



CABI Monitoring, Evaluation and Learning Strategy

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KNOWLEDGE FOR LIFE

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Executive Summary

Monitoring, evaluation and learning (MEL) aims to measure and optimise the results of interventions, ensure relevance and efficiency in the implementation and to learn what works, what doesn't work, and why, in a particular context. The CABI MEL Strategy is a critical component in driving accountability, learning, continuous improvement, and evidence-based decision-making for the organisation. The Strategy sets out CABI's approach to MEL based on the strong foundations already in place within the organisation. Its implementation will contribute to assessing project and programme outcomes and impact, generating understanding of change processes, and informing learning for project partners, stakeholders, donors and internally within CABI. It allows us to address the following questions to improve our project/programme design:

1. Are we doing what we said we would do?
2. Are we making any difference?
3. Are these the right things to do?
4. Do we need to make any adjustments?

CABI's MEL is based on two key approaches:

- the project logical framework (logframe) approach (LFA)
- theories of change (ToC)

The LFA specifies the linear representations of inputs and activities that lead to outcomes, while the ToC describes the interactions between project components that are expected to lead to impact and the underlying assumptions of the change process.

The key priority actions for MEL strengthening over the next 3 years are outlined as follows:

- i. Foster a MEL-driven culture to ensure accountability
- ii. Institutionalise MEL principles and practices
- iii. Invest in capacity of MEL staff
- iv. Review and update MEL strategy

Introduction

A well-designed monitoring, evaluation and learning system is essential to measure and optimise the results of interventions, ensure relevance and efficiency in the implementation, and to learn what works, what doesn't and why in a particular context. The aim of Monitoring, Evaluation and Learning (MEL) is to improve programme quality, performance, and learning across CABI. A dedicated CABI MEL team operates across different regional centres to provide comprehensive support for an effective implementation and monitoring of our work.

In this document, we outline the general principles for MEL, and describe the frameworks and approaches taken to MEL within CABI.

General principles

Good MEL allow us to address the following questions:

1. Are we doing what we said we would do? [Implementation as planned]
2. Are we making any difference? [Outcome/impact evaluation]
3. Are these the right things to do? [Strategic relevance, testing the model]
4. Do we need to make any adjustments?

Monitoring is a continuous, methodical process of systemic data collection and information gathering throughout the life of a project. The information collected is used for regular assessment of implementation progress and intended and unintended results, so that adjustments can be made while the work is going on. Monitoring is also used to systematically track a particular condition - for example the environment, the situation of women, to identify trends.

Evaluation represents a learning and management process: measuring, analysing and interpreting change helps us determine what results have been achieved and whether the initial assumptions about what would happen were right. It also enables assessments to be made about relevance, coherence, effectiveness, efficiency, impact and sustainability of the work (OECD, 2019).

Impact Evaluation is the systematic analysis of lasting or significant changes, positive or negative, intended or unintended, in people's lives generated by a given action or series of actions.

We focus on four areas of evaluation:

- assess *outcomes and impact* of the programme within the project/country context
- test *underlying assumptions* of the project model or theory of change
- establish *causality* and programme *contribution/ attribution*
- assess the *efficiency and effectiveness* of the programme

MEL is done for two main reasons that support sound decision making:

Accountability: we keep track of activities and outputs to demonstrate to the communities, partners and donors we work with, that we are delivering what we promised in line with agreed budgets, and that we are open for discussions related to our delivery.

Learning: we test our assumptions, models and procedures, and capture the results and lessons to enable us to reflect critically on whether we are creating change, and whether the change is what we expected and what is needed. This learning supports decision making in the current work, as well as enabling future programmes and policy advice to be based on thorough knowledge and evidence about the effects of the interventions and the factors that influence the outcomes, either positively or negatively.

CABI MEL frameworks and approaches

Results-based management (RBM) is critical for development programme effectiveness by planning, managing and measuring an intervention with a focus on the results you want to achieve. Our approach involves mainstreaming MEL throughout the project cycle and sensitizing the entire implementation team to its principles and practices.

MEL at CABI is based on these key project planning and MEL approaches / tools:

- Theory of Change (ToC)
- Logical Framework (Logframe) Approach (LFA)

As a foundational tool, CABI outlines its **Theory of Change (ToC)** during the project design and planning phase, to see the expected interactions between project components that drive results and lead to impact. It also identifies the underlying assumptions behind the change process. This gives a holistic image on how and why change is expected to occur. LFA and ToC are developed during the project design and planning phase and used guide implementation, monitoring, evaluation and learning. They are living document / tools and adapted to changing contexts during project implementation.

Theory of Change (ToC)

CABI uses theories of change, presented in diagrammatic form with an accompanying narrative summary. The theory of change locates a programme within a wider analysis of how change comes about, acknowledging the complexity of change and the wider systems and actors that influence it. It is a tool that facilitates an on-going process of reflection to explore different pathways of change and how it happens, such as through stakeholder engagement, advocacy and policy influencing, and what that means for the part we play in a particular context, sector and/or group of people. Specifically, the ToC enables us to:

- (1) draw the anticipated causal pathways across activities, outputs, outcomes, and impacts from a systems thinking perspective
- (2) clarify assumptions underlying the expected changes in different systems

- (3) outline key domains of interest to identify impact indicators, and
- (4) develop evaluation questions that will inquire about process, efficiency, adoption, productivity and sustainability of CABI's interventions.

Figure 1 provides one example of how CABI designs programme ToC outlining casual pathways across results. However, it is worth noting that ToC diagrams do not have a set format and should be designed in the most appropriate way for each project to illustrate the theory.

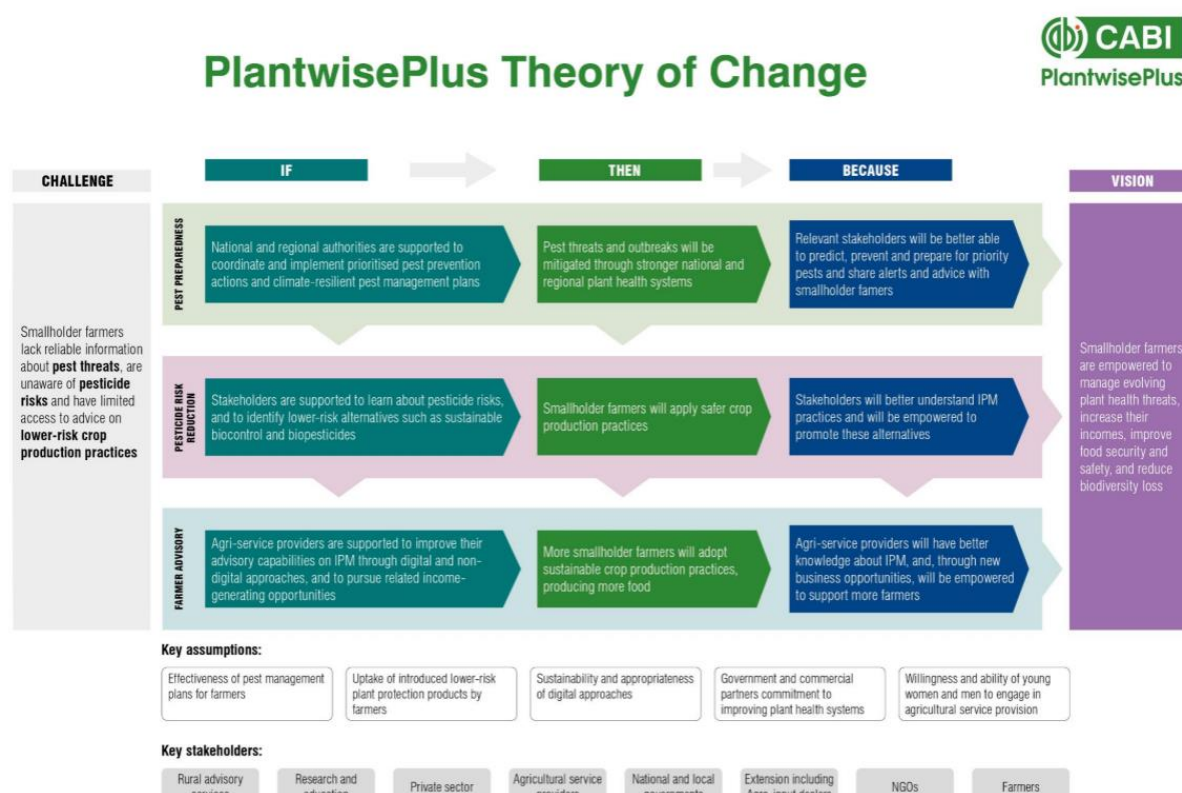


Figure 1 ToC from CABI's Flagship PlantwisePlus Programme

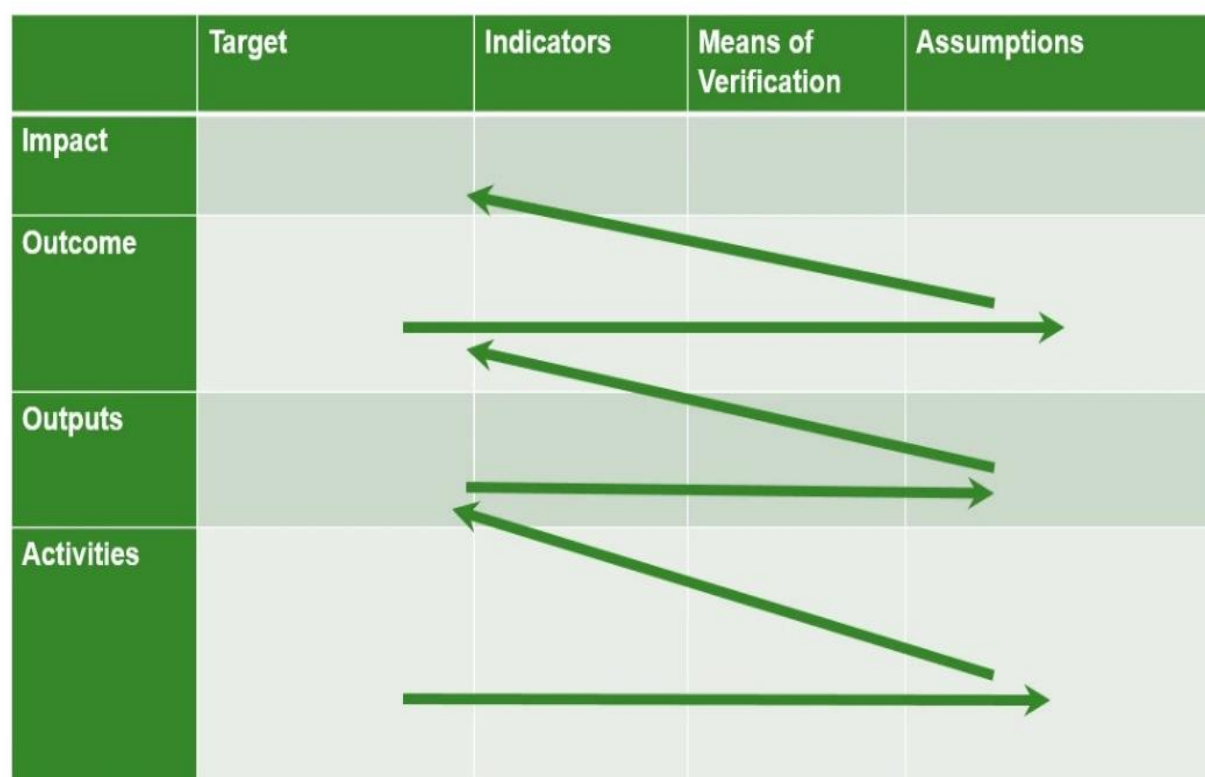
Logical framework approach (LFA)

Building on the ToC, the Logical Framework Approach is developed to specify the linear representations of inputs and activities when carried out (and if assumptions hold) lead to outputs and successful implementation of these outputs lead to achievement of longer-term changes, i.e., outcomes (Figure 2). LFA works as a practical tool for Project Managers and MEL staff for guiding implementation, and monitoring, evaluation & learning (MEL).

It sets out a logical sequence of cause-effect relationships between activity, outputs, outcomes and impacts, and the underlying assumptions that connects each level of results (output, outcomes, impacts). Results are measured through SMART¹ indicators that are associated with Means of Verification (MoV), which specify the data sources used to measure and validate the indicators. MoV becomes more complex as we move from outputs towards outcome and impact levels.

¹ Specific, Measurable, Achievable, Relevant, Time-bound

Outcomes should be achieved within the life of the project and will be reported on by the time the project comes to an end. Impact is expected to be seen some time after project completion and, unless the project is of considerable duration, it is not always appropriate to attempt to



measure impact during the project duration.

LFAs are updated on the LogAlto (the software that CABI uses), to ensure effective and harmonized reporting on the indicators – which allows to develop useful visualization on reports for Project Board, especially Project Managers to make decisions accordingly.

Figure 2: An example of a logical framework

Good MEL practices

The following practices should be followed in all MEL activities. The purpose is to guide all CABI staff to follow clear roles, responsibilities and ethical considerations. They do not include all aspects of good practice but form the basis of critical considerations in the implementation of MEL.

1. **Clear purpose and roles.** MEL must be designed with a purpose in mind, and the approach must not be unnecessarily complicated or resource intensive. Who is the monitoring, or the evaluation study, being carried out for? Why? What information is required? What are CABI's needs versus the needs of partners? Each stakeholder group has its own information needs and ways of working, and the MEL approach for each project or programme must match that.
2. **Joint responsibility and accountability.** MEL is not something that CABI 'does' or partners 'do for CABI'. It is also not something that the MEL team 'does' for projects or programmes. MEL is most effective when we collaborate with project teams and

stakeholders in a process of assessment and learning how to improve the project or programme on a continual basis.

3. **Participatory.** Deciding who should do evaluation depends on time, resources available and the purpose of the evaluation. They are often undertaken by external specialists, but project staff, funders and participants all play an essential role. Good evaluation can give people a real say in the decisions that affect their lives.
4. **Inclusive.** MEL approaches must serve the purpose of practical learning that ensures CABI's work encompasses gender and diversity to optimize benefits for all groups. MEL activities should promote empowerment and equal participation of target groups.
5. **Adaptive and flexible.** Maintaining flexibility and being adaptive, including being critical about CABI's role, is vital when working in complex and unpredictable environments. CABI teams and partners need to keep their eyes open to new ways of capturing evidence of change, direct or indirect, positive or negative, intended or unintended.
6. **Clear ethics.** All evaluators must ensure honesty and integrity in the evaluation, ensure that they respect the privacy, security, dignity and self-worth of the respondents, programme participants, clients, and other stakeholders with whom they interact.

Monitoring, Evaluation and Learning Systems

To operationalise MEL approaches and principles, a MEL plan is needed to stipulate what, who, when and how data should be collected and reported against specific indicators. Once the MEL plan is developed, it should be a living document and include a regular reflection session to review the MEL approach to ensure it meets different needs (data use and reporting), as well as informing the learning and adaptive management process and adjust as necessary.

Data collected according to the MEL plan should then be reported through CABI's MEL data management system where projects are placed on a digital, centralized MEL portal namely LogAlto. Besides project reporting, LogAlto also supports corporate reporting against CABI's Strategy indicators, to ensure internal and external coherence and relevancy of our work. In this way, MEL data feeds into 6-monthly progress reporting of CABI's strategy to monitor organisational performance in achieving our targets and ultimately enabling us to deliver meaningful and measurable impact.

Monitoring

Basic project monitoring, which occurs in all projects, feeds into project reporting, providing evidence of completed activities and outputs. Project monitoring is often carried out in conjunction with our partners, who can have the best on-the-ground information about project progress. CABI aims to provide some capacity development and support to our partners in this work, ensuring project monitoring and reporting systems work in synergy with any systems already in existence in-country. Specialist MEL expertise is not required for this; project managers are responsible for the implementation monitoring.

Evaluation

CABI works in complex systems that involves different elements and actors that interact with each other. To understand the interconnectedness between these systems, evaluation approaches must be flexible enough to identify them and thereby understand what difference (positive or negative consequences) we have made through our interventions, as well as the influencing factors.

The choice of evaluation approach should be pragmatic and driven by what is suitable, feasible, ethical, and affordable in the given situation. Therefore, CABI uses a variety of evaluation designs and methods (e.g. experimental, case-based, participatory) and a mix of qualitative and quantitative methods at different scales (e.g. impact stories, case studies, large scale studies) to evaluate outcomes and impact. We aim to include our partners in all evaluation work to enhance their ownership of the process, findings and learning across projects, and their capacity to carry out evaluation work themselves. More details on the diverse range of evaluation work are referenced in *Social Science Capability Statement* ([CABI Social Science Capability Statement](#)).

Evaluation Criteria

CABI's MEL strategy aligns with the Organization for Economic Co-operation and Development's Development Assistance Committee (OECD-DAC)² criteria to ensure its interventions are impactful, sustainable, and inclusive. By prioritising **relevance**, projects are designed based on stakeholder needs and aligned with national priorities and global development goals as well as CABI's Strategy. The organisation evaluates **effectiveness** through rigorous data collection, monitoring progress toward results (through LogAlto) as well as by other means, and fostering behaviour change among programme participants. **Efficiency** is maintained by optimising resources and conducting periodic cost-effectiveness analyses and other surveys by expert economists / social scientists to maximise impact. **Coherence** is ensured by aligning interventions with national policies, international frameworks, and complementary initiatives to maximise synergies and avoid contradictions. To assess **impact**, CABI examines the broader effects of its interventions, including both intended and unintended outcomes, ensuring projects contribute to productivity, environmental sustainability, and improved livelihoods. **Sustainability** is a core focus, with efforts to build local ownership, strengthen institutions, and promote environmentally sound practices that ensure continued benefits after project completion.

CABI also integrates **cross-cutting criteria** such as gender and inclusivity, climate change, and coordination and partnerships. **Gender**-transformative approaches are embedded in project designs, with disaggregated data and indicators to evaluate equitable access and benefits. **Inclusivity** is achieved by engaging marginalized groups through participatory approaches and ensuring interventions target vulnerable populations. **Coordination and partnerships** with governments, NGOs, and private-sector partners enhances resource sharing and avoids duplication, ensuring cohesive efforts toward shared goals. CABI also incorporates environmental and social safeguards to align projects with sustainability principles.

² OECD (2021), <https://doi.org/10.1787/543e84ed-en>.

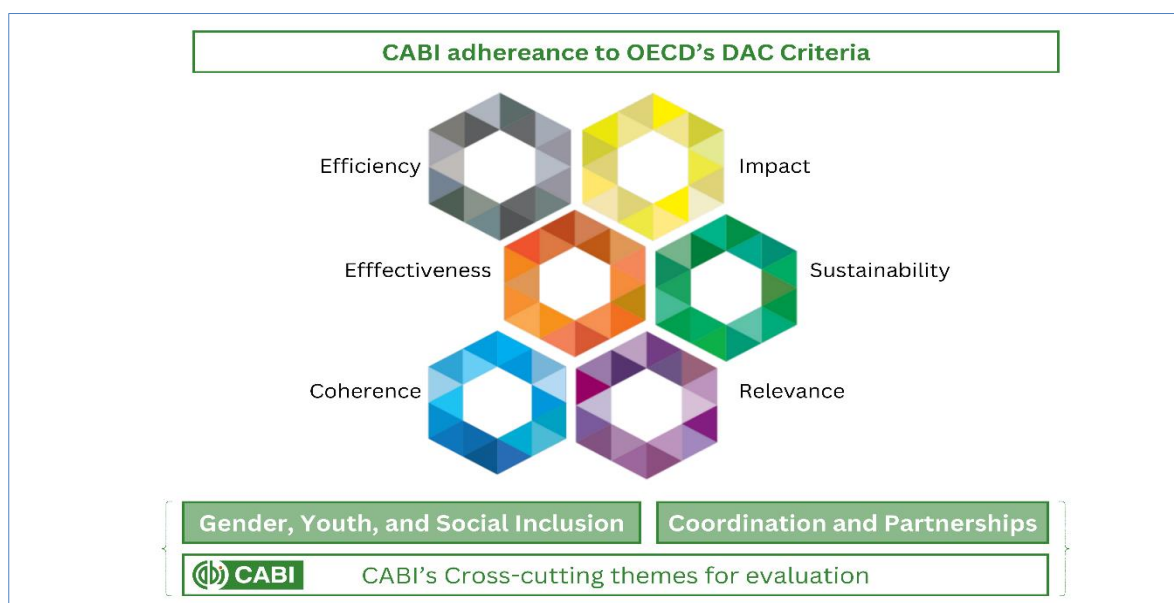


Figure 3 CABI adheres to OECD's DAC Criteria of conducting evaluations

Learning

To ensure that learning is being effectively integrated into programme design and implementation, the MEL framework establishes systematic processes for capturing insights, reflecting on findings and applying lessons to improve programme outcomes. These mechanisms include:

Stakeholder Workshops and Co-Design Sessions. Inclusive workshops are conducted to bring together programme staff, beneficiaries, and partners to discuss MEL findings and co-create solutions. These sessions emphasize collaborative learning, ensuring diverse perspectives can inform programme trajectory/ adjustment where required.

Knowledge Sharing Platforms. Digital platforms and shared repositories (available on Social Science Resource Hub) are used to disseminate tools, templates and knowledge products including reports and case studies derived from MEL activities. These platforms promote timely sharing of insights across teams and enhance institutional knowledge.

Action Plans and Follow-Up Mechanisms. Findings from MEL activities are translated into concrete action plans. Follow-up mechanisms, such as periodic progress checks with programme/ project teams, ensure that recommendations are implemented effectively, with changes incorporated where needed and tracked for impact.

Feedback Loops. Regularly scheduled feedback sessions allow data and insights from monitoring and evaluation to be shared with programme teams. These sessions focus on discussing performance trends, challenges, and areas for improvement, enabling teams to make evidence-based adjustments to their strategies.

By embedding these mechanisms within the project or programme operational structure, this ensures that learning is not only captured but also actively used to enhance programme design, improve implementation strategies, and achieve intended outcomes. This iterative approach strengthens accountability, promotes innovation, and maximizes the programme's overall impact.

Priority Actions for MEL Strengthening in CABI: 2025-2028

As we take stock of what we have achieved so far, we also aim to have actionable steps that will drive continued progress and ensure our goals are met with measurable impact. These steps are essential for our MEL strategy as they create a structured, forward-looking approach to assessing and enhancing programme effectiveness. This action plan not only strengthens decision-making and resource use but also empowers teams to learn, improve, and deliver greater impact for communities served. Together, these actions build a resilient, insight-driven culture that drives mission success and long-term sustainability.

The CABI MEL team's strategic goals are:

1. Enhanced staff capacity to implement MEL in projects/ programme, ensuring alignment with CABI strategy targets
 - ✓ 60% of project/programme staff with their MEL capacity enhanced
2. Ensured accountability through strengthening MEL systems that support generating and utilising evidence
 - ✓ 100% of all pertinent, active projects reporting through LogAlto

i. Foster a MEL-driven culture to ensure accountability

- Create/ update standardized MEL guidelines, templates and protocols
 - ✓ Number of templates/ protocols updated and approved
- Schedule periodic review of MEL tools.
 - ✓ Number of reviews conducted against planned
- Make MEL a standard part of project and programme development, budgeting, planning, implementation, and reporting.
 - ✓ MEL template usage/adoption rate (in ongoing projects)/ percentage of projects consistently following MEL Plan
 - ✓ Instances of MEL team engagement for feedback on project design and reporting mechanism
- Build MEL awareness across the organization and embed MEL practices into organizational work routine.
 - ✓ Availability of standardized MEL protocols/template
 - ✓ Number of MEL trainings delivered
 - ✓ Number of information sessions with CABI staff on MEL conducted
- Track project contributions towards CABI Strategy targets through systematic monitoring.

- ✓ Increase in number of projects contributing to MTS
- Systematize facilitation of post-project reviews/ structured discussions/ 'stop and reflect' assessments to capture learning from ongoing and completed projects.
 - ✓ Number of completed and ongoing projects with post-project review conducted
 - ✓ Annual compilation of lessons learned conducted (ID Projects)
- Enhance the use of MEL findings on outcomes and impacts for external engagement and communication.
 - ✓ Number of evaluation studies, case studies, stories of change etc. used for blogs and other media stories
- Generate evidence / support evidence gathering to inform policy and advocacy.
 - ✓ Number of policy papers/ research documents produced/ contributed to inform projects and programmes

ii. Institutionalise MEL principles and practices

- Develop e-learning modules for remote access to build MEL knowledge across the staff.
 - ✓ Number of modules developed
 - ✓ Number of page visits/ downloads (User statistics)
- Build MEL capacity across departments by providing in-house training for office staff (present and incoming).
 - ✓ Number of staff trained
 - ✓ Number of training modules developed
 - ✓ Number of staff training delivered
- Train programme/ field staff on quantitative and qualitative data collection methods and MEL terminologies.
 - ✓ Number of staff trained across CABI
 - ✓ Percentage of programme staff who attended the training on data collection methods and MEL terminologies
 - ✓ Improvement in staff knowledge (percentage increase)
- Leverage technology for data management and learning, e.g., roll out digital tools, adopt data analytics, use mobile data collection tools and embed FAIR data principles etc.
 - ✓ Number of new digital tools being currently used
- Develop and maintain a data collection and knowledge management system/ a shared learning space.
 - ✓ Establishment of a central MEL library/ resource hub

iii. Invest in capacity of MEL staff

- Train MEL team on advanced topics around contemporary data evaluation tools and MEL frameworks.
 - ✓ Number of trainings held
 - ✓ Number of certifications completed
 - ✓ Number of team members completing training courses
 - ✓ Percentage of MEL staff trained
- Promote peer learning within Social Science team, through the exchange of technical insights and project learning through webinars and workshops.
 - ✓ Number of sessions conducted on MEL practices/ methodologies
 - ✓ Number of joint learning sessions with other teams held

iv. Review and update MEL strategy

- Integrate new MEL concepts, practices and approaches into strategy document.
 - ✓ Review of MEL materials and strategy documents undertaken
- Conduct review of the strategy every three years.
 - ✓ Strategy reviews undertaken and feedback incorporated to update MEL strategy

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