

KTC-MÁLAGA SEMINAR

KNOWLEDGE TRANSFER CENTER IN BEST PRACTICE AND STRATEGIC PLAN IN THE MEDITERRANEAN

IMPULSE, MONITORING AND EVALUATION OF STRATEGIC PLANS

Málaga, Mars 22-23, 2012

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Stage Impulse and monitoring objectives

- ❑ **Strengthen the credibility of the plan** when it is able to communicate / inform about its progress.
- ❑ Allow the agents responsible of the implementation **keeping in touch with civil society.**
- ❑ **Maintaining a critical / constructive attitude** is crucial to the projects improvement.
- ❑ **Collect information** that will be useful for the subsequent evaluation process.



COMMITMENT LETTERS

- ❑ Document **to be approved each year** which include **projects to promote / implement** during the next financial year, reflected in the Strategic Plan.
- ❑ Is approved by the executive body of the Plan.
- ❑ The fulfillment of the commitments is evaluated upon each fiscal year has finished, through **monitoring reports.**



PROYECTOS ESTRATÉGICOS QUE SE COMPROMETEN A IMPULSAR EN EL AÑO 2005 LOS PATRONOS DE LA FUNDACIÓN "ESTRATEGIAS"

	Nº de proyectos
LA DIPUTACIÓN PROVINCIAL DE JAÉN	93
LA UNIVERSIDAD DE JAÉN	9
LA JUNTA DE ANDALUCÍA	86
LA CONFEDERACIÓN DE EMPRESARIOS DE JAÉN	12
LA CÁMARA OFICIAL DE COMERCIO E INDUSTRIA DE JAÉN	10
COMISIONES OBRERAS-JAÉN	4
UGT-JAÉN	4
LAS ASOCIACIONES DE DESARROLLO RURAL (POR SI MISMAS O A TRAVÉS DE LOS RESPECTIVOS AYUNTAMIENTOS)	59
	TOTAL 163*

* Varios de estos proyectos están impulsados por más de un Patrono, por este motivo la suma de proyectos estratégicos a impulsar por cada Patrono es superior al total de proyectos que se van a impulsar durante el año 2005.

INFORME DE SEGUIMIENTO DE LA CARTA DE COMPROMISOS 2005

Plan Estratégico

DE LA PROVINCIA



de Jaén

2000-2006

PROYECTOS DE LA CARTA DE COMPROMISOS 2005

ESTADO DE EJECUCIÓN DE LOS PROYECTOS ¹	Nº	% s/Total
● Ejecutados	21	12%
⊖ En ejecución	102	61%
○ Iniciados	28	17%
∪ En estudio	11	6%
— No iniciados	6	4%
Total	168	100%

- **Ejecutados:** Proyectos ya realizados, tengan o no continuidad en el tiempo.
- ⊖ **En ejecución:** Proyectos ya iniciados pero cuya ejecución no se ha completado.
- **Iniciados:** Proyectos cuya ejecución se encuentra en una fase inicial o preliminar.
- ∪ **En estudio:** Proyectos en fase de análisis, estudio de viabilidad o redacción de anteproyecto.
- **No iniciados:** Proyectos que no se han llegado a plantear por ninguno de los agentes encargados teóricamente de su impulsión.

¹ Los proyectos han sido evaluados con base en la información facilitada por los agentes impulsores, tomando como fecha de referencia el 31 de diciembre de 2005

Joint of the impulse and monitoring: Follow-up tables (I)

□ Types

Depending on the strategic axes of the plan:

- Depending on the development degree
- According to the critical issues and key areas of the plan
- For thematic affinity or complementarity



Joint of the impulse and monitoring: Follow-up tables (II)

- They are responsible for **supervising the implementation** of strategic project
- **Composition**
 - - Entities directly involved in project implementation
 - Collectives or individuals directly or indirectly affected by its implementation
 - Experts and technicians
 - Entities which do not have direct responsibility, but can play an important role
 - Citizens who chose it



Joint of the impulse and monitoring: Follow-up tables (III)

□ Objectives

- Achieve the coordinate implementation of the measures
- Make a framework for cooperation between institutions and companies involved
- Provide adequate pulse work, to improve the effectiveness of the actions
- Carry out monitoring of project implementation
- Inform about the plan evolution and facilitate the actors involvement
- Maintaining a critical and constructive attitude by collaborators



Evaluation of a territorial strategic plan

- Evaluation systems are characterized by **globally assess the degree of realization of the strategy**, paying attention to:
 - Possible changes in the **enviorenment**
 - Implementation project degree
 - **Territory** evolution



1. MEASURING CHANGES IN THE ENVIOIREMENT

- Environmental assessment is made based on the areas which have been analyzed during the diagnostic phase. Thus, we study **the evolution experienced by the region, autonomous region or community in which the territory is involved, what happened in the Spanish and European environment, etc..**



2. MEASURING IMPLEMENT PROJECTS STAGE

MODELO DE FICHA DE EVALUACIÓN DE PROYECTOS ESTRATÉGICOS

NOMBRE DEL PROYECTO	SITUACIÓN ACTUAL: DE 0 A 100	PONDERACIÓN DE LAS FASES	GRADO DE REALIZACIÓN (en %)
Identificación del agente/s implicado/s		x 0,05	
Aceptación de la medida por el agente		x 0,15	
Nivel de ejecución*		x 0,80	
TOTAL:			

* NIVEL DE EJECUCIÓN	
No iniciado	0%
En estudio	15%
Iniciado	50%
En ejecución	75%
Ejecutados	100%

No iniciado: Proyecto que no se ha empezado a ejecutar por ninguno de los agentes encargados de su impulsión.

En estudio: Proyecto en fase de análisis, estudio de viabilidad o redacción del anteproyecto.

Iniciado: Proyectos cuya ejecución se encuentra en una fase inicial o preliminar.

En ejecución: Proyectos ya iniciados pero cuya ejecución no se ha completado.

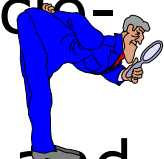
Ejecutados: Proyectos ya realizados, tengan o no continuidad en el tiempo.

Fuente: *Plan Estratégico de la provincia de Jaén 2000-2007. Evaluación final.*



3. MEASURING EVOLUTION OF TERRITORY

- ❑ Based on a **system of indicators** to measure its development experienced.
- ❑ This system should bring together a set of socio-economic indices that **reflect the evolution experienced by each of the critical** issues and key variables analyzed in the diagnostic internal territory phase.
- ❑ This information helps determine whether the evolution of the city, county or region **fits the model of future defined in the main objective of the plan.**



Evaluation Council of the Strategic Plan

- ❑ **Composition:** representatives of the core management, technical staff, experts and representatives of the implementation responsible
- ❑ **Objectives:**
 - ➔ Serve as a forum to discuss and **consensus the steps to evaluate** the strategic plan: indicators to be used, data required by different entities, etc.
 - ➔ Satisfy the needs of **information and transparency** of all who have participated in the process
 - ➔ Facilitate **decision-making**: will allow to the responsible decide if the plan continues, must be reformulated, etc.



CONSEJO DE EVALUACIÓN DEL PLAN ESTRATÉGICO DE LA PROVINCIA DE JAÉN

COMPOSICIÓN:

- Patronato de la Fundación “Estrategias”
- Presidentes y Secretarios de los 10 Grupos de Impulsión
- Director y Coordinadora de la Oficina Técnica

COMPETENCIAS:

- Consensuar la metodología para evaluar el Plan Estratégico y su impacto en el territorio
- Selección de los indicadores de evaluación
- Elaborar un Informe de Seguimiento y Evaluación del Plan



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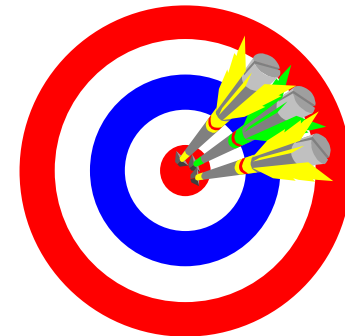


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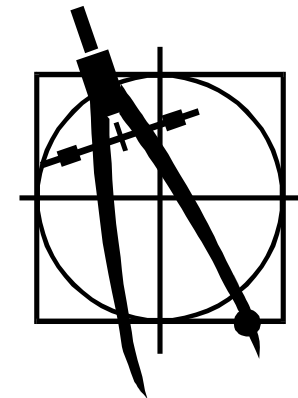
MISION

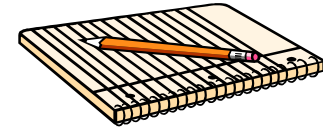
- The KTC's mission will *be to promote, encourage and disseminate best practices in strategic planning processes and act as an intermediaton and approach between Mediterranean cities and territories that use the instrument of strategic planning to promote the development of their respective spatial areas.*



VISION

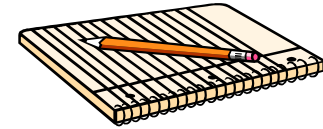
- KTC's **vision** is to become *an reference entity in the field of strategic planning at the service of local governments in the Mediterranean area, being present and visible to the entire spectrum municipal, metropolitan, district and provincial levels of the Mediterranean countries integrated in it.*





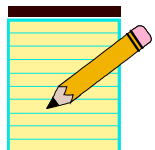
SPECIFIC OBJETIVES (I)

- A. Detection and identification of best practices in strategic territorial planning process and municipal governance, which have proved effective and efficient, through evidence of a high level of achievement of good results
- B. Improving quality of strategic regional planning processes, through the dissemination and possible application in other local areas of best practices of planning and governance.
- C. Sharing experiences of diagnosis, strategy design, project development, promotion, monitoring and evaluation of plans, giving appropriate answers to different institutional and political contexts.



SPECIFIC OBJETIVES (II)

- D. Development, testing and publication of guides and materials (theorist and practical) effective and innovative.
- E. Implementation of training for technicians, managers and politicians to optimize best practices of teachers participating in the program.
- F. Direct advice and customized to the different processes responsible for strategic planning.
- G. Broadcast to the international community of best practices identified and recommendations, guides, courses, materials, research, etc., arising during the development of their actions.



PROJECT FOR IMPLEMENTATION AN EVALUATION SYSTEM OF TERRITORIAL STRATEGIC PLANS

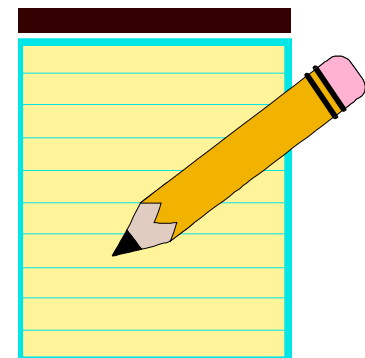


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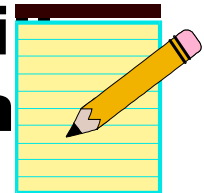
Implementation of a evaluation system of territorial strategic plans

- The **Strategic Planning Department of Planning, Local Development and Governance** at the University of Jaen and the Andalusian Network for Strategic Urban Development and Planning (**RADEUT**) signed in April 2011 a **cooperation agreement** for a study aimed at establishing a evaluation system of territorial strategic plans of Andalusia.



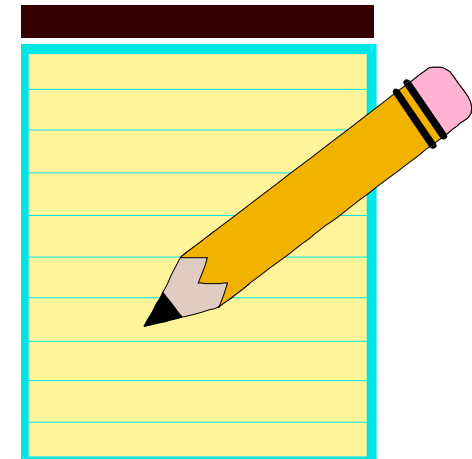
What is this project?

- The work to be carried addressed, firstly, **the analysis of a sample of regional strategic plans that have been evaluated** to determine methodology used, indicators used, evaluation criteria followed, etc.
- From this analysis and the study of evaluation techniques of the existing public policies, it **will be proposed an evaluation system that can be applied to different strategic plans** in Andalusia to measure their achievement homogenously.



Strategic plans evaluated and being studied

- Alcalá de Guadaíra, Alcobendas, Antioquia (Colombia), Barcelona, Bilbao, comarcas de la provincia de Badajoz, Córdoba (ciudad), Elche, Granollers, Getafe, Gijón, Irún, Jerez, Málaga (ciudad), Mataró, Mollet del Vallés, Montcada i Reixac, provincia de Jaén, provincia de Málaga, Sevilla, Valencia and Zaragoza.





CITIES AND MEDITERRANEAN TERRITORIES THAT APPLY BEST PRACTICES IN STRATEGIC PLANS EVALUATION STAGE



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BEST PRACTICES IN SOUTH SHORE

- Sustainable Development Strategy of **Al-Fayhaa**
 - OBSERVATORY OF THE ENVIOREMENT AND DEVELOPMENT OF TRÍPOLI (TEDO)
- Strategic Plan of **Izmir** (MONITORING)
- Strategic Plan of **Great Sfax**
 - OBSERVATORY OF THE SUSTAINABLE DEVELOPMENT



BEST PRACTICES IN NORTH SHORE

- Evaluation of the strategic plan in **Barcelona**
- Evaluation of the Strategic Plan of **Valencia**
- Evaluation of the I Strategic Plan of **Málaga**



Other planning processes in Mediterranean area

- There are other planning processes, whose we know, but which do not have enough knowledge to weigh the best practices they have developed in stages of impulsion, monitoring and evaluation.
 - Strategic Plan of the Medina of **Tetuán**
 - Strategic Plan of **Nador**
 - Plan for the rehabilitation of **Alepo** old city
 - Restoration of **Damasco** old city
 - Alejandría: integrated management of lake **Maryut**
 - Strategic Plan of **Roma** 2020



PUEDES CONTACTAR CON LA
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