

# **Building capacity in monitoring, evaluation and reporting for more effective waterway management**

## **(‘MERI makes for good waterway outcomes’)**

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### **Key Points**

- The West Gippsland CMA engaged RM Consulting Group (RMCG) to undertake a mid-term review of their Regional Waterway Strategy (RWS) Implementation Plan, 11 funded waterway projects and RWS MERI plan.
- RMCG used a collaborative approach, aimed at building internal capacity in MERI by working closely with the West Gippsland CMA’s project managers and teams throughout the project.
- The project demonstrated how building internal capacity for MERI can help regional waterway managers to improve strategic planning and project delivery; demonstrate impact to investors; and make a strong case for future investment.

### **Abstract**

‘MERI’ (Monitoring, Evaluation, Reporting and Improvement) fills many with dread: the process can be overly bureaucratic, and reporting requirements can feel clunky or confusing. Many project managers end up frustrated they haven’t had the opportunity (or are unable) to tell the real story of the work they’ve done, it’s achievements and how it contributes to their organisation’s strategic objectives. As a result, MERI can become a burden and a ‘box ticking’ exercise.

RMCG were engaged by the West Gippsland CMA to undertake a mid-term review of their:

- Regional Waterway Strategy (RWS) Implementation Plan
- 11 funded waterway projects
- RWS MERI plan.

RMCG used a collaborative approach, aimed at building internal capacity in MERI by working closely with the West Gippsland CMA’s project managers and teams throughout the project.

- Articulating clear strategic objectives is critical. This builds line-of-sight between project activities and overarching catchment-scale outcomes.
- Tools like program logics are helpful to outline what you are doing and why, and to identify assumptions and knowledge gaps. These don’t have to involve a fancy template – a whiteboard sketch can be enough!
- A collaborative approach to MERI planning helps build project teams into the process – ensuring that project design, delivery and monitoring is grounded, practical, meaningful and evidence-based.

The project demonstrated how building internal capacity for MERI can help regional waterway managers to:

- Improve strategic planning and project delivery
- Demonstrate impact to investors
- Make a strong case for future investment.

### **Keywords**

Monitoring, evaluation, reporting, improvement, capacity, waterway

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### **Introduction**

In 2019, West Gippsland Catchment Management Authority (CMA) engaged RMCG to undertake a mid-term review of their:

- Regional Waterway Strategy (RWS) Implementation Plan (WCMA, 2016)
- 11 Victorian government funded waterway projects
- RWS MERI plan (Riverness, 2016).

From the outset, a key focus of the CMA was to build effective staff capacity (and mutual learning) for improved project delivery. At a minimum, this needed to involve a series of small group interviews or workshops in order to maximise the interaction and learnings between the staff involved in each waterway project/ or plan.

The concept and practice of project ‘MERI’ (Monitoring, Evaluation, Reporting and Improvement) has often been viewed by waterway project staff as an overly bureaucratic reporting process (or ‘box ticking’ exercise) and not an opportunity to review, reflect, learn and adapt to deliver more effective waterway outcomes. This hasn’t been helped by reporting requirements that can seem confusing or focused on the wrong level of activity, the use of unfamiliar MERI terminology or remote evaluation processes that are undertaken external to the project team.

Many waterway project managers often end up frustrated they haven’t had the opportunity (or are unable) to tell the real story of the work they’ve delivered, it’s key achievements and how it contributes to their organisation’s strategic waterway objectives.

The mid-term review project (RMCG, 2019) provided an opportunity to reset this focus, and RMCG adopted a collaborative approach for the CMA to iteratively build upon aimed at:

- Building and embedding internal CMA capacity in MERI
- Making MERI terminology accessible as a core part of project management
- Demonstrating how tools such as program logics can help to outline what key activities and works they need to be doing and why?

Accordingly, RMCG worked closely with the West Gippsland CMA’s project managers and delivery teams throughout the review project. This collaborative process led to greater ownership of the review’s findings and recommendations.

Two years on from this project, the CMA has now adopted many of the review’s key recommendations, which have been demonstrated through an improved culture of active and regular project MERI and adaptive management. This is demonstrated here through the lens of one of the CMA projects examined through the mid-term review: *“Delivery of water for the environment”*.

The aim of this paper is to highlight the method used for both the mid-term review and the CMA’s approach to MERI. In the sections below the focus is on how consultation and collaboration has been combined with more traditional tools like program logics, to review and improve both the impact of the waterway strategy and the ability to demonstrate that impact. One example has been included, on management of water for the environment, to illustrate the approach in more detail.

### **Approach**

In undertaking the project in mid 2019, RMCG undertook seven visits to the West Gippsland CMA to meet the CMA staff at their office locations. During this period a total of 12 project interviews were conducted face-to-face with project delivery staff. Whilst a simple action, it was still an invaluable way to build a connection with the project leaders and make sure the advice provided was realistic and practical due to greater insight into their situations. A further half-day workshop was also held with key project delivery staff from West Gippsland CMA, as well as CMA staff covering project management and investment reporting. This was an opportunity to review progress against each of the eleven CMA waterway projects and the RWS Implementation Plan and

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test the review's preliminary findings. For each waterway project, discussion with project teams covered each of the themes in the Evaluation Framework prepared for the review.

As part of the 2<sup>nd</sup> phase of the review, an additional workshop was held at the CMA with project managers and coordinators, as well as staff from the Department of Environment Land Water and Planning (DELWP) waterway monitoring program to review the existing MERI plan and its alignment with the RWS Implementation Plan themes and priorities.

While taking a collaborative approach is a common claim, often demands on those involved mean that, in practice, it is very limited. The approach used here did reflect this commitment. For instance, significant time was dedicated to one-on-one discussions with project teams focusing on simply understanding their project – asking questions, seeking clarification on why certain approaches were used, and seeking their insights from their project delivery experience. While a simple step, pausing to reflect on the project approach is something that many project teams do not routinely take the time to do. The advice provided for each project (that accompanied the mid-term review findings) was very specific to both the particular project and the project team. As demonstrated in the case study below, the advice provided was tailored specifically to the CMA's project, with evidence it has helped to build capacity of the staff.

Using this MERI approach has helped the CMA make project delivery more targeted and meaningful, it has identified the key waterway partnership and engagement focus required and has highlighted where it needs to improve. This improved MERI capacity is best demonstrated through the following case study focused on the West Gippsland CMA's "*Delivery of water to the environment*" project.

### **Case study: Delivering water to the environment project**

This project aimed to deliver on CMA's statutory responsibilities in managing the environmental water reserve for rivers, aquifers, wetlands, and estuaries. Key Management Activities included:

- Development of short- and long-term environmental water management objectives and actions through review of flow recommendations, environmental water management plans, seasonal watering proposals, and environmental water deliveries
- Protection and management of EPBC listed species and Ramsar listed wetlands through environmental flow deliveries
- Improved management of groundwater resources
- Contributions to state-wide environmental water monitoring programs.

A complementary project component "Community Engagement for Environmental Water" aimed to increase community awareness and advocacy for environmental water; build capacity for increased community participation in environmental water management; and recognise and understand the shared benefits of environmental water and explicitly consider these shared benefits in environmental water management, without compromising the ecological outcomes. Key Management Activities included:

- Development and implementation of a tailored Environmental Water Reserve (EWR) Community Engagement Plan
- Increasing community awareness, advocacy and participation in environmental water management using targeted approaches such as establishing Environmental Water Advisory Groups, citizen science monitoring and strengthening partnerships
- Understanding and reporting (to local communities and the VEWH) on the shared benefits of environmental watering, and where possible enhance these benefits, including Aboriginal and recreational values
- Building the capacity of Traditional Owners and recreational users to participate in water resource management
- Enabling West Gippsland CMA and the Gunaikurnai Land and Waters Aboriginal Corporation to further progress discussions about increased collaboration on the implementation of the environmental water related aspects of the West Gippsland Waterway Strategy (WGCMA, 2014).

To help the staff, a program logic was developed for these projects (Figure 1) based on the descriptions in the West Gippsland CMA’s project management system, and from feedback collected via interviews with the project team.

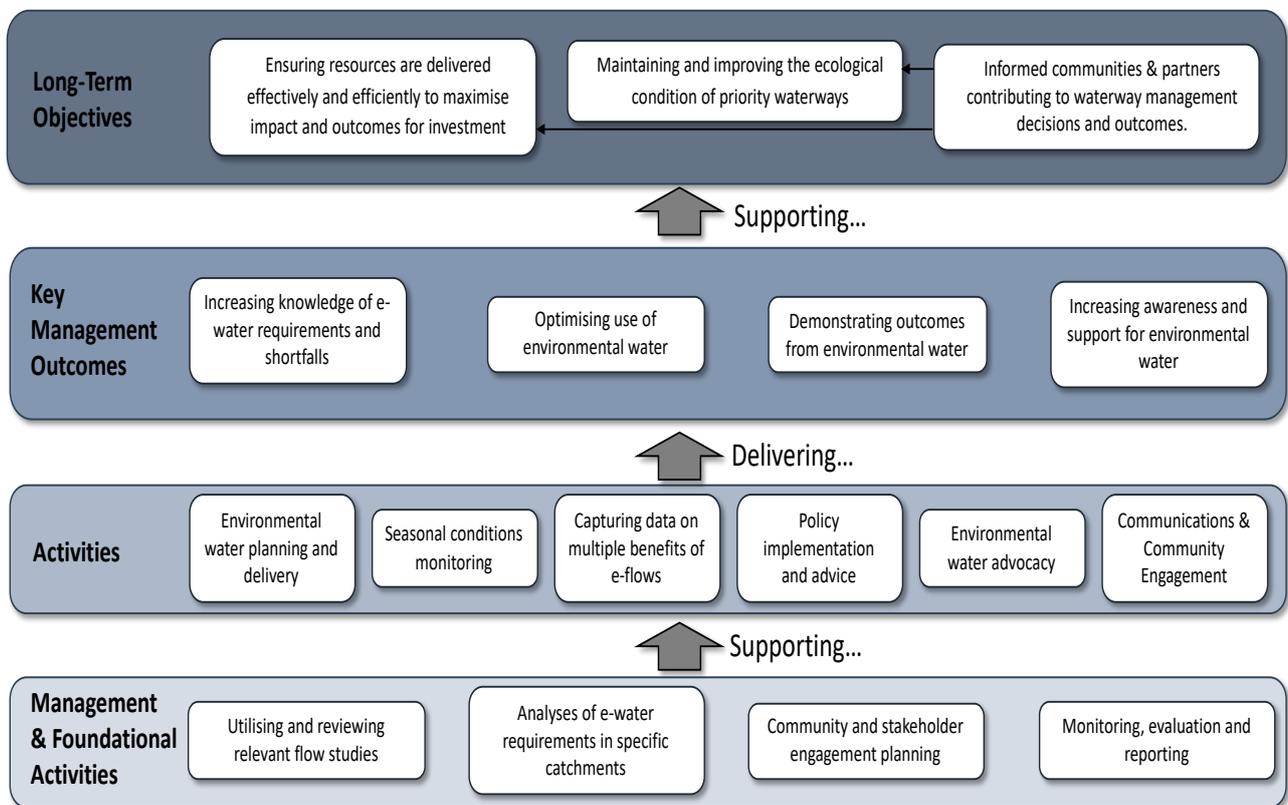


Figure 1: Program Logic: Managing Water for the Environment

### Key findings and recommendations

The review found that both projects were on track and achieving good outcomes despite significant staff changes over the implementation period. In particular, the strong planning and governance framework for the environmental water project and good ongoing relationships with partner organisations had helped to ensure good project delivery.

It also found that investment in the development of partnerships with Southern Rural Water (SRW), Victorian Environmental Water Holder (VEWH) and DELWP were paying dividends, leading to improved communication and information flow, increased trust, and better outcomes.

The review also found the projects had helped to increase the advocacy capacity of both West Gippsland CMA and the wider community in relation to environmental flows and waterway health. Likewise, a new EWR Community Engagement Plan (with associated MERI) was an important piece of work with implications for the broader waterway program. In particular, the framework for monitoring and reporting on social outcomes for community engagement activities provided a useful basis for other projects within West Gippsland CMA.

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Despite this, the review also identified some key areas for improvement:

- Increased preparedness for drier conditions (including drought refuge modelling and planning) as an important short-term priority, alongside completion of flow shortfall studies to inform the renewal of the Central and Gippsland Region Sustainable Water Strategies.
- Continued long-term monitoring of outcomes through the Victorian Environmental Flows Monitoring and Assessment Program (VEFMAP) together with complementary local monitoring to demonstrate outcomes. This focus also included an opportunity to utilise a revised approach to citizen science to support this work.
- Utilising and sharing expertise across CMAs and partner organisations in order to increase staff skills and capacity (e.g. flow modelling, drought contingency planning, monitoring approaches to fish spawning and recruitment, delivering cultural outcomes from flows with Traditional Owners).
- Raising the profile (both internally and externally) of water for the environment as an integral component of the CMA's broader waterway program and integrated catchment management, including a strong narrative about long-term outcomes and links to complementary works and activities. This included a focus on quantifying the wider shared benefits (e.g. for recreation, tourism etc) of water for the environment.

### ***The project two years on***

In response to these recommendation, the CMA's environmental water project team has continued to build its MERI capacity. Rather than pursuing an approach that focuses on levels of activity (i.e. number of seasonal watering proposals to deliver environmental outcomes), the CMA now has three clear measurable and, to an extent, attributable outcomes from delivery of water for the environment:

- Fresh water flows into the lower Latrobe wetlands (affecting both EC and pH).
- Fish breeding and abundance (particularly Grayling and Tupong) in the Thomson and Macalister rivers.
- Birds and frogs presence and abundance, including EPBC listed species in the Heyfield Wetlands.

The CMA has resourced the long-term monitoring of these outcomes in partnership with key agencies and community groups. The team is clear that building awareness and support in the community is critical to the success of the project, as well as the importance of a plan to achieve this.

Other examples of improved outcomes delivered through the project include:

- Strengthening the partnership approach with Gunaikurnai Land and Waters Aboriginal Corporation, the region's Traditional Owners, to increase awareness and knowledge of cultural water and how to deliver it.
- Working with Field and Game Australia through their monitoring programs to raise awareness of the issues surrounding the Lower Latrobe wetlands, building on their advocacy and financial support for restoration works to improve them.
- Active use of Arthur Rylah Institute's long-term fish monitoring program and available data.

Overall, the CMA is working in a more targeted and engaging way to increase the number of stakeholders who understand and advocate for water for the environment and its outcomes, particularly irrigator groups. This outcome focus is also evident now in CMA's communications with the public, and in project reports. For example, an environmental water release text and media release will always now contain the why (the outcome being sought), and not just the activity. The CMA's communications around water for the environment are also now integrated with other aspects of waterway health outcomes, which allows the conversation to focus not solely on the delivery of water but on the broader short- and long-term measurable waterway goals the community and partners are interested in.

However, whilst making a promising start the CMA recognises that building relationships with key stakeholders and partners around outcomes is a long-term strategy that will require continued investment of time and energy. The CMA sees the value in having meaningful discussions on outcomes and better understanding barriers to success as key ways to continue to build connections with stakeholders and to achieve waterway goals.

This renewed MERI focus has made it clearer what the CMA is aiming for, and in turn has made its stakeholder conversations, reporting and future planning easier.

## **Conclusions**

This review project has shown (as outlined in the case study) how building internal capacity for MERI can help regional waterway managers in the following areas:

- Awareness – the CMA understands evaluation and MERI better through having simpler models and language (e.g. there is a clearer understanding of the links between enviro water project and fish populations like Tupong and Grayling).
- Skills – the CMA has improved MERI data collection methods that are part of routine project delivery, not an additional task that's added to their workload. Communications and partnerships are now focused to the particular interests of the target audience (e.g. communications highlight particular environmental water outcomes for irrigators, versus those for Field and Game).
- Practice change – the CMA is now promoting regular MERI discussions among its staff (e.g. through annual review meetings) to share their lessons and data in order to reflect on project progress and improve as they go, with an outcome focus now embedded in everyday thinking around project delivery.

This internal capacity for MERI is important as it can help regional waterway managers to:

- Improve strategic planning and project delivery
- Demonstrate impact to investors
- Make a strong case for future investment.

The key to this success was the adoption of a project approach that incorporated the following key features:

- Articulating clear strategic objectives. This critical component builds line-of-sight between project activities and overarching catchment-scale outcomes.
- Using tools like program logics. These help to articulate what you are doing and why, and to identify assumptions and knowledge gaps. These don't have to involve a fancy template – a whiteboard sketch can be enough.
- Using a collaborative approach to MERI planning. This helps build project teams into the process – ensuring that project design, delivery and monitoring is grounded, practical and evidence-based.
- 'Decoding' the jargon and methods typically used in evaluation to make the process more accessible and more easily used by project teams – and to help to make it a routine part of normal project delivery.

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