

Strengthening objective setting, monitoring and evaluation.

In April 2015 all WFD Catchment Partnerships were invited to apply for funding from the **Catchment Partnership Action Fund (CPAF)**. The primary aim of this funding was:

“to enable partnerships to deliver a ‘sustainable quick win’, i.e. a project that will be delivered in the 2015/16 financial year with demonstrable outputs...to demonstrate the value of the partnership to potential funders, and assist with the aim of the Defra policy framework of partnerships becoming self-sustaining” [EA 2015]

During the application assessment process the Environment Agency (EA) and the River Restoration Centre (RRC) noted the need for significant improvements in **clearly communicating project aims and objectives**, and **planning how progress under these objectives was going to be evaluated to demonstrate project success**.

Therefore in early 2016, three workshops were held in Sheffield (20th January), Bristol (2nd February) and London (4th February). The events were coordinated by RRC and EA with input from the Catchment Based Approach (CaBA) Support Team. Each workshop covered:

1. Knowledge sharing from large-scale successful Catchment Restoration Fund (CRF) projects, and the issues faced by CPAF projects,
2. Setting clear project objectives to support project delivery, and defining success targets,
3. Monitoring and evaluation to demonstrate that project objectives and benefits have been achieved.

A total of **142 delegates attended the three events, with 80% of all partnerships represented** by partnership hosts, partnership members, or EA catchment coordinators.

Presentations and other outputs are available on the RRC website. >>

Main Learning Points

- Partnerships with a clear catchment-scale vision found project planning and delivery easier.
- Clear and targeted project objective setting requires time and effort to get right.
- Achievement of long term goals cannot be evidenced by short term projects.
- There is sometimes a tendency to set over-ambitious targets, which cannot be met by short term projects.
- Planning what to evaluate and how to do it needs to be part of the project planning phase.
- The monitoring and evaluation plan needs to sit and be carried out alongside physical works delivery.
- There is a need for more guidance on simple (achievable and realistic) and cost effective evaluation methods.
- Many catchment partnerships lack the capacity to undertake detailed monitoring but can access volunteers.
- Where good quality evidence is collected, it supports further planning and funding approaches.
- Information and guidance exists, but finding what is needed in each specific instance is difficult.
- CPAF has allowed the partnerships to deliver projects and also explore where each partnership needs support.
- Short funding timescales and uncertain year-on-year continuity severely constrains catchment partnership ability to deliver.

Introduction >>

Damian Crilly (*Environment Agency*)

Objective Setting and Monitoring >>

Jenny Mant (*Ricardo-AEA, Cascade practice [formerly RRC]*)

CaBA Support Team Update >>

Michelle Walker, Rob Collins, Dave Johnson

Learning from the Catchment Restoration Fund

Defra's **42 Catchment Restoration Fund (CRF)** projects (2012-2015) were large value 3-year schemes. They collectively built a wealth of information which could be applied to other smaller projects (e.g. CPAF). Presentations reflected on:

- The main project challenges and what was learnt,
- The importance of clear objectives for both project delivery and project monitoring,
- How evaluating the monitoring demonstrates success,
- How demonstrating success had been useful in securing further support and funding.



CRF Wensum River Restoration and Floodplain Enhancement Project.

Key points

Understand the problem. Use available baseline data and collect additional information if not available. This is critical to being able to create a clear vision and to set achievable project objectives.

Set clear project objectives. This provides a clear direction of travel for project delivery. A great example of how setting clear and targeted objectives helps define the measures of success was given by Moors for the Future and The National Trust, summary available here [>>](#)

Capacity to monitor. This was increased by: partnering with universities; citizen science monitoring groups; and using follow-on projects. For example, the Norfolk Rivers Trust partnered with students from the University of East Anglia who were looking for research project ideas.

Using the results. Define how you will use the information you collect - for a project funder?, future partners?, local community? This will affect what you monitor and how. For example, prior to planning what data to collect, the Westcountry Rivers Trust had considered who would be interested in their results and the potential benefits for justifying future project work. The general public will want different information to a local authority.

Demonstrate success. 'Monitoring' is sometimes excluded from funding sources so use terms which highlight the outcome of monitoring such as 'evaluating' or 'demonstrating' success. Sound evaluation and evidence shows professionalism and generates funder confidence in an organisations ability to deliver further projects. For example, the Wye and Usk Foundation used key facts and case studies to explain the benefits of their CRF project to local authorities. CRF monitoring data was also used to justify the need for more work to address similar issues in other areas of catchments.

Sheffield

River Aire - Kirkstall Fish Passage >>
Ian Hope (Leeds City Council)

Rivers Alport and Ashop - the Peatland Restoration Project >>
Richard Vink (the National Trust) and Tia Crouch (Moors for the Future)

Bristol

Wye (Herefordshire) Improvement Project (WHIP2) >>
Simon Evans (Wye and Usk Foundation)

Westcountry Rivers Trust Projects >>
Bruce Stockley (Westcountry Rivers Trust)

London

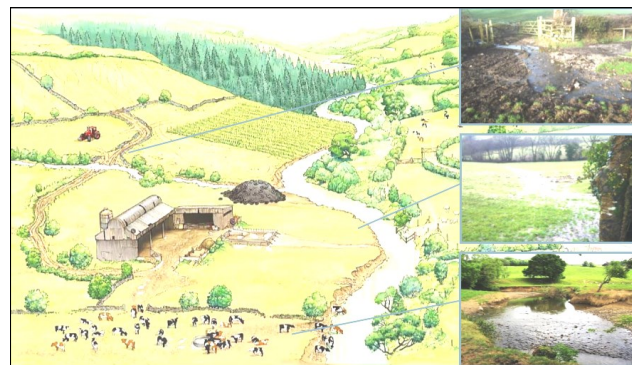
Nine Chalk Rivers Project & River Nar Restoration Project >>
Jonah Tosney (Norfolk Rivers Trust)

Wensum River Restoration and Floodplain Enhancement >>
Ed Bramham-Jones (Pensthorpe Natural Park)

Catchment Partnership Action Fund Lessons

CPAF projects were 10 months in to their work at this point. Two **CPAF projects** were presented at each event and asked:

- Have clear objectives been set or is this challenging?
- Have the objectives you set supported project delivery?
- How have you planned your monitoring and evaluation to demonstrate project success?



Bristol Avon Rivers Trust provided training from their model farm to influence land managers

Key points

A catchment approach. Set small scale projects within a wider vision for the catchment. Link to the aims of past or existing projects. Some projects used CPAF as a foundation for delivering future projects. For example the Bristol Avon Rivers Trust used part of their funding to establish a model farm, which could be used to demonstrate good land management techniques to more landowners in future projects.

Plan early. Partnerships reported that they had struggled to set objectives and plan monitoring. Reasons ranged from lack of notice of funding, short application time or lack of experience as a 'partnership' rather than an individual organisation.

Seek advice. Challenges in monitoring were mostly attributed to a lack of knowledge and experience of the available and cost effective monitoring methods. For example, Cambridgeshire Acre, running a misconnections campaign, had no prior experience of monitoring water quality. To overcome this, they sought advice from RRC, Environment Agency and River Care, to monitor phosphate levels effectively.

Be realistic. Is it achievable? Do not set unrealistic objectives just to impress a funder. Proving you have met your targets then becomes impossible. The same goes for evaluating its success. What capacity and timescale are you working within? Choose simple methods such as fixed point photos or simple citizen science methods.



The River Glyme Restoration Project used preliminary background studies to really understand the problems and plan the solutions.

Sheffield

Hambleton Beck Restoration Project >>
Rita Mercer (Wharfe and Lower Ouse CP/ Yorkshire Dales Rivers Trust)

Bristol

River Glyme Restoration Project >>
Hilary Phillips (Evenlode CP [Cotswolds Management Catchment])

Bristol Froome Restoration Project >>
Harriet Alvis (Bristol Avon CP/ Bristol Avon Rivers Trust)

London

River Ems: Fishery Habitat Enhancement Works >>
Ses Wright (Arun and Rothers Rivers Trust / Arun and Western Streams CP)

Ramsey Water Care >>
Rachael Brown (Cambridgeshire ACRE / Old Bedford CP)

Project Objective Setting, Monitoring & Evaluation

Objective setting. One of the biggest problems around managing and delivering a project is communicating the vision and having clarity of objectives. The process of setting SMART objectives provides a structure for critical thinking to understand what the project will tackle and deliver. It provides a clear summary to partners, funders, the newly appointed project officer, and others. See guidance on setting SMART objectives >>

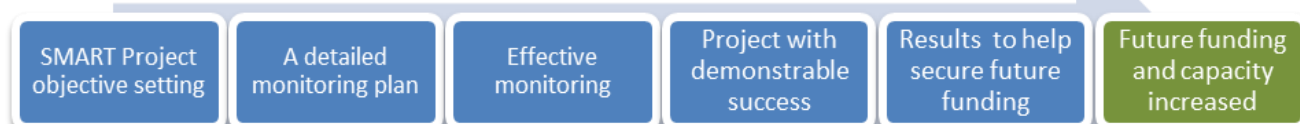
S	M	A	R	T
SPECIFIC	MEASURABLE	ACHIEVEABLE	REALISTIC	TIME-BOUND

Key points

Work to a catchment plan. Groups who set objectives for a hypothetical project example often struggled when compared with those who chose real examples, as they had no information of the wider catchment plan.

Be specific. Work through the process to set objectives that are Specific and Measurable, and then to check that they will be Achievable and Realistic within the Time available. The objectives should then be revised during project delivery if unexpected barriers to delivery emerge.

Clarity for funders. Setting clear objectives makes it much easier for your funders to understand what you are aiming to achieve and the resulting benefits. Clarity of objectives, actions, costs, and how they will be measured makes assessing a bid for funds far simpler.



Monitoring and Evaluation.

How can objectives be monitored and evaluated to demonstrate project success? Get the RRC simple monitoring planner and further guidance here >>

Also see RRC 'Monitoring and evaluating you projects' factsheet >>

Why	Why do you need to monitor? List the <u>project objectives</u> .
What	What is your <u>monitoring objective</u> ?
How	How will you measure it. What methods are you going to use?
Data	What is already available, what do you need to collect.
When	When will you monitor (timing and where)?
Who	Who is going to carry out the monitoring?
Cost	How much will it cost? Include volunteer and staff time.
Confidence	How robust are the monitoring methods chosen?
Evaluation	How, when and who will evaluate the monitoring results?

Key points

As a working document. Only 25% of attendees had seen or used the monitoring planner previously even though all CPAF projects were required to submit the planner when applying. This highlighted the need to include all material in the handover to a new project officer or the delivery organisation.

Useful tool. Whilst 75% had not used it before, the groups said that the planner would be a useful tool for better planning their monitoring. It helped identify what was possible with limited funds.

Plan early. The planner should be filled in as part of the project planning process so any further baseline data required can be collected prior to delivery, and monitoring partners found (e.g. universities/ angling clubs).

Helping refine objectives. The process of filling in the monitoring planner helps in reviewing both the monitoring objectives and even refining the original project objectives.

Accessible examples. A recurring theme was that partnerships often lacked knowledge or expertise of monitoring, how to plan effective evaluation and more specifically, issues of what baseline data to collect and what monitoring methods to use. **RRC will be adding example planners to the current website page.**