

BY TRACY BERGHAN, OPUS INTERNATIONAL CONSULTANTS, WELLINGTON.

TOWARDS EFFECTIVE DISTRICT PLANS

IMPROVING MONITORING OF DISTRICT PLANS - NATIONALLY.

In July this year, Opus International Consultants (Opus) and six Wellington local authorities started an 18-month sustainable management fund project aimed at improving monitoring of not only their own district plans, but district plans nationally. The six local councils participating in the project are: Kapiti Coast District Council; Porirua City Council; Wellington City Council; Hutt City Council; Carterton District Council; South Wairarapa District Council.

Adding to their experience and advice to the project are Dr Jenny Dixon (School of Resource and Environmental Planning, Massey University) and Erica Sefton (Minister for the Environment). Local Government NZ has also offered to assist in reviewing the resource kit with dissemination.

THE PROPOSAL

The proposal involves Opus and the project partners working together to develop a resource kit that will provide guidelines for the effective implementation of district plan monitoring by local authorities nationally.

THE ISSUE

Section 35 of the *Resource Management Act* requires local authorities to monitor the suitability and effectiveness of any policy statement or plan for its region. This is critical to achieve sustainable, effective and equitable resource management.

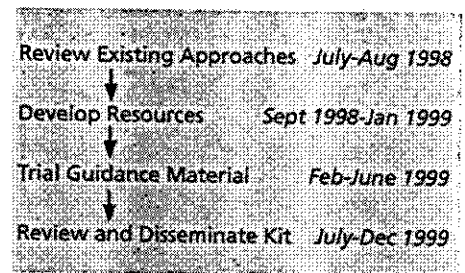
Surveys undertaken by Opus International Consultants (1997), and Hill Young Cooper (1996), indicate that very few territorial local authorities (TLAs) had commenced work on addressing their section 35 responsibilities. This is not surprising as TLAs have traditionally had limited experience with development and management of monitoring activities and employed few, if any, specialist monitoring staff. Until recently, most authorities have been focused solely on district plan preparation.

There is almost a complete absence of user-friendly guidance material available to assist TLAs with this monitoring function. While the

Guide for Local Authorities document, published in 1997 by Ministry for the Environment, provides a useful introduction to monitoring responsibilities, it does not provide sufficient practical guidance, tailored to the unique needs of rural and urban TLAs to enable them to begin the process of plan monitoring. This project builds on the earlier guide by providing a tailored user-friendly resource kit, containing practical guidance on the process (the steps to take and people to involve) and also "tools" (in the form of worksheets, checklists and case studies) to help councils through this process. The project will also complement research funded by the Public Good Science Fund which is examining the relationship between plans and their environmental outcomes.¹

THE APPROACH

Existing monitoring approaches used by TLAs nationwide will be reviewed and the project team will review the district plan provisions and monitoring requirements of the project partners.



DEVELOP RESOURCES

Guidance material (possibly in the form of a Resource Kit) will be developed which can be used by TLAs to address their section 35(2)(b) monitoring responsibilities. The format and contents of the kit will be developed by working closely in a series of interactive and practically-focused training workshops with the project partners. The guidance material will be finalised following trialing and further development by the project partners. While the contents and format will be finally determined during the course of

the project, it is envisaged that key components will include:

- An introductory section (outlining the responsibilities of TLAs under section 35 of the Act).
- A guide to contents and use of the kit.
- A "process" section (containing an illustrative flow chart identifying the nature and timing of key elements to be undertaken for effective district plan monitoring – for example, where to start, who to involve, what questions and tasks to complete, and how to proceed).
- A series of technical sections providing more detailed guidance material to support each key task identified in the flow chart, including sections on "identifying your monitoring responsibilities", "identifying appropriate monitoring techniques" (including hard and soft techniques and selection of indicators), "analysis and interpretation of your data", and "effective reporting" (for both internal and external audiences). The guidance will include appropriate checklists of action, worksheets to be completed, and ultimately (following the trial phase) case studies.

- A contact section for further information.

The effectiveness of the Resource Kit guidance material will be trailed and evaluated. Local authority project partners will be responsible for trailing each element of the guidance by applying it to their plan to as great an extent as possible to identify monitoring requirements; identify appropriate monitoring techniques, including indicators; gather and analyse data; and interpret and report on plan effectiveness.

The results and feedback following the trial will be used to amend and finalise the guidance and to prepare a series of case studies, which describe and quantify the approaches and results of the project partners.

Once the Resource Kit is finalised it will be disseminated to project partners and all TLAs nationally. This will also be when you can get a copy of the Resource Kit (December 1999).

The project partners see this project as a chance to improve and increase their own monitoring, improve local networking, as well as developing a resource kit relevant to other territorial local authorities' monitoring requirements.

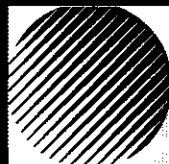
The key to success of the project is the active participation of all project partners.

The team would like to acknowledge the support of Guy Spooner, general manager, Carterton District Council, in the initial stage of this project. It is with great regret that we report that he recently passed away and we would like to extend our sympathy to his family and colleagues.

For more details on the project contact Tracy Berghan, Opus, Wellington tel 0-4-471 7583, or Erica Sefton, Ministry for the Environment tel 0-4-471 9400, or visit the web page www.opus.co.nz.

FOOTNOTE

1. *Planning Under a Cooperative Mandate* is a collaborative research programme involving Dr Neil Erickson (International Global Change Institute, University of Waikato), Dr Jenny Dixon (School of Resource and Environmental Planning, Massey University), Jan Crawford (Planning Consultants Ltd), and Dr Philip Berke (University of North Carolina). The nine-year programme (1995-2003) is funded by the Foundation for Research, Science and Technology.



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For more information call:

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Hamilton - Murray Kivell
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Napier - Rowena Macdonald
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Palmerston North - Joanna McIntyre
(06) 350 2500

Wanganui - Jenny Harrison (06) 345 4109

Wellington - Tracy Berghan (04) 471 7000

Nelson - Valerie Williams (03) 548 1099

Christchurch - Neil Sheerin (03) 365 1530

Dunedin - Julie McMinn (03) 474 8899

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The project team – Back row (from left): Phillipa Richardson (PCC), Stephen Lamb (WCC), Brendon Marshall (HCC). Front (from left): Andrew Guerin (KCDC), Robyn Fisher (HCC), Yolanda Morgan (Opus), Tracy Berghan (Opus). Missing are: John McSweeney (Opus), Ross Smith (SWDC).