

PRACTICAL EXAMPLE FOR MONITORING AND REPORTING TRAINING WORKSHOPS

Name and Council: Michael Bathgate, Dunedin City Council

Workshop Session: Plan Effectiveness Monitoring

Synopsis:

A resource management monitoring strategy was developed, in consultation with key stakeholders and elected representatives. This set the framework for prioritising issues for monitoring, development of indicators and reporting.

A series of topic-based monitoring reports was developed, each examining different aspects of the district plan. While to some extent these were SOE in style, they were developed with monitoring of plan effectiveness in mind.

To date, monitoring information from these reports has been employed in three plan evaluation reports. Public and stakeholder consultation also fed into the evaluation reports, along with other available information such as research, case law, legal opinions. The evaluation reports reviewed the efficiency and effectiveness of individual sections of the district plan.

What worked well and why:

The monitoring strategy provided a good basis for prioritising issues for monitoring. The topic-based reports provided useful tools for raising community awareness about the district plan, as well as input into plan effectiveness monitoring. Good media response to these reports helped to get the message across.

Monitoring data (e.g. indicators) formed a building block for value-added work such as the evaluation reports. It has been very useful for both policy development and consents processing. In addition, research reports have been used to examine in greater depth particular areas of interest (e.g. inner-city apartment living, vacant industrial land, residential capacity study). Having these branded as part of the overall monitoring programme helps to promote the overall package.

Hot Tips for Success:

- Start monitoring today – there is no better time.
- Expect the sands to shift, this is very much an iterative and evolving process.
- Use a project management approach to define roles, secure resources, set milestones.
- Find a monitoring champion amongst senior management or elected representatives.
- Use students wherever possible to help with surveys and other monitoring work.

What did not work well and why:

Limited resources means that some tasks are always going to suffer. In this case, data management could have been better – for instance, a wish list item of an integrated monitoring database accessible to other staff and the public has never been fulfilled. Also more stringent quality assurance systems – for

instance, to more thoroughly assess quality of data obtained from other Council departments.

Linkages to Community Plan outcomes and monitoring has to date not been as good as they could have been. Recent efforts to align the two sets of monitoring requirements will help to promote resource management monitoring as a key aspect of community outcome monitoring.

Pitfalls to Avoid:

- Don't reinvent the wheel - plagiarise other Council's monitoring strategies and copy processes used for indicator selection and development.
- Don't underestimate the amount of time required for data collection and management.
- Don't over-promise/under-deliver - avoid long lists of indicators and collecting data for its own sake.
- Producing large written reports of little value – be tightly focused in your output and consider the target audience.

What were the critical factors in getting approval for this approach or process or product in terms of decision making?

- Development of a monitoring strategy with input from a range of Council departments.
- Emphasising the statutory requirement to monitor.
- Promoting monitoring as part of the bigger picture – how monitoring information and outputs can be used by a range of staff and stakeholders.
- If starting now, emphasise the relationship with and contribution to community outcomes monitoring required for the Community Plan.

References available from this work?

Monitoring and evaluation reports available at www.cityofdunedin.com

Main Contact Person/Position: Michael Bathgate, Environmental Monitoring Planner

Phone: (03) 474 3492

Email: michael.bathgate@dcc.govt.nz