Frequently Asked Questions: Online Monitoring, Evaluation, Reporting and Improvement Tool (MERIT)

Version: January 2015. This document will be updated from time to time

These FAQ are primarily for the information of funding recipients.

MERIT background

1. Why did reporting move online?

Organisations and individuals who receive funding under Australian Government NRM programmes are required to report regularly to the Department on the progress of their projects. Previously, this reporting was done on paper or word processing based reporting forms. This often caused variation in reporting between NRM projects and programmes. In turn, this made it difficult to collate information to tell a whole-of-programme story about the impact of NRM investments.

MERIT (the monitoring, evaluation, reporting and improvement tool) is an online reporting system that simplifies and streamlines reporting across Australian Government NRM programmes. MERIT is a collaborative effort between the Department and the Atlas of Living Australia (www.ala.org.au) and was launched in December 2013.

MERIT:

- simplifies reporting for funding recipients, enables a more complete project record and shows a direct link between project activities and biodiversity conservation
- allows greater transparency and increased efficiencies for the Australian Government
- enables project data to be used by the Australian Government for more comprehensive reporting of programme achievements and high level strategies (e.g. Australia's Biodiversity Conservation Strategy and the State of the Environment Report)
- allows for information to be standardised across programmes and project stories to be made available for public learning
- enables MERIT users and the public to search for projects in their area or projects doing similar work
- responds to funding recipient feedback that they wanted to know what is happening with the information they provide to the Department in their reports.

2. What are the key features of MERIT?

Key features of MERIT include:

- The ability for funding recipients to provide information and submit data related to their project/s, such as:
  - Output data (e.g. number of trees planted);
  - Qualitative outcome data (e.g. change in vegetation condition using the Australian Government's Ecological Monitoring Guide or state-based vegetation condition methods);
  - Photos, videos and other stories about projects; and
  - Development of a MERI plan.
- A map showing the location and basic details of all projects, with the ability to add mapping layers for analysis purposes.
- Project dashboards showing information on the progress of projects.
- A publicly available programme level dashboard displaying aggregated project data.

3.   What information is public?

'Public' information is viewable by anyone who visits the MERIT website. Currently, public information is limited to:

  ✤   MERIT homepage, including the Map, Projects and Dashboard tabs

  ✤   Individual project's Overview tab, which displays basic project information that is already publicly available through the Department's website.

Eventually, the majority of data and information reported will be presented publicly except for sensitive data such as sacred sites and threatened species locations. Examples of information to be made public may include reported data, photos and maps.

4.   What resources and support are available for MERIT users?

There are several ways to get help with using MERIT:

 * **User guides** - available at: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides.

 * **MERIT Demonstrator Project** – this project has been set up in the MERIT 'test' website so that MERIT users can explore the range of activity forms currently available. A sample MERI plan is also included in the demonstrator project. Users will need to log in with the credentials noted on the project's overview page in order to view everything in the project. The demonstrator project is available at: https://fieldcapture-test.ala.org.au/project/index/8b87b9d5-fc24-4d6f-b526-bf8aef4a8754

 * **MERIT Schema** – this document contains every field description, data use and type for each activity form in MERIT. It also lists the outputs that are currently used for reporting. The Schema can be accessed from the 'Project Documents' on the *MERIT Demonstrator Project* overview page.

 * **MERIT Ready Reckoner** – a three page summary table of each activity, minimum data requirements (mandatory fields), target measures (outputs) plus more. The Ready Reckoner can be accessed from the 'Project Documents' on the *MERIT Demonstrator Project* overview page.

 * **Activity Family Tree** – a one-page table demonstrating the temporal relationship between activities. Commence reading the table from the centre 'Primary Activity' column. Activities to the left are those you may choose in preparation for the primary activity, including baseline data. Activities to the right are those you may choose for monitoring/maintenance of the activity, including comparison to baseline data. The Activity Family Tree can be accessed from the 'Project Documents' on the *MERIT Demonstrator Project* overview page.

 * **Departmental grant managers** – Funding recipients with further questions about using MERIT can contact the Department's grant managers and regionally based

staff (for regional staff contact details see: http://www.nrm.gov.au/contact/nrm-officers)

- **MERIT mailbox** – funding recipients should contact their Departmental grant manager in the first instance. Contact the MERIT team at merit@enviroment.gov.au for further technical support, or to provide feedback on MERIT.

Reporting in MERIT

5.   Who has access to my project?

Only a few people within an organisation (e.g. those identified on project applications) have administrator rights to change and submit reports to the Department. Administrators can also grant 'admin' or 'editor' access to other employees in their organisation or to sub-contractors. Those with 'editor' access can input and edit data, but not submit reports to the Department. Instructions on allocating project access are in the MERIT user guide: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

6.   What information is required in project reports?

Funding recipients are required to submit regular reports on the progress of their project/s.

For previous Australian Government NRM programmes, progress reporting is defined by the activities to be undertaken as per each project's MERI plan. The project MERI plans set out the outcomes, outputs (deliverables) and activities (including monitoring and evaluation) for your project. You will be required to report against each of these aspects of your project:

- **Outcomes**: Reporting on progress towards outcomes may require that you provide evidence and/or an assessment of how your project is progressing. As outcomes are often only observable over a longer term period it may not be possible for you to report conclusively against the outcome. However, where evidence (through monitoring and evaluation) can be used to show that the longer term outcome is on track or likely to happen, this should be included. For example, seedling survival rates may demonstrate progress towards establishing vegetation, and changes in pest density may show that conditions are improving for species targeted for conservation. The extent that you will be able to report against outcomes will depend on how you plan for this in your project MERI plan.

- **Outputs**: Reporting on outputs is required as a means of demonstrating that the project is delivering on the funding agreement and project MERI plan. For example, output reporting may include the area of revegetation completed, area of weed treatment or number of stakeholder engagement activities undertaken.

- **Activities**: In the activity schedule of your project MERI plan you will have detailed the activities that you will undertake for each six-monthly period. You will be required to report the outputs that are associated with each of these activities, noting which ones

were completed, which ones were not, and will have the opportunity to provide any additional information about the activity.

- **Key evaluation questions:** Your project MERI plan also set out some key evaluation questions to be answered throughout and/or on completion of your project. Each reporting period you will be able to report against these evaluation questions.

- **Risks and threats**: Details of risks and threats to the project and mitigation strategies being used to address them should be entered into MERIT. These should be updated at each reporting period or as required.

7. Can reporting forms and my MERI plan be printed?

Funding recipients are able to print both blank and completed forms in MERIT, as well as the project MERI plan. Blank activity forms can be printed and used in the field, if preferred. Use the print function on your browser to print activity forms containing data or the MERI plan. Instructions on printing are in the MERIT user guide in *Section 5.2 – Creating or Editing the MERI Plan*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

8. Can I view a summary of activities in a stage?

Stage summaries collate key activities and outputs for previous stages into the one document. MERIT users with access to a project can view and print out stage summaries for that project. Instructions on how to access project stage summaries are in the MERIT user guide in *Section 12.1 – Stage Summary*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

9. Why can't I enter data into my activity forms?

Your project plan is likely 'unlocked' to enable editing by project members. You will need to submit your plan for approval by your grant manager, and they will need to approve it before you can commence or continue adding data to your activities. Instructions on editing and submitting your plan in MERIT are in the MERIT user guide in *Section 5 – Create/Edit a Project Plan* and *Section 6 – Submit a Project Plan for Approval*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

10. Do activities in MERIT have to be linked to a site?

All on-ground activities in MERIT should be linked to a site. Activities such as management plan development do not have to be linked to a site, but it is preferred that all activities are linked to a site where possible. Instructions on assigning a site to an activity are in the MERIT user guide in *Section 7.5 – Add site to an activity*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

11.   Does MERIT capture qualitative project outcomes?

The reporting forms in MERIT include comment boxes to capture qualitative data. In addition, the Progress, Outcomes and Learning – Stage Report form includes areas for funding recipients to outline project progress including the lessons they have learnt during a stage, successes and challenges, and reasons for the level of success experienced. For example, if a project didn't achieve all that it set out to due to unforeseen circumstances, like extreme weather, an explanation for this can be provided.

At the completion of a project, funding recipients are required to describe project outcomes, lessons learned, and address the key evaluation questions (impact, effectiveness, efficiency and appropriateness) outlined in their project MERI plan.

MERIT also allows funding recipients to report on site condition monitoring and visual site assessment through photo point and video monitoring.

12.   Will I have to do my project financial reporting through MERIT as well?

Basic budget data is displayed but due to the public nature of MERIT it cannot be used for project financial reporting at this stage. Project financial reporting will occur separately to project output and outcome reporting. Financial reporting will continue to be managed by the Department's grant managers directly with funding recipients.

The only financial information which will be included in MERIT is the total amount of funding allocated to a project.

13.   Can I use MERIT at any time?

MERIT allows funding recipients to record and upload data about the progress of their projects on a continual basis. Reports can only be submitted to the Department at the conclusion of each project stage (i.e. after 1 January or 1 July).

MERIT system capabilities

14.   Which internet browser should I use to view MERIT?

While MERIT is available through all browsers, including Internet Explorer, it achieves best performance with Google Chrome or Mozilla Firefox.

15. Will we be able to upload data from our own reporting system directly into MERIT?

The Department is working to enable bulk data upload from a range of existing NRM databases. Because of the large number of databases used by the NRM community, this functionality will be available sooner for some systems than others.

16. How do I create a site in MERIT?

There are two main options for representing your locations/sites spatially. You can either import shapefiles created by GIS software directly into MERIT using the 'Upload a shapefile' function, or you can draw your own shapes using the MERIT tool. This latter function is simpler if you do not have access to GIS software, although the MERIT tool provides less functionality and precision. You are encouraged to use GIS software if possible. Instructions on creating sites are in the MERIT user guide in *Section 7 – Add a Site to a Project*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides.

Please note: MERIT can only show points or shapes for a site, not lines. For example, if you try to load a fence line, it will be displayed in MERIT as either a point or a polygon (shape), not a single line. This is an identified enhancement for future iterations of MERIT.

17. What spatial information enhancements are planned for MERIT?

It is hoped that future iterations of MERIT may include the potential to have layer switching, where all the shapefile layers are displayed in a list and layers (such as sites, zones, wetlands, etc) can be switched on/off.

18. Can MERIT store and display photos and videos?

Funding recipients can upload photos and videos to their project page in MERIT. Photos and videos can also be uploaded as part of photo point monitoring, to show the change in a site over time. Photos and videos can also be used to help demonstrate project activities, such as community engagement activities or project works being undertaken. Instructions for uploading photos, videos and other documents to projects are available in the MERIT user guide in *Section 11 – Project Reporting – Upload a Document*: http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides

19. Can data, graphs or the Gantt chart be extracted from MERIT?

The programme level dashboard located on the MERIT home page displays aggregated output data to provide an overview of what all projects have delivered. People visiting MERIT can filter data in the dashboard to search for what a programme or region, for example, has

achieved to date. The programme level dashboards only display data sourced from approved reports.

Project members may request raw data from their project/s by contacting their Departmental grant manager or emailing merit@environment.gov.au.

The gantt chart and graphs from dashboards cannot be downloaded at present, however they can be taken as a screen shot or printed using the browser print function.

20. When will forms for state based vegetation surveys be ready?

Forms for state based vegetation survey methodologies are being developed and will be included in MERIT in 2015. Funding recipients can collect vegetation condition data using relevant methods and attach files in MERIT for later upload. This reporting is only necessary where it has been outlined in the project MERI plan.

Assessment methodologies that will be included in MERIT forms are:
- Habitat Hectares
- TasVeg (coming soon)
- BioMetric
- Bushland Condition Monitoring
- Native Vegetation Condition Assessment and Monitoring for WA
- BioCondition Site Assessment (v2.1).

Additional methodologies may be included in MERIT in the future, based on feedback from funding recipients.

21. What functions will be available in MERIT in future?

The Department is continually looking at ways to improve MERIT and a number of enhancements have already been implemented based on user needs and feedback. Please visit the 'About' page on MERIT for current information on enhancements, fixes and news: https://fieldcapture.ala.org.au/home/about. Feedback and suggestions are welcome and can be forwarded to Departmental grant managers or by emailing merit@environment.gov.au

22. I have slow or no internet connection. Can I use MERIT?

The MERIT website has been optimised to operate with limited bandwidth, e.g. by containing static maps where possible to reduce the size and complexity of the site.

MERIT includes printable forms so you can print each form, fill it out in the field and enter the data into MERIT when you have internet access. Please contact your Departmental grant manager if your internet access is very limited.

23. Will MERIT be able to accept data after my project funding has finished?

The Department's priority in developing MERIT is to enable more efficient and useful monitoring and reporting of funded projects. However, there is great value in continued monitoring and reporting to further understand the longer term outcomes of its environmental funding.

In the future, we will look at how MERIT can be set up to allow funding recipients to continue to use the system for tracking environmental outcomes after their project funding has finished.