



# Anatomy of a Climate Action Project

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May 2023

# ACKNOWLEDGMENTS

## Recommended Citation

Open North. 2024. "Anatomy of a Climate Action Project." Open North.

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This white paper was produced for the Community Solutions Network, a program led by Evergreen and lead technical partner Open North and a national community of partners. The Community Solutions Network is supported with funding provided by Infrastructure Canada. The views expressed in this publication do not necessarily reflect those of the Government of Canada.

# TERMINOLOGY & SCOPE

The ideas in this guide have been developed for small and medium sized municipalities. Groups beyond this audience are likely to find value in the content, but the expertise and research leveraged here focuses particularly on the circumstances of small and medium-sized municipalities in Canada.

In this paper, we use the following terms:

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**Climate action project**

This does not refer exclusively to what is traditionally considered a "project"—a goal-oriented action with a start and end—but can include process and protocol shifts (such as workflows to better enhance the municipality's response to climate events).

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**Adaptation/resilience**

These two terms are used somewhat interchangeably, with adaptation referring to the processes or actions that mitigate the negative effects of climate change (a dyke is an adaptation that limits damage from flooding).

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**Resilience**

Resilience refers to a state that has been achieved due to adaptations wherein the negative effects of climate change are no longer felt as harshly but are workable within the municipality's expected operations.

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**Domain**

In this paper, domain is used in reference to any area or category that falls under the remit of municipal governments, that is, transportation, housing, health, etc.

# EXECUTIVE SUMMARY

In the coming decades, small and medium-sized governments will increasingly focus on a new category of work: climate action projects that are technology-enabled, but not technology-focused. These projects will require deep integration across traditional domains and jurisdictional boundaries with collaboration based on well-governed data. With the support of intermediary organizations, governments will implement new models for engaging with the private sector. New models of project development and management will embed technology into the foundational processes and systems of public service provision, with a clear focus on maximizing ecological outcomes and equitable public benefit.

The following content is a practical guide to doing this new category of work. It presents a set of tools within a loosely sequential framework, highlights connections to federal-level policy objectives (and associated funding sources), and lists references where practitioners can find more information.

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# INTRODUCTION

## A new kind of climate action project

**Communities of all sizes will continue to be significantly impacted by climate change**, including geographic, demographic, and extreme weather events. [Research indicates](#) that Canada will increasingly be a destination for climate-induced migration. For a number of reasons, population growth is likely to be focused on large urban areas (for example, migrants are more likely to locate into existing diaspora communities) which will put additional pressure on the housing markets and infrastructure of cities. These effects, however, will be regional, encompassing peri-urban areas and small municipalities surrounding large population centres. Furthermore, small to medium-sized municipalities are typically more affected by climate-related events (for example the economic impact resulting from weather-induced losses in agriculture is greater) than large urban municipalities. Communities of all sizes must prepare for a period of rapid urbanization and climate adaptation to meet the needs of a rapidly growing and changing population.

**Climate action must be organized at the sub-national level.** Within local governments, climate action is becoming a shared goal across departments, like transportation and public health. These initiatives will bring together adjacent jurisdictions at the inter-municipal level. This requires data-led cooperation both internally and externally.

**Technology has a role to play.** We are working in the yet-to-be-named era that comes after the smart city: when technology is a tool, not a focus. Every climate action initiative will involve technology to some degree. And every department, including traffic management, land use planning, waste, parks management, water, and the city clerk, will be using technology in some way—which foregrounds the importance of effective and collaborative implementation of technology among existing core municipal operations. The most important issue for practitioners to address is *how to effectively integrate and manage technology and data*—an issue that poses significant operational challenges, especially at the intra-municipal and inter-municipal levels.

**Effective integration and management of technology is a matter of data governance.** Data governance—and associated issues like revenue models, access and privacy, procurement and contracting, and standards-setting—is crucial. When structured well, data governance [can enable effective cross-departmental and multi-jurisdictional climate action](#). It can enable faster response to climate emergencies and provide new approaches to resource quality measurement and improvement.

## Defining climate action projects

This paper outlines basic protocols for climate action projects that are fundamentally structured in response to the present state of the ecological, political, technical, and economic climate. What are the primary characteristics of this new kind of climate action project, and what are their benefits?

- Moving beyond conventional “smart city” projects, these require a measured and intentional approach to technological assets and systems.
- They use private sector technologies on terms set by public sector agencies. This means that second-order effects of technologies (such as pricing models, resident-facing information, data ownership, etc.) are shaped by governments, and can be designed to maximize equitable public benefit.
- They are not designed to position any one city as a “leader,” but derive their effectiveness and resilience (and data comprehensiveness) from multilateral alignment in inter-jurisdictional coalitions. This is based on collaboration and co-learning among government peers, increasing project resiliency.
- Because they are multilateral and infrastructural, data governance is a primary concern. This means that governments and their private sector partners need to establish clear protocols for data collection, use, management, and stewardship.
- Although they may use “pilots” or “experiments” as part of the process, they are focused on sustainable integration with existing core operations. These climate action projects may necessitate changes to existing operational frameworks, like budgeting, staffing, data management, permitting, and more.

It is inherently challenging for local governments to structure this kind of project, but there are substantial benefits in terms of systemic impact. Climate action aligns with federal and provincial policy priorities, so these projects are well fit for funding.

## The opportunity

**Canada has made policy and funding commitments for climate action.** Amidst global recognition of the need for climate action, Canada has begun outlining a strategy and approach in the [Climate Change Plan](#). The agenda includes carbon pollution pricing, a commitment to net-zero emissions by 2050, clean electricity regulations, and a national adaptation strategy. However, as evidenced in [Report 6 of the Commissioner of the Environment and Sustainable Development to the Parliament of Canada](#), there is a need for Canada to move beyond plans to identify and prioritize measures that seriously reduce greenhouse gas emissions. As the federal government continues putting its Climate Change Plan in motion,

we anticipate a groundswell of climate action at the sub-national level.

**Climate action must be multilateral.** This wave of work will have the greatest impact if individual communities work in a reciprocal and additive way. Put differently: the singular work of any one jurisdiction—even the largest of Canada’s metropolitan areas—will not meaningfully mitigate the effects of climate change. But the coordinated work of many communities will have profound implications for an equitable and sustainable future of climate resilience.

Multilateralism is important for a number of reasons. Climate action requires coordinated action across domains (like traffic planning, housing, and energy production). The natural environment works in bio-regions—at the scale of an ecosystem, like a wetland or grasslands—which span across multiple government jurisdictions. Data collection and management should work at an equivalent scale. By effectively structuring climate action projects and using shared models for data governance, Canadian municipalities can rise to that challenge.

**Intermediary organizations will have an important role to play.** While local governments and communities regularly communicate and share information, turning that into a well-structured project requires capacity that is often missing at the local government level. The bright spots—projects that have shaped the mold for the next generation of climate action work—are typically facilitated by an intermediary, most commonly an academic institution, non-profit, or regional planning authority.

### Policy priorities

The National Adaptation Strategy outlines the Canadian Federal Government's guiding priorities on climate adaptation. The next decade of municipal climate action projects will be most effective if they align with and contribute to these priorities—to secure funding, measure outcomes, and support complementary work across the country.

#### National Adaptation Strategy

- **Disaster resilience:** Efforts that build both short and long term resilience to climate risks (e.g. flooding, wildfires, drought, extreme weather).
- **Health and well-being:** Adaptation to climate impacts that influence the physical, mental, and social well-being of people.
- **Nature and biodiversity:** Halting and reversing nature and biodiversity loss in supporting a future where ecosystems are thriving in a changing climate.
- **Infrastructure:** Planning infrastructure with climate change impacts in mind, with a particular focus on communities with infrastructure at high risk of climate impact (northern and indigenous communities).
- **Economy and workers:** Building resilience in economic sectors (e.g. agriculture, fisheries, forestry, tourism) requires collaboration across sectors and giving workers the skills and knowledge to adapt.

A broad category of domain-specific initiatives also bolster the federal climate agenda, such as the [Canadian Mortgage and Housing Corporation National Housing Strategy guide](#). Finally, intermediary organizations offer funding support, such as the Federation of Canadian Municipalities' [Green Municipal Fund](#).



# THE CHALLENGE

## Primary barriers for climate action projects

### Limited capacity

Local governments have limited “capacity”—defined as staff time and expertise. More and more governments have at least one staff member dedicated to climate/sustainability, but the work is inherently cross-functional, requiring expertise across different areas of the organization (from data management to public relations to procurement), and authority to engage with external stakeholders. Climate action projects are also inherently large in scope, requiring time and effort in excess of one full time employee plus ad-hoc support of other staff. Because teams are heavily under-resourced, they outsource smaller, one-off projects to consultants—which undermines public benefit, forecloses long-term expertise development related to climate action, severs links between concurrent projects and between projects over time, and increases costs to government. This means that each municipality often reinvents the wheel, creating multiple and competing frameworks for data collection, management, and actioning.

### Short-termism

Climate action projects can be politically polarizing. This can create challenges in garnering buy-in among residents, businesses, and politicians, limiting the ability to secure funding and move forward. As climate resilience is often about preparing for future risks, it can be difficult to find support when immediate needs—such as housing or public health—are present and urgent.

### Regional Coordination

The impacts of climate change do not align with local or regional boundaries (conversely, benefits accrue across multiple communities). Effective climate action therefore depends on collaboration across jurisdictions, especially on issues that require harmonization, such as data, physical infrastructure, and standards.

While this can and should be seen as an opportunity, many local governments don’t have norms or agreement frameworks in place to facilitate cross-jurisdictional collaboration. Collaborative project management typically needs to cover questions in the following categories (see Data Governance for more detailed discussion):

- **Cooperative government purchasing** - How are costs and staff capacity shared along with decision-making mechanisms for procurement in collaboration with other municipalities? The [Halton Co-operative Purchasing Group](#) works to do just this for municipalities in the Region of Halton.
- **Project management** - How are project roles shared and dispersed? What structure does the project management follow?
- **Ownership / IP** - Who owns any product that is a result of the collaboration.
- **Disparities in policy objectives** - How are differences in policy objectives accounted for without disrupting the project?

- **Disparities in operational frameworks** - Operational frameworks vary across municipalities and communities, which impacts how decisions are made and what timelines look like.
- **Data sharing & ownership** - How do stakeholders maintain ownership over their data and decision-making ability for any data sharing?

### Data standardization and interoperability

A central concern in inter-jurisdictional and regional coordination is data. Data is a 'lingua franca,' enabling planning, measurement, impact evaluation, technology implementation, and more. One of the primary challenges to collaborative project development is the lack of mutually agreed data standards. When local governments create one-off projects with a vendor or set of partners, those projects often generate a new, unique approach to data, metadata, aggregation, collection protocols, and management practices. That means the project will not be interoperable with projects that come before and follow after, or concurrent projects in surrounding jurisdictions.

### Rapid solutioning

Because the need for climate action is urgent, governments lack capacity, and there is an abundance of technology on the market, practitioners often fall into the trap of moving too quickly to procure an off-the-shelf product solution. With good intentions, they rush to acquire and implement solutions, or replicate case studies from around the world. The real risk is not a month of delay, but of mid-term failure when:

- Technology solution(s) do not fit the real needs and opportunities of the context
- A single technology cannot solve a complex climate problem
- Public sector agencies outsource capacity to operationalize and maintain technology
- Technology is considered outside of its social and political context
- Climate action projects fail to inspire a sense of shared direction and mutual ownership in a diverse group of partners
- Governments get locked into long-term contracts

# BUILDING BLOCKS

## The challenge statement

*“The better a problem is articulated, the easier and more effectively it can be solved.”*

– Nielsen Norman Group

The first step in a successful climate action project is a discovery process focused on defining the challenge. This involves questioning assumptions, assessing the lived experience of the challenge, and clearly identifying root causes (the systems behind observed outcomes) and the contextual factors that make it difficult to address them. The process culminates in a clear and succinct “challenge statement.”

Gaining a deep understanding of the challenge and its context, drivers, stakeholders, and incentive structures is crucial. Without one, project teams risk investing in solutions to symptoms rather than causes, or only partially addressing a deeper issue.

A good challenge statement defines the present and desired state, illuminating the value of solving the problem. It includes criteria for prioritizing and evaluating potential solutions, as a function of the desired outcomes.

Because it tracks throughout the full lifecycle of a project, the challenge statement provides a shared

vision, creating alignment among a multilateral project team and their collaborators. It is also foundational for the creation of a project specific theory of change and monitoring and evaluation plan. By the same token, it is a useful communication tool that helps gain buy-in along the way.

All orders of governments routinely use challenge statements as part of their core projects, requests for proposals (RFPs), and to engage with partners. See, for example, the Government of Canada’s [Impact Canada](#) initiative. Impact Canada provides a platform along with the necessary resources for federal departments to issue challenge statements in the search for innovative solutions. [The Opportunity Project](#) is another example: a US federal program that structures “sprints” around clearly stated challenge statements.

Project teams have a wide array of tools at their disposal, several of which are listed in this section. Note that the challenge statement process should be simultaneous with stakeholder definition and engagement. The challenge statement will guide the subsequent solution development process, as well as the measurement frameworks and key performance indicators (KPIs).

## What makes a great climate action challenge statement?

- It clearly describes a compelling problem related to climate and environmental health.
- It connects to existing agendas, resources, and priorities.
- It tells a human or place-based story (showing why that problem matters).
- It includes a description of the affected population or area and indicates the scale of the problem, why it is difficult to address, and the impact of resolving it.
- It includes key variables that can be used to quantify the present and desired state. These variables should be explicitly used to prioritize potential solutions during the solution discovery phase.
- It has been created with, and validated by, stakeholders, especially those directly involved or affected.
- It is well-scoped, so that a technology + process solution can plausibly have an impact, and it is focused enough to be actionable.
- It is specific enough to be actionable and broad enough that the design process can explore laterally and arrive at a creative solution. It clearly explains the difference between the present state and desired state, without prescribing a solution.
- It does not focus on a problem that is internal to the government organization.
- It does not suggest reliance on a single provider or technology; rather, it points to a multi-sectoral collaboration.

## Stakeholder definition & engagement

*“We spend a lot of time designing the bridge, but not enough time thinking about the people who are crossing it.”*

—Dr. Prabhjot Singh, Director of Systems Design at the Earth Institute

Conventional stakeholder engagement practices are frequently insufficient for climate action projects because the impacts of climate change are so far-reaching, time scales are so extended, issues are so politicized, and, most importantly, the negative effects of climate change are disproportionately borne by marginalized and otherwise “hidden” populations.

Each project requires a unique identification process (see “Stakeholder mapping” below); stakeholders should not be exclusively drawn from traditionally well-represented groups or established stakeholder lists. The engagement process should be active, not passive—local governments should reach out directly to identified stakeholders and maintain a relationship with them beyond a single project.

### Stakeholder mapping

In many communities, stakeholder engagement defaults to a standard procedure (town hall meetings), a ready list of stakeholders, a set of community-based organizations that function as intermediaries, or a

digital engagement platform. There is surely value to leveraging institutional knowledge, but the danger is limited feedback, lack of diversity and representation, and confirmation bias.

A stakeholder map is meant to capture the full picture of who is impacted by a project, and who might impact it. Such maps should start with stakeholder “groups” (organized by sector, domain, industry, type, demographic, location, etc.), then fill in more and more detail (including key contacts, specific organizations, or engagement forums). Successful stakeholder mapping exercises lean on the expertise and experience of multiple staff and departments. They capture not just those most immediately connected to the project but those that may have some connection to the input or outcome of the project. Once a “full” stakeholder map has been drawn, project teams can choose a subset of individuals or groups to target, based on the team’s capacity for outreach and engagement.

## Building a stakeholder engagement framework

A stakeholder engagement framework is essentially an action plan that goes hand in hand with the stakeholder map. It lists objectives, specific strategies, and stakeholder-specific considerations.

It is advantageous to build on existing strengths, assets, and relationships within and across the municipality or community. For example, this might be an academic partner, a community-based organization, or a recent engagement campaign.

The framework should also identify weaknesses or key considerations—like anticipated resistance from a particular business or sector, or groups that have been underrepresented in past engagement. In this way, the framework illuminates opportunities for overcoming standing gaps.

### What makes a great stakeholder engagement framework?

- It articulates a clear goal for the engagement that can be communicated effectively and clearly to all stakeholders. This is likely in the form of a “research question.”
- It communicates tangible impacts that can be readily understood by stakeholders. Impacts should match lived experiences.
- It should build on existing relationships. If these relationships do not exist, a plan for starting and maintaining relationships needs to be constructed.
- It cannot be one-dimensional. Use online and in-person approaches to engage with stakeholders.
- Identify groups that are under-represented and actively reach out to them.
- Communicate constraints. If respondents aren’t given parameters, they may provide very real feedback that the local government is not in a position to incorporate and respond to. This fractures trust.
- It isn’t overly prescriptive or narrow. Ensure that stakeholders have freedom to think across a wide space of possibility.
- It includes plans for following up with the participants at various points in the project.

# Solution discovery & procurement

*“Oversimplification of our design options is dangerous since it hides more of the working parts needed to design effective, sustainable institutions than it reveals. And, it reduces our awareness of the need to monitor outcomes and improve them over time through better processes of learning and adaptation.”*

— Elinor Ostrom, *Understanding Institutional Diversity*

Building on the challenge statement, the solution discovery process should focus on stakeholders, systems, and future value. With these in the foreground, technology is a support—deeper issues, like procurement, data management, impact measurement, and communications, become the subject of

design. The “solution” shapes how stakeholders of all kinds consider climate action and its value.

The early phases of solution discovery should be divergent, generating as many paths as possible to reach your desired outcome (as stated in the challenge statement). Consider using co-creation with stakeholders and cross-functional collaboration to diversify perspectives and explore the implications of a solution for various stakeholders.

What follows is a narrowing and prioritization phase, based on clear evaluation criteria (also stated in the challenge statement). You may loop through this expansion and contraction cycle several times before arriving at a viable solution that is ready for implementation.

Solution discovery may use any number of tools, from internal brainstorming workshops to formal RFPs.

## How to arrive at new and best-fit solutions

- **Understand the Landscape:** Landscape scanning is about engaging with the state of the art—technologies, projects, providers, and research related to your challenge statement. Landscape scanning will give the project team an understanding of feasibility, cost, and potential partnerships. This may begin with desk research then incorporate more structured outreach like requests for proposals and requests for inquiries.
- **Generate and solicit ideas:** Generating and soliciting ideas should begin with divergence (thinking broadly about approaches to the challenge statement, based on the landscape scan). In many cases, the best fit solution will require a shift in processes, norms, or policies. This step may also involve a formal RFP.
- **Evaluate:** Following a divergent idea generation and solicitation phase, projects move forward through convergence—honing in on the most viable and desirable ideas, based on evaluation criteria in the challenge statement. Evaluation should be neutral and objective, comparing processes vs. technologies, open source vs. commercial solutions, and local collaborative solutions vs. singular established vendors.
- **Identify and interrogate bias:** Many projects begin with stakeholders holding preconceived notions about the solution and the process to get there. Identifying these biases and critically examining them in a group ensure that they are appropriately placed within the process and not an unseen force.

# Data governance

*“Data governance should not be perceived as a constraint or a burden. It is instead a tool for bringing about clarity as well as mutual understanding through the (mandatory) discussion, agreement, and documentation of dependencies and responsibilities.”*

— Vincent Oefner

With climate action projects there is a need to examine how ecosystems are interconnected and how they are impacted by our built environment. Examining the impacts and interconnectedness means that climate action projects naturally rely on multiple different datasets (think data on extreme heat and its importance to data on air quality). In Open North's previous paper, [Data Governance—the missing piece in the climate action puzzle](#), we highlight the need for governments to align their digital and data strategies with their climate action plans. In order for data to contribute to a climate action project's goals, effective data governance is needed to ensure it is managed consistently and responsibly throughout its lifecycle, from its collection, to its processing, storage, sharing, use and reuse, and eventual disposal.

“Data governance is both an organizational process and a structure; it establishes responsibility for data, organizing program area staff to collaboratively and continuously improve data quality through the systematic creation and enforcement of policies, roles, responsibilities, and procedures” ([National Center for Education Statistics](#)).

Data governance is typically formalized in a data governance framework. The goals of the framework will vary depending on the priorities of any given organization, however some of the most common goals driving the development of a framework include:

- Minimize risks associated with data, especially personal identifiable information (PII).
- Establish internal and partnership-based rules for data collection, use, and management.
- Implement compliance requirements.
- Improve internal and external communication.
- Increase the value and integrity of data.
- Facilitate the cooperative administration of data and project communications.
- Help to ensure continuity and connection to other projects in the future.

To realize these high-level goals, specific systems, responsibilities, and protocols are developed in collaboration with all stakeholders.

## Establishing a robust data governance framework

**The idea of creating a data governance framework can seem daunting, but the following tips will help you to get started.**

- **Define the role data will play in achieving your vision:** The principles guiding your approach to data governance will be determined by what you want to be able to do with your data. Effective data governance within a climate action project should be grounded in a clear vision, always looking toward your ultimate goals. This vision will provide direction and help you develop appropriate protocols to ensure responsible, accountable, and transparent decision-making across the data lifecycle.

## Establishing a robust data governance framework (continued)

- **Map out a data acquisition strategy:** Once you have identified what data inputs will be necessary for your project, you will need to identify what gaps exist and determine a strategy to fill them by working with partners and across departments. This may include collecting new data, accessing existing data through a data sharing agreement, or licensing proprietary data from a vendor, depending on your project needs. Make sure to identify the cost and effort associated with each approach.
- **Identify partners and define their roles:** Your project may include other organizations who will be involved in creating, collecting, sharing, analyzing, or managing required data. It is important to clearly define their roles and responsibilities at the outset to head off confusion or conflicts.
- **Consider the entire data lifecycle in your plans:** Data governance is not a static consideration, but rather it applies throughout the data lifecycle: from collection or creation, cleaning and processing, sharing, analysis, storage, and eventually destruction. Consider how your data will be handled at each of these stages, identify potential risks, and develop strategies for managing these risks. Possible steps include:
  - Agree on a statement of integrity and ethics.
  - Conduct an analysis of risk (focusing on PII).
- **Anticipate future use cases for your data:** Data should be thought of like any other organizational asset. When properly managed, data collected in the course of one project can be reused in future projects led by your team, shared with other departments, or made available to external partners to support other climate actions.
- **Decide when and how you will review and update the framework:** A data governance framework should be treated as a living document, to be regularly reviewed and updated as you gain more experience throughout the project to ensure that it is always aligned with your end goals.

## Measurement frameworks

*“Organizations grow in the direction of what they repeatedly ask questions about and focus their attention on.”*

— David Cooperrider, Appreciative Inquiry

### Measuring long-term success with climate action projects

Measurement is how you demonstrate the success of a project. It is typically a requirement for ongoing support and funding. This is particularly important

for climate action projects as they are often designed to provide their most significant benefits over the long-term. A comprehensive measurement framework is critical to demonstrating the medium and long-term benefits of such projects. Municipalities need to plan to measure how, in the case of climate adaptation or mitigation, a project will reduce risk or impact over a 5, 10, and 50 year time period.

### Measurement as collaboration

Climate action projects have the potential to meaningfully advance indicators across traditionally



disparate domains (e.g. transportation and parks), and across jurisdictions (e.g. air quality in neighboring communities). To achieve multilateral outcomes, it is important to design shared measurement frameworks and indicators and embed them into the project structure and sustainability model (e.g. ongoing funding). This demonstrates how a single project can advance the goals of many departments or stakeholders.

### Measurement to build trust

Project indicators are intended to communicate success or progress of a project, but their value goes

significantly beyond that, identifying learnings, establishing trust with stakeholders, and building support for a project or initiative.

### Limiting scope of measurement to what is realistic

Project teams should feel comfortable in limiting the scope of data collection for the purpose of project evaluation while acknowledging that there is room for improvement. A list of 200 indicators is going to hobble any attempts at measuring project success and likely includes indicators with minimal value to the organization.

#### Creating an effective measurement framework

- Align project-specific KPIs with broader policy objectives and priorities (like greenhouse gas emission reduction or workforce development).
- Use measurement as a way to create continuity for long-term work whose development and impact spans across political cycles.
- Resources available for data collection - Identify who will be collecting the data and whether they have the capacity to collect all the data that is required.
- Time required to collect the data - Based on the resources available for data collection, how long will it take to collect the data? Ensure this is built into a project plan.
- Technical capacity to collect the data - Does the organization have the technical resources and expertise to collect the data?

# NEXT STEPS

## How we can help

Have questions about any part of this or all of it? Reach out to our team at [csn@opennorth.ca](mailto:csn@opennorth.ca) for support on a climate project. Open North provides professional services in data and technology projects in municipalities across Canada. We look forward to hearing from you and discussing how we can help.

## How you can help

We think of this document as a first draft. While it is informed by our own expertise and knowledge from working and talking to communities across Canada, we know there is still room for improvement. Let us know how this fits within your experience of putting together climate action projects, both for operationalization and for funding opportunities. Contact us at [csn@opennorth.ca](mailto:csn@opennorth.ca) with your thoughts or better yet schedule a chat with us to dive into areas for improvement.



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