

Natalia DZIARMAKOWSKA

MONITORING AND EVALUATION SYSTEM FOR REVITALISATION PROGRAMMES IN GERMANY

Natalia **Dziarmakowska** (ORCID: 0000-0003-2705-6058) – *Institute of Urban and Regional Development*

Correspondence address:

Targowa Street 45, 03-782 Warsaw, Poland

e-mail: ndziarmakowska@irmir.pl

ABSTRACT: Monitoring and evaluation should form the foundation of revitalisation programme management. The literature on the subject points to a general reluctance of municipalities to assess the effects of implemented revitalisation programmes, as well as the difficulties that municipalities encounter during this process. In Germany, in 2013, the federal and state governments, along with municipal associations, adopted an inter-programme concept for the evaluation of revitalisation programmes. This concept represents the first systematic structure for monitoring and evaluation of revitalisation programmes. The aim of the article is to present the assumptions of this concept and provide an overview of the experiences gained so far in its implementation. The study was based on desk research, an in-depth individual interview, the case study method, and an email interview.

KEYWORDS: evaluation, monitoring, urban regeneration

Introduction

In the 1970s, evaluation research in Germany was still in its infancy. In the 1960s and 1970s, a vast number of reports which provided information on the effects of redevelopment programmes were published (Wollmann, 1978). In the 1980s and early 1990s, interest in impact evaluation waned and then regained its importance with the introduction of new urban development programmes (IfS, 2009). It was not until the “Social City programme” was launched in 1999 that evaluation was conceptually considered right from the start (Wilhelm, 2012). In 2013, the federal and state governments, along with municipal associations, developed a joint inter-programme concept. This concept introduced the first systematic framework for monitoring and evaluation of revitalisation programmes in Germany (Altrock, 2016).

The term “monitoring” refers to the systematic and continuous collection, analysis, and assessment of quantitative data that provide basic information on the programme implementation. The data collected in the monitoring process are used to evaluate the programme and can, therefore, be considered an elementary tool for evaluation (Spadło, 2021). Since evaluation serves diverse purposes and fulfils various tasks using different research methods and procedures, the term “evaluation” cannot be defined uniformly (Giel, 2013; Fitzpatrick et al., 2012). This diversity is reflected in the number of definitions that can be found in the literature, and it is not far from the truth to state that there are as many definitions as there are evaluators (Franklin & Thrasher, 1976). Defining the term “evaluation”, the authors emphasise different aspects, including the study of merit and worth, the goals of the evaluation, as well as the procedures and methods employed in this process (Stockman & Meyer, 2014). One widely accepted definition defines “programme evaluation” as “the application of evaluation approaches, techniques, and knowledge to systematically assess and improve the planning, implementation, and effectiveness of programmes”(Chen, 2005).

There are not many studies that explicitly deal with the methodological and conceptual basis for evaluation in the Urban Development Support programme. The preliminary study by Wollmann “Evaluierungsforschung” (1978), makes an initial significant contribution. This publication provides a comprehensive overview of research methods and procedures in the fields of evaluation and impact research. A further contribution is made by the paper “Evaluierung der Städtebauförderung. Leitfaden für Programmverantwortliche” (BMVBS, 2012), published in 2012, which introduces the inter-programme concept and explains how to conduct self-evaluation of regeneration programmes at the local level. In addition, as part of the report “Entwicklung von Performanzindikatoren als Grundlage für die Evaluierung von Förderprogrammen in den finanzpolitisch relevanten Politikfeldern” (IfS 2009), the logic models and the performance indicators for the funding programmes, including urban regeneration programmes, were developed. In the report “Evaluierung der Städtebauförderung: Wirkungen und Nebenwirkungen” (BBSR, 2016), conceptual and methodological problems in programme evaluation were discussed. In the paper “Wirkungen und Erfolge der Städtebauförderung” (BBSR, 2022), ways to further develop the monitoring of the Urban Development Support programme and the methods for future programme evaluations were reviewed.

Academic literature emphasises the importance of monitoring and evaluation in the proper management of revitalisation processes. The scale of problems to be addressed in degraded urban areas, as well as the limited human and financial resources of the public sector, necessitate the proper allocation of these funds (Altrock, 2016; BMVBS, 2011). In Germany, evaluation and monitoring play an increasingly important role in the Urban Development Support programme (Göddecke-Stellmann, 2016). In recent years, evaluation practice has made enormous progress in terms of content and methodology (Altrock, 2007; Rolfes & Wilhelm, 2014). Nevertheless, there is general scepticism about evaluation. Regional and local authorities often perceive the evaluation of revitalisation programs as a burdensome and mandatory task (Rolfes & Weith, 2005; Becker, 2003). In the context of the information presented, the aim of the article is to present the assumptions of the German inter-programme evaluation concept as well as the experiences gained from its implementation.

Research methods

The article relies on an analysis of subject literature and numerous documents, employing a case study method as well as research in the form of an in-depth interview and an e-mail interview. The desk research method involves the analysis of scientific reports and papers, as well as documentation from meetings organised at the federal level (Transferwerkstatt). A case study involves analysing and describing a phenomenon, process, or problem in a comprehensive and detailed manner to capture the complexity of a single case (Stake, 1995): “The purpose of a case study is to study intensely one set (or unit) of something – programmes, cities, counties, worksites – as a distinct whole” (Balbach, 1999). The choice of the case study was guided by the principle of “intensity sampling”: “an intensity sample consists of information-rich cases that manifest the phenomenon intensely” (Patton, 2002). The purpose was to select municipalities that would undergo an assessment of the revitalisation programme in accordance with the conceptual assumptions of the federal monitoring and evaluation system. The selection criteria for the case study included:

1. conducting monitoring and self-evaluation in line with the joint inter-programme concept and submitting monitoring and evaluation reports to the Federal Research Institute for Building, Urban and Spatial Development (BBSR),
2. the willingness to cooperate.

The Research Institute for Construction, Urbanism and Spatial Development has no information on the extent and form in which self-evaluation is carried out at the local level. Therefore, the literature review was conducted to identify potential case studies. Consequently, two municipalities were identified, with one ready to cooperate and make data available. As part of the case study, an in-depth individual interview was conducted with a representative of the municipality of Markt Schierling. Additionally, the research method employed here was an email interview. This method provides respondents with tools for structured reflection and enables participation in the study by individuals who cannot participate in face-to-face interviews for any reason (Petocz et al., 2012; James, 2016; Dahlin, 2021). It serves as a viable alternative to direct and telephone interviews (Meho, 2006). Through this method, data from the Federal Institute for Research on Buildings, Urban Affairs and Spatial Development (BBSR) were collected.

The Urban Development Support programme

The origins of urban renewal in Germany date back to 1970, when the first national urban development funding programme called “Urban Regeneration and Development Measures Programme” (“Städtebauliche Sanierungs- und Entwicklungsmaßnahmen”) was established. The general objective of the programme was to improve the technical condition of urban buildings. All subsequent programmes were initiated to address particular issues. The “Protection of Urban Architectural Heritage” programme (“Städtebaulicher Denkmalschutz”) was introduced in 1991 in the eastern federal states and in 2009 in the west. Under the programme, municipalities could obtain funds for measures related to the preservation and further development of historic city centres. In 1999, a further funding priority was set in the form of the “Social City” programme (“Soziale Stadt”). The goal of the programme was to stabilise and modernise urban districts with special development needs. The “Urban Redevelopment” programme (“Stadtumbau”) was established to counteract the consequences of social, economic, and demographic changes. The “Active Urban and District Centres” programme (“Aktive Stadt – und Ortsteilzentren”) projects were implemented to strengthen central urban areas and reduce vacancy rates. The “Smaller Cities and Communities” programme (“Kleinere Städte und Gemeinden”) focused on problem areas in small towns and villages that were further removed from more densely populated areas. The “Green Urban Future” (“Zukunft Stadtgrün”) promoted investments in green urban infrastructure (Hatzfeld & Lang, 2011) and aimed at improving the urban climate and environmental justice.

To simplify the highly complex structure, the Urban Development Support programme has been completely revised and redeveloped. Due to the introduction of the new programme structure for urban development assistance, all the previous programmes had come to an end. The Urban Development Support programme was combined into three programmes, namely “Living Town and City Cen-

tres” (“Lebendige Zentren”), “Social Cohesion: Building Coexistence in the Neighbourhood Together and Growth” (“Sozialer Zusammenhalt”) and “Growth and Sustainable Regeneration programme” (“Wachstum und nachhaltige Erneuerung”). The “Living Town and City Centres” programme helps communities ensure diverse utilisation of the existing building stock, design public spaces and preserve unique architectural heritage, especially in historic city centres. The aim of the “Social Cohesion” programme is to increase the quality of life and housing in local urban neighbourhoods, deliver a greater diversity of uses, and strengthen cohesion in the neighbourhood. The “Growth and Sustainable Regeneration” programme supports municipalities in revitalising brownfield sites, removing no longer-needed housing, and adapting to climate change.

Evaluation of revitalisation programmes in Germany – conceptual assumptions

In 2013, the federal and state governments, along with municipal associations, developed a joint inter-programme concept. It forms the basis for systematic evaluation and consists of five modules (BMVBS, 2011): fundamentals of evaluation, self-evaluation of a municipal revitalisation programme, accompanying studies, midterm evaluation and cross-cutting evaluation (Table 1).

Table 1. Modules of the inter-programme concept of evaluation

Module	Product
I. Fundamentals of evaluation	<ul style="list-style-type: none"> • Design evaluable programme • Development of indicators for monitoring • Further development of the monitoring and self-evaluation framework
II. Self-evaluation	<ul style="list-style-type: none"> • A self-evaluation protocol (local level)
III. Accompany in research	<ul style="list-style-type: none"> • Documentation of case studies and best practices • Programme implementation report • Experience exchange
IV. Midterm evaluation	<ul style="list-style-type: none"> • A midterm evaluation report
V. Cross – cutting evaluation	<ul style="list-style-type: none"> • A cross evaluation report

Source: author's work based on BMVBS (2012).

The first module, fundamentals of evaluation, pertains to the conceptual assumptions of the monitoring system. Despite the diversity of regional and local problems, potentials, and approaches, as well as the fundamental autonomy of the states, a uniform catalogue of monitoring indicators was adopted for all revitalisation programmes to ensure comparability and systematic evaluation. Municipalities are obliged to complete two monitoring forms. The first one (“Elektronische Begleitinformation zur Bund-Länder-Städtebauförderung”) includes questions regarding project revitalisation funding, revitalisation area, major revitalisation projects, and legal and regulatory aspects. Municipalities are required to complete this form when applying for funding. With the help of the second form (“Elektronisches Monitoring 2020 zur Bund-Länder-Städtebauförderung”), data on input, output, and context indicators are collected. Municipalities are obliged to fill out this form annually (Göddecke-Stellmann, 2016). The data collected from municipalities as part of the monitoring system serve various purposes, such as obtaining a general overview of the allocation of funds for the development of revitalisation areas, providing databases for assessing revitalisation programmes and offering initial information to politicians and the public about the status and allocation of implemented funds (BBSR, 2015).

The second module is a self-evaluation. The term refers to the evaluation of the municipal revitalisation programme. The assessment is carried out jointly by the local government and stakeholders. The self-evaluation is to be understood as “questioning one’s (own) actions”. Its purpose is to optimise revitalisation activities through continuous and systematic reflection and discussion of the

implemented programme, exchanging experiences among stakeholders, and if necessary, changing the adopted action plan (BMVBS, 2011). To support local authorities in evaluating revitalisation programmes, a handbook titled “Evaluation of revitalisation programmes: a guide for local authorities” (“Evaluierung der Städtebauförderung. Kommunale Arbeitshilfe”) was published. The self-evaluation can be conducted through regular reflection meetings attended not only by the local authorities but also by various stakeholder groups involved in the programme implementation. A protocol should be drawn up after such a meeting and put forward to the Federal Research Institute for Construction, Urbanism and Spatial Development.

The third module is accompanying research. It refers to research and analyses conducted during implementation to adjust the programme design. For this purpose, the so-called federal transfer office (Bundestransferstelle) was established. It is responsible for continuous and rapid knowledge and experience transfer (e.g. meetings, events, documentation of case studies and good practices), preparation of implementation reports, and formulation of findings and recommendations (BMUB, 2017; BMVBS, 2012).

The fourth module, the midterm evaluation of the programme, provides the basis for the joint inter-programme concept (BMVBS, 2012). Its aim is to identify the strengths and weaknesses of the programme, to determine the impact of the implemented instruments, and to assess the extent to which its objectives have been achieved. The midterm evaluation relies primarily on secondary analysis of available data and case studies. It should be carried out by external experts at least every four to six years and no later than three years after the end of the programme. Reports on the implementation of individual programmes, as well as their evaluation, are published on the official BBSR website.

The fifth module is cross-cutting evaluation. Its aim is to assess the realisation of revitalisation policy goals. The module includes analysing the overall urban development funding system from a medium- to long-term perspective to determine whether it addresses current local needs and problems or requires potential adjustments. This involves assessing the degree to which the objectives of the revitalisation policy are achieved beyond the internal logic of the individual programme (BMVBS, 2012).

Evaluation of revitalisation programmes in Germany – previous experience

The first module, fundamentals of evaluation, outlines the requirements that municipalities need to follow when applying for funds. According to the gathered data, municipalities complete and submit two monitoring forms to the Federal Research Institute for Building, Urban and Spatial Development (BBSR). The data collected through the forms is used at the central level for various purposes, including informing the public about the allocation of public funds for revitalisation projects, drawing up reports, and supporting the decision-making process. The Federal Research Institute for Construction, Urbanism and Spatial Development regularly informs about the results of monitoring in its publications.

Within the second module, a self-evaluation, municipalities evaluate the municipal revitalization programme. A short protocol from the evaluation meeting should be drawn up and submitted to the Research Institute for Construction, Urbanism and Spatial Development. Based on the gathered data, it is not possible to determine the extent and form in which self-evaluation is carried out at the local level.

The third module, which consists of accompanying studies, is mainly based on the case study method. Selected revitalisation areas are studied in-depth. The selected case studies illustrate the diversity of municipal approaches to urban development. The documentation of the case studies on websites, as well as within the framework of numerous academic publications and reports, enables continuous knowledge transfer. Another essential component of the accompanying studies is a report on the implementation of individual revitalisation programmes prepared according to specified standards to allow comparison between programmes at the federal and state levels. The report is prepared every two years and published on the official BBSR website. In addition to a compilation of information collected from municipalities through the first form (“Elektronische Begleitinformation zur Bund-Länder-Städtebauförderung”) and a description of case studies, the report illustrates best practices adopted at the local level. The report also includes an assessment of the programme implementation provided by the team of experts responsible for the accompanying research. As part

of the accompanying research, regular discussions and exchanges of experiences take place among external experts and representatives of federal, state, and local authorities. These discussions aim to optimise the conceptual foundations of the programmes. Moreover, the data obtained through accompanying research and the conducted analyses serve as an essential database used in midterm evaluation (BMVBS, 2012). In summary, the third module, accompanying research, encompasses all three stipulated elements being carried out, namely documentation of case studies, preparation of reports on the implementation of revitalisation programmes as well as the exchange of experience among external experts and representatives of local governments, states, and the Federal Research Institute for Construction, Urbanism and Spatial Development.

The midterm evaluation, the fourth module, aims to assess progress achieved in implementing programmes at the federal, state, and local levels and to draw lessons for future programme design. The BBSR supports evaluation by providing evaluators with monitoring data and the results of research projects. Table 2 presents an overview of the evaluation findings for five programmes that were implemented between 1991 and 2019. In line with the inter-programme evaluation concept, programmes should be evaluated at least every four to six years, no later than three years after their completion. Since 2013, the evaluation of revitalisation programmes has been carried out in accordance with the concept.

Table 2. Evaluations of revitalisation programmes conducted between 2004 and 2020

Programme Name	Programme Start Date	Programme End Date	Programme Evaluation Date
Urban Regeneration and Development Measures	1971	2012	-
Protection of Urban Architectural Heritage	1991	2019	2012; 2020
Social City	1999	2019	2004; 2017
Urban redevelopment	2002	2019	2008; 2012; 2017
Active Urban and District Centres	2009	2019	2015
Smaller Cities and Communities	2010	2019	2018
Green Urban Future	2017	2019	-
Living Town and City Centres	2020	-	-
Social Cohesion – Building Coexistence in the Neighbourhood Together	2020	-	-
Growth and Sustainable Regeneration	2020	-	-

Source: author's work based on www.staedtebaufoerderung.info [04-08-2023].

Within the fifth module, cross-cutting evaluation, several research projects were conducted, and their results were published on the official BBSR website. These studies cover various aspects, including the economic effects of revitalisation projects and their impact on the climate, the treatment of particularly valuable historic buildings, future financing needs, green infrastructure issues at the conceptual and project implementation level, as well as factors that favour and hinder the implementation of instruments.

Evaluation of revitalisation programmes in Germany – key evaluation findings (examples)

It is not possible to present evaluation findings of each regeneration programmes implemented in Germany, which is why the example of the programme “Aktive Stadt – und Ortsteilzentren” was used.

In the period from 2014 to 2015, a nationwide midterm evaluation of the „Active Urban and District Centres” programme was carried out to review the strengths and weaknesses of the programme and measure the degree of goal achievement. The programme was evaluated positively overall, and the evaluation showed that the programme strategy had proven itself. The assessment provides important information on the status of programme implementation. It indicates which projects

were included in the integrated concepts (above all, measures to improve public space, investments in public facilities and building renovation) and which were considered sufficiently (e.g. social housing, innovative mobility and craft). Moreover, good practices and problems related to the implementation of programmes and proposed instruments were identified. In some municipalities, the programme has already led to improvement in city centres, but in some cases, not all challenges can be overcome, and new approaches will be required to achieve visible effects. Subsequently, recommendations for programme improvement were formulated. Based on the results of the midterm evaluation, the programme strategy was updated in 2017.

Markt Schierling is one of the municipalities that implemented the “Active Urban and District Centres” programme in 2009–2020. The municipality performed a self-evaluation of the municipal revitalisation programme, drew up an appropriate protocol from a reflection meeting, submitted it to the Federal Research Institute for Building, Urban and Spatial Development (BBSR), and published it on the official website of the municipality. Evaluation meetings took place in 2013, 2015, and 2019. As can be seen from the data received, the meetings were not held annually, as this would entail an appreciably heavier workload. However, due to the long implementation period of the revitalisation programme, the local government did not see the need for more frequent evaluation. The steering group (Lenkungsgruppe), which is a forum for cooperation and dialogue between stakeholders and representatives of the local authority, also participated in the evaluation process. According to the protocol, the self-evaluation aims to facilitate discussions on the implemented projects, analyse the assumptions of the adopted revitalisation programme, and reflect on further measures (Markt Schierling, 2013). During the steering group meeting, the following issues were discussed:

the degree of implementation of revitalisation projects and their effects,

- the degree to which revitalisation needs have been met,
- newly identified needs of the revitalisation area and the type of actions to be taken to address them,
- the degree of implementation of the strategic objectives of the revitalisation programme and the adequacy of its assumptions,
- the forms of cooperation and coordination among stakeholders,
- necessary changes in the financing conditions for revitalisation projects,
- existing procedural and implementation obstacles and proposals for their solution,
- the possibility of continuing and consolidating the achieved effects after the end of the financing period.

The evaluation confirmed that the goals of the integrated revitalization concept turned out to be correct. Moreover, the self-evaluation allowed for the optimisation of the revitalisation process by adapting the measures to changing requirements. The instrument “project funds” proves to be difficult to implement, which is a valuable indication of the BBSR. The evaluation of the programme also ensures transparency about the revitalisation process, which, in the long term, can contribute to greater public support for revitalisation measures.

The mid-term evaluation, as well as self-evaluation, provide important insights into the implementation of revitalisation programmes at the federal and local levels.

Conclusions

In recent years, a great deal of progress has been made in both methodological and conceptual terms in the field of monitoring and evaluation. In 2013, the first systematic framework for monitoring and evaluation of revitalisation programmes was developed in Germany. The adoption of uniform monitoring and evaluation standards for all revitalisation programmes aims to reduce the time-consuming nature of the evaluation process and ensure compliance with quality standards. The data obtained in this research indicate that the conceptual assumptions of the monitoring and evaluation system adopted in Germany are largely implemented in practice. However, it is not possible to clearly state the percentage of municipalities that perform the self-evaluation of municipal revitalisation programmes.

The joint inter-programme concept for monitoring and evaluation enables structure and systematic programme monitoring, regular discussions, and exchange of experiences among external

experts, representatives of the federal, state and local authorities, continuous knowledge transfer, as well as documentation of case studies and best practices. As the example of the “Aktive Stadt – und Ortsteilzentren” programme shows, midterm evaluation provides information on programme performance and identifies strengths and weaknesses of the programme, based on which recommendations for improving programme implementation were formulated. The example of Markt Schierling demonstrates that the information contained in the monitoring reports provides valuable insights into programme implementation. Nevertheless, the result of the single case study cannot be generalised to the entire federal state.

Considering the definition of monitoring and evaluation quoted at the beginning of this article, it should be stated that the implementation of the inter-programme concept allows for systematic and ongoing monitoring of the revitalisation process and provides central databases for their assessment (BBSR, 2015). In the case of evaluation, the situation is somewhat different. At the federal level, the evaluation of individual revitalisation programmes is carried out at strictly defined intervals. As part of it, case studies are analysed, but in a selective manner, which means that only a small percentage of communes implementing a given programme are covered by the study. Self-evaluation could provide essential information about the impacts produced by an intervention at the local level. However, based on the obtained data, it is impossible to state what percentage of municipalities undertake programme evaluation and to what extent it is carried out.

The academic literature indicates difficulties in evaluating the revitalisation programmes by local authorities. Among the main ones are lack of clarity on how to conduct an evaluation and which research method to use, uncertainties regarding the necessary human and financial resources to carry out the evaluation process, lack or insufficient financial and human resources, high effort compared to the expected benefit, priority of operational work, and lack of political interest (BBSR, 2015; Rolfes & Wilhelm, 2005). It seems necessary to support local authorities in the assessment of implemented revitalisation projects, both in methodological and conceptual terms. Therefore, research should be undertaken to determine the scale at which self-evaluation is carried out at the national level. Further research is required to identify the problems municipalities face in self-evaluation and develop efficient solutions to challenges they encounter. Nevertheless, it is important to disseminate knowledge of good practice.

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Natalia DZIARMAKOWSKA

SYSTEM MONITOROWANIA I EWALUACJI PROGRAMÓW REWITALIZACJI W NIEMCZECH

STRESZCZENIE: Monitorowanie i ewaluacja powinny stanowić podstawę zarządzania programami rewitalizacji. Literatura przedmiotu wskazuje na ogólną niechęć gmin do oceny efektów realizowanych programów rewitalizacji oraz trudności na jakie napotykają gminy podczas tego procesu. W Niemczech w roku 2013 rządy federalne i stanowe wspólnie ze stowarzyszeniami gminnymi przyjęły międzyprogramową koncepcję ewaluacji programów rewitalizacji, która stanowi pierwsze systematyczne struktury monitorowania i ewaluacji programów rewitalizacji. Celem artykułu jest przybliżenie założeń tej koncepcji, a także przedstawienie dotychczasowych doświadczeń w zakresie jej wdrażania. W opracowaniu wykorzystano analizę danych zastanych, pogłębionego wywiadu indywidualnego, metodę studium przypadku oraz wywiadu e-mailowego.

SŁOWA KLUCZOWE: ewaluacja, monitorowania, rewitalizacja