



Food and Agriculture  
Organization of the  
United Nations

# Monitoring, evaluation and learning in the tropical fruit sector to generate evidence for sustainability and resilience

An introductory guide for trainers



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# Acknowledgements

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This training guide was prepared by María Hernández Lagana and Michael Riggs, both from the Responsible Fruits Project team. The document benefited from the overall guidance and support of Pascal Liu, Senior Economist and Team Leader, Responsible Global Value Chains team, Markets and Trade Division.

Thanks to Laura del Castillo Buelga for her overall support in publishing this guide. Thanks to Jonathan Hallo who created the graphic design of the document.

The elaboration of this guide was possible thanks to support from the Government of Germany.

# 1. Introduction

The FAO technical guide, “Monitoring, evaluation and learning (MEL): generating evidence on resilience and sustainability in the tropical fruit sector”, was developed to support export-oriented producers and businesses to generate information needed to measure and track progress towards the resilience and sustainability ambitions. Evidence generation is a key component of responsible business conduct and due diligence, requiring businesses to track and report on progress made towards achieving their sustainability goals and to provide evidence to customers and consumers about how businesses are committing to sustainability.

The technical guide aims to equip users with the knowledge on how to set up a MEL system, from the development of a resilience and sustainability strategy for their operations to the selection of indicators, data collection tools and data analysis to support decision-making.

Recognizing the need for capacity development and to make the content of the technical guide accessible to different audiences, including producers, associations working with small growers and other businesses, the Responsible Fruits Project has developed a learning module. The learning module is composed of two items: this training guide and a slide deck for trainers. It provides the basic content for trainers and others to design and deliver an introductory session to support the application of MEL in tropical fruit value chains.

FAO may update this training guide from time to time based on experience, or as technology or knowledge evolves. Feedback and suggestions to improve these learning materials are welcome from any user at any time by writing to [responsible-fruits@fao.org](mailto:responsible-fruits@fao.org).

## 2. Target users

This guide is a resource to help trainers and others involved in capacity development to get a better understanding of what MEL is, why it is important to the resilience and sustainability of tropical fruit value chains and how to start developing a MEL plan for tropical fruit businesses.

Given the detail required to set up a MEL system, this training guide is intended for different users:

- a. Trainers:** This learning module provides trainers with practical resources to organize and deliver training either to a set of producers or businesses, for instance, as part of a session organized by a producer association to train business staff who will be involved in MEL activities (e.g. sustainability teams, human resources, field operations officers, etc.). The trainer will be in charge of supporting tropical fruit businesses to either become familiar with MEL and its related practices or, for more advanced users, begin implementing MEL practices effectively. Trainers may refer to the MEL technical guide prepared by the Responsible Fruits Project (more details in the subsequent section) for a better understanding of the topic and the content in the capacity development material.
- b. Learners – beginners:** they include users who require a basic understanding of what MEL is and how to conduct it, such as those who may become responsible for or are supporting the implementation of MEL in their tropical fruit business. This learning module will serve as a starting point for understanding key concepts, learn how they can support their business to start developing a resilience and sustainability strategy and how to measure progress towards their success.
- c. Learners – advanced:** they include experienced personnel who are responsible for implementing MEL in their businesses or associations such as monitoring and evaluation officers, sustainability officers, sustainability teams and other professionals responsible for conducting the MEL practices in tropical fruit businesses. This learning module will give them resources to refine their existing MEL exercises and align them with good practices on MEL where applicable. The module also provides guidance on how MEL relates to responsible business conduct and due diligence, which might be required for market compliance.

# 3. Documentation and tools

The Responsible Fruits Project developed resources to support understanding and operationalizing MEL in tropical fruit value chains. All these materials are available in English and Spanish.

## Training guide

This training guide is a companion to the technical guide and provides a starter kit for trainers, learners and others who are developing capacities to implement a MEL system to generate evidence on resilience and sustainability goals of tropical fruit businesses.

## Technical guide

The technical guide, “Monitoring, evaluation and learning (MEL): generating evidence on resilience and sustainability in the tropical fruit sector”, provides a step-by-step guidance on how to implement a MEL system. The guide introduces readers to the topic of MEL, its importance to make business operations more resilient and sustainable and its alignment with responsible business conduct and due diligence practices.

The technical guide provides in-depth guidance to set up a MEL system. It first guides users on how to develop a resilience and sustainability strategy using Theories of Change, then supports users on how to define outcomes, outputs and activities needed to achieve the resilience and sustainability goals. Then, it provides guidance on how to define the indicators needed to generate evidence, select the data collection tools, carry out data analysis and use the information generated for decision making. This document also offers links to several resources and recommendations that can support businesses to report on progress.

The technical guide is available in English and Spanish.

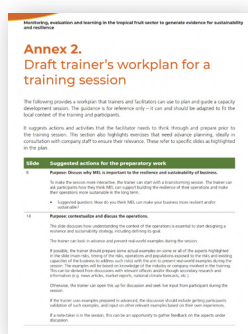
## Slide deck



One slide deck is available for use in a learning context. The deck provides an overview of the relevant content in the technical guide. This content is suitable for use in an introductory capacity development event organized by a tropical fruit company or an association representing producers, packers and export-oriented businesses overall. The content in the slides has been developed by FAO and was tested during the validation workshop of the technical guide. You will find the slides in **Annex 1** of this training guide.

To download an editable version of the slide deck, go to the project's webpage on **resilience**, or write to **responsible-fruits@fao.org**. The slide deck is available in English and Spanish.

## Trainer's workplan



A guiding workplan and a script to accompany the slide deck are available to support the trainer to organize and facilitate capacity development sessions. It also provides suggestions for preparatory work to ensure that the information provided is well contextualized for the learners. You will find the workplan in **Annex 2** of this training guide.

## 4. Organizing a training session

The slide deck on MEL in tropical fruit value chains (see [Annex 1](#)) is a structured document that supports trainers to guide participants to:

- understand the concepts of MEL and why these are relevant to the resilience and sustainability of their operations; and
- get an overview and practical guidance of the key steps to follow to set up a MEL system in their operations.

The slide deck can and should be adapted to fit the context in which the capacity development exercise is carried out. Learning outcomes are more impactful if the slides and content are contextualized to the local risks and targeted audience. Tailoring of the slide content can be done by pre-identifying and selecting the environmental and social risks relevant to the country or region of production, or by fine-tuning the content relative to the scale of the businesses' operations (e.g. small, medium or large; single company or producer association). A suggestion on where changes can be made is provided in the work plan ([Annex 2](#)). A summary of a capacity development session is provided under "Session preview".

When organizing a capacity development session, the trainer should consider the following:

- **Engage with relevant colleagues** from the association or company to get a good understanding of the objective of the training, context of the operations, and learners' profile. This will also ensure that appropriate company or association members are attending. For instance, the sustainability officer in charge of conducting risk assessment processes, certification compliance officer, phytosanitary officer, etc.
- **Familiarize yourself with the slide deck** and script and adjust them as required to meet the participants' needs.
  - If required, ask relevant company/association colleagues (point above) for any key information you may need to customize the content of the slides to make it suitable to the context of the business operations (e.g. environmental challenges, ongoing social-related issues, compliance with voluntary sustainability standards/certifications, etc.).
- **Decide whether any other materials or tools** (e.g. flip chart, Menti poll) **will be needed** to make the session more interactive and guide discussions (e.g. Slide 18). Based on this decision, prepare the relevant tools and materials.

## Session preview

Section	Description
<b>Session purpose</b>	To provide an overview of monitoring, evaluation and learning (MEL) and its important role in supporting tropical fruit value chains to become more resilient and sustainable. The session also introduces the key steps to follow to put MEL in practice.
<b>Session contents</b>	<p>Building on the MEL technical guide for tropical fruit value chains, this session introduces participants to key concepts and steps for implementing a MEL system as part of business operations. To help tropical fruit businesses apply this process in practice, the session covers the following topics:</p> <ul style="list-style-type: none"> <li>• The purpose and importance of MEL in tropical fruit value chains, and how it is aligned with responsible business conduct and due diligence practices.</li> <li>• Key steps for implementing MEL and important considerations.</li> <li>• Introductory guidance on designing a resilience and sustainability strategy, which forms the foundation of a MEL system.</li> </ul>
<b>Intended audience</b>	Producers, packers, exporters, business associations, researchers, MEL practitioners and any others who are interested in better measuring, tracking and reporting on their sustainability and resilience goals and progress. Businesses that aim to comply with due diligence requirements of importing markets can also benefit from this learning module.
<b>Human resources suggested</b>	1 facilitator, 1 co-facilitator/notetaker (if available) for capturing key discussion points and brainstorming, for reporting, for handling printouts (if needed), etc.
<b>Session duration</b>	<p>1.5 hours. The duration will vary depending on the number, type and length of exercises and discussions organized, as well as on the breaks taken during the session.</p> <p>If required, the trainer could split the session into two sections to avoid participant's fatigue.</p>
<b>Pre-reading</b>	Technical guide: "Monitoring, evaluation and learning (MEL): generating evidence on resilience and sustainability in the tropical fruit sector."
<b>Methods</b>	<p>The session can be delivered in person and/or online.</p> <p>It is advisable that the learning session be as interactive as possible to facilitate the understanding of key concepts and processes. For example, this can be done by prompting questions throughout the presentations, using external tools (e.g. Mentimeter, Whiteboard, etc.) to facilitate brainstorming and discussion, or organizing paired or small-group work for understanding the context of the operations, the definition of indicators, the resilience and sustainability goal of the business, etc.</p>
<b>Session outputs</b>	<ul style="list-style-type: none"> <li>• An awareness of MEL, and its relevance for enhanced resilience, sustainability and global trade.</li> <li>• An understanding of what key steps are needed to develop a MEL system aiming to measure and track progress towards resilience and sustainability goals and objective.</li> <li>• An awareness of FAO's technical guide on MEL for tropical fruit value chains.</li> </ul> <p>Note: This is only an introductory session. Neither the development of a resilience and sustainability strategy, nor the elaboration of each MEL step are intended to be completed in this session.</p>

- If the business or association intends to conduct a follow-up exercise for the design of a resilience and sustainability strategy or a MEL system, **having a note-taker in the session would be important**. The person will support capturing key ideas and information that might come out as part of the discussions and will inform the follow-up exercise.
- **Share with participants the session overview** prior to the training session with participants. If you are training several members of a single company or association, ask the focal points to share these tools with their colleagues.

# Annex 1.

## Slide deck for training on monitoring, evaluation and learning (MEL) in tropical fruit value chains

Please contact the Responsible Fruits Project team at [responsible-fruits@fao.org](mailto:responsible-fruits@fao.org) to access an editable version of the slide deck.



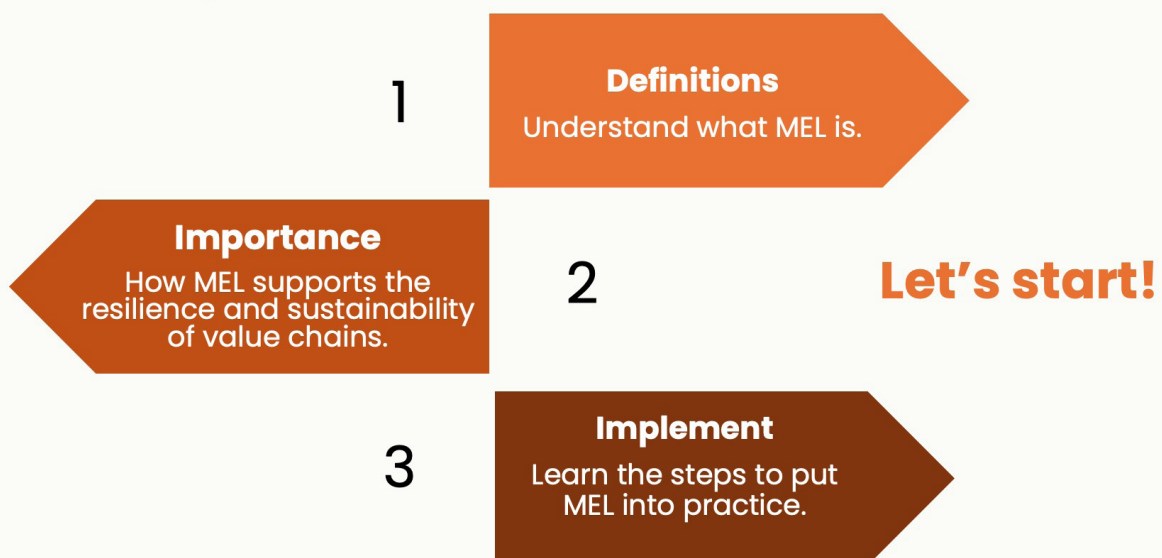


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## What will you learn in this course?

- ✓ What is **monitoring, evaluation and learning (MEL)**.
- ✓ Why MEL can support your business to **become more resilient and sustainable**.
- ✓ How to **start developing a MEL system** for your business.

## How will we get there?





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## Part 1. What is monitoring, evaluation and learning (MEL)?

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## What is monitoring, evaluation and learning (MEL)?

MEL is the process of **collecting data** on your **business' performance** to make **informed decisions** that will ultimately **improve your operations**.

When focused on **resilience** and **sustainability**, MEL helps businesses measure their:



a) **positive impact** on environmental, social and economic wellbeing (**sustainability**).



b) ability to **withstand, adapt to, and recover** from various shocks, stresses, and risks (**resilience**).

Each component has a different purpose:



### Monitoring (M)

Continuous assessment of the activity implemented by your business.

*"How do you know that your activities are happening the way you planned?"*



### Evaluation (E)

Deeper, objective assessment of the achievements of your activities or programmes.

*"Are the interventions contributing to your business' resilience and sustainability goals?"*



### Learning (L)

Translate M&E findings into knowledge to improve and/or develop new activities.

*"What and how should your business improve based on the new information?"*

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1

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## Part 2. Why is MEL important to the resilience and sustainability of tropical fruit businesses?

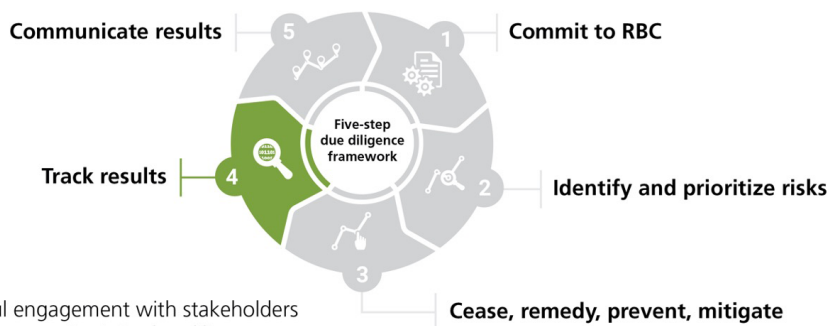


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## MEL supports:

- Establishing **mechanisms and metrics** to identify risks, track progress and measure impact.
- **Creating a plan** to address current and future risks.
- **Learning** from results.
- **Evidence generation** that back up sustainability claims and reporting.
- **Accountability and transparency.**

MEL contributes directly to **responsible business conduct (RBC)** and **due diligence**.



**Incorporate:**

- Meaningful engagement with stakeholders
- A gender perspective into due diligence

## Key aspects to consider when designing a MEL system:

- ✓ Design your MEL system **before** starting any activities.
- ✓ **Engage senior management** and key staff to align objectives and improve decision-making.
- ✓ Ensure **traceability** of your business processes and activities.
- ✓ Include MEL in your **budget**.
- ✓ **Assign clear responsibilities** for tracking activities and results across your business.
- ✓ Understand **stakeholder information needs** to generate useful information only.

### **Note!**



Your MEL system for sustainability and resilience building activities should be **fully connected to your business' own priorities.**

The **capacity** and **resources** of your business also impact its development. **MEL activities should build on existing processes!**





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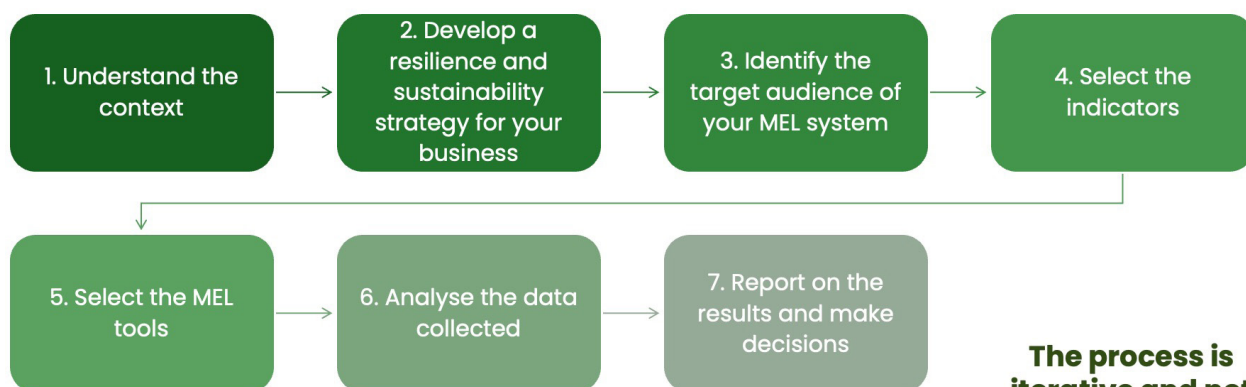
## Part 3. Putting MEL into practice

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### What's the process to develop a MEL system?



**The process is iterative and not always linear!**

## Step 1. Understand the context

Analyse the environmental and socioeconomic situation in which your main business activities evolve, including:



**Main risks** impacting your operations.



**Operations and people exposed** to the risks.



**Timing** of the risks.



**Capacity** of your business to address the risks.

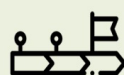
## Step 2. Develop a resilience and sustainability strategy for your business

The strategy lays out what your business **wants to achieve** and **how it will get there**:

- Set out resilience and sustainability short- and long-term goals.
- Define how to achieve the goals (activities, actions, programmes, etc.)



**Theory of change (ToC)**



**Logical framework (log frame)**

## How to build a resilience and sustainability strategy?



Let's take this example of Company's A goal:



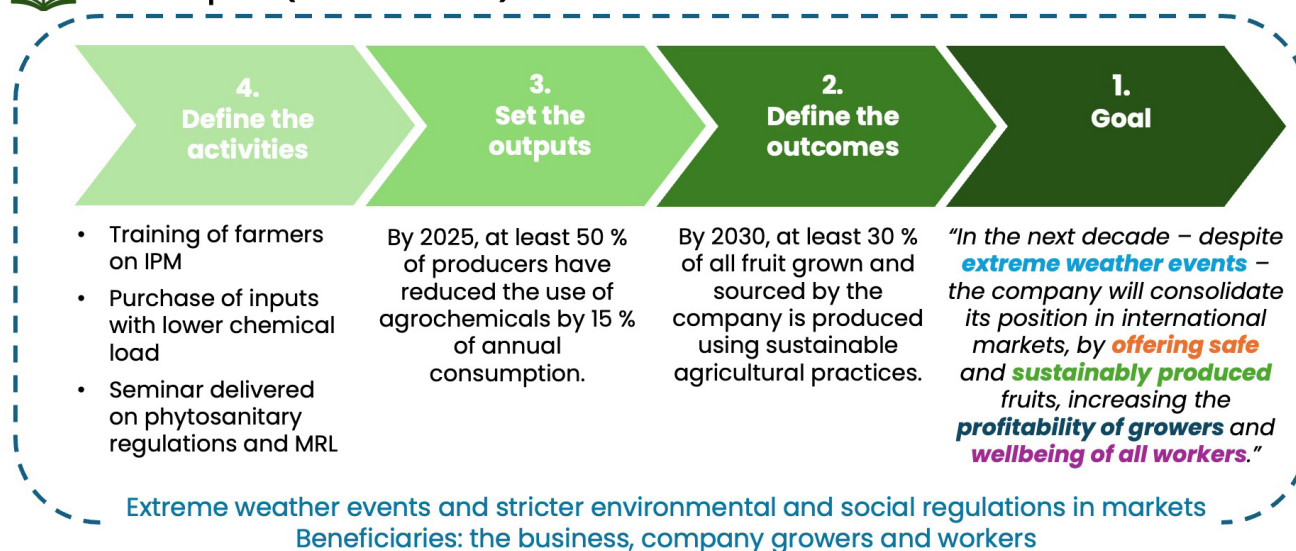
### Company A's goal

*"In the next decade – despite **extreme weather events** – the company will consolidate its position in national and international markets, by **offering safe, healthy and sustainably produced** fruits, increasing the **profitability of growers** and **wellbeing of all workers.**"*

What **short- and mid-term steps** and **activities** are necessary for Company A to achieve this goal?



## Example (continued)



Notes:  
IPM=Integrated pest management; MRL=maximum residue limits



## Example (continued)



### Company A's goal

*"In the next decade – despite **extreme weather events** – the company will consolidate its position in national and international markets, by **offering safe, healthy and sustainably produced** fruits, increasing the **profitability of growers and wellbeing of all workers.**"*

To address **extreme weather events**:

- Invest in climate-proofing technologies (irrigation, inputs, etc.)

To produce **safe and healthy food**:

- Reduce agrochemical use

To **produce sustainably**:

- Increase capacity of growers to reduce water use (training)

To improve **workers' wellbeing**:

- Put occupational health and safety protocols in place
- Provide fair and formal contractual arrangements

To improve **grower's profitability**:

- Establish fair and formal contractual arrangements with growers and suppliers
- Improve consumer awareness on production challenges

### Step 3. Identify the target audience of your MEL system

Identify and prioritize the stakeholders who will use the information and learning generated through your MEL system.



#### Internal users

Those with a high stake in the business activities and who make decisions.

*Ex. board of directors, senior management, divisional directors, and local communities (if applicable).*



#### External users

Those not directly engaged with the business but with an interest in its activities.

*Ex. importing companies, consumers, service providers, retailers, certification bodies, policymakers, researchers, etc.*

### Step 4. Select the indicators

#### What is an indicator?

- A tool to **assess the performance and success** of business activities;
- an instrument to **measure progress** towards specific objectives; and,
- it is based on **objective** and **concise information**.

Indicators should generate **consistent** results and track **progress** under the **same conditions** over time!



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## Step 4. Select the indicators (continued)

How to define them?



Let's take this example:

### **Company A's short-term goal (output):**

By 2027, all farmers and growers have increased their efficiency in water use for irrigation.

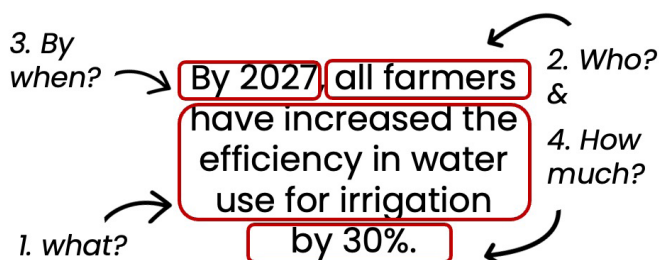
The indicator(s) needs to:

- a) measure if **company farmers and external growers** improved their efficiency on water used for irrigation.
- b) **inform** due diligence and certification **requirements**.



## Example (continued)

### Company's output:



### Indicators:

1. Number of farmers with high-water efficiency irrigation systems and/or using good water management practices  
→ *Measures quantity of farmers*
2. Water used for irrigation per hectare  
→ *Quantifies water used (aligned with certification requirements)*

## Step 5. Select the MEL tools and collect data

### What are MEL tools?

Instruments to generate data to measure indicators.

- Surveys, lab tests, reports, check lists, interviews, geospatial information, etc.

### How to select them?

- ✓ Identify the **type and size** of the implemented activity (e.g. individual, plot, watershed).
- ✓ Define the **complexity and accuracy** of information required.
- ✓ Set a **budget**.
- ✓ **Focus on the actual data needs of your business!**






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## Step 6. Analyse the data



### Why analyse data?

-  To get insights on **what has worked** and what has not worked in your strategy
-  To **facilitate learning** and enable strategy and operational adjustments.
-  To **guide decision-making**, including investment decisions.

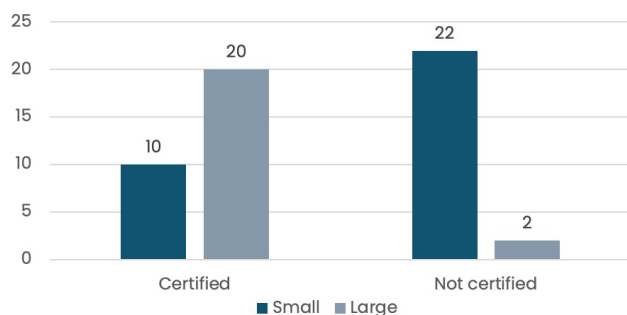
... without a proper analysis of your results, the time and resources devoted to developing your strategy and collecting data will be wasted.

## Types of analyses

### Frequency

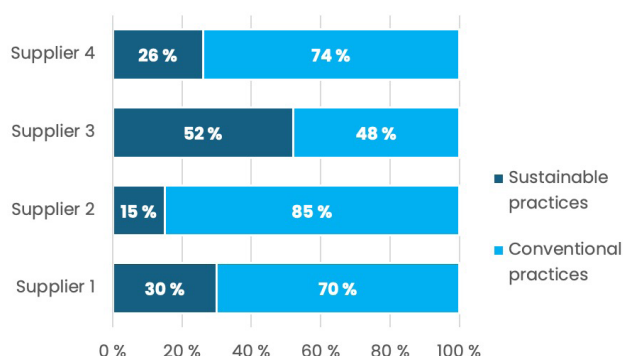
#### Frequency of farmers enrolled in a certification scheme

Total number of farmers enrolled in the organization=54



### Descriptive statistics

#### Average proportion of land under sustainable agricultural practices, by fruit supplier



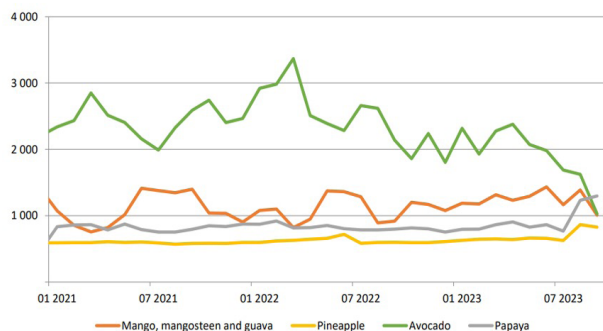
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## Types of analyses

### Trends

**Major tropical fruits:** World average export unit values, January 2021 to August/September 2023, USD/tonne



### Attribution analysis

- Draw on your resilience strategy.
- Check behaviour of key indicators,
- Check differences in groups for different activities you might have implemented.
- Analyse trends (as discussed)
- Hold consultations to understand the impact of your activities and strategy.

## Step 7. Report on the results and make decisions



Focus on:

- ✓ **Identifying and communicating what worked well** according to your strategy and commitments (e.g. certifications, pledges to comply with international standards).
- ✗ **Highlighting the bottlenecks** encountered and **specify areas needing improvement** to enhance your sustainability and resilience.

### ⚠ Important:

- **It needs to be done in good faith;** ensure transparency, accuracy, consistency and completeness, and avoid greenwashing.
- **Full data disclosure isn't mandatory** if it threatens commercial confidentiality or security.

## Step 7. Report on the results and make decisions (continued)

Resources to structure a sustainability report in the context of sustainability and RBC:

- **The Global Reporting Initiative (GRI) 13:** Agriculture, Aquaculture and Fishing Sectors standards.
- The **European Union's Corporate Sustainability Reporting Directive (CSRD)** guidance to report on social and environmental information.
- **European Sustainability Reporting Standards (ESRS).**
- **UN Global Compact's Communication on progress guidebook.**



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## Step 7. Report on the results and make decisions (continued)

- The **Carbon Disclosure Project** for climate change, forests and water security impacts.
- The **Sustainability Disclosure Standards.**
- The **Accountability Framework Initiative's Operational Guidance on Reporting, Disclosure and Claims.**

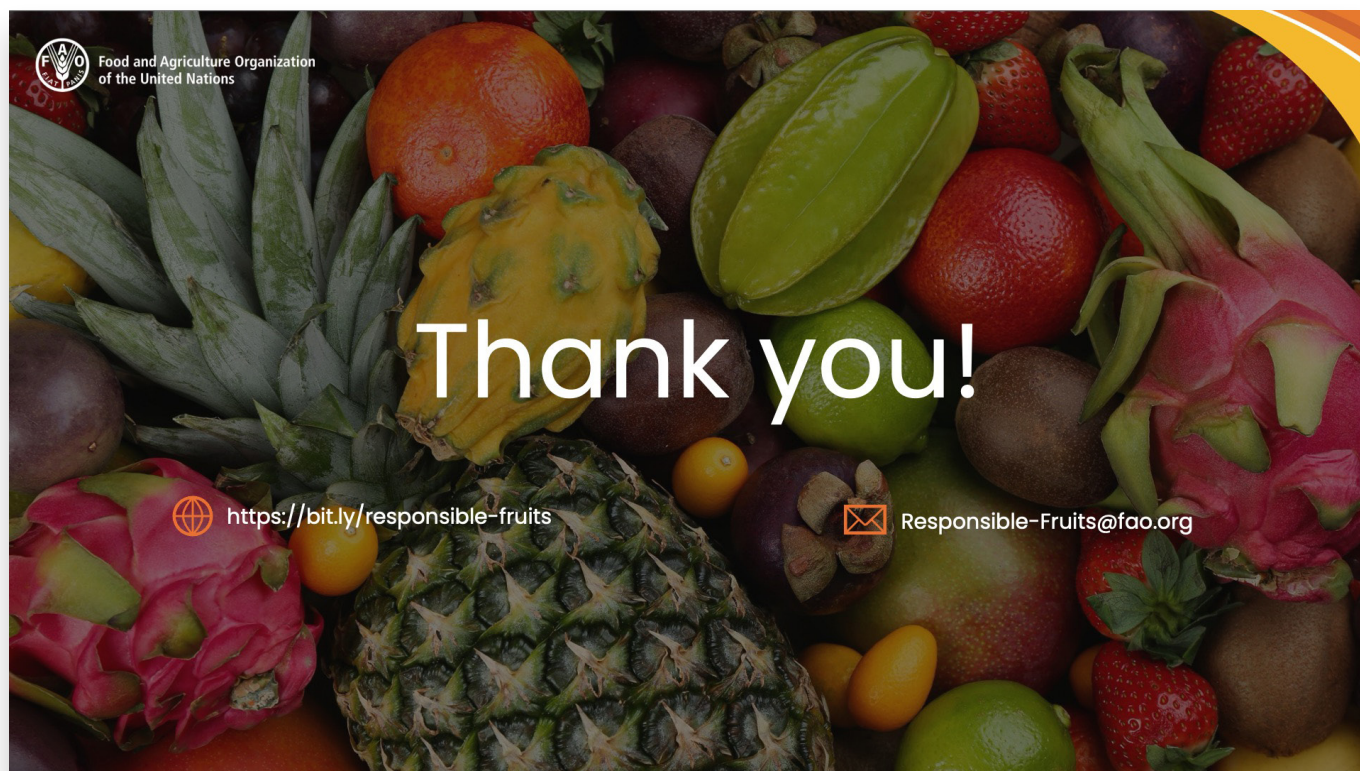


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## We reached the end!

### Today we learned:

- ✓ **What MEL** is and how it can support resilience and sustainability in your business.
- ✓ MEL is key to **measure your progress and success** regarding the sustainability and business operations.
- ✓ MEL can support your business to increase its **transparency** and can **enhance the reputation** of your brand!
- ✓ MEL is aligned with **responsible business conduct** and directly contributes to **due diligence and reporting** required by some markets.



# Annex 2.

## Draft trainer's workplan for a training session

The following provides a workplan that trainers and facilitators can use to plan and guide a capacity development session. The guidance is for reference only – it can and should be adapted to fit the local context of the training and participants.

It suggests actions and activities that the facilitator needs to think through and prepare prior to the training session. This section also highlights exercises that need advance planning, ideally in consultation with company staff to ensure their relevance. These refer to specific slides as highlighted in the plan.

Slide	Suggested actions for the preparatory work
8	<p><b>Purpose: Discuss why MEL is important to the resilience and sustainability of business.</b></p> <p>To make the session more interactive, the trainer can start with a brainstorming session. The trainer can ask participants how they think MEL can support building the resilience of their operations and make their operations more sustainable in the long term.</p> <ul style="list-style-type: none"><li>• Suggested question: How do you think MEL can make your business more resilient and/or sustainable?</li></ul>
14	<p><b>Purpose: contextualize and discuss the operations.</b></p> <p>The slide discusses how understanding the context of the operations is essential to start designing a resilience and sustainability strategy, including defining its goal.</p> <p>The trainer can look in advance and present real-world examples during the session.</p> <p>If possible, the trainer should prepare some actual examples of some or all the aspects highlighted in the slide (main risks, timing of the risks, operations and populations exposed to the risks and existing capacities of the business to address such risks) with the aim of presenting real-world examples during the session. The examples will be based on knowledge of the industry or company involved in the training. This can be derived from discussions with relevant officers and/or through secondary research and information (e.g. news articles, market reports, national climate forecasts, etc.).</p> <p>Otherwise, the trainer can open this up for discussion and seek live input from participant during the session.</p> <p>If the trainer uses examples prepared in advanced, the discussion should include getting participants validation of such examples, and input on other relevant examples based on their own experiences.</p> <p>If a note-taker is in the session, this can be an opportunity to gather feedback on the aspects under discussion.</p>

## Slide Suggested actions for the preparatory work

16 **Purpose: provide an overview of how a resilience and sustainability strategy is developed.**

The slide has animation. It is important the trainer familiarizes themselves with the content. Note that the strategy is developed backwards, i.e. the goal is set first, and then, outcome, outputs and activities are defined.

Shocks, stresses and risks, as well as populations and/or landscapes benefited by the strategy (identified in Step 1, slide 14) should be considered throughout the development of the strategy to ensure that risks and specific needs are effectively addressed.

17, 18 and 19 **Purpose: to brainstorm so that participants can start thinking about the activities, outputs and outcomes needed to reach a resilience and sustainability goal.**

A concrete example is useful for learning. Thus, a goal statement has been developed for a fictitious company, "Company A". The facilitator should familiarize themselves with the statement and some suggested actions (slide 18) and ask participants the actions they think Company A needs to take to achieve the goal.

Slide 18 has a full example focusing on the activities, outputs and outcomes related to the section on "sustainably produced" fruits. You can take this for discussion and open the floor for participants to provide more ideas on what could be done. Slide 19 summarizes other generic actions contributing to the rest of the components of the goal.

23 and 24 **Purpose: provide an example of how indicators can be developed.**

Slide 23 presents the output for Company A and relates to the "sustainability" aspect of the goal outlined in Slide 17. It is important for the trainer to explain that the indicator must measure whether both company farmers and external growers have improved water use efficiency for irrigation. External growers supplying fruit to the company must also be considered, as this is required for Company A to meet due diligence obligations in its primary export market.

Additionally, the indicator must serve as a tool to report on certification requirements, which include tracking the amount of water extracted to assess water use efficiency and sustainability.

Slide 24 identifies all the different components of the indicator presented in Slide 22 and suggests two different and complementary indicators to measure it.

27 **Purpose: present an overview of the types of data analysis available.**

The trainer is not expected to present each type of data analysis in detail. The idea is to give an overview of what companies can do with the data collected, what type of information can be gathered and how it can be presented in their reports.

It is important that participants understand that someone with at least basic data analysis skills and software use (e.g. Excel) is required to take care of this task.



# BUILDING RESPONSIBLE GLOBAL VALUE CHAINS FOR SUSTAINABLE TROPICAL FRUITS

## GET IN TOUCH

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