

Update to Monitoring Advisory Group - 1 June 2007

The last meeting of MAG on 29 January 2007 considered the 2006 Regional Monitoring Report (RMR) and the monitoring systems scoping study. The main actions were in relation to finalising the RMR and taking forward the outputs from the scoping study. The MAG meeting scheduled for 31 May has been cancelled as the Assembly and chair of MAG felt that there were no major issues which needed a steer from the group at this stage. We have however provided an update on a number of aspects of the monitoring work below and would invite members to let us have comments on this. We have specifically asked for comments on the draft terms of reference for the task group for developing online surveys (see outputs from scoping study below).

The next meeting of the group will be scheduled for October and members of the group will be contacted nearer the time to identify a suitable date. There may also be a need to contact the group for advice in the summer following receipt of the panel report.

Please note that Nikki Nicholson will be going on maternity leave at the end of May. If you have any comments on this update or on MAG please contact Julie Dagless in the first instance who will be directing monitoring queries either to Catriona Riddell, who will be leading on monitoring for the next few months, or to Sandrine Mathard, who is coordinating our monitoring work and in particular the Regional Monitoring Report, surveys and work on affordable housing.

This update includes the following issues:

1. Regional Monitoring Report
2. Affordable Homes Monitoring
3. Outputs from the Scoping Study
4. CLG Project: AMR Core Output Indicator Data Capture and Sharing
5. Office of National Statistics - Regional Presence
6. English Regions Network Monitoring Officers Liaison Meeting on 15th May 2007
7. South East Plan / EiP Update

I. Regional Monitoring Report

I.1 The 2006 Regional Monitoring Report has now been finalised and is available on our website at <http://www.southeast-ra.gov.uk/publications/monitoring.html>. The Assembly received the final copies from the printers on Friday 25 May and will be sending a copy of the report to all MAG members.

I.2 We propose to make the following changes for the production of the 2007 RMR:

- 1) A rationalisation of indicators (review of data quality and balance of indicators between topics) especially between the Quality of Life and Economy chapters.
- 2) To strengthen identification of any research or policy implications arising from the analysis, specifying any actions arising from those implications.
- 3) Advisory groups will be consulted through a selection of members from each advisory group - this group will discuss:
 - a. Reasons why the policies are not being implemented;
 - b. Whether the policies which are being implemented are achieving what was being intended (including an analysis of contextual changes);
 - c. The actions proposed to remedy the position including, where appropriate, RSS (or LDD) review.
- 4) Other issues, such as presentation and layout will be addressed through consultation of the Monitoring Advisory Group.
- 5) Data providers will be advised in advance of any requests from the Regional Assembly.

- 6) Local authorities will continue to be consulted by emails on the commercial and leisure and housing data.
- 7) Changes for the monitoring surveys include a rationalisation of use classes' definitions, the inclusion of a summary spreadsheet only for core output indicators, the inclusion of PSS3 definitions and the creation of a new form for affordable monitoring and, therefore the deletion of Table 23 on affordable homes.
- 8) Other changes will be adopted after receiving feedback from CLG on this years Monitoring Report.

2. Affordable Homes Monitoring

- 2.1 We commissioned consultants Three Dragons in February 2007 to carry out some work to improve monitoring of affordable homes. The members of MAG sitting on the affordable housing task groups have overseen this work. A summary and progress report on the project is given below.
- 2.2 **Aim of Project** - the Regional Assembly will need to monitor policy H4 from the draft South East Plan on the provision of affordable housing. The information collected by the Regional Assembly through local authorities should be used to assess progress in relation to the target for affordable housing and the make-up of this target divided in social rented and intermediate affordable housing.
- 2.3 **Background Information** - to date, there has been very mixed performance amongst local authorities in the provision of data to the Assembly. Some authorities do not provide this information at all and the accuracy of other information provided is variable. For the last couple of years, the Assembly has had to rely on Housing Corporation data only restricted to grant funded schemes.
- 2.4 **Description of Project** - the project was to recommend an approach which will give the Assembly more reliable information which could be included in the Regional Monitoring Report. The practical output from the proposed research was the creation of a 'how to do' guide for local authorities with a new form to be despatched with the Assembly's annual request for information for the Regional Monitoring Report. This guide, accompanied by a new designed form, has recently been piloted by the members of the task group and will go out to local authorities in June.
- 2.5 Progress on the returns collected via this new form and guide will be reported at the next Monitoring Advisory Group.

3. Outputs from the Scoping Study

- 3.1 The January meeting of MAG agreed to the setting up of two task groups to take forward the outputs of the scoping study. Firstly, a group to oversee the review of geographies used in the two regional surveys. The Assembly has now discussed the issue of geographies internally and decided that a cross-cutting task group is needed to take forward this work. This should include representatives from the Assembly's Employment Land Task Group, Housing Advisory Group and Monitoring Advisory Group.
- 3.2 The second group is to oversee the development of online surveys. A draft of the terms of reference for this group is included below. **We would be grateful if you could let us have comments on these. Please forward your comments by 15 June 2007.** Please could you also let us know if you would like to sit on this group. The datatool being developed by SEE-iN is due to be launched in June 2007.

The Assembly will then be discussing requirements for the development of the surveys as an add-on to the datatool with SEE-iN's consultants. It is anticipated that the task group will first meet in late summer and will oversee the project until May 2008.

Task Group for Developing Online Surveys: Terms of Reference (Draft)

A - Aims

The group will provide advice, support and technical expertise to the Regional Assembly on the development of new online versions of the Regional Housing Survey and Regional Commercial and Leisure Survey.

B - Objectives

1. To develop a survey that: addresses each of the Assembly's requirements; generates the maximum response rate; and ensures the highest level of accuracy.
2. To work with the geographies task in determining which classifications and geographies should be included in the surveys. This will be dependant on the Regional Assembly's requirements and the likely monitoring capabilities of each local authority.
3. To determine how data should be uploaded for each of the two surveys: either on a site-by-site basis or aggregated according to the criteria specified under objective two.
4. To assist the online-survey-developer on the technical issues associated with completing and returning each survey. This will determine where the surveys can be accessed (for example, on either the Regional Assembly's website or the SEE-iN website); how data can be transferred from local authority systems (possibly by linking directly to existing Geographic Information Systems); and where the surveys should be stored (either on the SEE-iN datatool or on the Regional Assembly's own system).
5. To provide the online-survey-developer with suggestions on the design of the two surveys. This will include both technical and cosmetic detail.
6. To assess whether the online surveys could be used as a tool for local authority monitoring and, if so, what additional functionality would be required to address the needs of these local authorities.
7. The group will probably need to meet about three times at different stages in the survey development.

4. CLG Project: AMR Core Output Indicator Data Capture and Sharing

- 4.1 CLG and the RTPi have commissioned the University of Manchester and University of Sheffield to carry out the first phase of a project looking at core output indicators and their capture across Local and Regional Authorities. Phase one will rationalise and define a set of shared regional and local AMR core output indicators and is expected to be completed by 15 August 2007.
- 4.2 The project specification includes reference to the work having particular regard to the scoping study carried out in the South East and we have fed in our problems with the current core indicators to CLG as discussed at previous MAG meetings.

CLG are also ensuring that their consultants contact local authorities to obtain their input into the process and for them to highlight concerns. We have forwarded the details of monitoring contacts in the South East to CLG for this purpose. Phases two and three will look at the processes / systems for data capture and integration with local and regional systems and will commence in September 2007. We plan to use the new core output indicators from next year for the 2008 monitoring report.

5. Office of National Statistics - Regional Presence

- 5.1 Richard updated the group at the last meeting on the decision by the ONS to locate two statisticians within each region. We would now like to welcome Peggy Causer and Neil Park who took up their new positions at the start of April. They are based with the SEE-iN team and can be contacted on Peggy.Causer@ons.gsi.gov.uk and Neil.Park@ons.gsi.gov.uk.

6. English Regions Network Monitoring Officers Liaison Meeting on 15 May 2007

- 6.1 The meeting discussed the following:

6.2 **National Housing and Planning Advisory Unit** - Kevin Williamson, the Chief Executive of the new unit, had attended the Planning Directors Group meeting on 16 April and feedback was provided to the monitoring officers group. The unit has been formed as one of the Government's responses to the Barker Review which has identified the importance of feeding housing market information into the planning process to address affordability issues. Toby Ayling from the unit will be attending future meetings of the monitoring officers group. The monitoring officers expressed concern over the use of the affordability model developed by Reading University being used by the new unit and CLG's current process to re-tender their household projections.

6.3 **PPS3 and its implications for monitoring** - the discussion included the need for clarification of the methodology to be used for housing trajectories and the feeding back of concern to CLG about the exclusion of windfall sites from the five years deliverable supply as well as the need for feedback from Government Offices to local authorities on Annual Monitoring Reports. CLG informed the group that they were planning to run some workshops on PPS3 which will look at these issues.

6.4 **Core Output Indicators on Business Development and Regional Services** - the group fed back concern to CLG on the current use class split (definitions for regional services and employment land) and CLG updated the group on the core output indicator project (see above).

6.5 **Regional Observatories, production of State of the Region Reports and ONS Regional Presence** - the regions reported on their current structures to produce Regional Monitoring Reports and State of the Region Reports and the possible overlaps. The representative from the Association of Regional Observatories took an action away to review best practice across the regions in relation to producing these reports.

7. South East Plan / EiP Update

- 7.1 The Examination in Public finally closed its doors on the 30 March. We now wait to hear what the Panel's view is, having tested it rigorously over the period from December 2006 to March 2007.

The Panel is due to submit its findings to government at the end of July and the report is due to be published shortly after that. The onward timetable in terms of the Government's Proposed Changes and final approval of the plan will be firmed up by GOSE once they have received the Panel's Report. In the meantime, we continue with partial reviews on Gypsies & Travellers and Minerals and have started to scope a first review of the plan.

- 7.2 A number of members of MAG were present at the final EiP session on monitoring, review and format of RSS. The discussions focused on:
- Whether the proposed means of measuring progress towards achieving the draft RSS objectives are appropriate, including the proposed monitoring indicators.
 - How to strengthen the monitoring framework at sub-regional level.
 - Whether the draft Plan is sufficiently explicit on how the plan, monitor and manage approach is intended to work.
 - Whether the draft Plan is clear enough about other circumstances that would trigger its review.
 - Whether there will be further need to re-balance the relationship between the regional and sub-regional policy components of the draft Plan.
- 7.3 Issues that arose from the debate were:
- The relationship between the Regional Monitoring Framework and the draft Plan.
 - The need for greater synergy between monitoring and regional level strategies (i.e. the Regional Housing Strategy (RHS) and Regional Transport Strategy (RTS)).
 - The need to consider contextual indicators and periodic evaluation of monitoring indicators.
 - The need to consider focusing on sectoral targets to monitor climate change including new monitoring indicators for green infrastructure.
 - The importance of exploring ways to effectively monitor behavioural change.
 - The need to consider housing indicator targets in the light of Planning Policy Statement 3 (PPS3) Guidance.
 - The role and responsibility of local authorities in monitoring indicators.
 - The effectiveness of the plan, monitor and manage approach in controlling development on previously developed land (PDL) and greenfield sites.
 - The conformity role of the Regional Assembly and joint working with local authorities.
 - The role of Annual Action Plans (AAPs) in identifying specific actions to address policy objectives and targets.
 - Consideration of the merits of setting out explicit triggers including a set timescale for a full review of the draft Plan.
 - The complexity and duplication of the sub-regional policy component of the draft Plan and the need to consider trimming it down.
 - Possible standardisation of sub-regional policy and the need for a more robust Sustainability Appraisal (SA) process at sub-regional policy level.

South East England Regional Assembly
29 May 2007