Monitoring, Evaluation, Reporting, and Improvement Framework

NSW Climate Change Fund

Prepared for the NSW Office of Energy and Climate Change, NSW Treasury

23 February 2023

Acknowledgment of Country

We acknowledge that Aboriginal and Torres Strait Islander peoples are the First Peoples and Traditional Custodians of Australia, and the oldest continuing culture in human history.

We pay respect to Elders past and present and commit to respecting the lands we walk on, and the communities we walk with.

We celebrate the deep and enduring connection of Aboriginal and Torres Strait Islander peoples to Country and acknowledge their continuing custodianship of the land, seas and sky.

We acknowledge the ongoing stewardship of Aboriginal and Torres Strait Islander peoples, and the important contribution they make to our communities and economies.

We reflect on the continuing impact of government policies and practices, and recognise our responsibility to work together with and for Aboriginal and Torres Strait Islander peoples, families and communities, towards improved economic, social and cultural outcomes.

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Introduction

Image 1: Helicopter lift for walking track works, Tomaree National Park. Image credit: John Spencer/DPE

1   Introduction

This following section outlines the document's structure, content and how it should be used.

1.1   Introduction to the document

This document presents the Monitoring, Evaluation, Reporting and Improvement (MERI) Framework for the NSW Climate Change Fund (CCF). This Framework is structured as follows:

Section 1 introduces the MERI Framework context and structure.

Section 2 presents the MERI Framework scope including the purpose, audiences and their information needs, and an overview of the resources required for implementation.

Section 3 presents the CCF outcomes hierarchy, outlining how it contributes to the achievement of intended outcomes.

Section 4 details each of the monitoring, evaluation, reporting and improvement framework elements.

Appendices

1.2   What is CCF?

The CCF is established under Part 6A of the *Energy and Utilities Administration Act 1987* (the Act) to reduce emissions and manage the impacts of a changing climate. Between 2022-2030, the NSW Government will invest up to $2.8 billion in initiatives to minimise and mitigate the effects of climate change and deliver real benefits to people, the NSW economy, and the environment.

The CCF Portfolio Management Office

The CCF Portfolio Management Office (PMO) is an enabling function that provides a coordinated approach to the administration and management of the CCF. The PMO exists to:

- provide oversight and coordination of the CCF
- drive accountability through established governance structures.

The primary role of the CCF PMO is to consider whether the CCF is delivering on the intended government and legislative requirements, but it also provides a program support function to enable high quality program design and implementation.

1.3 About the CCF MERI Framework

This Framework was co-developed between Clear Horizon and a project steering committee made up of staff from the NSW Department of Planning and Environment and NSW Treasury Office of Energy and Climate Change. Each project steering committee member has a key role in the oversight and implementation of the CCF and the programs delivered under it. The process included targeted engagement with CCF stakeholders who could provide unique perspectives and contributions to ensure the full spectrum of programs was considered in its design. Evaluation of CCF programs is a legislative requirement under the Act. The Framework has been designed to ensure MERI has regard to the NSW Government's Outcome Budgeting approach, and the NSW Government Program Evaluation Guidelines. It also considers requirements in relation to relevant State Outcome Indicators and Program Performance Measures.

As more is learned through delivery of CCF programs, this Framework will be updated as required to incorporate these lessons. As such, this Framework should be viewed as a living document.

1.4 The CCF MERI system

This Framework is the overarching document in the CCF MERI system. It informs MERI activities at both the portfolio and program levels, as well as the supporting guidance documents to support its implementation.

The CCF MERI system is shown in Figure 1 below.
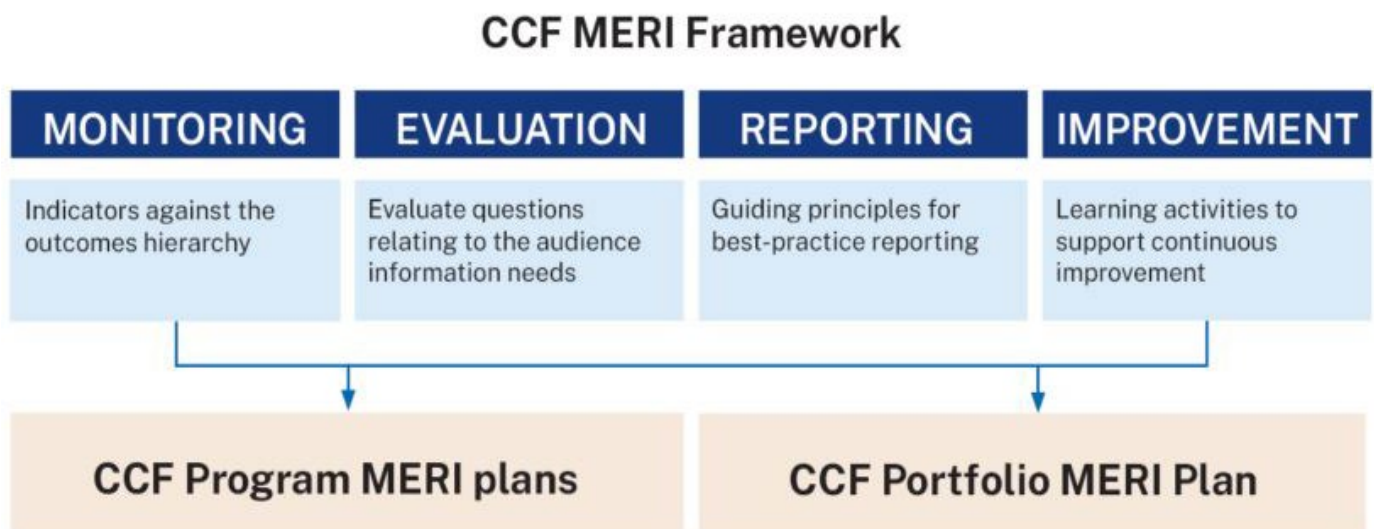
Figure 1: The CCF MERI system and how it informs MERI across the portfolio and program levels

The Act provides the overarching strategic direction for the CCF and informs the scope of CCF MERI and its outcomes hierarchy, which provide the basis for the CCF MERI Framework.

The CCF MERI Framework includes the following elements:

- the **monitoring framework** presents the key indicators at the program, portfolio and PMO level to track achievement against the outcomes hierarchy

- the **evaluation framework** presents the evaluation questions relating to the audience's information needs to guide evaluative judgements about CCF programs and the portfolio

- the **reporting framework** presents the principles for best practice reporting at the program and portfolio levels

- the **improvement framework** presents the approach to learning activities to inform continuous improvement.

This Framework provides the overarching structure and direction for the planning and implementation of MERI activities at the portfolio and program level, including the PMO. As shown in Figure 1, **the MERI Framework informs:**

- The scope and approach to **CCF portfolio MERI.** The implementation of CCF portfolio MERI involves the ongoing collection and synthesis of portfolio and program monitoring data for sensemaking of portfolio progress against the outcome hierarchies, evaluative assessments of the portfolio drawing on monitoring data and additional data, portfolio reporting, and learning and improvement to inform portfolio design and delivery.

- The scope and approach to **CCF program MERI.** These align program outcomes (as per business cases and other program documentation) with the CCF outcome hierarchy. The implementation of the CCF program MERI plans involves the ongoing collection and synthesis of program monitoring data against the program logic for sensemaking of progress, evaluative assessments of the program drawing on monitoring data and additional data, other program reporting requirements, and learning and improvement to inform program design and delivery (including future business case design).

- **Guidance documentation** developed to support CCF MERI planning. A full list of the guides and templates available to support the implementation of the MERI Framework is presented in Appendix A.

2

CCF MERI scope

Image 2: People hiking, Murramarang South Coast walk, near Pretty beach, Murramarang National Park. Image credit: John Spencer/DPE

2 CCF MERI scope

The following section presents the scope of the MERI Framework, including the purpose and boundaries of the Framework, and its intended audiences.

2.1 Purpose and boundaries of the CCF MERI Framework

The purpose of the Framework is to:

- drive continuous learning and improvement of program design and implementation, and
- demonstrate the achievement of the CCF outcomes.

The Framework provides a model for assessing performance, and change over time, against the outcomes sought by the CCF portfolio of investment. The Framework also guides processes for improving program and portfolio design and implementation to optimise efforts in addressing the impacts of climate change. The Framework applies to all CCF programs, even if they are only partly funded by CCF.

2.2 MERI audiences and their information needs

The MERI Framework has been designed for audiences with specific information needs. Table 1 describes the primary audiences that will *use* the MERI information to make decisions about the CCF at either the portfolio or program level. The secondary audiences that may be *interested* in the MERI information for their own applications are not described.

Table 1: MERI audiences and their information needs

Audience	Information needs
Portfolio Management Office (PMO)	Is the CCF portfolio achieving intended outcomes? How well is the PMO supporting the achievement of intended outcomes? How can the portfolio of investment be better designed and implemented to achieve the intended outcomes?
Program teams and program governance groups, e.g., program boards	Are CCF programs achieving their intended outcomes? What is working well? What should we continue to do? How can future programs be better designed and implemented to achieve their outcomes?
NSW Minister for Energy	Are CCF programs and the portfolio generating positive outcomes for the people of NSW? Where should future investment be focused?

Audience	Information needs
Deputy Secretary, Office of Energy and Climate Change CCF Administration Committee CCF Performance Sub Committee	Are CCF programs and the portfolio achieving their intended outcomes? What is working well? What should we continue to do? How can future programs be better designed and implemented to achieve their outcomes? How can the portfolio of investment be better designed and implemented to achieve the intended outcomes? Where should future investment be focused?
NSW Treasury	Are CCF programs being evaluated in line with the NSW Treasury evaluation guidelines? Are CCF programs and the portfolio achieving their intended outcomes?

2.3 Resourcing

MERI across the portfolio and programs must be appropriately resourced. Resourcing for MERI must be committed during the design stage of a program and considered in the design of portfolio oversight and governance. It is recommended that programs allocate up to 5% of the total program budget to ensure their MERI can be planned and delivered in line with Treasury requirements, while also ensuring the CCF meets its statutory obligations.

MERI resourcing may include quarantined funding for specific elements, allocations to support teams or specialists to provide support to MERI planning and delivery, or actions that are integrated with program delivery. Ongoing monitoring, targeted research and investigations, external independent evaluation studies, and peer reviews may all be required. These needs should be considered when determining resourcing requirements.

3

CCF outcomes framework

Image 3: Flock Bronzewing in Narriearra Caryapundy Swamp National Park. Image credit: Courtney Davies/DPE

3 CCF outcomes framework

The following section presents the CCF outcomes framework, which shows how the CCF is expected to create the desired outcomes. It provides the 'canvas' against which to tell the expected and actual story of change and is foundational to the structure of the MERI Framework.

3.1 Background to the CCF

Between 2022-2030, the NSW Government will invest up to $2.8 billion in initiatives to minimise and mitigate the effects of climate change and deliver real benefits to people, the NSW economy, and the environment.

The CCF is established under Part 6A of *the Energy and Utilities Administration Act 1987* (the Act). The Minister for Energy administers the CCF. As a statutory fund critical to achieving the NSW Government's 2050 net zero emissions target, the CCF is bound by legislation to only support activities that achieve its purposes. These include reducing greenhouse gas emissions, saving energy and water, and reducing the impacts of climate change.

The two main thematic areas of CCF investment are in net zero and resilience. The NSW Government has a range of strategies and plans that relate to its aspirations in relation to those two themes, including the Climate Change Policy Framework (2016), The Net Zero Plan Stage 1: 2020–2030 (2020), and the NSW Climate Change Adaptation Strategy (2022). As represented in Figure 2 below, the CCF makes targeted investments in net zero and resilience programs with a larger proportion directed at net zero programs.
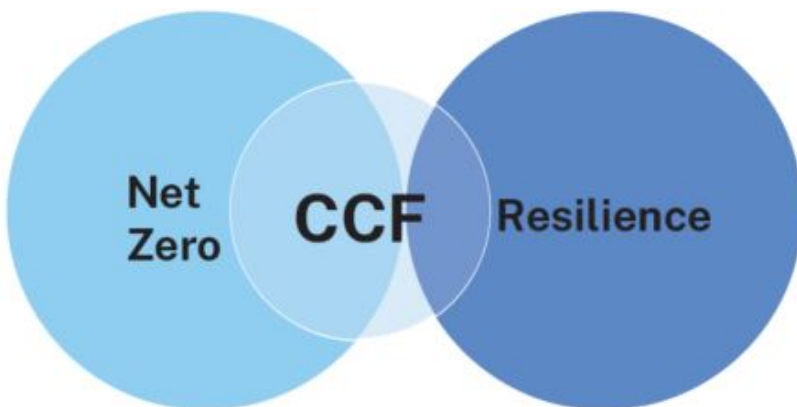
Figure 2: CCF in context of the net zero and resilience portfolios

3.2 The CCF outcomes hierarchy

The **CCF outcomes hierarchy** depicts the relationship between CCF-funded programs, the intended outcomes of the CCF, the higher order outcomes in the relevant policies, strategies, and legislation, and how this is underpinned by the enabling function of the CCF PMO. The outcomes hierarchy is presented as a model in Figure 3 with a supporting **narrative**.

The design of the CCF outcomes hierarchy is underpinned by the principle of demonstrating contribution, rather than attempting to attribute observed changes to the portfolio and its programs. This is because the CCF operates in a complex programming and operational environment with some programs being comprised of multiple funding sources, thus needing to deliver on multiple strategic priorities other than those directly relevant to the CCF. Additionally, many of the programs are delivered over long time frames, and there is a range of external factors that will affect the extent to which the desired outcomes can be achieved.

State outcome

Connecting communities to resilient and sustainable energy and local environments and heritage

A strong, diverse and resilient economy

Purposes of the CCF
To provide funding to...

Reduce greenhouse gas emissions and the impacts of climate change associated with water and energy activities

Encourage water and energy savings and the recycling of water

Reduce the demand for water and energy, including addressing peak demand for energy

Stimulate investment in innovative water and energy-saving measures

Increase public awareness and acceptance of the importance of climate change, and water and energy saving measures

Contributions made by the State for the purposes of national energy regulation

Climate Change Policy Framework objectives

Achieve net zero emissions by 2050

New South Wales is more resilient to a changing climate

Net Zero and Adaptation Strategic objectives

Net Zero Plan Outcomes

Compared to 2005 levels, NSW emissions are reduced by 70% by 2035, and NSW is well-positioned to meet its net zero emissions by 2050 target

Electricity is reliable, affordable and sustainable for NSW

Private investment is attracted to NSW, to create new jobs and grow the economy

Environmental, economic and social benefits delivered to local businesses and communities

Regional NSW and key sectors are competitive and prosperous.

Climate Change Adaptation Strategy Objectives

Well adapted economy, businesses, industries and livelihoods

Well adapted society, government, communities, families and individuals

Well adapted natural environment, biodiversity, ecosystems and natural resources

Well adapted built environment and infrastructure

CCF Focus Outcomes

Net Zero Plan Priorities

There is uptake of proven emissions reduction technologies

Consumers and businesses are empowered to make sustainable choices

The next wave of emissions reduction innovations are invested

New South Wales leads by example

Resilience outcomes

Risk to public and private infrastructure, assets and property from climate change impacts is managed and/or reduced

Risk to community from climate related hazards and impacts is targeted and is reduced

Community has the capability to take action to cope with climate change impacts

Avoid and minimise climate change impacts to ecosystems and biodiversity

CCF Funded program outcomes

Program outcomes as per program logic

Enabling functions

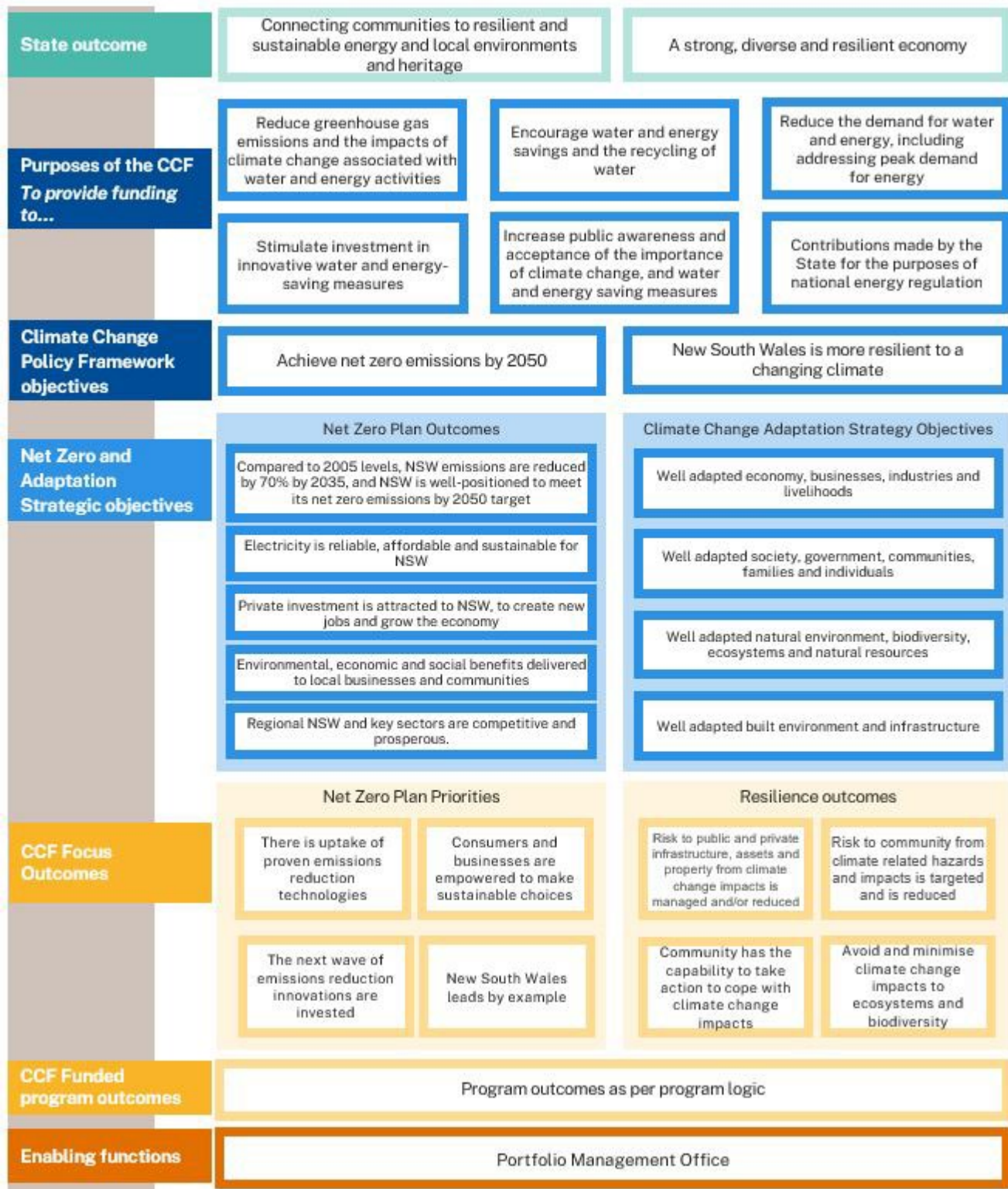Portfolio Management Office

Figure 3: CCF outcomes hierarchy

3.2.1 The CCF outcomes hierarchy narrative

NSW recognises the opportunity to build resilience and improve sustainability to achieve the social, economic and environmental prosperity of its citizens. This is reflected in the State Outcomes of "connecting communities to resilient and sustainable energy and local environments and heritage",

and "a strong, diverse and resilient economy". The work of the Department including the CCF is in service of this broad vision.

The CCF contributes to this vision through the purposes for which the CCF can be used as defined in the Act. Broadly, these relate to the reduction of greenhouse gas emissions and encouraging energy and water efficiencies.

The Climate Change Policy Framework echoes these priority areas stating 2 key goals of achieving net zero by 2050, and NSW being more resilient to a changing climate.

To achieve the net zero target, the Net Zero Plan provides more targeted priorities around how it will be achieved, namely that:

- there is uptake of proven emissions reduction technologies

- the next wave of emissions reduction technologies are invested in, consumers and businesses are empowered to make sustainable choices, and

- NSW leads by example.

The Net Zero MERI Framework has translated these priorities into outcomes which are reflected in the outcome hierarchy.

To improve the resilience of NSW to a changing climate, the NSW Government has invested in a suite of programs. They target:

- the management and/or reduction of risk to public and private infrastructure

- reduction of risk to assets and property from climate change

- the targeting and reduction of risk to community from climate related hazards and impacts

- providing community with the capability to take action to cope with climate change impacts, and

- avoiding and minimising climate change impacts to ecosystems and biodiversity.

These outcomes align with the objectives of the NSW Climate Change Adaptation Strategy which are also reflected in the outcome hierarchy.

The end-of-program outcomes of each individual CCF program will contribute to these broader outcomes.

Importantly, the work of the CCF PMO will support a coordinated and consistent approach for managing the portfolio providing the best opportunity for the desired outcomes to be achieved.

4

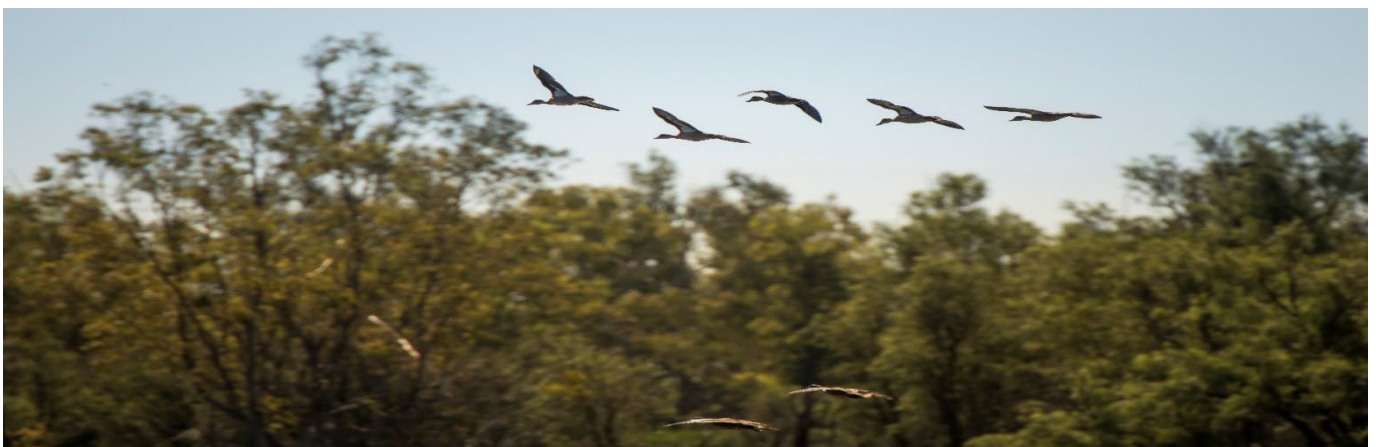# The elements of the MERI Framework

Image 4: Grey Teal, Mid Murray River. Image credit: John Spencer/DPE

4 The elements of the MERI Framework

This section presents the measurement, evaluation, reporting and improvement frameworks.

4.1 MERI Framework elements

Each of the MERI Framework elements are structured against the CCF outcomes framework, with the areas for monitoring, the focus of evaluation, the reporting and improvement processes aligned with the various levels of the outcome hierarchy (enabling processes, program outcomes, and portfolio impact), as demonstrated in Table 2 below. The following section is structured around each of these components to systematically organise monitoring, evaluation, reporting and improvement across the CCF.

Table 2: How each of the MERI elements of the Framework align with the CCF outcomes hierarchy

CCF outcomes hierarchy level	Monitoring	Evaluation	Reporting	Improvement
Portfolio outcomes Overall contribution of CCF funded programs to the CCF focus outcomes, and higher order policies and strategies	Monitoring portfolio level indicators as well as aggregation and leveraging of program level data	Evaluating the efficacy of the portfolio in achieving intended outcomes	Tracking the performance of the portfolio	Continuously improving design and implementation Refining assumptions
Program outcomes CCF end of program outcomes and their contribution to CCF focus outcomes	Monitoring the activities and outcomes of CCF funded programs	Evaluating the effectiveness of funded programs	Tracking the performance of individual programs	Understanding what works, and what doesn't
Enabling functions The portfolio management office (PMO)	Monitoring enabling activities and processes delivered by the Portfolio Management Office	Evaluating the efficiency and effectiveness of foundational processes	Tracking the performance of the PMO	Learning how impact occurs Identifying opportunities for improvement

4.2 Monitoring

Monitoring involves the ongoing collection and analysis of data (numbers and stories) to understand the progress of the CCF against the outcomes hierarchy. The following section presents the overarching monitoring framework, which is structured against the levels of the outcomes hierarchy and details the indicators and the processes for monitoring them. Synthesised monitoring data is utilised for evaluation (Section 4.3), reporting (Section 4.4), and improvement (Section 4.5).

The monitoring framework guides how the change is measured at the portfolio and program level, including the enabling function of the PMO.

- At the portfolio level, monitoring the achievement of the CCF focus outcomes is an important part of being able to tell the CCF's overall story and identify adjustments to the portfolio of investment and how it is managed.
- At the program level, monitoring activities, immediate outcomes, intermediate and end-of-program outcomes ensures that data is available to inform improvements to program implementation, as well as informing evaluation and other reporting requirements.

Programs are expected to have prepared a monitoring plan within 12 months of a program commencing. Net zero programs are expected to use the Data Monitoring and Collection Plan template. Resilience programs are expected to use the CCF Resilience Monitoring Plan template. All programs are expected to conduct an annual review of their monitoring plans.

Refer to the CCF Monitoring Guide for further guidance.

- The PMO monitors the enabling activities and processes that are put in place to understand how well it is supporting the achievement of a consistent and coordinated approach to the management of the portfolio.

The following table sets out the levels of monitoring for the CCF and where the detailed indicators for each level can be found.

Table 3: CCF monitoring indicators

CCF outcomes
Portfolio level: net zero outcomes
Compared to 2005 levels, NSW emissions are reduced by 70% by 2035, and NSW is well-positioned to meet its net zero emissions by 2050 target
Electricity is reliable, affordable and sustainable for NSW
Private investment is attracted to NSW, to create new jobs and grow the economy
Environmental, economic and social benefits delivered to local businesses and communities
Regional NSW and key sectors are competitive and prosperous

CCF outcomes
Portfolio level: resilience outcomes
Risk to public and private infrastructure, assets and property from climate change impacts is managed and/or reduced
Risk to community from climate related hazards and impacts is targeted and is reduced
Community has the capability to take action to cope with climate change impacts
Avoid and minimise climate change impacts to ecosystems and biodiversity
Program outcomes (refer to program evaluation plan and accompanying data collection plan)
End of program outcomes defined in individual program logics
PMO enabling functions
Based on the priorities set out in the PMO implementation plan

4.3 Evaluation

Evaluation is the systematic determination of the merit, worth, and/or significance of something. While we might use monitoring data to give us short-cycle feedback on how a program is progressing — and this can inform small adjustments — evaluation is a formal and more in-depth study where judgements about the value and achievements of a program or portfolio are made

Evaluation is a point-in-time investigation structured around key evaluation questions (KEQs) which are informed by the primary audience's information needs and the CCF outcomes hierarchy.

There are generally two forms of evaluation: formative and summative. A formative evaluation is generally conducted while a program is in its implementation phase, or while it is still forming, for the purpose of finding areas for improvement. Formative evaluations often have a focus on how well processes are working as this will have a large bearing on whether the desired outcomes will be achieved. For the purposes of CCF evaluation, these are called **mid-term evaluations**.

Summative evaluations are generally conducted when a program is reaching the end of its implementation or after completion. These evaluations 'sum up' how well the program has delivered the intended outcomes, and whether the program represented value-for-money. They can be used to inform whether a program should be continued, or sometimes inform where future investments should be made, and what policy directions to take. For the purposes of CCF evaluation, these are called **end-of-program evaluations**.

This section directly aligns with the content of the CCF Evaluation Guide (NSW Department of Planning and Environment, 2021), which is comprehensive in providing detailed guidance on the steps to develop and implement program and portfolio level evaluations.

Programs are expected to have prepared an evaluation plan using the CCF Evaluation Plan template within 6 months of a program commencing. A mid-term evaluation report must be completed for programs longer than 3 years. An end-of-program evaluation report must be completed within 12 months of program completion.

Refer to the CCF Evaluation Guide for further guidance

4.3.1   Key evaluation questions (KEQs)

The CCF KEQs are presented in Table 4 and will guide the assessment of the CCF's effectiveness in relation to the outcomes achieved, the quality of the processes used to support delivery, and what economic value the portfolio delivered, i.e., did the portfolio of investment achieve good value-for-money. These evaluations will search for insights to inform continuous improvement of the CCF and increase the scale of its impact. The portfolio level and PMO KEQs are suggested as a guide and will be confirmed when developing the terms of reference for a whole-of-fund evaluation. Refer to Part 3 of the CCF Evaluation Guide for detail on conducting these evaluations.

Importantly, the portfolio, program and PMO monitoring indicators set out in the previous section will be foundational to enabling these evaluations to be undertaken.

Table 4: CCF key evaluation questions

Criteria	Key evaluation questions
CCF outcomes Effectiveness, appropriateness and efficiency of investment in achieving outcomes	What contribution has the CCF made to achieving the CCF focus outcomes? To what extent does this contribution represent good value-for-money?
Program outcomes Effectiveness, appropriateness and efficiency of program processes and outcomes	**Program processes** How did program management arrangements support effective delivery? To what extent was the program design appropriate to the context? To what extent has the program been delivered on time and budget? **Portfolio outcomes** What contribution has the program made to the achievement of net zero emissions by 2050? (for net zero programs) What contribution has the program made to the achievement of NSW being more resilient and adapted to a changing climate? (for resilience programs) What were the unanticipated outcomes of the program, both positive and negative? Did the program achieve value for money over the duration the program was in place?

Criteria	Key evaluation questions
	Net zero programs
	To what extent did the program drive uptake of, or investment in, emissions reduction technologies?
	To what extent did the program empower consumers and businesses to make sustainable choices?
	To what extent did the program invest in (or support investment in) the next wave of emissions reduction innovations?
	How did the program ensure NSW leads by example?
	Resilience programs
	To what extent has the program managed and/or reduced risk to public and private infrastructure, assets and property from climate change impacts?
	To what extent has the program targeted and reduced risks to the community from climate related hazards and impacts?
	To what extent has the program addressed the community's capacity to take action to cope with climate change impacts?
	To what extent has the program avoided or minimised climate change impacts to ecosystems and biodiversity?
Enabling functions Effectiveness, appropriateness and efficiency of enabling function to support the achievement of outcomes	How well is the PMO supporting the achievement of the outcomes?

4.4   Reporting

Reporting makes use of monitoring data to provide point-in-time updates to audiences on implementation progress and informs any decisions that the audience may be responsible for.

There are several processes in train currently which are informing the development and iteration of CCF reporting. These include onboarding CCF programs to an enterprise project management system called SPACE, and new strategies and related governance being established. Due to the dynamic nature of the reporting environment, best practice reporting principles are provided in this section of the Framework. Detailed guidance for programs, program boards, and other parties with responsibilities in relation to reporting are captured in the supplementary guides to this Framework which will be updated as required.

4.4.1   Best practice reporting principles

The following principles apply to any form of CCF reporting regardless of whether it is at the program or portfolio level.

- **Reporting audiences and their information needs are clearly defined.**
  The value of a report lays in the information being provided in response to the audience's needs.

- **Reporting requirements are harmonised wherever practicable.**
  Leveraging the 'collect once, use many times' data principle. The same is encouraged wherever possible for reporting purposes where governance groups have similar information needs.

- **Reporting roles and responsibilities are clearly defined.**
  Determination of roles and responsibilities provides clarity for the various stakeholders in the reporting process. This includes any responsibilities in relation to preparation, interpretation, and decision making.

- **Providing sufficient guidance for reporting stakeholders.**
  This includes defining the expected quality of reports, practical instructions about the processes that should be followed, and the decisions and actions that should be taken by reporting audiences.

- **Reporting is as automated as far as is practicable.**
  The systems supporting the CCF continue to evolve and improve. While complete reporting automation is not yet a reality, best efforts will be made to automate as much as possible as the system matures.

Program level reporting

As part of the evaluation planning process, programs identify the governance groups that they are required to report to (section 2.2 of program evaluation plans). This is also reflected in the program data monitoring and collection plan where each indicator identifies the reporting purposes it will be used for. This includes indicators that will be required for program board, evaluation and CCF portfolio level reporting. Taking the time to identify these reporting requirements and the data that will be used to fulfill them is an important step in integrating the monitoring, evaluation, and reporting functions.

Portfolio level reporting

Portfolio level reporting will utilise the CCF portfolio indicators and the PMO indicators. While some reporting requirements are established, others continue to evolve. The key portfolio level report is the CCF Annual Report which is a legislative requirement under the Act. Importantly the annual report which is tabled by the Minister in Parliament must include an evaluation of the effectiveness of each program as it is completed.

As discussed, the CCF is one portfolio that invests in net zero and adaptation programs. As such, it may need to contribute to these broader reporting processes. The CCF PMO will also respond to ad hoc reporting requests.

4.5   Improvement

Learning and improving is all about using data and insights from various sources to inform decision making. Strategic learning occurs when an organisation or group integrates data and evaluative thinking into their work, adapting their strategies in response to what they learn. The I in MERI recognises that the real world requires us to adapt our plans and respond to new information and a changing context if we are to reach our desired outcomes. This requires putting evidence-based improvement at the centre of the work we do. This is supported by a culture where critical reflection is encouraged, and failure can be embraced as a learning opportunity. Investment in monitoring, evaluation and reporting yields the greatest rewards when improvement activities are also applied. Learning and improvement activities can take many forms and be conducted at a range of scales.

Improvement activities can be looked at as short cycle and long cycle improvement.

- **Short cycle learning** and improvement activities often rely on analysing and reflecting on monitoring data during implementation. There are often logical points in implementation to do this such as following the completion of a pilot study, or application round. They can also be embedded as a regular scheduled activity such as a 6-monthly review of the data collection and monitoring plan. As these short cycle activities occur throughout implementation, often the data being reviewed in the earlier stages of delivery are more focused on outputs and processes which are often lead indicators about whether an intervention is on track to achieve its outcomes. Short cycle activities allow adjustments and adaptations to course correct and continuously improve throughout implementation.

- **Long cycle** learning and improvement activities tend to be less frequent and more substantial. These activities include conducting evaluations and holding annual reflection workshops. They will often draw on at least some outcome data and can inform more significant decisions such as future strategic direction, and how investment should be targeted.

Both short and long cycle learning and improvement activities can be employed at both a program and portfolio level and may be formal or informal.

Program level improvement activities can be embedded in several project management tools. For example, project schedules, terms of reference of relevant governance groups, or in the evaluation activities timetable of the program evaluation plan. Improvement activities will be program specific and should be tailored to the needs of the program.

Portfolio level improvement activities will be informed by several sources of information. This includes insights generated from the portfolio level indicators, and issues being reported through governance boards and other forums.

Refer to the CCF Improvement Guide for further guidance

Appendix A: Guides and templates to support the implementation of this Framework

The following table provides an index of the CCF MERI Framework supporting guides and templates. It is intended that this index will be built upon as the need for further supporting materials is identified.

Document title	Purpose
NSW CCF Evaluation Guide	Detailed guidance for delivering program level and portfolio level evaluations
NSW CCF Monitoring Guide	Detailed guidance for developing program level indicators to monitor
NSW CCF Improvement Guide	Detailed guidance for planning and implementing improvement activities.
NSW CCF Evaluation Plan template	A template for CCF funded program evaluation planning
CCF Resilience Monitoring Plan template	A detailed monitoring plan template for resilience programs with relevant portfolio indicators prepopulated
Data Monitoring and Collection Plan template	A detailed monitoring plan template for net zero programs with relevant portfolio indicators prepopulated
CCF Portfolio Indicators Master Workbook	The source of truth for CCF portfolio and PMO indicators
CCF Evaluation Peer Review Criteria	Sets out the criteria that CCF evaluation plans and reports will be peer reviewed against
CCF Evaluation Report Writing Guide for Consultants	A guidance document for consultants engaged by CCF programs to deliver evaluation reports to ensure standards and requirements are understood. Key elements of the CCF Evaluation Peer Review Criteria are embedded
CCF Evaluation Plan Approval Briefing Pack template	A compendium of templates to prepare the relevant documents and accompanying infographic to shepherd an evaluation plan through the approvals process
CCF Evaluation Report Approval Briefing Pack template	A compendium of templates to prepare the relevant documents and accompanying infographic to shepherd an evaluation report through the approvals process

Document title	Purpose
CCF Management Response template	A template with guiding text to support the development of management responses to evaluation report recommendations
CCF Evaluation Report Executive Summary template	A template with guiding text to support the development of an evaluation report executive summary for publication