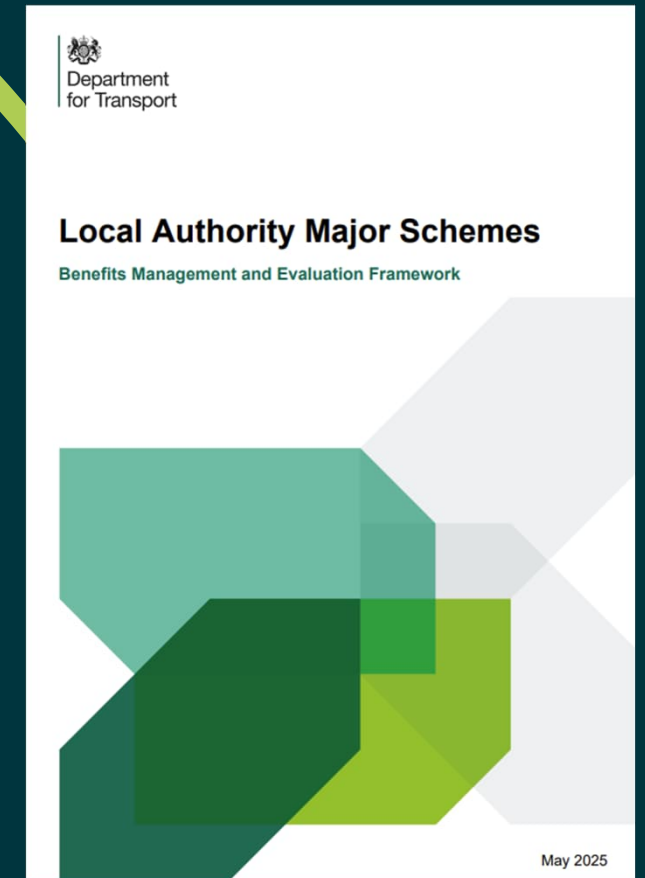


Getting more from Monitoring, Evaluation & Benefits Management

The Major Scheme Benefits Management and Evaluation
Framework (May 2025) – Keeping your work off the shelf...

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Introduction

- **Benefits Management:** The identification, quantification, analysis, planning, tracking, realisation and optimisation of benefits (measurable changes that a project seeks to deliver)
- **Evaluation:** The systematic process which examines the effectiveness of a project; this can include how it was implemented, what effects it had and why
- **Monitoring:** Supports both processes
- Both are intended to ensure that projects deliver their intended outcomes

Introductions



Neil MacDonald
Technical Director

**Monitoring and
Evaluation Technical
Lead, UK & Ireland**

Birmingham



Katrina Keddie
Associate Director

**Senior Monitoring
and Evaluation Lead,
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Manchester

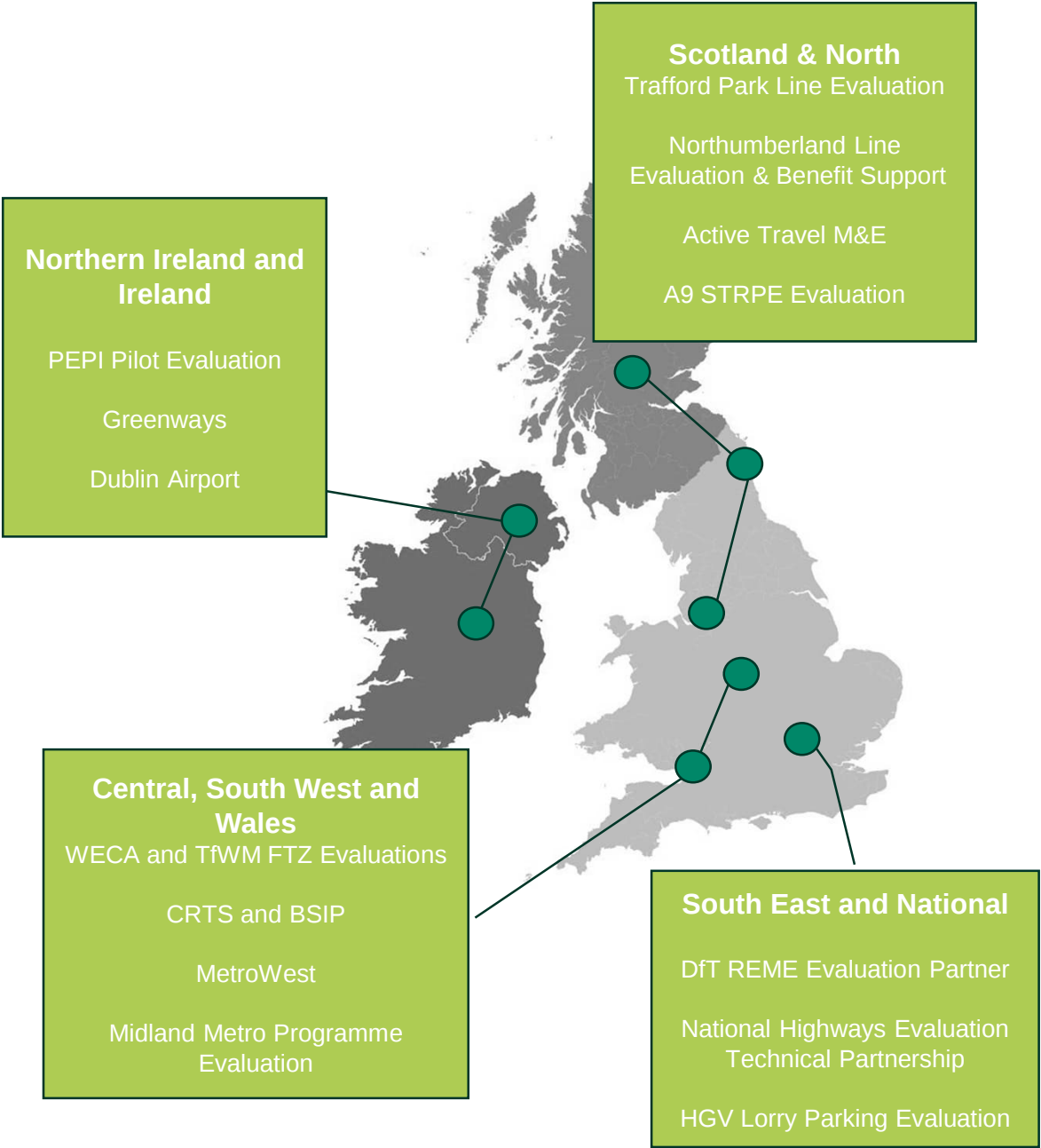


Richard Redfern
Technical Director

**Executive Sponsor
for Monitoring and
Evaluation Lead, UK
& Ireland**

Bristol

*Together, we help to empower clients to make
better decisions through a data driven
understanding of what works (and what doesn't!)*



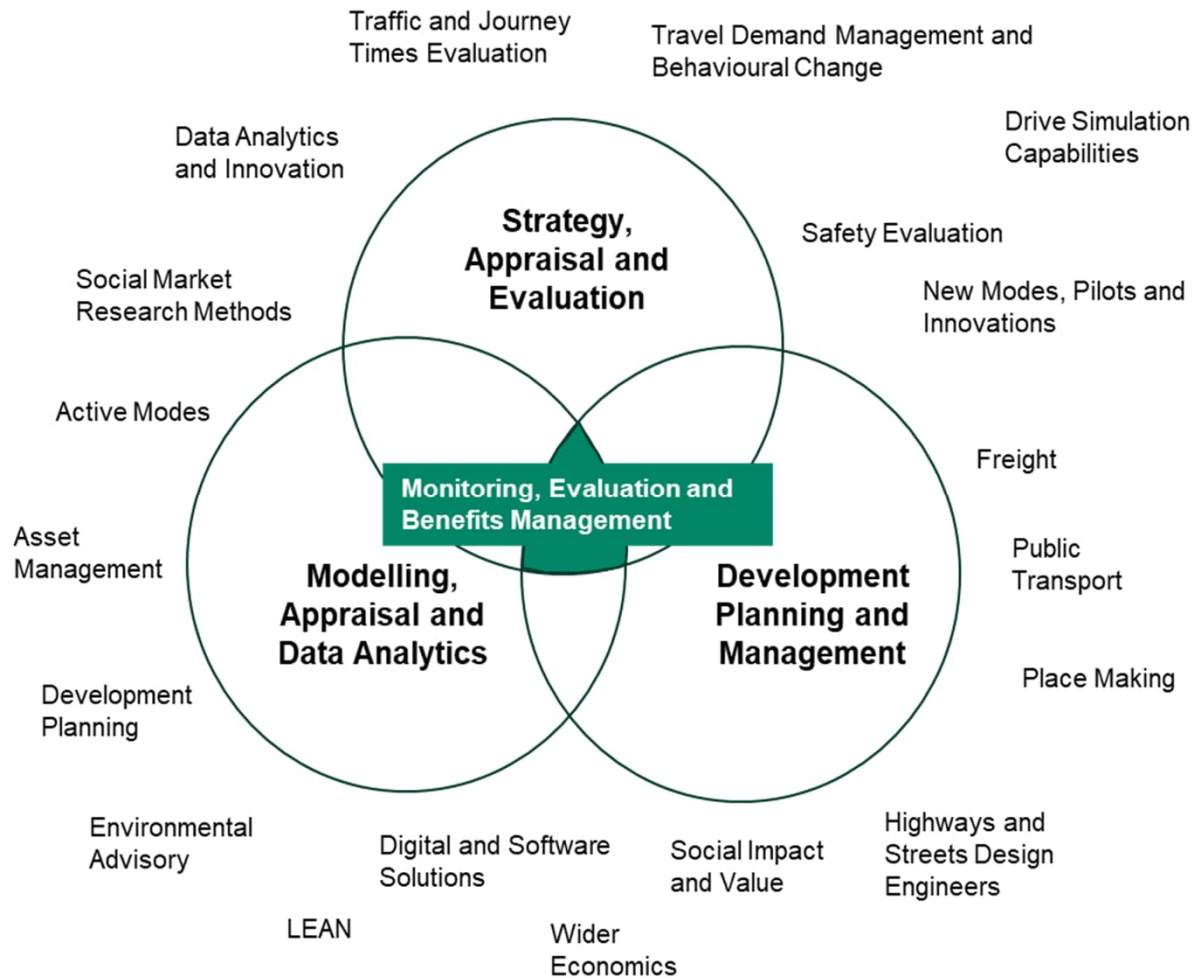
Senior Decision Maker or
End User

LA Commissioner of Evaluation
(LA Project Manager)

Practitioner of Evaluation

Other

Presentation Overview: What will we cover today?

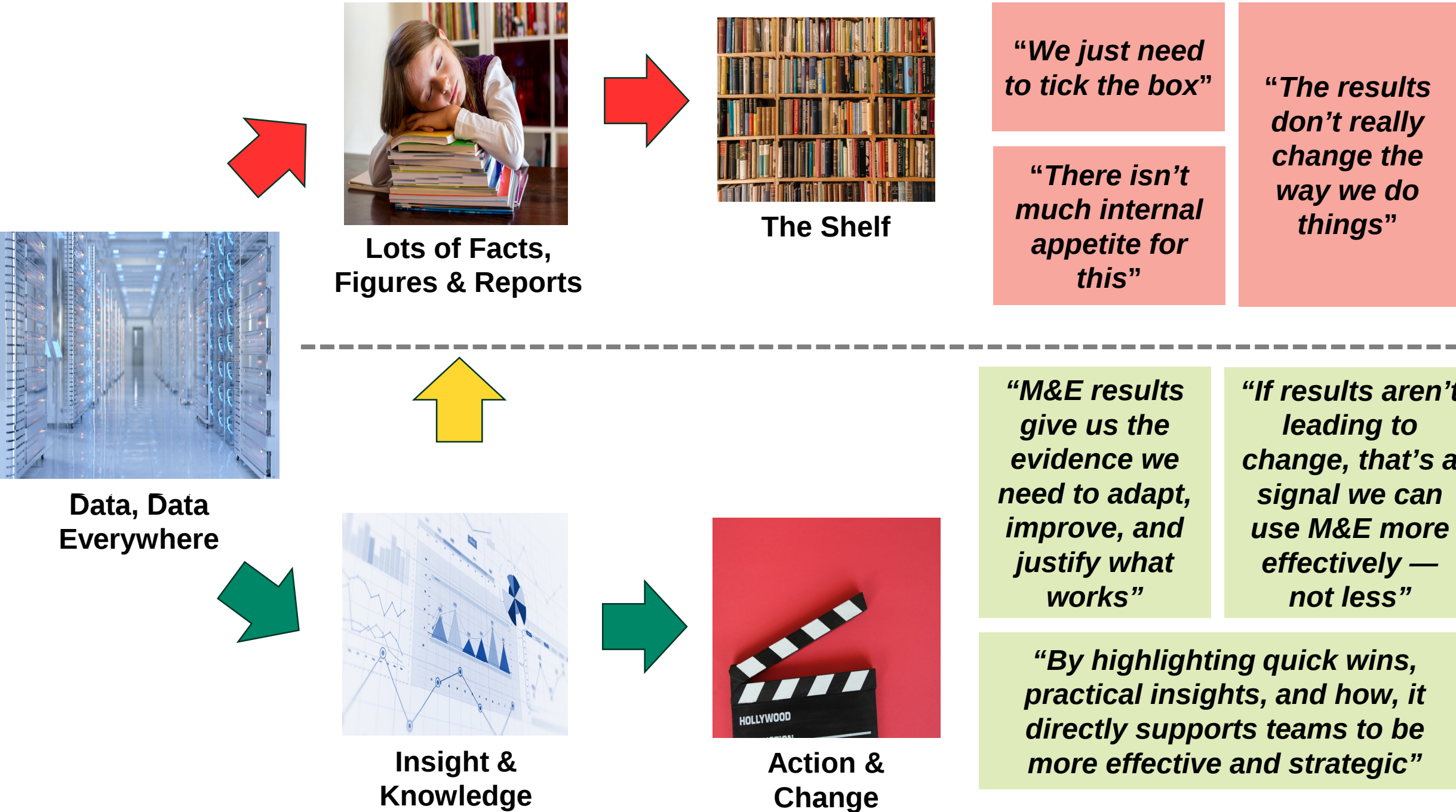


- **Introduce some of the key changes and their practical implications (May 2025)**
- **Share some practical insight into undertaking Monitoring, Evaluation and Benefits Management Activities with impact**
- **Discuss the call to action**

<https://www.menti.com/alxgrkon352b>

Use Code: 2568 4710

From Data to Shelf? Time to shift our mindset?



Snapshot Key Changes and Implications

- Updated framework for local authority major schemes, to set out the scope and requirements for the benefits management and evaluation of local authority major schemes
- New supporting materials, including report templates and example logic maps
- Aimed at local authority scheme promoters and relevant stakeholders, such as consultants
- Builds upon the 2012 framework for local authority major schemes.
- The framework has been authored by DfT analysts (social researchers, transport modellers and economists), and has undergone external peer review

Source: Presenting the 2025 Local Authority Major Schemes Framework (Hugh Hammond, Rosie Bain)

Delivering a better world

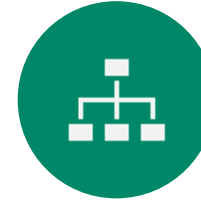
A snapshot of the key changes – Department for Transport Messaging



A clear set of **definitions** of relevant terms and concepts to enable a shared understanding between professionals with different backgrounds



A recommendation to adopt a **joint benefits management and evaluation approach**



Improved flexibility so that plans can be tailored to specific scheme objectives and characteristics



Updated guidance on the **selection and design of benefits management and evaluation approaches** in a local authority major schemes context



New guidance on how benefits management and evaluation activity relate to transport appraisal and development of the business case



New guidance on **evaluation of outturn value for money**



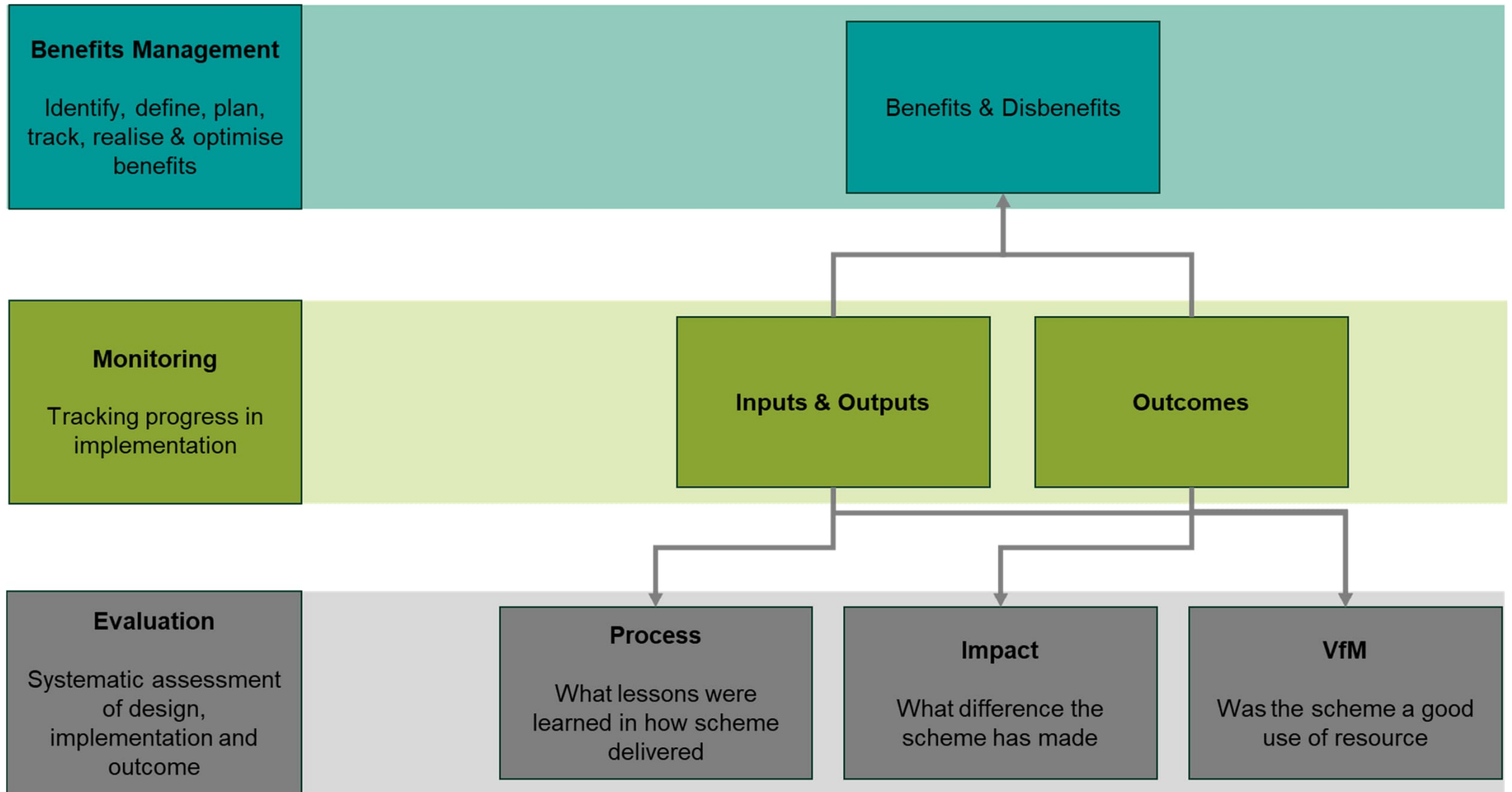
A set of **suggested metrics to promote consistent data collection** across local authority major schemes



Increased support for scheme promoters to meet the framework's requirements, including resources such as report templates

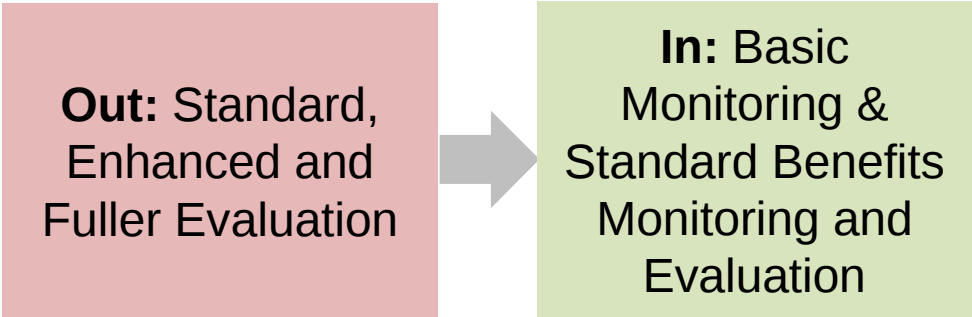
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An overview of the Framework Expectations

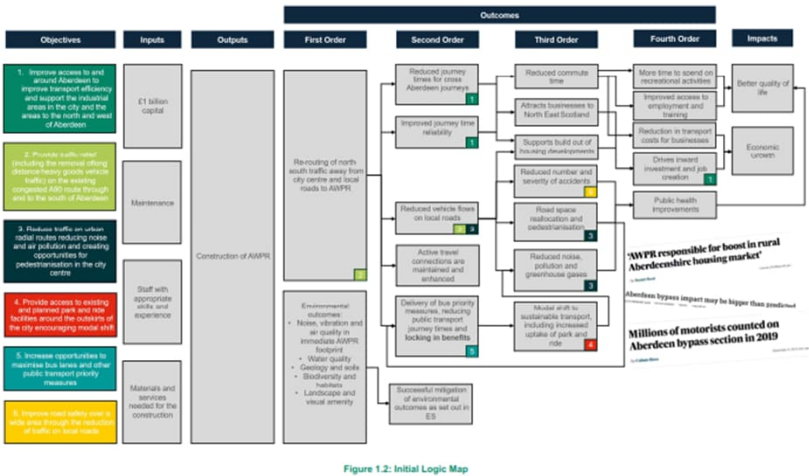


Some of the take aways...

2



5



3

Clear signal to Monitoring, Evaluation and Benefits Management as capital expenditure and expectation to retain budget (Para 2.3-2.6)

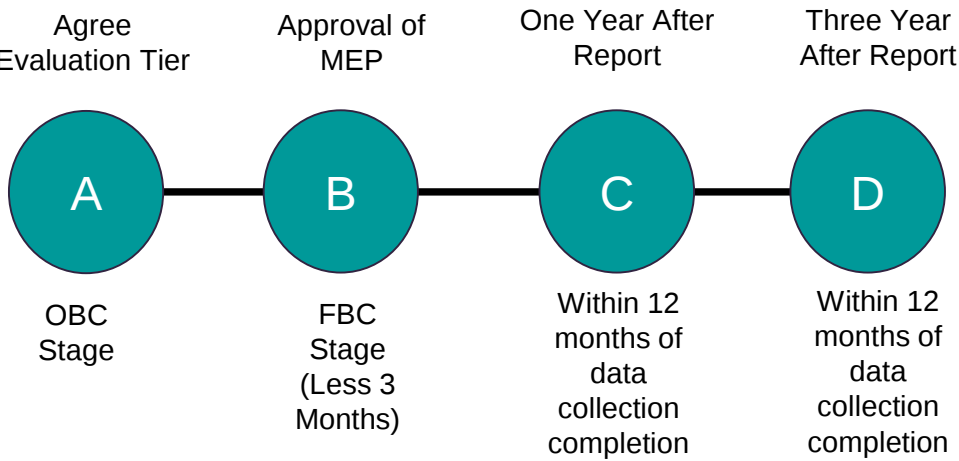
Strong focus on use of Theory of Change

6



Templates available to guide reporting expectations

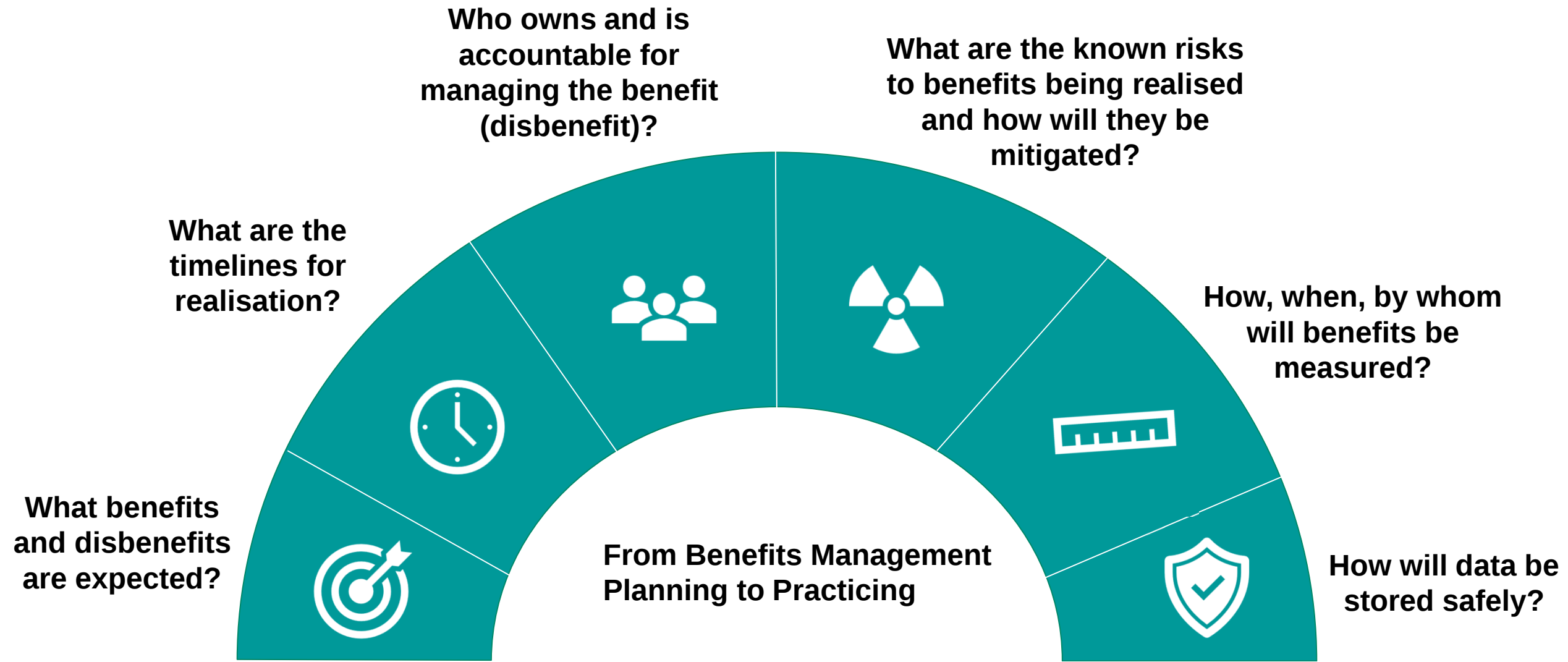
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7

Pragmatic guidance on specific evaluation methods, counterfactual and modelling expectations

8 The Benefits Management Bit...



An overview of the Framework Expectations

9

Benefits Management, Monitoring and Evaluation Plan

Year 1 Report

Year 3 Report

Scheme Context and Background		
Scheme Objectives and Theory of Change		
• Benefits Management Objectives and Research Questions • Resourcing and Governance • Project Plan • Dissemination Plan	• Scheme Inputs and Costs • Scheme Outputs • Early Lessons Learned and Process Evaluation • Planned Data Collection for Year 3 Report	• Research Questions • Scheme Outcomes and Impacts • Value for Money Evaluation • Summary and Conclusions <i>“You have creative licence to design what works for your organisation”</i>

10

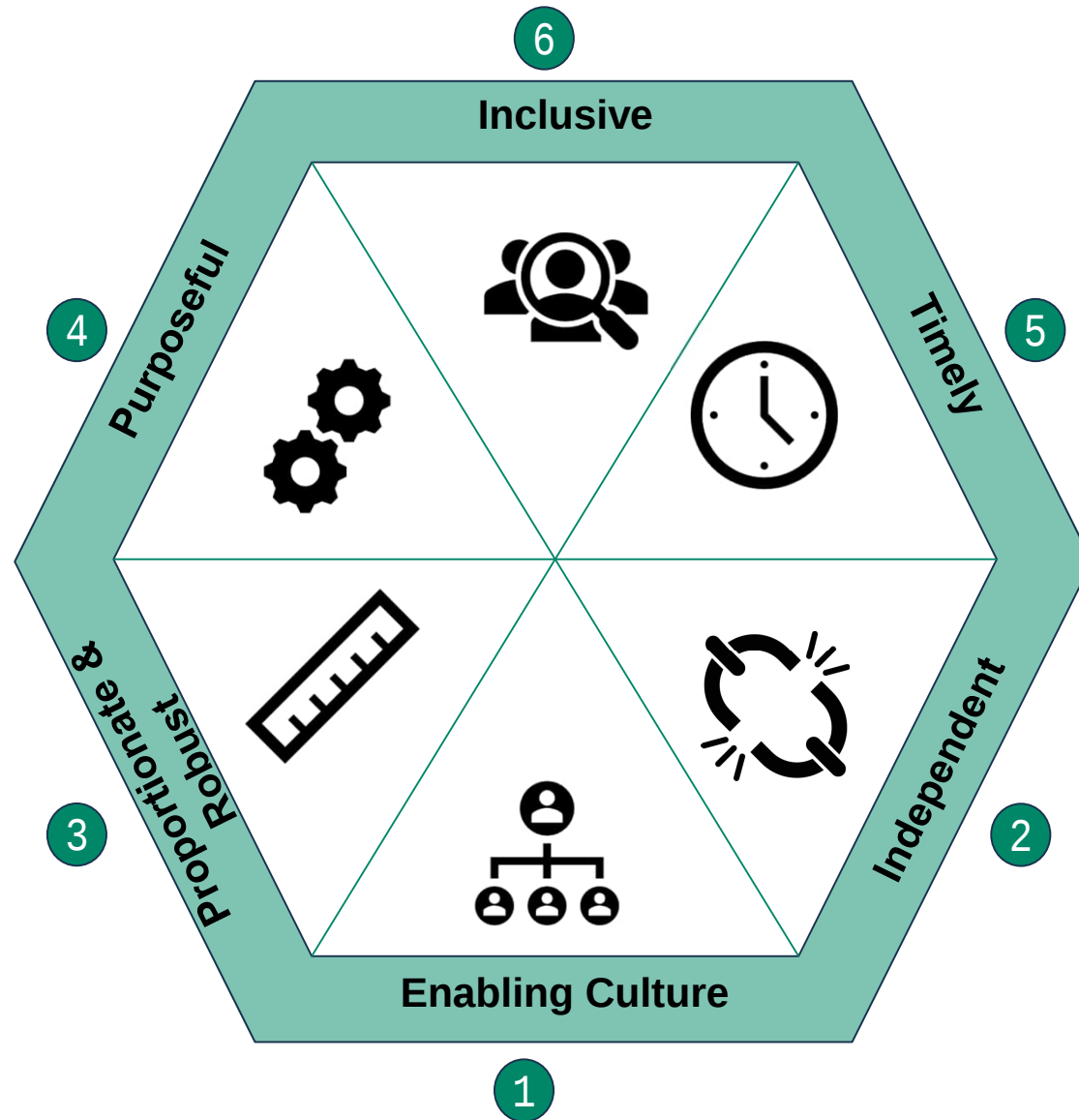
Explore your own organisational systems and operational data							
Project Data	Carbon	Air Quality	Noise	Biodiversity	Safety	Safety	Local Econ. Impacts
Backfill the Gaps (Other Secondary Data Sources and Primary Research – Engage your stakeholders/beneficiaries)							

Lots of pointers to data metrics and supplementary guidance

How to keep outputs off the shelf

Department for Transport (DfT) Local Authority Major Schemes:
Benefits Management and Evaluation (May 2025)

What is Successful Evaluation and how might we get there?



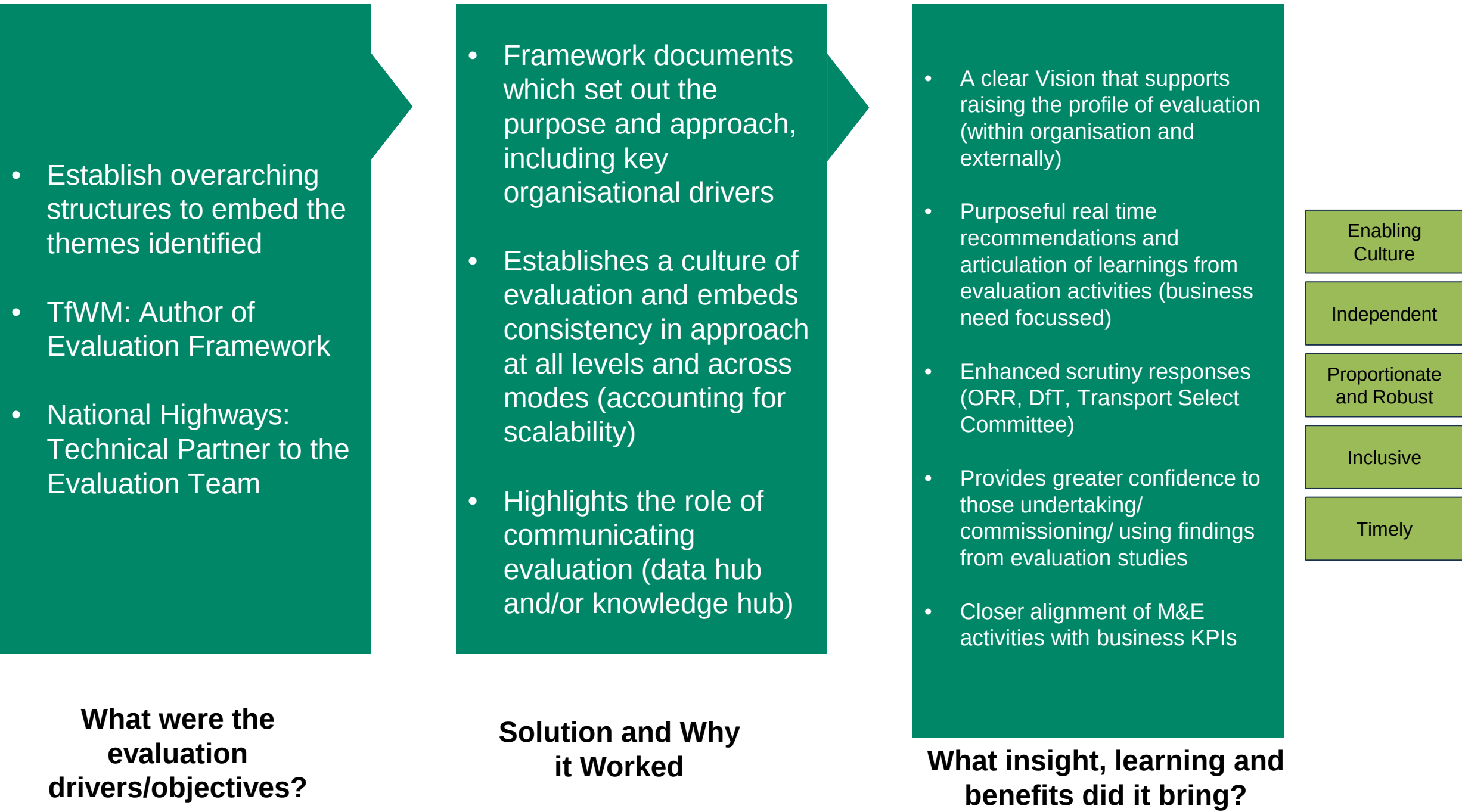
- Allows for confident accountability (when underpinned by strong quality assurance)
- Contributes to future decision making and investment choices
- Stops us making bad investments and reduces scope for waste
- Helps improve processes and systems (stronger/faster)
- Drives knowledge and learning

Tick the
box

Adopt Best
Practice

Develop New
Best Practice

Case Study 1: Evaluation Frameworks & Independent Partners



Case Study 2: Active Travel Scheme Evaluation Design

- Scheme-specific MEPs for several active travel schemes in Bolton in line with regional (Transport for Greater Manchester) as well as national guidance



What were the evaluation drivers/objectives?

- Succinct MEPs with common structure to build familiarity and ease of navigating
- Consistency in design enables (in time & if desired) aggregation of findings across schemes
- Synergy with accompanying Business Cases to ensure MEPs reflect strategic and economic drivers
- Collaborative planning to build support for proposed approach and focus on the intended outcomes of the scheme to maintain proportionality

Solution and Why it Worked

- Development of the evidence base to build public confidence in active travel
- Data collection outputs to support other transport planning applications
- Enabler of useful evaluation (Prompt for Baseline data collection to be undertaken so before and after comparisons will be possible)

What insight, learning and benefits did it bring?

- Enabling Culture
- Proportionate and Robust
- Purposeful
- Timely

Case Study 3: Worcester Southern Link Road 1YA Evaluation



- Evaluation evidence sought on capacity impacts, economic and housing growth impacts, flooding impact and accessibility impacts

What were the evaluation drivers/objectives?

- Proportionate approach taken, particularly as this was the 1YA evaluation
- Strong DfT Dialogue and research objective focused
- Independence for the process evaluation
- Proportionate engagement with local communities and stakeholders to support the impact evaluation, particularly qualitative topics (recognized aspects of best practice)

Solution and Why it Worked

- Strong and relatively non-contested submission of 1YA report to DfT
- Customer insight - Stronger understanding of Active Travel needs in the area
- Bespoke recommendations on how to tighten up business case assumptions

What insight, learning and benefits did it bring?

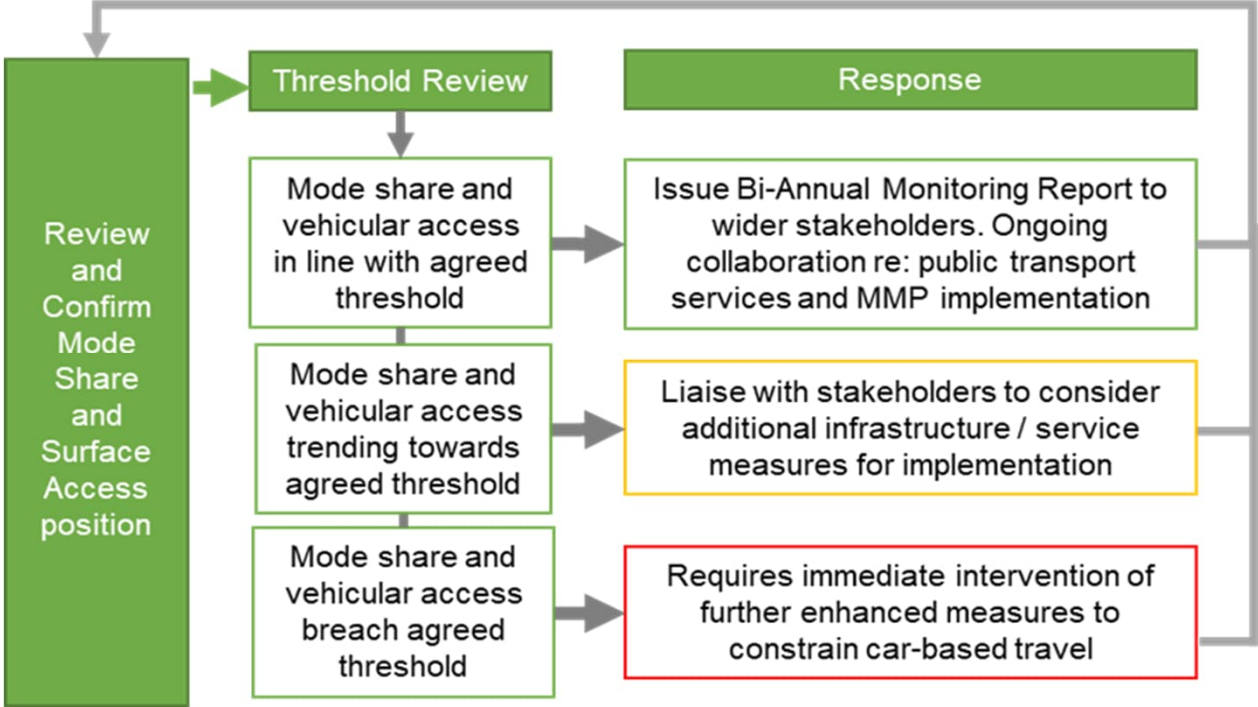
- Independent
- Proportionate and Robust
- Inclusive
- Timely

Case Study 4: Development Planning Monitoring Tool (Dublin Airport, Transport Infrastructure Ireland)

- Framework to oversee operating performance of the transport network surrounding Dublin Airport as the airport grows
- Supercedes use of a passenger cap as a means of determining transport network conditions, with a more structured, robust, multi-modal and live transport monitoring framework

- Two tiers of transport monitoring indicators, with thresholds defined
- Defined management process for ongoing use

- Proactive & transparent management of transport network with a prompt response when mitigation actions are required – *application for monitoring and managing development and growth more broadly (S106?)*



- Enabling Culture
- Independent
- Proportionate and Robust
- Purposeful
- Timely

What were the evaluation drivers/objectives?

Solution and Why it Worked

What insight, learning and benefits did it bring?

Concluding Remarks and Discussion

Key Messages...Our Call to Action...

1

Don't see M&E outputs as the end game or the box to tick – it can be formative (Learn as you go)

2

Be Selfish - National guidance doesn't have to be analogous with a straight jacket (Evaluate with purpose, proportionality and robustness)

3

Use organisational frameworks/vision to achieve cost efficiency and optimise impact of M&E outcomes

4

Follow the process – take time to plan early to optimise added value

5

Work with your stakeholders and beneficiaries – they provide free intelligence and help validate findings

Documents



[Local authority major schemes: benefits management and evaluation framework](#)

PDF, 1.43 MB, 68 pages

This file may not be suitable for users of assistive technology.

► [Request an accessible format.](#)



[Local authority major schemes: benefits management and evaluation plan template](#)

MS Word Document, 297 KB

This file may not be suitable for users of assistive technology.

► [Request an accessible format.](#)



[Local authority major schemes: year 1 benefits management and evaluation report template](#)

Available at:

<https://www.gov.uk/government/publications/monitoring-and-evaluation-framework-for-local-authority-major-schemes>

Are your reports on the shelf? If so, how do we ensure they don't get there?

What do you regard as the biggest practical barriers to undertaking purposeful, proportionate and robust evaluation?

Where has monitoring and evaluation been applied and/or made a difference in your organisation?

Is it time to change the terminology?

What evidence/knowledge gap could benefits management, monitoring and evaluation fill?

Opportunities for the MHA+ Community

Common Monitoring, Evaluation and Benefits Management Framework

Common Data and Knowledge Share Platform

Monitoring, Evaluation and Benefits Management Community

Evaluation and Benefits Management Maturity Assessment

AECOM Delivering a
better world