



Ouse Valley Climate Action Monitoring, Evaluation and Learning Guide

INFORMING POSITIVE CHANGE

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1 Introduction

Two documents have been developed setting out the approach to monitoring, evaluation and learning (MEL) for the Ouse Valley Climate Action (OVCA)

This MEL ‘how to’ guide is one of the documents and is a practical and simple guide for OVCA projects to help plan and deliver the monitoring, evaluation and learning (MEL) of their projects. It provides a resource for those delivering projects and undertaking MEL data/evidence capture, analysis and project plan development and also for the OVCA Core team supporting projects in developing and delivering their evaluation plans. It is designed to provide guidance for the MEL processes and methods relevant at a project level.

This guide is accompanied by an online [MEL toolbox](#), hosted on the South Downs National Park Authority website, which has a range of resources to support project MEL activities.

The other OVCA MEL document an MEL framework. The MEL framework a strategic level document that sets out the approach to monitoring, evaluation and learning of OVCA at a programme level to support OVCA partners and projects in working towards the vision of *an engaged, knowledgeable community, where residents and decision-makers understand the threats posed by the climate and ecological emergency and are actively collaborating to reduce their carbon footprint and build resilience at personal, community and ecosystem levels*. It also reflects the requirement for evidence collection, monitoring and evaluation activity to be undertaken at a project level. The MEL framework is of relevance to: the OVCA Programme Board in its role providing oversight of the programme; the OVCA project team in their programme management/reporting role and delivery of some projects; the MEL, carbon measurement and behaviour change consultants and may also be of interest to The National Lottery Community Fund (TNLCF) Climate Action Fund (CAF) team.

MEL project key activities

MEL project activities	Deadline/frequency
Finalise MEL project plan	November 2024
Evaluation check in with CAG	January – May 2025
Check in meeting with MEL consultants	November 2024
Learning / reflection workshop	May 2025
Final MEL workshop for projects	July/August 2025
Final project MEL reports	1 August 2025
End of project interviews	August/September 2025

Table 1. Project MEL activities and deadlines/frequency

2 Glossary

There are a number of different words used in monitoring and evaluation. There are variations in how these can be defined, so for clarity, we have defined how the key terms are being used in this guide.

Activities are actions taken or work performed through which use inputs, such as funding or expert advice to produce a specific output. Planting fruit trees is an example of an activity.

Impacts are the long term effects produced by activities, directly or indirectly. They can be intended or unintended and can also be positive or negative. An example of an impact is a reduced carbon footprint of an area.

Inputs are the financial, human or material resources used to deliver an activity.

Methods are the ways that information is collected and analysed to provide evidence.

Outputs are tangible products or services that are produced as a result of programme or project activities. An example of an output is the creation of an orchard.

Outcomes are the achieved or likely short to medium-term effects of the outputs of activities delivered. An example of an outcome is that carbon is sequestered by fruit trees.

3 Introduction to monitoring, evaluation and learning

The overall vision of the Ouse Valley Climate Action programme is:

'An engaged, knowledgeable community, where residents and decision-makers understand the threats posed by the climate and ecological emergency and are actively collaborating to reduce their carbon footprint and build resilience at personal, community and ecosystem levels.'

Focusing on three key areas:

nature recovery and climate resilience

people's knowledge and skills

greener energy and travel

It is important for projects to understand how they contribute to the programme vision/key areas and how they can demonstrate the impact they are making. Building MEL into project planning and delivery helps projects to do this.

3.1 Why is evaluation important?

So why is evaluation important for projects? It can help:

- check project progress;
- understand the impact of a project;
- identify and record what has been learned from a project. This will help inform any adjustments needed to a project to keep it on track. It is also useful to share any learnings with other stakeholders;
- check whether what a project is doing is still what local people want or need;
- identify strengths and weaknesses in a project. This may help identify areas where additional support is needed, or if adjustments are needed to the project. Identifying strengths in a project may also help identify opportunities for future development.
- demonstrate whether project resources, e.g. time and money, have been used effectively. This is of particular importance for funders and others involved in a project, so they understand what has been achieved and how successful a project is.
- create a basis for future planning. A project may wish to continue beyond the current funding period, or another project may be identified that could be delivered in the future. MEL of an OVCA supported project will help you gather information to inform

future project planning and can also provide evidence to support future funding applications.

3.2 The OVCA MEL Cycle

The OVCA MEL Cycle was developed as part of the OVCA MEL framework. The MEL Cycle diagram in Figure 1¹ shows the seven steps in the cycle of monitoring evaluation and learning of the OVCA programme. Whilst the process for undertaking the OVCA programme MEL work during the period of funding from the Climate Action Fund will entail completion of one full cycle, this cycle could also be used to inform MEL activities of any succession programme.

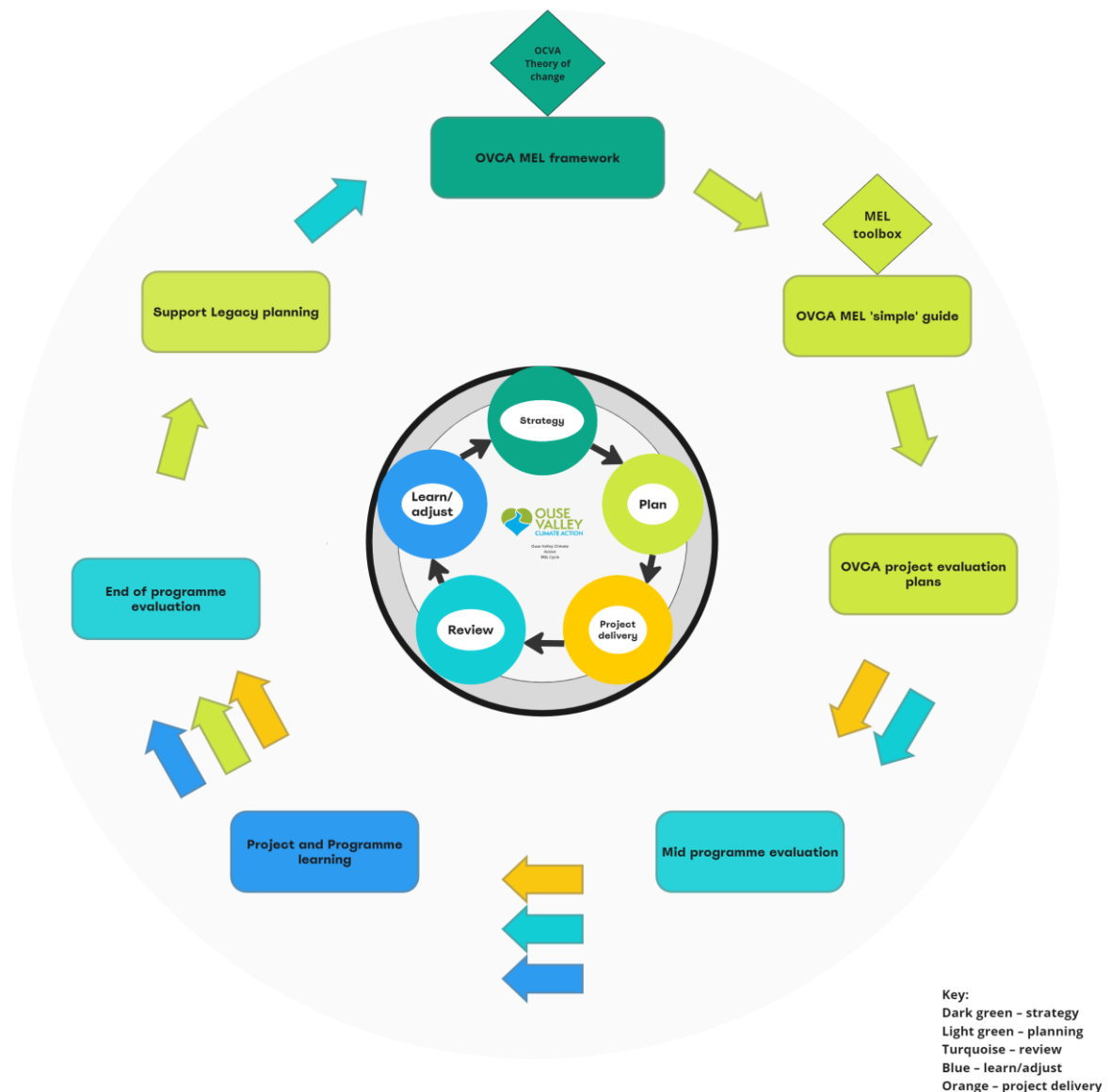


Figure 1. OVCA MEL Cycle

¹ If the smaller text in this diagram is not readable, please zoom in and the text should get clearer, or view at [OVCA MEL Cycle](#)

4 How to plan project monitoring, evaluation and learning

4.1 Evaluation plans

The OVCA Core team are supporting projects to develop their evaluation plans. Three OVCA projects, kindly helped to pilot the process of developing their evaluation plans, which has helped inform the process and information included in the guide here.

The flowchart in Figure 2² sets out the process for development and review of project evaluation plans and Table 1 shows key project MEL activities and deadlines/frequency.

The starting point for a project in developing an evaluation plan are the outputs and core outcome themes it will deliver that have been agreed with the OVCA Core team and the out. These are set out in the project outcomes agreement for each project. The OVCA Core team will pre-populate the [Project evaluation templates](#) with this information and will then meet with the project team to agree the outcomes, indicators and methods and frequency of data collection for these to be included in the project evaluation plan. For any outcomes relating to carbon emissions or behaviour change, the carbon measurement and behaviour change consultant teams will meet with the project teams to advise on data to be collected and methods for this. Projects are also asked to identify some learning questions that describe what they would like to learn about from the project for inclusion in their evaluation plan.

Project evaluation plans are then reviewed by the MEL consultant team and the OVCA Core team will discuss any significant issues identified from this with individual project teams and agree with them any changes to be made to the evaluation plan.

The OVCA Core team will discuss how evaluation data collection is progressing as part of their quarterly 'check-in' meetings with projects

The MEL, carbon measurement and behaviour change consultant team will do a light touch review of project data collection in September 2024 and then a full data collection review in August/September 2025 at the end of the OVCA programme.

² If the smaller text in this diagram is not readable, please zoom in and the text should get clearer, or view at [OVCA Evaluation plan flowchart](#)

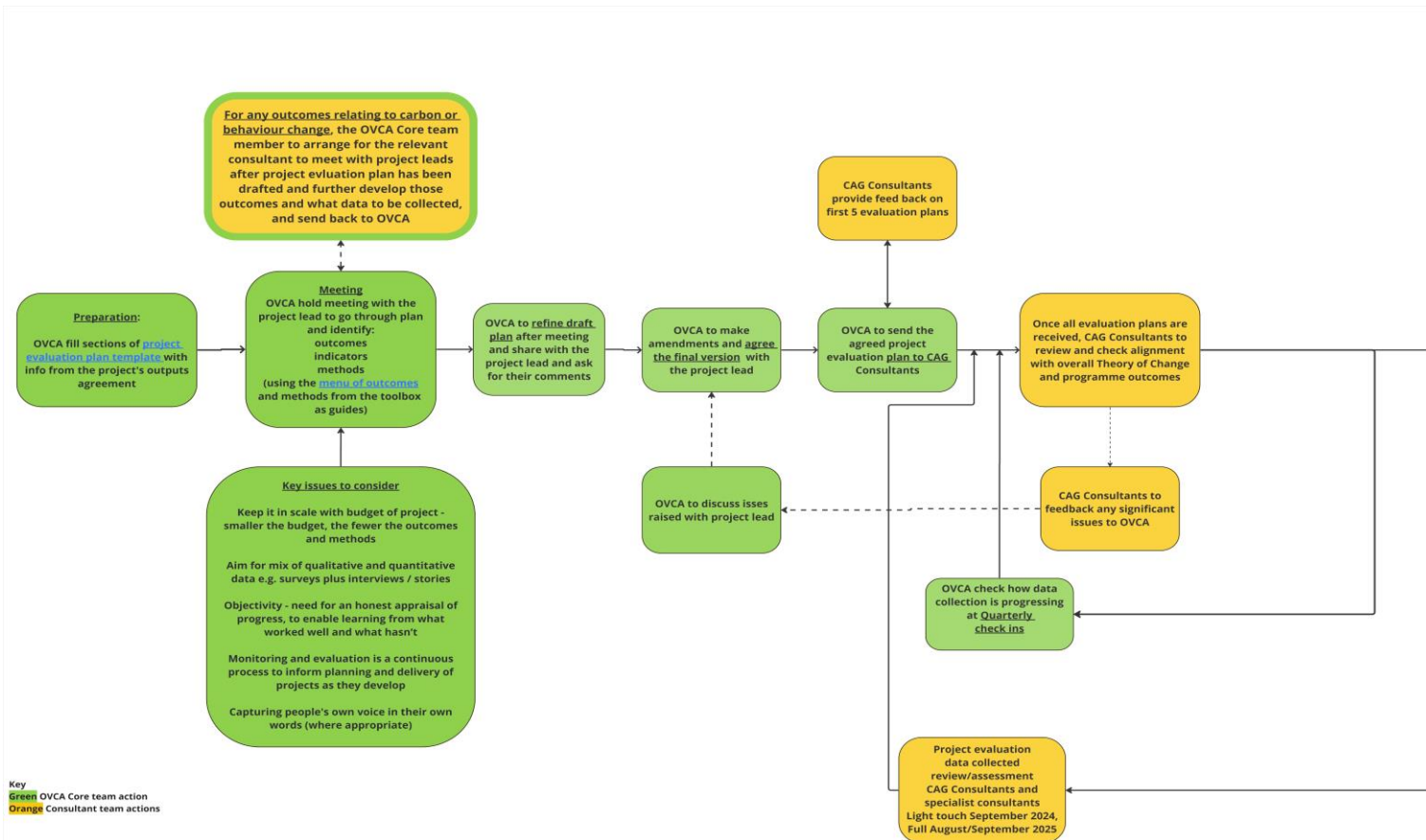


Figure 2. OVCA project evaluation plan development/review flowchart^{2,3,4}.

³ Templates can be found at [Project evaluation templates](#)

⁴ The Menu of outcomes can be found in the [MEL toolbox](#)

4.2 Key principles and guidance for MEL of community projects

There are some useful principles for community projects to help guide the planning and delivery of your MEL activities. The approach to MEL should:

- Encourage honest appraisal of progress, to enable learning from what worked well and what hasn't.
- Be a continuous process to inform planning and delivery of your project as it develops
- Help the project to be accountable
- Highlight successes and achievements
- Be as objective as possible
- Be proportionate to the scale and resourcing of the project

The Menu of outcomes can be found in the [MEL toolbox](#)

In undertaking MEL activities, try not to collect data you don't need. If collecting personal data, you will need to ensure you work within the [UK Data Protection Act 2018 \(DPA\)](#) and the [EU General Data protection regulation 2018 \(GDPR\)](#) to ensure the secure processing and storage of data.

Examples of methods of data collection

This section provides some guidance and examples on some potential methods and types of tools that projects could use to collect data that can be used to measure progress on the outputs and outcomes in the project evaluation plan. Further examples and guidance can be found in the [MEL Toolbox](#).

Quantitative and qualitative data

There are two key forms of data used in MEL, quantitative and qualitative. Quantitative data is numerical, which includes anything that can be counted, measured, or given a numerical value. Qualitative data can be used to provide an understanding of behaviours, perceptions and underlying reasons for the achievement (or not) of the intended outcomes.

Quantitative methods are usually used to measure the 'what', whereas qualitative methods are most often used to explore the 'how' and 'why'.

Types of data include:

- Numerical data
- Documentary data (data or information that has already been collected)
- Observational data

- People's stories, descriptions of people's experiences, opinions, and views
- A combination / triangulation of the above evidence.

Common qualitative data collection methods could include:

- Focus groups and interviews, which can explore impacts with key local community members and organisations
- Case studies and stories can provide in-depth and potentially longer-term descriptions of people's experiences and views
- Open-ended surveys and questionnaires

Common quantitative data collection methods could include:

- Surveys - online or in person at events, which can be an effective method of obtaining information from a large number of participants, but is less useful for providing in-depth insight into an intervention
- Website statistics

5 Learning

It is important for projects to build processes for learning into their activities, as this will enable projects to make improvements and also to share lessons learned with their communities or other projects.

Collecting and analysing data can help projects to understand what has worked well, or less well, in a particular context. The 'learning' aspect is important to help projects understand why something has worked well or not so well, and draw out lesson, which can be used to improve project delivery, and can also be shared more widely with partners, communities and stakeholders. It ultimately results in a better programme of work.

Learning is a key part of the MEL cycle in *Section Error! Reference source not found.*, forming *Step 5*, but in reality it is often a continuous process throughout a project.

It can also help evaluation to feel less daunting, as the emphasis moves from whether a project has been a success or not, to what has been learned, and how that learning has been used and shared.

5.1 The benefits of learning for projects

Learning has many benefits. It can help projects to:

- Identify what's working well, for whom and why
- Identify challenges and things that aren't working as well, for whom (and why)
- Do what they do better e.g., post-event evaluation feedback can inform improvements that could be made to future events
- Problem-solve some of the challenges with others working on similar projects
- Show funders and decision-makers what projects have learned about what is needed and what can make a difference.
- Improve wider understanding of what works and why – this is particularly important for innovation projects, where there is no best practice, and where others may be trying similar things. Demonstrating learning using evaluation findings may also help with future funding.

Highlighting examples of what has gone well and best practice, as well as lessons learned from examples where things haven't gone so well, can be equally important. Those things which have gone particularly well can be used to inform future expansion and transfer of learning whilst analysing what has not worked as well and why can often provide valuable insights on how to improve things in the future. Project learning can be quite broad and may encompass some of the following:

- The way a project works
- Project achievements, outputs and outcomes
- Knowledge or research into a certain issue
- Culture - the values and behaviours that apply
- Process/system - the nuts and bolts of how things are done or administered in a project
- People – project teams, beneficiaries, participants - how they feel, know or experience
- Policy - the legal context and wider issues affected

How to build in project learning?

At the evaluation plan stage

As mentioned earlier, projects are asked to identify in their evaluation plans what they want to learn from their project and the key questions to answer. What could the evaluation of their project help them to learn about and what don't they know yet, but hope to learn about through their project?

These are some example questions from other projects:

- How best to recruit and retain volunteers for a particular type of project?
- How best to engage with a hard-to-reach community?
- To what extent can a certain project help to reduce the environmental impact of an activity?
- How did a project impact on the wellbeing of local residents?

Projects can then plan how they will use their evaluation to learn about these questions.

They might want to think about:

- What information or data they will need to gather.
- Who they should collect data / experiences from?
- When will they collect the data and who will be responsible for / involved in analysing it?
- How will they use and share the learnings?

It's good practice for projects to reflect honestly about how reliable data is and make this clear when communicating learnings. Key considerations include: could there be any bias in data collected? Does the learning come from project team reflections, or from participant/beneficiary feedback? What percentage of participants/benefits provided feedback?

Who could be involved in learning?

Involving people in the reflection and analysis of findings can give a wide range of insights and can ensure more people are able to make use of the learnings.

Depending on what it is a project is planning to learn about, project teams may decide to involve different types of people, such as:

- Project staff
- Project participants/beneficiaries
- Volunteers
- Other partners who the project is working with
- Organisations working on similar projects

They could be involved in many different ways, including:

- Suggesting learning question, or topics to learn about
- Coming up with ideas for data gathering (or maybe doing some data gathering themselves)
- Analysing findings and drawing out learnings
- In discussions and workshops around research findings, recommending how projects or processes could be improved based on learnings
- Suggesting how learnings could be shared more widely

How and when should projects reflect and learn?

Assessing and learning about outcomes is an ongoing and cyclical process. The plan, do, review cycle – see Figure 3, is a way to build learning into project activities. Project teams should plan to meet at certain points in the project to reflect on learnings, and build them into future plans. This could be on a regular basis, e.g. every three months, or could be at strategic points in a project, such as before project reporting deadlines.



Figure 3: Learning cycle

5.2 Reflecting as you go – tools and approaches for continuous improvement

Reflection is an important part of the evaluation process. Planning time for regular reflection will ensure that hubs are continuously learning as they go, not just at the end when the project has finished, so changes can be made if needed.

Different techniques will suit different situations, so using a variety of methods can be effective. Some may prefer to record with words in journals, others may prefer more visual methods. You should think about which methods might work best for the people that your hub is engaging with.

Techniques for reflection and learning include:

- Journals and blogs which can be used to record learnings as you go.
- Internal meetings with project / hub staff, thinking about what's working well, what could be improved. Techniques such as the Rose Thorn Bud Technique can work well, which is shown in Figure 4 below.
- Reflection workshops with a variety of partners or with the hub network, which could focus on specific areas of learning, as well as allowing some time for other learning.

The Rose, Thorn, Bud

The Rose Thorn Bud activity shown in Figure 4 can be used to stimulate reflections on what's worked well and what hasn't, from project participants and / or the project team, for those who respond well to visual cues. People think about what has gone well (the rose), what challenges they've come up against (thorn) and what they think areas of potential are (bud). Individuals then share their rose, bud, thorns with the group.

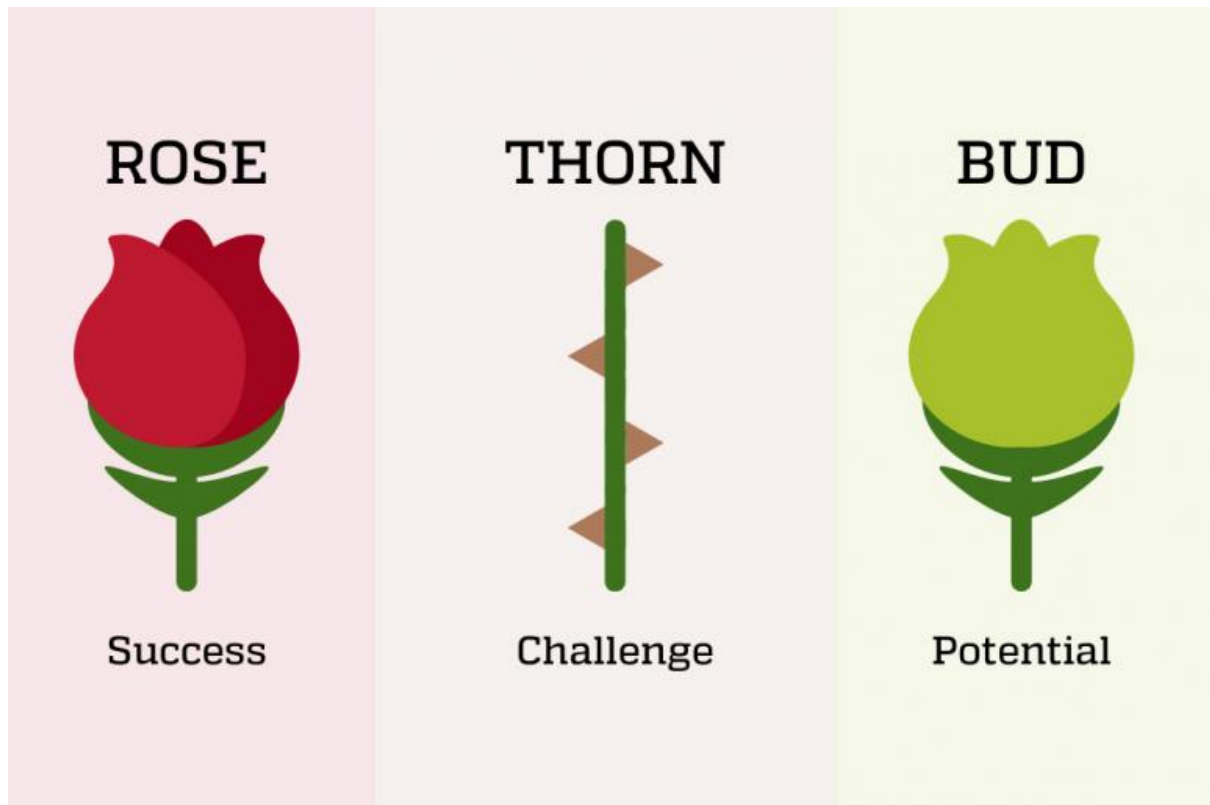


Figure 4: Rose, Thorn, Bud exercise⁵

The Critical River Journeying can be an effective way to visualise the journey of the project, and reflect on the learnings. It can be done throughout the project, as well as at the end. It can be used by individuals or by groups working on a project. It is good to keep the instructions to a minimum so people can use their imagination as to how to interpret their journey, however some simple guidelines include:

- Cover a table with paper. Draw a river with at least 3 and no more than 5 bends, with a beginning and end point. This represents the journey of your project, and the bends are key turning points or moments in your project.
- You can include some rocks, boulders or other obstacles, which represent challenges you've faced.
- You can include any other elements that you think help to illustrate your journey.

5.3 Sharing learning

Sharing learnings can help to continually improve processes, and help projects learn from each other about what has worked well, what has worked less well, and why.

⁵ [Rose, Bud Thorn](#)

Once projects have reflected on their learning, they can decide what to do with it. They might want to make some improvements to an existing project or processes, they might use it to help develop future programmes, or might want to share the learnings and influence others.

Hubs could draft some learning outputs at the start of their programme, which can evolve as they go. They might include outputs such as an event or conference to share learning on a certain topic, blogs or articles about their experiences and learnings, a case study demonstrating impact and learnings, or a 'how to' toolkit.

Within project teams

Sharing learnings can be facilitated through project meetings and can help projects to continually improve processes, and team members can learn from each other about what has worked well, and what has not and why.

Between OVCA projects

Learning across OVCA projects could happen in different ways. This could be through the regular OVCA all-project meetings, where projects can hear and learn from each-other, or could be through contact between individual projects, who want to learn/share learning with each other.

Wider dissemination of learning

Learning can also be shared across and beyond a community through events, articles, blogs or case studies.

Further sources of information on learning

- The National Lottery [How to learn from your project.](#)

6 Monitoring, evaluation and learning support and resources

There is a range of support available for projects to help with the planning and delivery of their MEL work, set out in Table 1.

Source	MEL Support available
OVCA Core Team	Day to day/general enquiries
CAG Consultants – evaluation team	Evaluation plans, theory of change and programme evaluation
Behaviour change consultants	What outcomes you could evaluate, what data to collect, and what tools can you use
Carbon accounting consultants	What data to collect and what tools to use
MEL toolbox	Webpage for OVCA with resources and tools that can be used in project MEL planning and delivery.

Table 1. MEL support available



CAG CONSULTANTS

Founded in 1983, CAG Consultants is an independent, employee-owned co-operative. We provide support, research and analysis, policy advice and training in a wide range of fields relating to sustainable development and climate change. We have practitioners in stakeholder & community involvement, regeneration, evaluation, economics and regulatory affairs. We deliver high quality, innovative and thoughtful work for our clients, who include government departments, local authorities, public agencies, the NHS and regeneration and community planning partnerships across the UK. We pride ourselves on our strong ethical approach and our commitment to social justice and improving and protecting the environment.

CAG Consultants' Quality Management System is approved to the Quality Guild standard.

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