3. Collection of Village Forums representatives requests	Six-monthly	1. Beneficiaries database 2. Attendance lists 3. Meeting minutes 4. Stakeholders Forum establishment certificate 5. Report on Village Forums representatives requests for the zoning plan	Livelihoods Project Officer

Developing a MEL Plan



Key considerations:

- Purpose of the plan
- MEL management
- Resource needs HR and £
- Timing and sequencing
- Feedback and lesson-learning
- Provision of sound evidence

What to measure and who to involve?



Key considerations:

- What aspects are you measuring:
 - Milestones
 - Indicators
 - Assumptions
 - Risks
- Who is responsible?
- Who needs to be included in the monitoring process?
- Who needs to be included in the evaluation process?



How do you plan to measure it?



Key considerations:

- Are there set methods, and templates to ensure consistency in measurement?
- When do they measure it?
- Is there a system to store and collate data?
- How do you use the data?



What is the budget?

- How much would the planned activities cost?
- Cost efficiencies and cost minimisation
 - How much can be done as part of routine reporting and management monitoring?
 - What requires specific evidence gathering?
 - What uses secondary data generated by others?



How do I develop a MEL Plan?



1. Identify the programme goals and objectives
2. Define indicators for tracking progress towards achieving those goals
3. Define Data Collection Methods and timeline
4. Identify MEL Roles and Responsibilities
5. Analyse data
6. Dissemination plan



Translating it into a structured plan

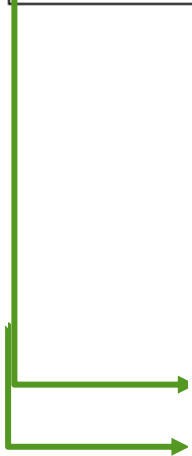


Project summary	Measurable Indicators	Means of verification	Important Assumptions
Impact: (Max 30 words)			
Outcome: (Max 30 words)	0.1 0.2 Etc.	0.1 0.2 Etc.	
Outputs: 1.	1.1 1.2 Etc.	1.1 1.2 Etc.	
2.			
Activities (each activity is numbered according to the output that it will contribute towards, for example 1.1, 1.2 and 1.3 are contributing to Output 1) 1.1 1.2 etc.			

S: Specific
M: Measurable
A: Achievable
R: Relevant
T: Timebound



Expected Results Chain	Indicators	Rationale (how does this link to the Outcome/ Output?)	Baseline (if not yet established, outline when/how it will be)	Targets	Data sources. This could include primary or secondary data.	Methodology	Freq.	Templates (how will data be recorded?)	Budget allocation	Responsibility (who will monitor progress towards this indicator/collect necessary data?)	Additional Comments
<i>e.g. Outcome</i>	<i>e.g. Outcome indicator 0.1</i>										
<i>e.g. Output 2</i>	<i>e.g. Output Indicator 2.3</i>										



Group Activity



- We are going to assign you to small groups using the breakout feature in Zoom
- The activity itself is on the interactive whiteboard Miro – Keep Zoom open so you can talk to your group, but navigate to the specific space on Miro for your group. There should be a “frame” with the same number your breakout room number! (you should see other members of your group their with cursors – no need to share screens)
- Andy (“Biodiversity Challenge Funds”), James, Peter, Rachel and Victoria will be moving between groups to help you with the exercises **but please don’t wait for us to begin** – if you have any questions or need help at any point, please just press the “call host” feature and someone will join your room as soon as possible!

Group Activity



- Prepare a MEL plan
 - To test the discipline of structuring the MEL plan and really testing the measurability of a project.
 - To allow you to then take this experience and apply to your own project.
 - Apply to your own project as soon as possible.

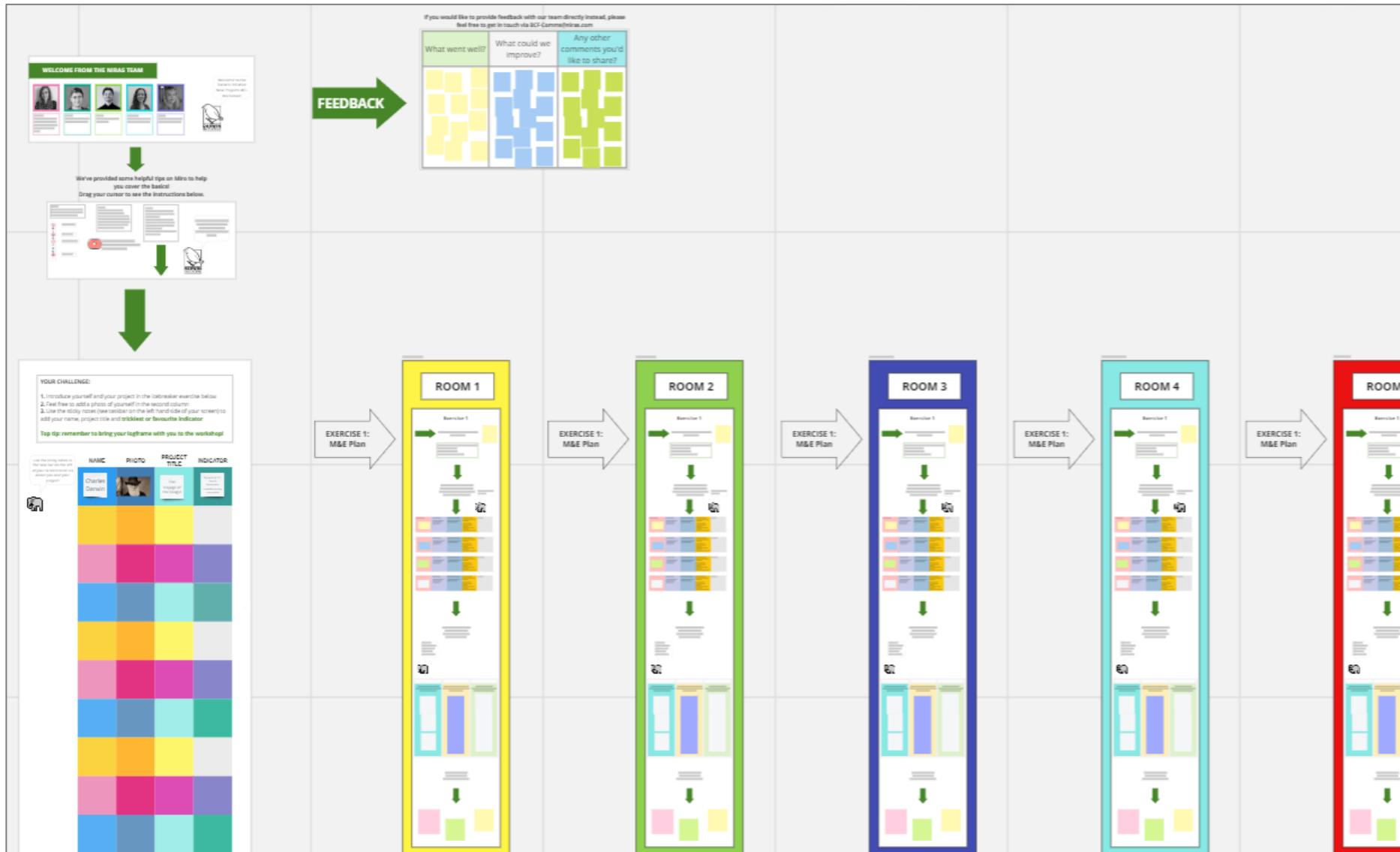
N.B. – your MEL Plan isn't something we need you to submit to Darwin Initiative (the logframe is the key tool we need you to report against regularly) but this MEL plan will help ensure you use your logframe most effectively!

Group Activity



- In your breakout rooms but working on Miro
 - Develop a simple MEL plan using the template provided for one or two projects
 - You should aim to complete 3 or 4 lines during this session (1 or 2 per project). Each line should be an indicator (either Outcome or Output).
 - Use the template and sticky notes to guide your thinking and work through some indicator examples
 - Also consider whether any indicators could be improved or made more SMART

What Miro Will Look Like



Template from Miro



INDICATORS:

Example 1:

RATIONALE:

(How does this link to the Outcome or Outputs?)

BASELINE/TARGET:

(If not yet established, outline when/how)

METHODOLOGY /FREQUENCY/ DATA SOURCE:

(Who monitors progress/collects the data?
How will the data be recorded?
What type of data is it?)

BUDGET:

RATIONALE:

(How does this link to the Outcome or Outputs?)

BASELINE/TARGET:

(If not yet established, outline when/how)

METHODOLOGY /FREQUENCY/ DATA SOURCE:

(Who monitors progress/collects the data?
How will the data be recorded?
What type of data is it?)

BUDGET:

Template from Miro

INDICATOR	IS IT SMART?	IMPROVED INDICATOR
<p data-bbox="363 375 730 464">Share examples of your current indicators using the sticky notes below</p> <div data-bbox="452 504 685 736"><p data-bbox="473 564 664 654">Indicator 1:</p></div> <div data-bbox="365 815 598 1048"><p data-bbox="390 875 581 965">Indicator 2:</p></div> <div data-bbox="488 1105 722 1338"><p data-bbox="513 1165 705 1255">Indicator 3:</p></div>	<p data-bbox="765 375 1151 464">Put a Y or N against each of the below for this indicator in its current form</p> <div data-bbox="838 564 1072 796"><p data-bbox="855 581 1035 602">Indicator 1 test</p><p data-bbox="855 632 884 761">S: M: A: R: T:</p></div> <div data-bbox="823 839 1056 1072"><p data-bbox="840 856 1020 878">Indicator 2 test</p><p data-bbox="840 908 869 1036">S: M: A: R: T:</p></div> <div data-bbox="890 1129 1124 1362"><p data-bbox="908 1146 1087 1168">Indicator 3 test</p><p data-bbox="908 1198 937 1326">S: M: A: R: T:</p></div>	<p data-bbox="1184 375 1541 464">If there is room for improvement, suggest new indicator wording here</p> <div data-bbox="1273 512 1506 745"><p data-bbox="1298 554 1485 682">Improved indicator 1:</p></div> <div data-bbox="1201 788 1435 1021"><p data-bbox="1226 829 1414 958">Improved indicator 2:</p></div> <div data-bbox="1228 1092 1462 1325"><p data-bbox="1253 1133 1441 1262">Improved indicator 3:</p></div>

Feedback from the session



- How did you find the process?
- Has anyone done something similar for their projects before?
- Did you identify any opportunities to make indicators SMARTer in the process?

Time for a short break!



- We'll be taking a 15-minute break now
- The next presentation will start at 10:30am UK time
- Please have a copy of your project's logframe ready for the next presentation



Evidence for Reporting



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Defining Evidence



What is Evidence?

- In simple terms: Information that supports a claim.

Two key purposes across the BCFs:

- i. to justify the approach you plan to implement; and
- ii. to demonstrate that changes have occurred as a result of the project.

Capturing 'Good' Evidence



What is good evidence?

- Collected to inform a clear and explicit theory of change (or pathway to change)
- Assembles locally relevant information
- Captures complicated, real-world associations
- Is logically consistent and is applicable across the project results chain.
- Considers assumptions and reduces uncertainty, while informing management of risk
- Provides a platform for agile project management

Types of Evidence



- What types of evidence can be used to inform the effectiveness of an approach?

Common Principles



Reliability:

- Concerned with consistency:
 - Completeness
 - Accuracy
 - Transparency

Validity

- Concerned with internal and external relevance:
 - How appropriate is the data you are collecting to informing the questions being asked of it.

How to use Evidence



Using evidence to demonstrate progress:

- Scheduling regular meetings with the project team to discuss progress
- Review the logframe on a regular basis
- Report clearly and concisely
- Ensure evidence is appropriate and capable of measuring progress
- Provide evidence to demonstrate where claims come from (i.e. don't write general statements)
- Ensure evidence submitted is clearly labelled, ideally cross-referenced
- Reporting against most updated logframe

Reporting Scoring Criteria (i)



What will reviewers be looking for in your Annual Report?

Score	Description	Achievement of Outputs/Outcome
1	Likely to be completely achieved	Based on the information provided in this report, the Outputs/Outcome will be completely achieved by project end. This could be because this project is late-stage, and project achievements are well on the way to completion (or completed) or, for early-stage projects, the project is progressing well, with indicator targets being met or exceeded and project assumptions holding true.
2	Likely to be largely achieved	There is good progress towards Outcome and Output completion (particularly the most important), however there remains some uncertainty about whether or not the project will achieve its stated Outcome and Outputs.
3	Likely to be partly achieved	Only partial achievement of the Outcome is likely and/or achievement of some Outputs.
4	Only likely to be achieved to a very limited extent	Outcome unlikely to be achieved but a few Outputs likely to be achieved.
5	Unlikely to be achieved	There has been limited to no progress towards completing the Outputs or Outcome so there is significant uncertainty or limited likelihood these will be achieved by the end of the project.
X	Too early to judge	It is impossible to say whether there has been any progress towards the final achievement of Outputs or Outcome. This score should not be used unless at least one of the following criteria are met: Project is postponed because of conflict; external constraints; recruitment delays.

Reporting Scoring Criteria (ii)



Score	Description	Comment on Reporting Quality and Evidence Provision
1	Good	The report is well-written and is clear throughout. There is good provision of evidence (i.e. not too much or too little) to substantiate claims made, including achievement of indicators. Evidence is clearly sign-posted where relevant.
2	Acceptable	The report is complete and evidence is provided to support claims made, but there is room for improvement. Please provide specific feedback comments for the project on how reporting and provision of evidence could be improved,
3	Poor	There are some gaps in the project reporting and/or it is poorly written and confusing or hard to understand in places. The provision of evidence is poor (i.e. there isn't enough evidence provided to substantiate the claims made in reporting and/or evidence is not clearly labelled / cross referenced which makes it hard to navigate – particularly where there are a lot of annexes).
X	Unacceptable	There are significant issues with project reporting and evidence provision which makes it challenging to complete the report review.

Reporting on project progress (i)



3. Project progress

This section (3.1- 3.5) is the main narrative report on project progress in the last year, and should be a flowing paragraphed presentation written in a formal style. Sub-sections reflect the progress against the project's logframe. We do not require a summary at the start, just clear reporting under 3.1 to 3.5. Please ensure that you clearly refer to evidence to support the narrative.

Annex 1 requires you to provide a **condensed version** of this narrative against the logframe Impact, Outcome and Outputs. In this section and in Annex 1 please report against the Outcome and Output indicators in the latest approved version of the logframe. Please also include your full project logframe in Annex 2. If there have been changes to the logframe please indicate where these are, and please note that, as described above, major changes to the logframe must be submitted for approval by separate email.

Within your reporting you will be asked to report progress towards:

- Activities
- Outputs
- Outcome
- Impact
- Monitoring of assumptions

Reporting on project progress (ii)



Annex 1: Report of progress and achievements against logframe for Financial Year 2023-2024

Project summary	Progress and Achievements April 2023 - March 2024	Actions required/planned for next period
<p><i>Impact</i></p> <p>Insert agreed project Impact statement</p>	<p>(Report on any contribution towards positive impact on biodiversity or positive changes in the conditions of human communities associated with biodiversity e.g. steps towards sustainable use or equitable sharing of costs or benefits)</p>	
<p><i>Outcome</i> (Insert agreed project Outcome statement)</p>		
<p>Outcome indicator 0.1</p>	<p>(Report progress against indicators, and reference where evidence is provided e.g. Evidence provided in section 3.1 of report and Annex X). This should be a condensed summary of your reporting in section 3.3 of the report)</p>	<p>(Highlight key actions relevant to this indicator planned for next period)</p>
<p>Outcome indicator 0.2, Etc.</p> <p>Insert additional rows depending on how many indicators you have</p>		
<p>Output 1 (Insert agreed Outputs with indicators relevant to that Outputs in lines below).</p>		
<p>Output indicator 1.1 (Insert original Output level indicators)</p>	<p>(Report progress against indicators, and reference where evidence is provided e.g. Evidence provided in section 3.2 of report and Annex Y). This should be a condensed summary of your reporting in section 3.2 of the report)</p>	
<p>Output indicator 1.2, Etc.</p> <p>Insert additional rows depending on how many indicators you have</p>		<p>(Highlight key actions relevant to this indicator planned for next period)</p>
<p>Output 2. (Insert agreed Output)</p>		
<p>Output indicator 2.1.</p>		
<p>Output indicator 2.2. Etc.</p>		
<p>Output 3. Etc.</p>		

Group Activity



Identify and review what good evidence looks like for your project.

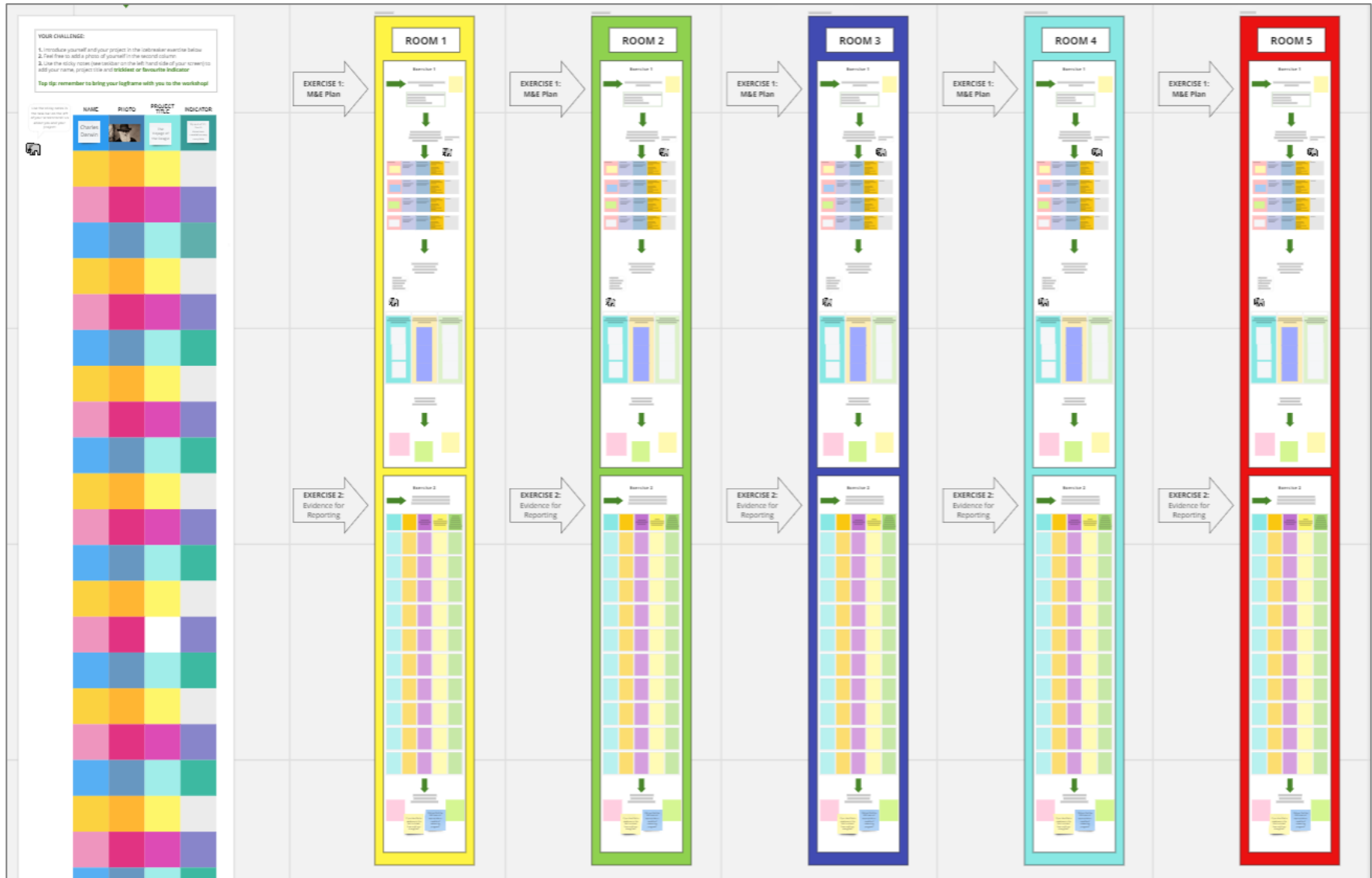
- To demonstrate if the MoVs you have identified are capable of measuring progress
- To think about what good evidence is for your project
- To consider and apply good practice of evidence collection at the start of your project

Group Activity



- In your breakout rooms but working on Miro
 - Select an indicator and corresponding MoV from your logframe
 - Consider if the MoV is appropriate to evidence a change/progress
 - Review the assumptions and consider if you are collecting evidence to support this assumption

What Miro Looks Like



Example



Indicator (you choose)	MoV (you choose)	Does this evidence your indicator?	What assumptions do you have which relate to this?	Are you collecting evidence to support this assumption? Any suggested improvements
Three trainings delivered to conservation practitioners to increase capacity in skill X by end of Year 1.	Attendance certificates	It confirms attendance but not improved capacity	i.e. attending training leads to improved capacity	No. Improve MoV to better capture increased capacity

Feedback from the session



- How did you find the process?
- Were the MoVs you identified examples of strong evidence?
- Did you find the MoV was not appropriate or capable of measuring progress?
- If you identified a weakness in the MoV included, how could you strengthen?

Wrap-up



- Thank you!
- Any final questions?
- We will upload slides to the Darwin Initiative and Darwin Plus websites after the event
- At the Top of the Miro board you will note we have a space for feedback – please grab a sticky note or two and let us know:
 - What went well?
 - What could be improved?
 - Any other comments you'd like to share
- And if anything else comes to mind after the session, please don't hesitate to get in touch!