

THEME: Performance Measures

How do we develop effective performance measures for natural area management contracts?

Currently, there is a wide range of performance measures being used by principals and contractors to gauge the success or otherwise of contract works.

It was generally agreed by the group that:

- Currently, all performance measures being used are relatively coarse and could do with applied improvement
- Performance measures should link to National, State & local biodiversity management objectives (i.e. Australian Natural Heritage Charter)
- A 'one size fits all' approach is not effective or relevant for the diverse range of works undertaken by contractors (i.e. performance objectives are vastly different for target weed control; fire access & bush regeneration programs etc)
- However, uniformity in reporting protocols and presentation formats required by principals enable a higher degree of project comparison (i.e. contractor/site performance); increased admin efficiencies & perhaps less subjectivity in reports
- Performance measures need to be relatively simple to collect data for, not time consuming, flexible in application & accurate in linking to project objectives
- Continuity of contractors and sites was also seen as a valuable way of monitoring performance over a time-frame that is consistent with natural area restoration projects

What do we do now?

A working group made up of principals (local/state government officers) & contractors/practitioners needs to be formed to further examine current performance indicators being used or promoted for use under the various State & Federal Govt. grant bodies etc. These can be evaluated for effectiveness at the local scale; real-world practicality; ease of gathering/reporting & applicability to different project types.

A call for any other approaches currently being used can also be made so that a thorough evaluation can be made. Ultimately, the working group would aim to produce "Best Practise Guidelines" for monitoring & evaluating project performance based on standardised but locally adaptable approaches to performance measuring.

Who will do it?

There was not a great deal of enthusiasm from the workshop participants to put their hand up & agree to make some time to progress this issue. To move these issues forward and start developing some best practice guidelines, we need interested and experienced people from the industry to come forward and throw their hats in the ring. Otherwise things don't change and the same old issues will continue to fester!

DETAILED NOTES: TRANSCRIPT FROM THE WORKSHOP DISCUSSION (AFTERNOON SESSION)

Mosman Council base their performance measures on percentage native vegetation cover. They start by mapping resilience.

The Australian Natural Heritage Charter (ANHC) covers a lot of the issues to do with performance measures, but not many people in the group use them or even knew about them.

Should the same performance measures be used for work done by bush regen contractors such as the creation of Asset Protection Zones, in which all vegetation is reduced?

Example: habitat for bandicoots is one of the main focuses of The Inner West Environment Group (IWEG), so their big performance outcomes include the number of volunteers on site, and the improvement of bandicoot populations.

Performance Measures used:

- **Fixed photo points** - comments: these are often necessary for Councillors, grant bodies etc when seeking further funding, but some don't like using them at all due to their ability to be misleading and their inability to portray true ecological health
- **Mapping of % weed cover and % native cover, before and after** - comments: some Councils only use one or the other. Percentage weed cover measuring can be time consuming and variable, depending on when the control works are done. Can be misleading if control works not undertaken properly and, for example, root systems are left in situ. Some councils don't like to use % weed cover as a performance measure at all. Mosman Council starts by mapping resilience
- **Monthly reports** - comments: usually consists of record of site visits, works undertaken and hours worked. Some councils provide a template to contractors. Reporting needs to be clearly identified and costed at the beginning of a contract. Monthly reporting by a contractor cannot be used as monitoring of a project
- **Amount of time it takes to maintain the site** – comments: in theory the amount of maintenance a site requires would decrease over time. This idea was disliked by some, as it was considered to involve too many variables, and the fact that primary work can be quite fast compared to more painstaking maintenance work.

Another approach is to base the monitoring on the seeding cycle of the weeds present on the site. Example measures include:

- All annual weeds prevented from seeding
- Woody weeds prevented from reaching 50cm height
- Vines prevented from reaching maturity

These measures are clearly defined and can be included in the original brief. They're more suited to the monitoring of maintenance sites.

"Performance measures need to be simple".

Not only the performance of the contractors needs to be monitored, but also that of the site and of the management plan. The contractors could follow the site plan to the letter, but the plan itself could be inappropriate. The ANHC outlines how to create appropriate work plans.

Flexibility

- "It all depends on the site"
- Sites, especially larger ones, can have a lot of variation within them. They may need to be divided up, with different performance measures used in different areas

- Flexibility is very important because it's impossible to predict outcomes within natural systems, and performance measures outlined at the beginning of a project may prove to be inappropriate, or impossible to achieve

Monitoring

- Should project/ site monitoring be done by someone external? This results in additional cost, but site monitoring done by contractors can result in bias, and Council staff often don't have the time, especially if they manage a large number of sites.
- If the nominated outcomes are too complicated, Council staff don't have the time to monitor and report on them.

Continuity and contractor relations

- Council staff maintaining a good working relationship with contractors and regular on-site discussion is more important and effective than well written contracts
- Maintaining continuity of contractors on sites is more important than saving money by going for the cheapest quote received each financial year
- Need to build shared site responsibility with contractors
- Other things (besides environmental outcomes) to tick off when considering re-engaging contractors include OH&S performance, and community engagement

Standardisation

- Councils should provide templates for monthly and final reports, including requests for future recommendations
- Everything needs to be standardised so that completely different things are not expected of contractors from council to council
- There is an industry standard for number of man hours per m² in "good" and "bad" bushland. Some councils use these figures for judging quotes and reports. It varies a lot from site to site, however, and can cause problems
- Performance measures need to be different between lump sum and schedule of rates contracts
- Is it possible to have industry standards in bush regeneration, considering number of variables being dealt with?
 - There would need to be a range of guidelines and standards
 - Real specificity would not be possible

Moving forward

- We need to see what's already out there in terms of performance measures
- Need to question what is trying to be achieved in attempting to form standard performance measures – who is it for?
- Both qualitative and quantitative measures would be needed
- Possibly need to get professionals (eg Q&A professionals) to work with Councils and contractors to sort it out
- Need to create a working group (possibly under the umbrella of the Restoring Biodiversity Industry Assoc.) to continue pulling ideas together
- SHOROC (Warringah, Mosman and Manly Councils) are working to develop bush regeneration contract standards. They will be happy to share their outcomes with other Councils once finished.

REPORT BACK & DISCUSSION WITH WHOLE GROUP AT END OF DAY

Comments:

- All of monitoring and evaluation measures are fairly coarse, and show a need for improvement.
- The difficulty is finding a measure that is not too time consuming.
- There is a need for a more standardised approach to monitoring and evaluation.
- Photos before and after are merely an illustration rather than a measure.
- Review contracted measurement August/September reporting back.
- Reporting to local government is about to disappear – State Plan of Reporting to Local Government – if councils don't have to do this – quarterly reporting
- Loop into council triad.

In the early days, in many contracts the performance indicators were whether the money was spent or not, and then the environmental consideration was almost secondary. But recently the Federal Government funding body wanted us to produce monitoring and evaluation plans and we had to come up with some options. Much of the monitoring and evaluation targets are fairly coarse. They don't necessarily tell us about habitat condition improvements, and the qualities of the works completed.

We did find that there needs to be uniformity in the ways the contractors record the measurements in their reports, and there was an undertaking from council staff to start circulating their existing templates and looking if we can unify those approaches, and the contractors to have a more standardised approach.

SHOROC is currently reviewing their contracting process and the performance measurement components. It was agreed that the RB09 forum looks at how they progress and we can learn from their experience. We are hoping that there are some well-focused minds in that group who are going to build a pathway forward. This will be hopefully reported back in August/September.

Response:

We are running the monitoring of the Western Sydney parklands contract and are trialling a database set up through state government funding for the next three years, and from that there should be a framework for monitoring.

Response:

I have just done a "back of the envelope" calculation and these audits to adequately monitor and evaluate the projects take up about 23% of my time to get base level monitoring done. The issue is for local government to have the resources to apply to a genuine quality management program, rather than just looking at the aspects as a requirement of a funding body. We want it to be appropriate that it helps inform our managers as well as improve practices, not purely as a compliance tool.

Response:

The state government has developed a monitoring and evaluation report strategy which is looking at the 13 natural themes under targeted state plans – biodiversity/water/land. They are doing statewide assessments of all of those targets and looking at resourcing them - CMA scale. There is a DRAFT catchment report coming out for every CMA region. CMA and agencies have seen them and are trying to fix them up.

Threats and conditions – CMAs have a complete knowledge of threats, but on conditions they do not have very good information – from erosion of soil, to soil from estuaries, flora and fauna, threatened species and even down to community engagement – so there is a broad spectrum of targets. In the last week or two, the state have come to the LGSA – our framework is almost in place – we now want to talk to local government. We can link this to what the local councils are doing on the ground . There is still a lot of work to be done in that area. I don't know whether you know that the reporting is about to disappear under the new State Plan of Reporting to Local Councils. The problem is what is going to replace that? There are all sorts of problems with the SOE but if the councils don't have to do it, will they stop doing the monitoring and reporting together. We are trying to work out ways and making sure there is quality monitoring and reporting throughout councils' formal planning process.

- Performance measurement is again linked with SHOROC work. Rob and Paul put their hands up to be involved in this process as well. There was a timing of August-September mentioned.
- SHOROC councils are setting up a panel of contractors for ecological control, feral animals control, weed control so that we can streamline the process. It might be a model that can be taken on elsewhere.
- There should be some research assessment of the gathering of those measures and research for the Western Sydney, and tie it into the Willoughby/North Sydney parklands.