

Towns Fund Monitoring and Evaluation Guidance

Version 1, issued 1st April 2021

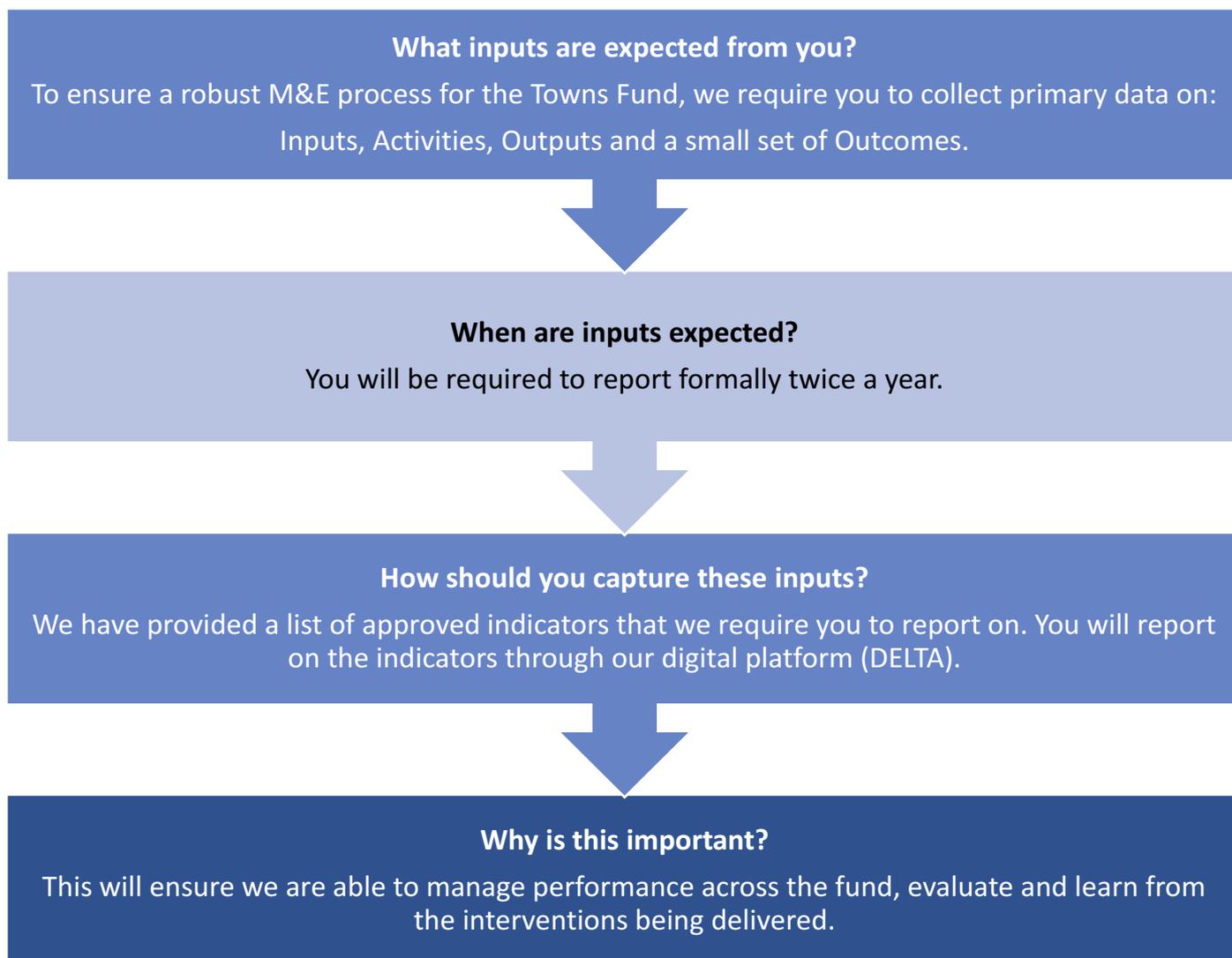
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1. Introduction

- 1.1. The Government launched the Towns Fund to invest in towns and high streets across England as part of its plan to level up our regions. This brought together the Town Deals and the Future High Streets Fund. 101 towns were selected to work with Government and agree a Town Deal. 72 places were successful in securing Future High Streets Fund funding.
- 1.2. As places move into the delivery phase of the fund, monitoring will be a key aspect to ensure we can track progress of the fund and the projects it is delivering. It will also provide the opportunity to start learning about the impacts of interventions being delivered in places. It is our aim to create a robust process while minimising the burden on local authorities.
- 1.3. This document sets out the monitoring and evaluation (M&E) requirements of both the Towns Deals and Future High Street Fund, by the Ministry of Housing, Communities and Local Government (MHCLG). It details our mandatory reporting requirements for the funds, the frequency of when we expect this to be collected and how you should do it. This will ensure we are able to standardise and aggregate data to allow for robust comparison and learning.
- 1.4. While we have set mandatory inputs, activities, and outputs we require you to report on, you can select further indicators most suited to your project mix. There is also the opportunity for you to carry out your own monitoring and evaluation specific to your interventions and place.
- 1.5. The reporting of data will be used by MHCLG to understand and manage performance across the fund. Using the indicators set out in this guidance, which include clear definitions and consistent metrics will allow for an open conversation on performance throughout the programme lifecycle.
- 1.6. This guidance is aimed at Local Authorities. Where we say 'you', we are referring to the Local Authority. For the purposes of this document, towns and high streets are referred to as "places" throughout. Towns Fund refers to both the Town Deals and the Future High Streets Fund. Where an area of this guidance is only relevant to a Town Deals / Future High Streets Fund place respectively, it will be stated.
- 1.7. MHCLG will also assist you in understanding and interpreting this guidance if needed.

Figure 1: Overview of M&E for the Towns Fund



Section A:

Background (for information only)

2. Our approach to M&E

The M&E opportunity

- 2.1. Our towns and high streets are diverse and those in need of support have been shown to have considerable existing assets and strengths. These include valued natural and environmental assets, a strong local identity and sense of place, existing physical capital and proximity to major hubs or ports. Despite these strengths, places have faced a number of significant challenges to growth and Covid-19 has exacerbated these further.
- 2.2. The Towns Fund provides a unique opportunity to better understand what policy interventions are most effective in driving economic growth and living standards at the town level. This improved understanding will rely on the frequent collection of high-quality data to enable the ongoing monitoring of progress and the evaluation of the Fund's impact. This section provides the context to why we are doing this, why we require you to collect data and how this fits in to the wider evaluation of the whole fund.

What is M&E and what will it tell us

- 2.3. Monitoring and evaluation are closely related, and a typical evaluation will rely heavily on monitoring data. Evaluation is a systematic assessment of the design, implementation, and outcomes of an intervention (e.g. programme or project). It involves understanding how an intervention is being, or has been, implemented and what effects it has, for whom and why. It identifies what can be improved and estimates its overall impacts and cost-effectiveness.
- 2.4. Monitoring observes programme implementation and performance through a continuous and systematic process of collecting data. Monitoring will demonstrate what has been delivered and evaluation will assess its impact. For further information on M&E, please see [‘The Magenta Book’](#).

M&E findings and future policy

- 2.5. M&E of the Towns Fund will ensure that Government has better evidence of what policy levers work best to improve connectivity, spatial organisation, skills, and local authority capability in our towns. There is not an established policy ‘playbook’ for how to turn around places in decline, so the TF intervention framework was broad and assessment criteria designed to allow towns the flexibility to choose investments that were the best fit for their context. This means, however, that it is particularly important we then learn from these interventions about what works. And at the local level, we want to help places understand what interventions are having positive impacts for their residents, where adaptations can be made and how best to support long term economic growth in towns and high streets that ensures future sustainability. All of this will help central and local government to learn from and create policies and interventions which continue to deliver sustainable growth and tackle deprivation in towns.
- 2.6. We already know that many of our places are seeing a decline in footfall, a lack of investment and slow business growth. Residents have negative perceptions of their area, there are higher levels of deprivation and many have low employment levels. A continuous cycle of monitoring will help us evaluate how we address and improve on these issues.

M&E and accountability

- 2.7. It is also important we ensure accountability for public funding. A rigorous M&E framework will ensure MHCLG can hold places to account for delivering agreed projects. It allows the department to be accountable for delivering the funds and realising the policy aims for which funding was allocated.

2.8. We are also adopting the recommendations of the [Public Accounts Committee](#), which recommended a rigorous M&E framework and that we provide an annual assurance update on the funds.

Our approach

2.9. Our overall approach to M&E for the Towns Fund:

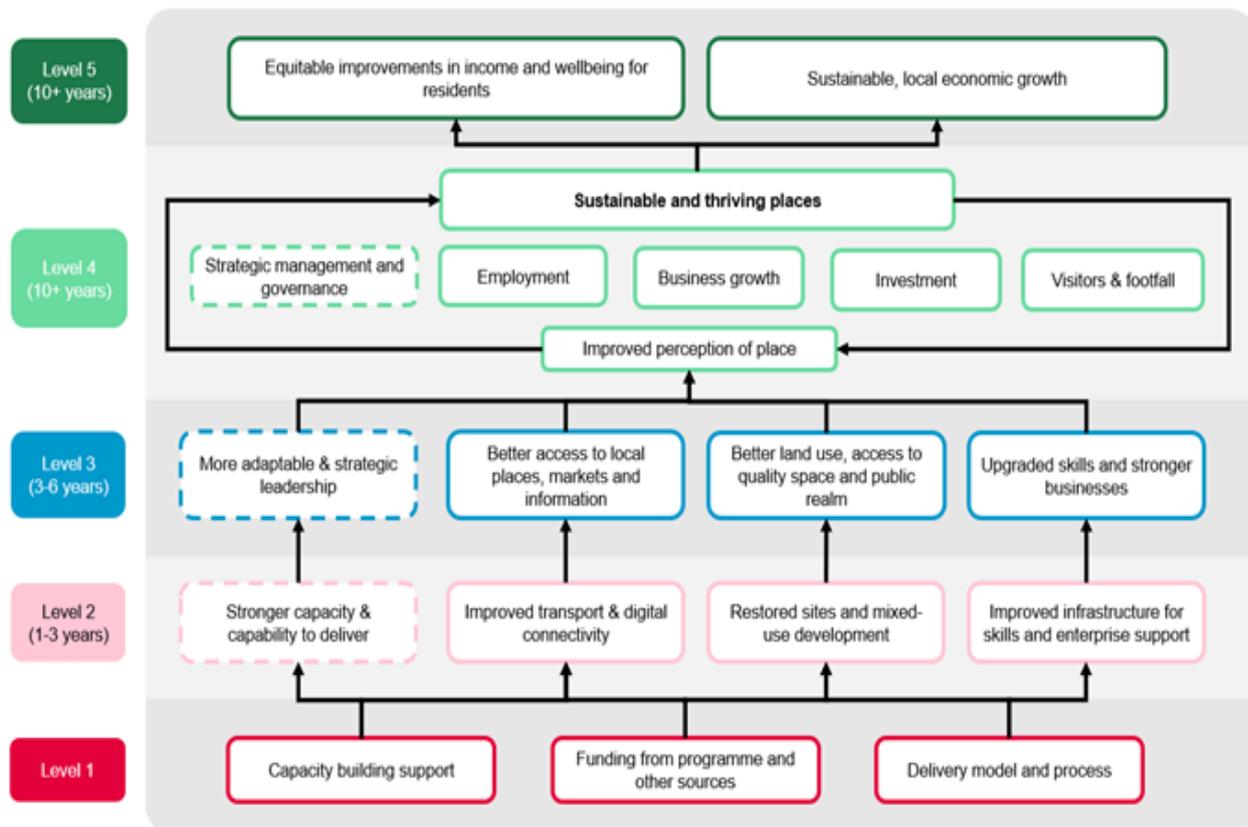
- Will allow an impact evaluation, as well as assessing how and why those impacts were achieved.
- Will produce an integrated picture of both Town Deals and Future High Streets Fund results, while enabling comparison and learning from the differences.
- Will allow evaluation and learning to be shared throughout the programme and at programme end, as well as ongoing monitoring and learning.
- Uses a mixture of methods, including quasi-experimental¹ design and contribution analysis as well as being grounded in an overarching Theory of Change (ToC).
- Includes some standardisation and fixed requirements, to enable comparison and aggregation, while allowing for flexibility.

¹ A quasi-experiment is a type of research design that attempts to establish a cause-and-effect relationship. The main difference with a true experiment is that the groups are not randomly assigned.

3. Understanding our Theory of Change

- 3.1. Our Monitoring and Evaluation Framework is grounded in an overarching Theory of Change (ToC). This covers the Towns Fund (both Town Deals and Future High Streets Fund) and could differ from the ToC set out in your Town Investment Plan (TIPs) or Future High Street Fund business cases. This section provides context to what we are looking to learn from monitoring and evaluation of the fund and how your data collection will help.
- 3.2. The ToC in *Figure 2* is based on a review of literature, conducted by the Towns Fund Delivery Partner. If you are interested in finding out more, please contact towns.fund@communities.gov.uk.
- 3.3. A ToC sets out causal pathways to achieving both funds' objectives, as well as the underlying assumptions. It includes five levels from:
- activities undertaken: (Level 1),
 - through to the outputs they deliver (Level 2),
 - the outcomes achieved (both intermediate and longer term – Levels 3 and 4)
 - the targeted impact (Level 5). Each level includes assumptions underpinning success at different points
- 3.4. You will primarily be collecting data for Levels 1 and 2. This is set out in Section B.

Figure 2: Towns Fund Theory of Change²³



3.5. Level 1: Inputs and Activities (the resources committed and activities undertaken)

² Not all outputs apply to the Future High Streets Fund interventions.

³ Timelines set out in Figure 2 are only indicative and some elements (such as sustainable change under Level 5) will arise much faster than stated.

- **Capacity building support** has been provided to local authorities to identify opportunities, deliver projects and build partnerships with local residents and businesses.
- **Funding from programme and other sources such as the private sector** is expected to enable improvements which provide benefits beyond the fund interventions.
- **Delivery model and processes.** The Towns Fund supports places to recognise their existing assets and challenges. They help them to decide the intervention combination required to promote growth locally. Both funds support places to develop their business cases and other strategies which guide investment.

If the above is assumed, activities are expected to lead to the following outputs.

3.6. Level 2: Outputs (what is delivered or produced)

- **Stronger local capacity and capability to deliver**, including improved skills related to skills gaps, an accessible network of external support or evidence as needed, and structures established to promote community and business engagement.
- **Improved physical access, transport and digital connectivity** such as establishing new or more efficient transport routes, providing alternative modes of transport, upgrading infrastructure to allow greater connectivity, including low carbon and “healthy” transport options, as well as removing obstacles to connectivity.
- **Restored sites and mixed-use development** leading to change in use and increased mixed use space. This includes the promotion of arts and cultural sites as community anchors, potential, tourism and to reinforce local identity.
- **Improved infrastructure for skills and enterprise support**, including for adult education and training providers and providers of business advice, support and networking.

If these outputs are achieved, it is assumed that they will create intermediate outcomes, which occur on the causal pathway to the final outcomes and impacts.

3.7. Level 3: Intermediate Outcomes (the early or medium-term results)

- **More adaptable and strategic local leadership (Town Deals only)**, in terms of better alignment of local funding with town priorities, increased community engagement and involvement of business and other stakeholders in local planning and development, improved efficiency of project delivery.
- **Better access to local places, markets and information**, in terms of reduced commuting and journey times to town centres and places of employment, as well as providing greater access to digital connectivity.
- **Better land use and access to quality space and public realm**, in terms of more mixed-use developments, lower vacancy rates, increased land values and better experience of public space and nature.
- **Upgraded skills and stronger businesses**, in terms of higher numbers of people trained to meet local workforce needs, reduced brain-drain among high-skilled workers and better labour force matching and innovation.

Over time, these anticipated changes will begin a virtuous cycle of development, leading to sustainable and thriving places (Outcomes).

3.8. Level 4: Outcomes

- **Sustainable and thriving places are characterised by:**
 - **Increased employment**, in terms of jobs created and maintained, employment rate, further propelled by investment and business growth in key sectors.
 - **Investment**, from private investors, developers and other public or community sources, catalysed by local improvements, including crowding in of investors, driven by improved perception of place, and profitability of local investments resulting from a range of improvements including agglomeration, improved transport and connectivity.
 - **Business growth**, including a diverse business community and expansion and longevity of existing businesses, supported by investment and perception of place.
 - **Improved perception of place**, including local sense of pride and cohesion and external sense of progress, improvement and dynamism, both driving and building on other improvements.

- **More strategic local management and governance**, to continue to respond and adapt to changing economic circumstances, and actively manage growth and risks, based on local need and evidence.

These changes will contribute to a virtuous cycle and are mutually reinforcing. It is assumed that these improvements will also address the negative social aspects contributing to deprivation of many places, including crime rates and poor mental and physical health. Improvements in these places will further propel this virtuous cycle as places continue to thrive (Impacts).

3.9. **Level 5: Impacts** (the long-term results)

The above shifts represent transformational change at a local level, building on the cyclical nature of improvements described in the outcomes. Over time, this virtuous cycle is expected to contribute to:

- **Equitable improvements in income and wellbeing residents**, assuming that there is a distributional effect to these benefits such that they support the levelling up agenda.
- **Sustainable⁴, local economic growth**, ensuring that local economies are stronger at the systemic level, provided that changes shift fundamental patterns underlying local economies and address previous market failures, and physical improvements are funded and maintained on an on-going basis, and further decline does not occur.

3.10. Although some structural impacts can take upwards of 10 years to materialise, MHCLG recognises that any observed impacts over this time period are less and less likely to have been solely influenced by investment from the Towns Fund interventions. As a result, interim impact evaluations are planned for the end of both Town Deals and Future High Streets Fund programmes, with a full impact evaluation planned for within 3 years of both programmes coming to a close, to maintain robustness of the findings.

3.11. To apply the ToC to the Towns Fund, a **logical framework** has also been produced which summarises the ToC's impact pathways in tabular format. This outlines the assumptions underpinning the results and presents the indicators, baseline figures, milestones and targets. If you would like more information on the logical framework, please contact towns.fund@communities.gov.uk.

⁴ This includes clean or inclusive growth.

4. The Evaluation Process

4.1. The evaluation is organised around four distinct components, with each activity focusing on a subset of questions:

- **Process Evaluation** – to assess how well the Fund is managed and delivered.
- **Interim review** – to characterise and understand any early indications of additional changes in immediate and intermediate outcomes.
- **Impact evaluation** – to fully assess and understand the additional outcomes and impacts that have been achieved by the two Funds.
- **Value for money evaluation** – to provide an assessment of VfM based on the performance of the Funds against measures of economy, efficiency, effectiveness, and equity.

4.2. These methods are included in the [Magenta Book](#) (HMT 2020) and have been selected due to their suitability for the complex nature of the Towns Fund.

4.3. In addition, the evaluation will include a specific focus on ‘Levelling Up’ and the consideration of excluded and disadvantaged groups.

4.4. Evaluating the impact and outcome of the Towns Fund (levels 3-5 of the ToC) is the responsibility of MHCLG, with the assistance of an Evaluation Provider⁵. **You will not be required to collect primary data for the fund-level impact evaluation beyond what is in Table 2 and 3.**

4.5. MHCLG plans to publish the evaluation once complete.

Table 1: Estimated MHCLG-led Evaluation timings

Evaluation Component	Approach	22/23				23/24				24/25			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<u>Process Evaluation</u>	Monitoring and primary data collection (input and output)			█						█			
<u>Interim Review</u>	Qualitative Information				█								
<u>Impact evaluation</u>	Theory-based approach Time series approach											█	
<u>Value for Money Evaluation</u>	4 Es: Economy, Efficiency, Effectiveness, and Equity			█						█			

⁵ MHCLG will provide more details on the evaluation provider in due course.

Section B:

Reporting Requirements

5. What you need to report on

Introduction

5.1. It will be your responsibility as the Local Authority to formally report twice a year on Inputs and Activities (Level 1), and Outputs (Level 2). This includes several mandatory indicators and a selection of indicators which you will decide based on your project mix. There are also a small number of Outcomes (Levels 3 & 4) you will need to provide information on. This is detailed below in Table 2.

5.2. We have divided the M&E responsibilities in this way to not over-burden you with reporting requirements. Collecting data on activities and outputs is your responsibility as this should already be embedded into your project management. MHCLG will lead on data collection for Outcomes and Impact. However, there are a small number of outcome indicators where we require your assistance in gathering the data.

5.3. Reporting twice a year will ensure we are able to generate information for both your area and the overall fund. It will also allow us to effectively monitor the progress of projects, manage and mitigate risks, ensure value for money, share lessons learnt and good practice within the lifetime of the programme.

Table 2: Overview of what you are required to report on across the ToC levels

ToC Level	What you are required to report on:	When
Level 1 Inputs & Activities	<ul style="list-style-type: none"> The amount spent directly on project delivery (either local authority or implementation partners) The amount of co-funding spent on project delivery (private and public) The amount of co-funding committed (private and public) The percentage of projects starting on time according to contract 	Semi-annually through the monitoring form
Level 2 Outputs	<ul style="list-style-type: none"> The number of temporary full-time jobs supported during project implementation The number of projects successfully completed The percentage of projects completed within budget The percentage of projects completed on time 	Semi-annually through the monitoring form
	<ul style="list-style-type: none"> The number of staff in the regeneration team at the local authority The amount budgeted for economic development teams and functions Project specific output indicators (see 5.6 and 5.7 below) 	Annually through the monitoring form
Level 3 Intermediate outcomes	Self-assessment on (Town Deals only): <ul style="list-style-type: none"> Leadership and Vision Delivery capacity and capability Financial viability and ability to attract investment Accountability, collaboration, and responsive governance. <p><i>Please note that the collection of qualitative data is for learning purposes only and will not be used for performance management.</i></p>	Annually through the monitoring form

Level 4 Outcomes	<ul style="list-style-type: none"> • The number of full-time equivalent (FTE) permanent jobs created through the projects • The number of full-time equivalent (FTE) permanent jobs safeguarded through the projects • Year on Year monthly percentage change in footfall (mandatory for Future High Streets Fund places) 	Annually through the monitoring form
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5.4. The full list of indicators including frequency, definition, metrics, evidence, and baseline requirements can be found in Annex 1.

5.5. In addition to the reporting on the indicators set out in Table 2, **you will also be required to provide updates semi-annually**, to keep track of progress, manage expectations, and highlight needs to intervention. See Table 3 below.

Table 3: Overview of what you are required to provide updates on

What you are required to provide updates on:	When
<ul style="list-style-type: none"> • Project Expenditure: Expenditure on project activities by local authorities or, in the case where a partner is implementing the project, their expenditure on project activities to date. This will also include forecasted spend. • Project Progress: A brief narrative to explain the below progress you are reporting on. • Project Changes: Any material changes to project designs or plans should be disclosed and described, including any timing delays. • Risks: Updates should be made to the project risk schedule using a RAG rating, as well as an explanation of the risks and required mitigation steps. The RAG rating will be used to flag any issues that require action or amendments. This will also allow changes in risk to be tracked over time. 	Semi-annually through the monitoring form
<ul style="list-style-type: none"> • Feedback on local engagements and how your overall investment strategy is progressing. Questions to aid the qualitative feedback will be provided in the monitoring forms. 	Annually through the monitoring form

Selecting your Project specific indicators (Level 2)

5.6. For **Town Deals**, you have proposed output indicators for each project in your TIP. You should review these against our indicator guidance to assist you in measuring the select results. You will need to adopt the indicators set within this document to streamline the reporting requirements. You will need to confirm your indicators through your M&E plan when confirming projects for your Town Deal two months after signing the Heads of Terms.

5.7. For **Future High Streets Fund** places, you proposed output indicators in your business cases. Your MHCLG delivery support manager will carry out a baselining exercise with you, through your M&E plan to ensure these align to our list.

5.8. If needed, MHCLG will work with you to identify the most suitable indicators for your project mix. We strongly ask that you select indicators from Annex 1 where possible – this will ensure a more robust and useful programme evaluation. If there are additional indicators that you wish to monitor and report on, then please include these in your proposed M&E plan and we can discuss whether we are able to

accept these as part of your reporting requirements. As local authorities you are of course also entitled to monitor any indicator you choose as part of a local evaluation.

- 5.9. If there are additional data requirements for your project mix that are not covered by our list of indicators, we will work closely with you to agree any changes. It is our aim to keep the burden on you to a minimum, so any additional requirements will represent the minimum data required to conduct a robust evaluation of the funds.

Footfall

- 5.10. For **Future High Streets Fund** places, as per our previous guidance, it is a requirement you contract with a footfall provider for the collection of this data within your relevant area of interest.
- 5.11. For **Town Deal** places, while contracting a footfall provider is not a condition, it is strongly recommended that you collect footfall data if your interventions are occurring in or around the high street or town centre, or if your intervention is aiming to bring more people to an area.

Submitting your data

- 5.12. You will be required to submit your monitoring forms through DELTA.⁶ MHCLG will work with you to set you up on the DELTA system and provide instructions on how to complete a return. These returns will need to be scrutinised and signed off by the Accountable Body's Section 151 Officer.
- 5.13. You may be required to continue monitoring on some outputs for three years following the completion of projects unless agreed otherwise with MHCLG.

⁶ MHCLG is exploring a new digital system for Monitoring & Evaluation and, therefore, this process may change in the future. Supplementary guidance will be issued if so.

6. Your involvement with the outcome and impact evaluation

Your input

- 6.1. We will require your assistance when carrying out the outcome and impact evaluation. This will range from facilitating access to sites and identifying stakeholders for study teams.
- 6.2. There are also a small number of outcome indicators we require you to collect data on, as outlined in the previous section. However, you will not be required to collect any data for the evaluation of any other outcomes, or for evaluating impact, as this will be led by MHCLG.
- 6.3. A sample of places will be interviewed for an 'Outcome Harvesting'⁷ exercise to assess effectiveness and impact of the delivery model on local authorities. This will be led by the Evaluation Provider and take place twice (interim and at the end of the project).
- 6.4. Over the course of the evaluation, the Evaluation Provider will identify places to conduct deep dive case studies with. In these instances, it will be arranged and paid for by MHCLG.

Commissioning local evaluations

- 6.5. Some places may have an interest in measuring different outcome indicators to those mentioned in this guidance e.g. seeing how particular groups have been reached through project activity. If you decide to commission a local evaluation, we would like to work with you to help align it with the data MHCLG will be collating.
- 6.6. Where possible, MHCLG will aim to share data collected from outcomes and impacts with places this will allow for a richer understanding and use of the data collected.
- 6.7. Local evaluations may also want to probe the role of intervention categories in more depth to create the evidence required for a case study and future learning. There is no mandatory requirement for you to carry out a local evaluation.
- 6.8. The What Works Centre for Local Economic Growth provide free support ranging from online evaluation case studies, bespoke one-to-one advice, workshops, and guidance - subject to capacity. Please contact info@whatworksgrowth.org for more details.

⁷ Outcome Harvesting is the process where an external evaluator will obtain information from Local Authorities and key stakeholders using interviews and focus group discussions. The aim of these activities is to identify changes in the actors' behaviours and how the Towns Fund influenced them.

7. How to collect your data

Data collection

7.1. Your data collection should cover Town Deals and/or Future High Streets Fund interventions, as well as Towns Fund accelerated funding projects. Where you are in receipt of more than one fund, you should report these together but distinguish between the two separate funds. I.e. Future High Streets Fund Project 1.

7.2. Table 4 identifies when you will need to complete your first return. For Town Deals places your first reporting will need to capture your Accelerated Funding for financial year 2020/21. Thereafter the reporting periods in Table 5 will apply. You should note that subsequent grant payments will only be made after the full annual reporting cycle has concluded. For some indicators, we will require a baseline. This will either be collected through your first report or through a separate exercise carried out during Summer 2021. We recognise the data available may be limited in your first return, however, it is important you complete the return for assurance purposes.

Table 4: First reporting

First Town Deals or Future High Streets Fund Payment	Baseline Collection Exercise	First reporting
Between 1 st April 2020 – 31 st March 2021	Through first reporting on 1 st June	1 st June 2021, including Town Deals Accelerated Funding data
Between 1 st April 2021 – 30 th September 2021	Summer 2021	1 st December 2021, including Town Deals Accelerated Funding data
Between 1 st October 2021 – 31 st March 2022	Summer 2021	1 st December 2021 (Town Deals Accelerated Funding data only) 1 st June 2022 (for Town Deals and/or Future High Streets Fund data)

7.3. Table 5 sets out the ongoing reporting periods and due dates all places will need to adhere to once their first reporting has been submitted.

Table 5: Reporting periods

Frequency	Reporting period	Due date
6-month reporting	<i>The 6 months relating to:</i> <ul style="list-style-type: none"> 1st April – 30th September 1st November – 31st March 	<ul style="list-style-type: none"> 1st December 1st June
Annual reporting	<i>The financial year</i> <ul style="list-style-type: none"> 1st April – 31st March 	<ul style="list-style-type: none"> 1st June

Data consistency

- 7.4. To provide a robust and informative analysis on the Fund's impact, it is vital that all parties collecting data use the same metrics and appropriate methods. Data collection periods for specific indicators are outlined in Annex 1 where applicable.
- 7.5. You should ensure that you have supporting evidence to validate results, for each indicator you report against (see Annex 1).
- 7.6. If you already collect data on an indicator that is inconsistent with our approach, you will need to align the data collection in line with our criteria. MHCLG is unable to accept data that has not been collected using the same metrics outlined in Annex 1.
- 7.7. There may be some instances where a private partner or other organisation is implementing individual projects. In these cases, you should ensure that you have an agreement, in the form of a contract with the third party on reporting its input, activity and output data to yourselves for collation. Primarily you are responsible for collecting the data set out in Section 5.

Disaggregation

- 7.8. Some indicators you report on will require the data to be broken down by different factors (disaggregated). It is your responsibility to collect the data disaggregated, and therefore you should be aware of this when selecting your indicators. Many of the socio-economic indicators can be disaggregated by sex, ethnicity, age and income level, while a number of the indicators related to businesses can be disaggregated by industry and enterprise size. The level of data disaggregation required per indicator is outlined in Annex 1.

Baseline evidence

- 7.9. For some indicators you will be required to provide baseline evidence. For example, photographic evidence of a site before the project delivery commences. This is outlined in Annex 1. Your M&E plan will identify where you are required to provide baseline evidence and you will need to collect this prior to starting project delivery.

Quality Assurance

- 7.10. Data validation and quality assurance involves checking whether the data collected accurately reflects reality. As a starting point, all data submission returns will need to be scrutinised and signed off by the Accountable Body's Section 151 Officer. Included in the reporting forms is explicit guidance for each indicator covering, definitions, and means of verification.
- 7.11. To ensure the data provided is accurate and can be deemed as reliable in our analysis MHCLG reserves the right to conduct:
- **Site verifications** – this will involve visiting project sites to check whether observations can confirm the validity of data collected.
 - **Data Audit** – this will involve visiting sites to check whether each data point can be evidenced.
 - **Triangulation** – this will involve comparing primary data sets to comparable external sources of data, or with qualitative feedback.

Resourcing

- 7.12. You are required to resource the data collection for Activities and Outputs and a small set of Outcomes. You should ensure this is accounted for in your project planning. In instances where MHCLG requires your support for data collection as part of the wider M&E efforts (e.g. identify

stakeholders to interview), we will put any requests to your project manager and seek to minimise the administrative burden on your staff.

Section C:

Next Steps

8. Learning from your data

- 8.1. The reporting cycle will be supported by regular check-ins with your Area Lead/ Towns Hub/ Future High Streets Fund Delivery Support Managers. This will be your opportunity to ask questions and flag any issues informally to MHCLG in advance of submitting your monitoring reports.
- 8.2. The data you provide twice a year will be collated, aggregated, and stored in our system. Given the depth of data provided, we may categorise it in the following ways for our analysis:
- Fund
 - Project themes
 - Budget size
 - Location
- 8.3. The data will be tracked against fund targets and project level targets. Any indicator that is underperforming against agreed contracted milestones and targets will be flagged at a project and fund level. The severity of the underperformance will be categorised as green, amber or red. Depending on the level of severity, there may need to be changes made at a project level to mitigate impacts and risks. There will be an opportunity to provide information in your returns if milestones and targets need to shift.
- 8.4. For the qualitative feedback reporting you will be able to tag your own responses using a dropdown list of themes that will allow for faster aggregation and analysis of this data. Your Section 151 officer should review the qualitative feedback provided by Local Authorities and alert MHCLG if there are any material concerns or issues being reported.
- 8.5. We will ensure that the data you provide is used continuously throughout the programme for learning, reflection, and project improvement. Currently we are exploring the following options:
- Developing a **dashboard** that will allow users to view the progress of the fund, as well as council-level dashboards. This will allow places to view their progress as well as their performance against indicators. It will provide you with the unique opportunity to actively learn about what interventions are progressing in your local area.
 - Holding **sense making and synthesis sessions** with places on a semi-annual and annual basis, within three months of the reports being submitted. Key lessons and themes uncovered throughout these sessions will be shared with all areas.
- 8.6. If there are any concerns, feedback sessions may also take place with individual councils to discuss the analysis of data, including performance and progress. Should a lack of progress or underspend occur, MCHLG will work with you to agree an improvement plan.
- 8.7. You may be required to provide case studies for communication purposes (see our Branding and Communications guidance) and/or to facilitate peer to peer learning.
- 8.8. MHCLG may make your data available to the public and it may be used to inform public statements.

The role of the Town Board (Town Deals only)

- 8.9. We see a useful role for the Town Deal Board (TDB) in the delivery phase of your Town Deal. They can ensure an element of independent 'on-the-ground' monitoring of your deal delivery and act as a 'critical friend' throughout the programme lifecycle. A regular catch up with your TDB will also allow the TDB to see through the town vision, take ownership of their proposed projects and provide a level of

accountability.

- 8.10. They could be given the opportunity to raise issues related to the progress of capital works or contractual negotiations from the perspective of their organisational members, constituents, or interest groups.

9. Developing your M&E plan

- 9.1. Now you understand the M&E requirements of the Town Deals and Future High Streets Fund, you should start to develop your M&E plan.
- 9.2. For **Town Deals** places, this is a requirement through your Heads of Terms. You will need to submit a draft M&E plan and confirm your indicators when confirming projects for your Town Deal, two months after signing your Heads of Terms. Your plan will be reviewed to ensure your indicators align with the fund level guidance. You should endeavour to quantify your indicators during this stage, but we recognise for some places this will not be possible until business cases are developed. Therefore, you should provide an updated and final plan at the 'Summary Business Case' stage prior to your first payment.
- 9.3. For **Future High Streets Fund** places, aspects of this plan may already be set out in your business cases and you should now use this plan to ensure alignment with this guidance. Your delivery support manager will review your plan with you. You should aim to complete this plan within two months of receiving your grant offer letter.
- 9.4. For places that are in receipt of both funds you will only need to produce one M&E plan. We recognise the two funds are at different stages and therefore, you should follow the timelines for whichever comes first. You should keep your plan updated as you progress throughout the two programmes.

Table 6: Submitting your M&E plan

Fund	Product	When	What we do with this information
Town Deals	Draft M&E plan	Project Confirmation Stage - two-months after signing Heads of Terms	Plan is reviewed to ensure indicators align with guidance and any issues are flagged.
	Final M&E plan	Summary Business Case Stage - within a year of signing Heads of Terms	Plan is agreed prior to first payment. Indicators must be quantified.
Future High Streets Fund	M&E Plan	You should aim to complete this within two-months of receiving your grant offer letter.	Plan is reviewed and agreed to ensure alignment with this guidance.

- 9.5. An M&E plan is important as it will provide you with an outline of everything you need to do to ensure your M&E is done correctly and in a timely manner. A template has been provided at Annex 2 with this guidance that we require you to use, it will confirm the following:
- Projects and spend
 - Indicators you are monitoring per project
 - Target per indicator
 - Understanding of:
 - Definition and required metrics
 - Evidence needed
 - Frequency of reporting

- Who is responsible for collecting it

9.6. We recommend nominating an M&E lead for the Towns Fund. They should ensure the M&E plan is followed and this guidance is adhered to.

M&E resources that you may find useful:

[Better Evaluation](#)

[The Magenta Book](#)

[The What works Centre for Local Economic Growth](#)