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NSW GOVERNMENT

Integrated Planning and Reporting Peer Review Program

Outcomes Report

December 2024

Acknowledgement of Country

The Department of Planning, Housing and Infrastructure acknowledges that it stands on Aboriginal land.

We acknowledge the Traditional Custodians of the land, and we show our respect for Elders past, present and emerging through thoughtful and collaborative approaches to our work, seeking to demonstrate our ongoing commitment to providing places in which Aboriginal people are included socially, culturally and economically.

Published by NSW Department of Planning, Housing and Infrastructure
dphi.nsw.gov.au

Integrated Planning and Reporting Peer Review Program - Report Back

Published: December 2024

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Acknowledgements
[Publication citation or credit for agencies/organisations outside the department that have provided significant input to content or funding.

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- Delivery Program
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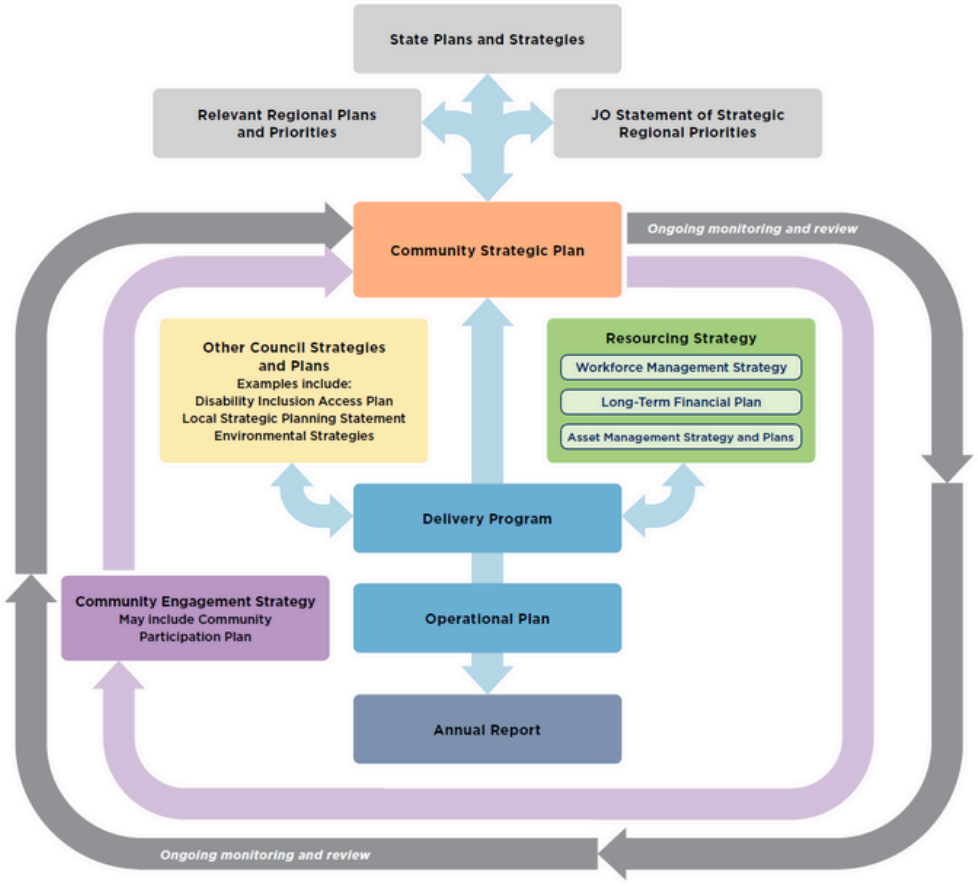
- Annual Report
- End of Term Report

Integrated
Planning & Reporting

It is a framework centred on the premise that all council planning should be based on a sound understanding of the community's expectations around priorities.

The Integrated Planning and Reporting (IP&R) framework was introduced in 2009 and has transformed the way councils in NSW develop, document and report on plans for the future of their communities.

IP&R brings plans and strategies together in a way that supports clear vision for the future and provide an agreed roadmap for delivering community priorities and aspirations.



Overview of the Program

Designed to enhance council capacity by sharing innovative ideas and best practices in Integrated Planning and Reporting documentation for NSW councils.

The Integrated Planning and Reporting (IP&R) Peer Review Program (the Program) was designed to provide a comprehensive understanding of the IP&R Framework capability within the local government sector, providing oversight of any gaps and identifying any areas of risks for further monitoring. Ultimately, this Program offers insights into the sector's maturity in implementing the IP&R Framework through the good, better, and best model.

The program emphasised professional development, presenting a valuable opportunity for council staff to enhance their knowledge and understanding of IP&R. Additionally, it facilitated collaboration with peers from other councils to review IP&R plans.

The insights and findings gained from this initiative will contribute to future revisions of the Office of Local Government's IP&R Guidelines and Handbook.

Undertaking
Peer Reviews

Utilising joint organisations and the NSW planning boundaries, six sessions were held in regional and rural NSW, along with two metropolitan sessions.

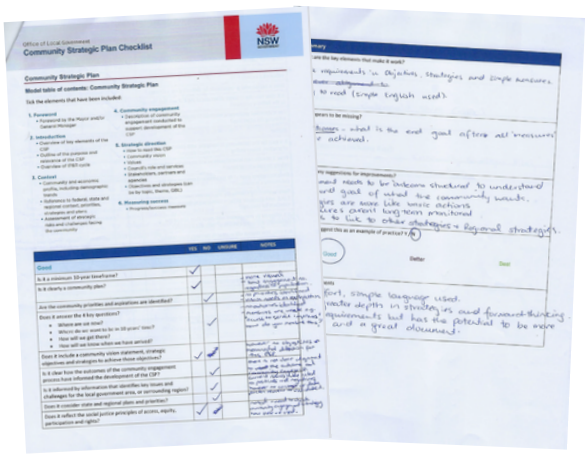
The Program commenced in November and continued into early December 2023, resumed in February 2024 and concluded in April 2024.

During each session, participants were matched according to their experience and the councils they represented. Each pair received an electronic copy of the Integrated Planning and Reporting (IP&R) suite of documents from four councils, along with checklists to document the outcomes of their review.

Participants reviewed the following IP&R documents:

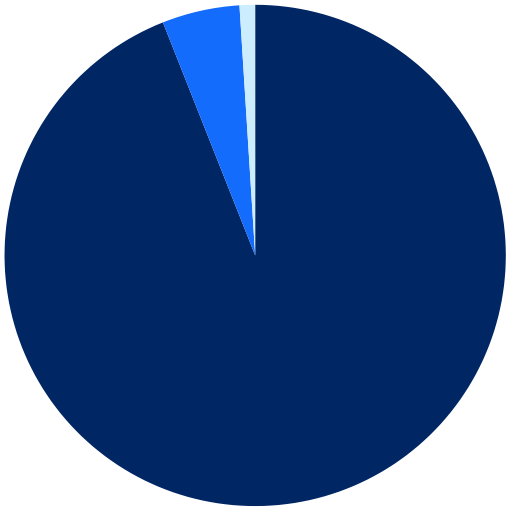
01 Community Strategic Plan
02 Delivery Program
03 Operational Plan
04 Annual Report
05 End of Term Report

The checklists were developed using the 'good, better, and best' model outlined in the IP&R Handbook. They guided participants through the review process by prompting them to consider whether each element had been addressed. Additionally, the checklists provided an opportunity for further feedback regarding what worked well and potential areas for improvement.



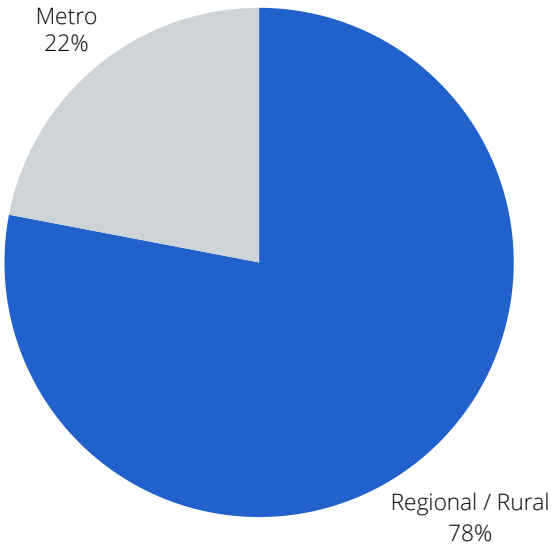
Who Participated

156	94	69%
Participants	Organisations	Council attendance



Organisations

The program successfully attracted 156 participants representing 94 organisations, including 88 councils, 5 joint organisations, and 1 county council.



Council Representation

A significant proportion of councils participated in the program, with 69% attendance overall.

This attendance was divided into 78% from regional / rural councils and 22% from metropolitan councils, reflecting the current distribution of 76% regional / rural and 24% metropolitan.

Outcomes of the Program

All 128 councils' Integrated Planning and Reporting documents were reviewed.

At the conclusion of the program, a total of 865 IP&R documents were reviewed. This figure reflects that each of the 128 councils' had their IP&R documents reviewed once, with an additional review conducted for 46 councils. Most of these reviews were focused on metropolitan councils.

The following section outlines the specific documents reviewed along with the corresponding number of reviews performed.

Community Strategic Plan	**178**
Delivery Program	**175**
Operational Plan	**173**
Annual Report	**172**
End of Term Report	**167**

Feedback on the Program

At the conclusion of the program, 70% of respondents rated their overall satisfaction as either 4 or 5 out of 5, with 72% expressing interest in participating in a follow-up workshop.

Participants identified the most valuable aspects of the sessions, highlighting four key themes: networking, conducting peer reviews, understanding available resources, and engaging in exercises and group discussions.

Key takeaways from the program included:

- Establishing professional connections and networking opportunities
- Identifying areas for improvement
- Gaining clarity on the attributes of 'quality'
- Recognising the importance of leadership support and buy-in
- Acknowledging the necessity for proactive communication from OLG regarding IP&R requirements
- Understanding the purpose and target audience for each document

Most participants gained valuable insights into the maturity of their own council documents, recognising their strengths — areas they are performing well — while also identifying opportunities for improvement.

IP&R practitioners consistently seek examples of best practices and frequently inquire about which councils are excelling in IP&R. A significant insight from these sessions was the understanding that no single council excels in every facet of the IP&R framework; rather, each council may possess strong components.

72%

INTERESTED IN A FOLLOW-UP WORKSHOP

Key Findings

As part of the IP&R Peer Review Program, the following documents underwent a peer review:

01 Community Strategic Plan
02 Delivery Program
03 Operational Plan
04 Annual Report
05 End of Term Report

A summary of the findings for each of the documents has been compiled, which includes:

- the total number of documents reviewed, along with a breakdown by regional/rural and metropolitan councils;
- an overview of key strengths and opportunities identified;
- the percentage of councils achieving a rating of 'good' or higher;
- results based on the ‘good, better, and best’ model, categorised by council category; and
- a summary of effective elements and potential areas for improvement.

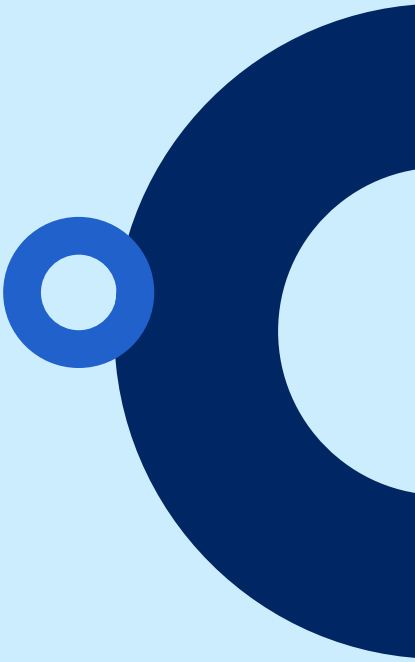
By sharing these findings, we aim to enhance future iterations of the IP&R documentation and inform upcoming versions of guidance provided by the Office of Local Government (OLG).

The information presented in this report is based on the peer reviews conducted as part of the Program. Participants undertaking the peer reviews had varying levels of understanding and experience with the IP&R Framework.

While every effort has been made to ensure the reliability and relevance of the content, the findings and conclusions reflect the perspectives of the participants and do not represent the views of the OLG.

This report is intended for informational purposes and should not be considered as professional advice.

The authors and organisations involved in the creation of this report do not accept responsibility for any errors or omissions.



Key considerations
when developing IP&R documents

- Use clear and simple language in all IP&R documents to engage readers.
- Maintain consistent branding and document formatting throughout all IP&R documents.
- Include the date the document is adopted/endorsed/noted (eg on the cover, inside the cover, or in the introduction).
- Introduce various visual elements to enhance the document's accessibility and clarity. This can include tables, infographics, photographs, hyperlinked tables of contents, and pages that explain how to navigate the document.
- Apply colour coding and numbering throughout the documents to improve connection, alignment, and readability.
- Include measures and indicators with targets to facilitate ongoing monitoring of progress and performance.
- Where councils choose to create their own version of the IP&R diagram, it is essential that it accurately reflects the hierarchy and the interconnected relationships amongst the documents.
- Where possible, incorporate the terminology consistent with the IP&R Guidelines, such as objectives, strategies, principal activities, plans, policies, actions, and programs.
- Maintain a strategic focus in the Community Strategic Plan; operational details should be included in the Delivery Program and Operational Plan.
- Ensure the document covers the relevant timeframe (eg Community Strategic Plan = 10+ years, Delivery Program = 4 years etc)
- Ensure that all documents are easily accessible on council’s website.

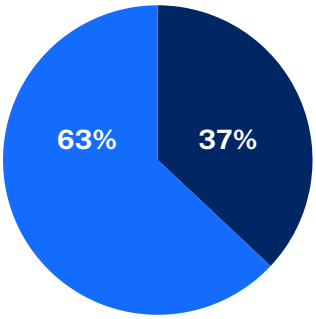
Community Strategic Plan

178

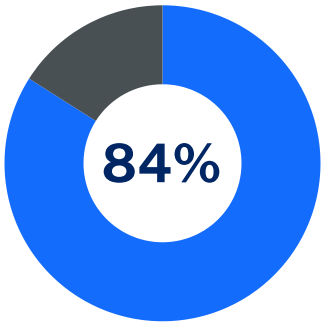
Community Strategic Plans peer reviewed

65 Metropolitan

113 Regional / Rural



Percentage of Metropolitan and Regional / Rural



Percentage of Councils meeting 'good' and above

Checklist Results:

STRENGTHS

94% had a minimum 10 year time frame

89% clearly identified a community vision statement, strategic objectives and strategies

87% were clearly community plans

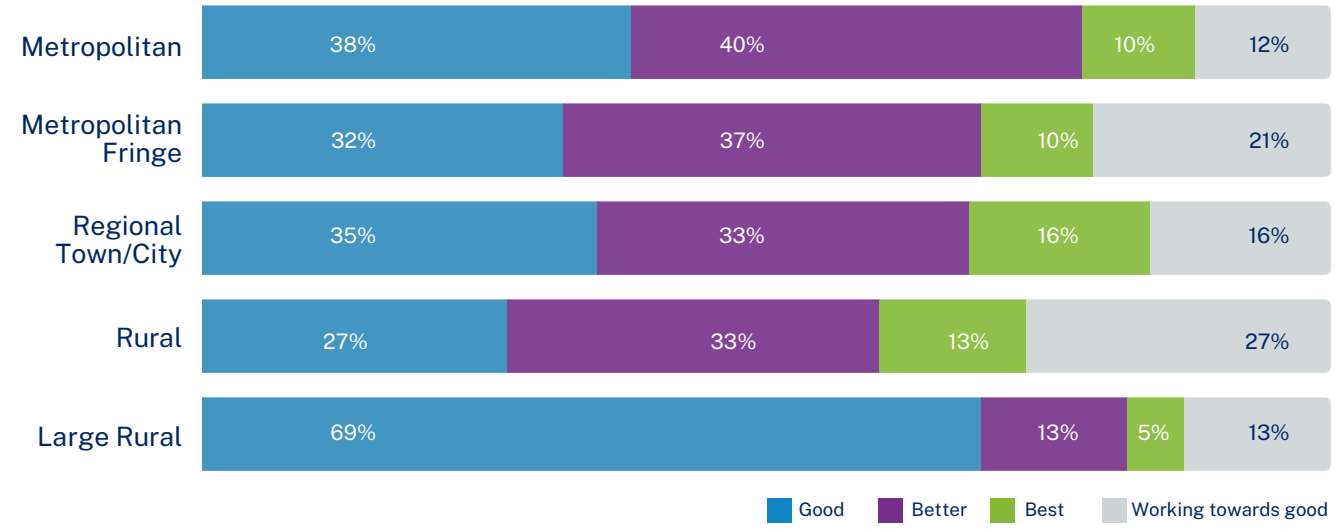
83% clearly identified the communities priorities and aspirations

OPPORTUNITIES

54% did not, or did not clearly state who was responsible for each strategy

36% did not, or did not clearly reflect the social justice principles

Results by council categories:



Community Strategic Plan

What works well

- Easy to read and understand, including using clear and simple language.
- Engaging visual elements to ensure the document is accessible.
- A structured layout that supports overall readability.
- A clear and distinct community voice is maintained throughout the plan.
- Well-defined measures and targets are outlined to gauge success.

Suggestions for improvement

- Clear responses to the 4 key questions:
  - Where are we now?
  - Where do we want to be in 10 years' time?
  - How will we get there?
  - How will we know when we have arrived?
- Clear description of how the Quadruple Bottom Line has been considered.
- Clear description of how the Social Justice Principles have been considered and addressed.
- Strong and clear community vision for the future.
- Defined responsibilities for each goal and strategy, whether assigned to the council or an external party.
- Measures that will test the effectiveness of the strategies in achieving the objectives of the Community Strategic Plan and demonstrate if the community is better off.
- Information used to inform the plan such as key challenges, risks, state and regional plans to be clearly articulated.
- Clear description of the service levels expected by the community to shape the priorities of the Community Strategic Plan and guide the development of other plans.
- Elements such as council's vision and mission statement and other corporate information detract from this being a community plan and are better suited for inclusion in the Delivery Program.
- More detailed information into how the community and stakeholders were engaged, the priorities identified, and how this input has influenced the development of the Community Strategic Plan.

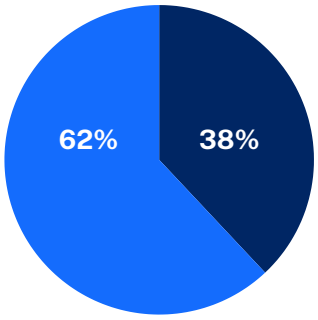
Delivery Program

175

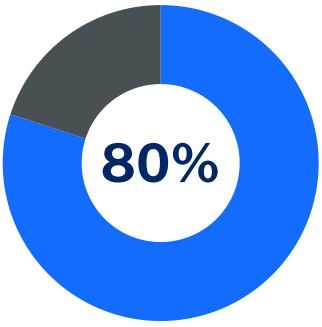
Delivery Programs peer reviewed

66 Metropolitan

109 Regional / Rural



Percentage of Metropolitan and Regional / Rural



Percentage of Councils meeting 'good' and above

Checklist Results:

STRENGTHS

89% of the strategies identified in the Community Strategic Plan carried through to the activities of the Delivery Program

86% exhibited a clear link with the Community Strategic Plan

85% were clear on what they were going to deliver

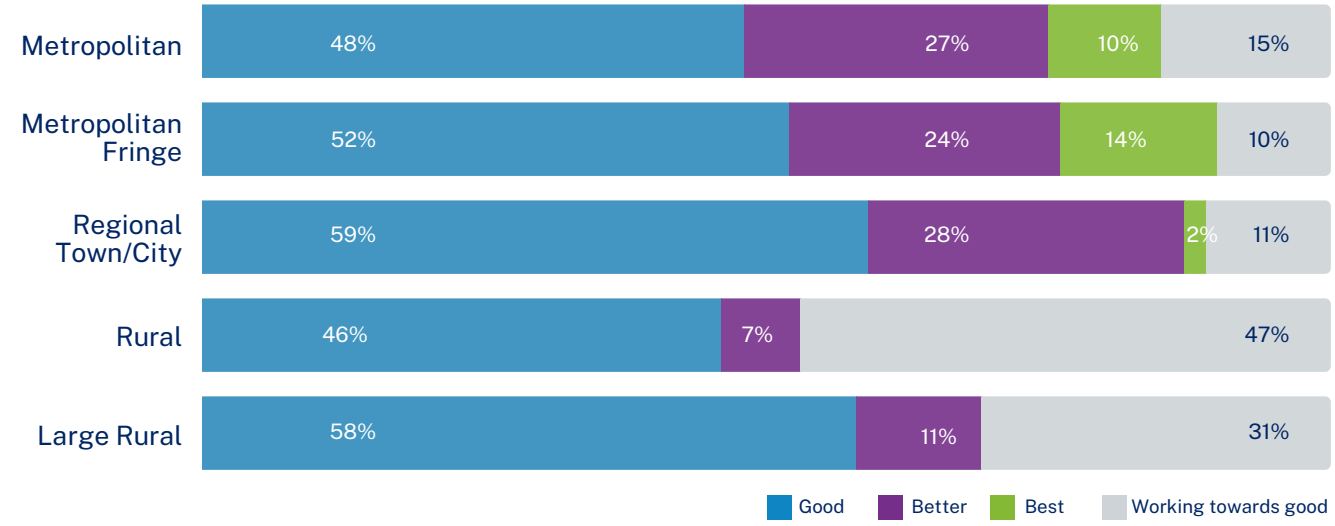
84% cover a 4 year timeframe

OPPORTUNITIES

63% did not, or did not clearly cover the areas of service that Council will review

62% were not clear on how they would address ongoing improvements to the efficiency, productivity, financial management and governance of the council

Results by council categories:



Delivery Program

What works well

- Clear alignment with the other IP&R plans including Resource Strategy and other strategic plans such as Disability Access and Inclusion Plan.
- Engaging visual elements to ensure the document is accessible.
- Well-defined methods of assessment to determine the effectiveness of each principal activity detailed in the Delivery Program.
- Clearly explained financial information presented by strategic direction or principal activity in an integrated format.
- Clear responsibility for each action.

Suggestions for improvement

- Establish measures with targets to facilitate the continuous monitoring of improvements in councils efficiency, productivity, financial management, and governance.
- Provide clear financial information including 4-year budget forecast, budget by outcome or action.
- Outline clear timelines for when actions will be undertaken or completed.
- Detail the capital works program including who is responsible.
- Explain potential risks and challenges, along with a plan to address them.

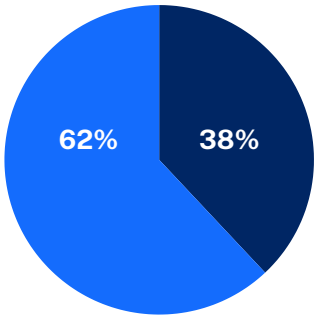
Operational Plan

173

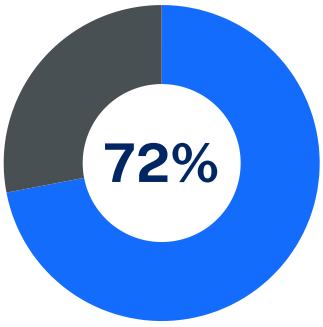
Operational Plans peer reviewed

65 Metropolitan

108 Regional / Rural



Percentage of Metropolitan and Regional / Rural



Percentage of Councils meeting 'good' and above

Checklist Results:

STRENGTHS

85% include a Statement of Revenue Policy

84% allocate responsibilities for each project, program or action

80% clearly show what is going to be delivered during the year

77% make it easy to see how it relates to the Community Strategic Plan and Delivery Program

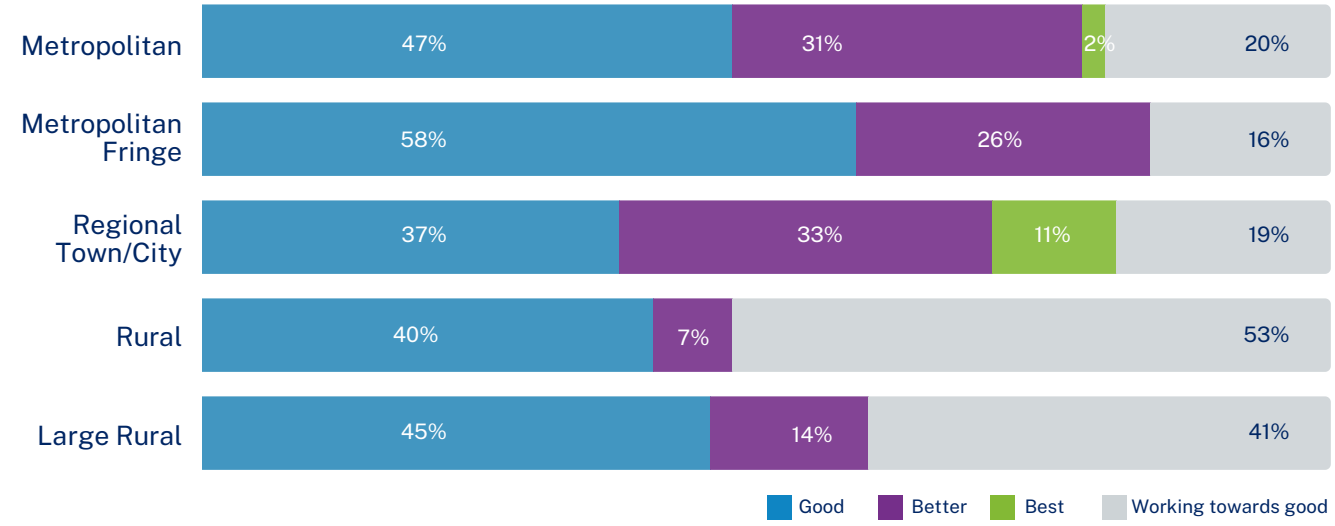
OPPORTUNITIES

71% do not, or do not clearly, include a detailed budget for each action

63% do not, or do not clearly identify what service reviews are to be undertaken

46% do not, or do not clearly show measures of effectiveness and efficiency, and targets

Results by council categories:



Operational Plan

What works well

- Engaging visual elements to ensure the document is accessible.
- Clear deliverables where the community can easily identify what will be achieved in the financial year.
- Clear measures to determine the effectiveness of the projects, programs and actions.
- Detailed information on major projects to be delivered in the financial year.

Suggestions for improvement

- Clear financial information including budget by project, program, or action.
- Establish measures with targets to facilitate the continuous monitoring of improvements in councils efficiency, productivity, financial management, and governance.
- Clear alignment with the other IP&R plans including Resource Strategy and other plans such as Disability Inclusion Action Plan.
- Clearly defined responsibilities for each action.

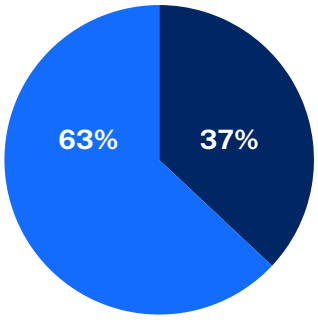
Annual Report

172

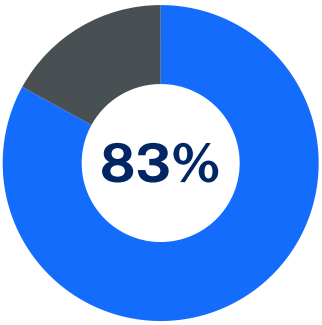
Annual Reports peer reviewed

64 Metropolitan

108 Regional / Rural



Percentage of Metropolitan and Regional / Rural



Percentage of Councils meeting 'good' and above

Checklist Results:

STRENGTHS

86% include council's audited financial statements and other statutory information

79% reference achievements in implementing its Delivery Program through that year's Operational Plan

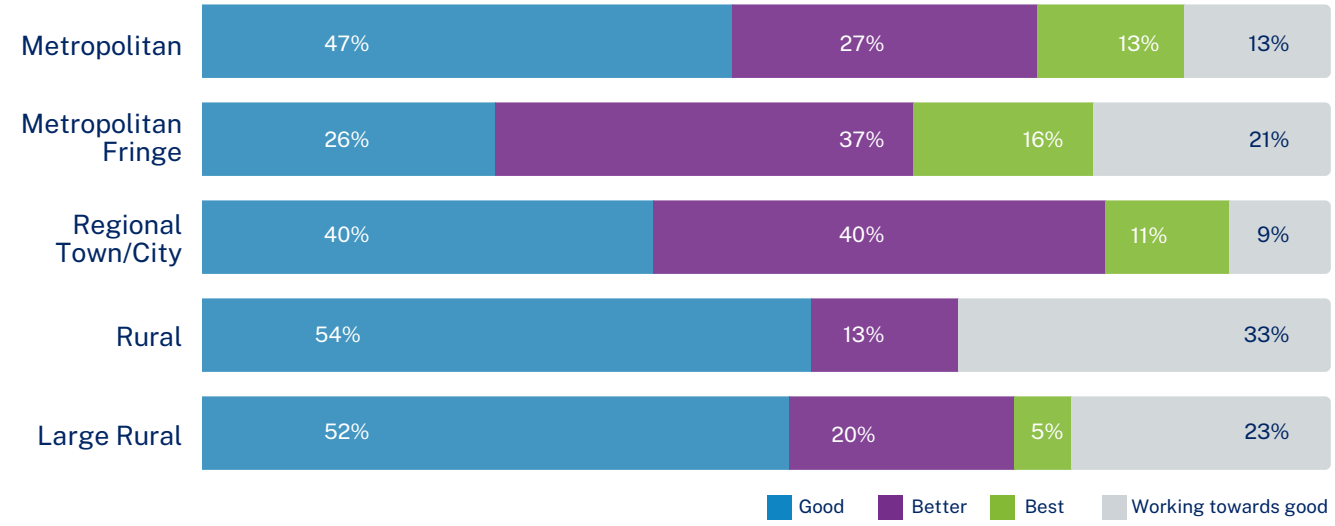
77% have been prepared with the community in mind

OPPORTUNITIES

62% do not, or do not clearly indicate how the council has progressed on the delivery of service reviews

49% do not, or do not clearly measure the effectiveness of the principal activities undertaken

Results by council categories:



Annual Report

What works well

- Engaging visual elements to ensure the document is accessible.
- Easy to read and understand, including using clear and simple language.
- Visual representation of data, utilising traffic lights and graphs.

Suggestions for improvement

- Ensure alignment with the Delivery Program / Operational Plan with clear reporting on the effectiveness of the principal activities.
- Include an evaluation of what was delivered, not delivered, what worked well and what did not.
- Create an annual report summary that presents key information in a community-focussed manner.
- Address all elements of the Annual Report checklist, recording N/A if council has no reporting obligation, rather than leaving it out.
- Include a hyperlinked table of contents for easy navigation.
- Add a 'How to read' diagram for better understanding.

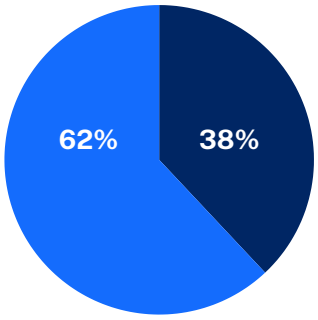
End of Term Report

167

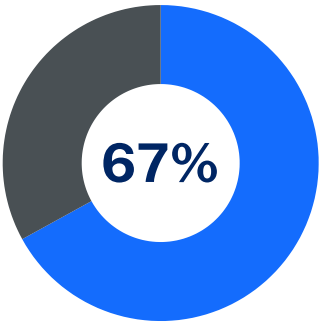
End of Term Reports peer reviewed

64 Metropolitan

103 Regional / Rural



Percentage of Metropolitan and Regional / Rural



Percentage of Councils meeting 'good' and above

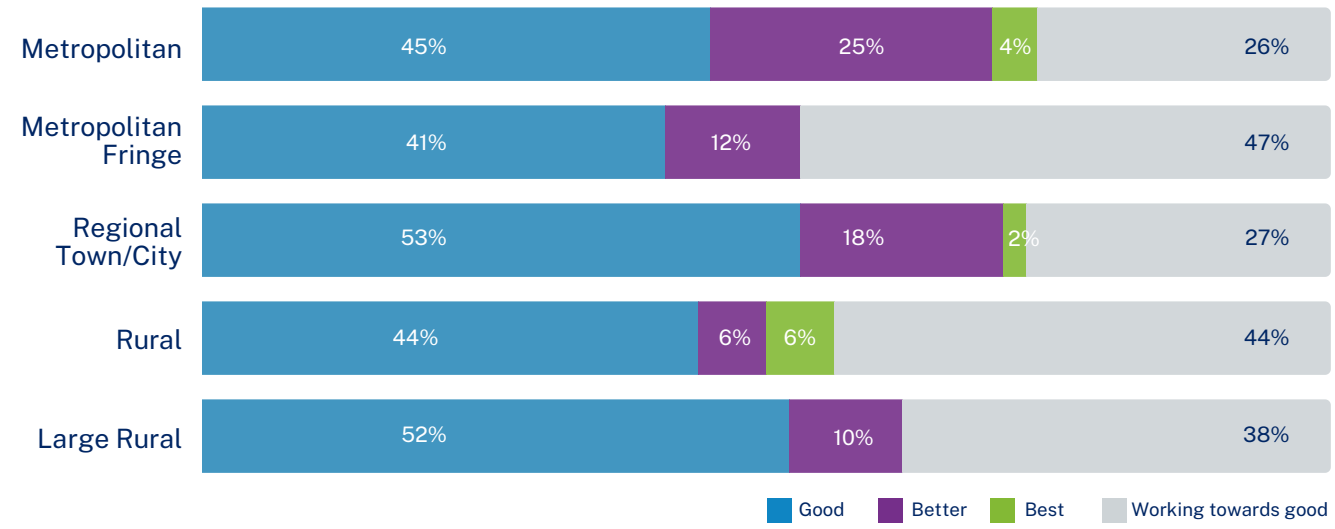
Checklist Results:

OPPORTUNITIES

45% do not, or do not clearly show progress in clear terms

53% do not, or do not clearly show the community's progress towards (or away from) its stated goals and aspirations as identified in the Community Strategic Plan

Results by council categories:



End of Term Report

What works well

- Easy to read and understand, including using clear and simple language.
- Engaging visual elements to ensure the document is accessible.
- Clear alignment with the Community Strategic Plan.
- Reporting against the measures outlined in the Community Strategic Plan.

Suggestions for improvement

- Utilise an analytical approach to reporting, focusing on evaluation rather than promotion. Assess what was successfully delivered, what fell short, what was effective, and what was not.
- Provide recommendations to the new council to inform the development of the next Community Strategic Plan

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