Implementing the Integrated Planning & Reporting framework

~ Key findings so far~

Identified from a review of council documents during the s508A application process in 2010

Overall

- Put all documents on Council's website, and make them easy to find
- Keep documents easy to read – the community is the audience
- Colour coding or numerical referencing helps to demonstrate links between documents
- Provide an introduction to each document
- Ensure the quadruple bottom line is addressed, and in an integrated manner
- Allow enough time for the planning process
- KPIs should relate to outcomes, not just outputs

Community Engagement Strategy

- Have a published document
- Identify how engagement occurred and the outcomes of it
- Is the diversity of the community reflected?
- How will information be provided to the community during the engagement process?
- Overtly address social justice principles
- Ensure councillors have a lead role in the engagement process

Community Strategic Plan

- Community Strategic Plan goals need to translate into actions for Delivery Program and Operational Plan

- Relationship to State Plan and regional planning needs to be clear

- Demonstrate the community's priorities

- What is Council responsible for?

- Overtly address social justice principles

Resourcing Strategy

- Demonstrate clear links between the Resourcing Strategy and…

  - Community Strategic Plan

  - Delivery Program

  - Operational Plan

- Cross-reference - use colour coding, numbering or columns to achieve this

Long-Term Financial Planning

- Must include scenarios (especially when applying for special rate variation)
- Link the Long-Term Financial Plan to the strategies of the Community Strategic Plan (both 10 years)
- Not a series of complex spreadsheets – able to be understood by the lay person
- Provide background to assumptions
- Check the bottom line adds up and is consistent across all documents

Workforce Planning

- Needs to address the needs of the Delivery Program (both 4 years)
- Demonstrate the links between the Workforce Plan and the Delivery Program
- Identify current and future workforce issues
- Identify what Council is going to do to address workforce issues

Asset Management Planning

- Develop an overarching Asset Management strategy which demonstrates links to the Community Strategic Plan and Delivery Program

- Provide condition maps or tables which make it easy to see which assets are in which condition

- Find out what standard the community will accept for assets

- Identify where Council has determined the intervention level to be

Delivery Program

- Link strategies and activities to the Community Strategic Plan objectives and strategies
- Include key performance indicators and assessment methods
- Include timeframes for activities
- Include levels of service

Operational Plan

- Include a Statement of Revenue Policy
- Demonstrate links to the Delivery Program
- Identify who's responsible for implementing activities and actions.

Tips

- Provide a range of opportunities for active councillor involvement throughout the process
- Consider establishing a cross-functional area team to ensure whole-of-council input to and ownership of the process
- Find out how other councils have presented their plans – see what works for your council
- Seek advice and input from your neighbours or networks in the sector
- Use the Integrated Planning and Reporting Manual to guide your process
- Check the Integrated Planning and Reporting Guidelines and Checklist to ensure all requirements are met