

SHOALHAVEN CITY COUNCIL INTEGRATED PLANNING AND REPORTING - INDICATORS FRAMEWORK

April 2012

Integrated Planning and Reporting

The Integrated Planning and Reporting (IPR) amendments to the Local Government Act include the requirement:

- to define 'methods of assessment' of progress on certain IPR elements,
- for the GM to report to Council at least every six months on progress against the adopted Delivery Program (DP),
- for the Annual Report to address progress on the DP.

The DLG IPR Guidelines (January, 2010) specifically provide:

- Community Strategic Plan - (para 1.8) - *identify the assessment methods* for determining whether the objectives are being met,
- LTFP - (para 2.6) – *identify methods of monitoring financial performance*,
- Delivery Program - (dot 2) – *identify a method of assessment* to determine the effectiveness of each principal activity in the DP,
- DP - (dot 4) - GM must ensure that progress reports are provided to the Council with regard to the principal activities determined in the DP, at least every six months,
- OP - (para 3.15) - *identify suitable measures* to determine the effectiveness of the projects, programs and activities undertaken,
- Annual Report –
 - outline Council's achievements in implementing its DP
 - year of ordinary election - outline of achievements in implementing the CSP
 - year of ordinary election - SoE report.

Reporting framework

Proposed indicators by which Council will measure progress and performance are included in each of the key IPR documents – the Community Strategic Plan, the Resourcing Strategy and the Delivery Program and Operational Plan.

Council will monitor its progress towards achieving the objectives of the Community Strategic Plan using two sets of measures at the objectives and strategies levels:

- 'Community Progress Indicators', shown in the front of the Community Strategic Plan, will measure progress towards achieving the objectives of the Community Strategic Plan,
- 'Strategic Progress Indicators' will measure results and progress towards achieving the Strategies of the Community Strategic Plan. Each Key Result Area in the CSP - Community, Environment, Economy and Leadership – includes Strategic Progress Indicators,

'Operational Performance Measures' will measure trends and progress on Activities in the Delivery Program and Operational Plan.

Community Progress Indicators will be measured primarily by random survey of the Shoalhaven community, at minimum for the 'end of Council term' report on Council's progress in implementing the CSP. Data to measure the Strategic Progress Indicators and Operational Performance Indicators will be drawn from Council operational data, survey results, State Government data and Australian Bureau of Statistics. Council has already developed a good set of indicators for the Key Result Area of Shoalhaven Environments through its established State of the Environment Reporting.

All indicators will be reviewed for reliability and appropriateness after each reporting year.

The Resourcing Strategy includes an Appendix containing indicators by which resourcing capacity and performance can be measured and reported, including a required element addressing long term financial planning indicators. The Resourcing Strategy also contains indicators addressing sustainable resourcing, workforce planning, asset management planning and information technology and telecommunications.

State of Environment (SoE) Reporting

The IPR requirements have retained the need for SoE reporting, which will continue to be delivered through Council's well-developed 'scorecard' methodology. Full SoE reporting, including community consultation, is now required only every four years (the year of the Council election).

Report Outputs

The objective of indicator reporting is to monitor, review and disseminate information about progress in the achievement of Council's objectives, strategies and activities, all of which are directed towards the Vision set out in the CSP. Planning, prioritising and resourcing of activities can then respond to the reporting information.

Recognising the range of audiences with an interest in Council's indicator reporting, and that different reporting cycles and levels of information will be needed to best inform those different audiences, a series of report types will form part of the IPR indicator framework. These are outlined in the attached table "Framework for Reporting on Indicators".

This will ultimately result in at least nine (9) report types, intended to both fulfill the relevant Local Government Act requirements and meet the needs of our audiences - from Council Managers to community and Government, and to be provided at quarterly, six-monthly and annual cycles. Generally, the more detailed and more regularly issued reports will have a more operational and management focus, and higher-level reports, issued less regularly, will have wider and external audiences.

A specific report will be required at the end of the elected Council's term, addressing CSP achievements over the whole of the term of the Council. While much of the basis of that report will come from the core indicator data, it will also include the results of a community survey and may also contain other elements. The 'end of Council term' report will be fully defined during 2011/12, for preparation in the second half of 2012.

Methodology

In order to most effectively manage the detailed indicator data collection and reporting process, using Council's 'interplan' corporate database, the reporting structure is based on the collection and retention of individual data sets, which can be reported at the 'KPI data' level, and also used as the basis for consolidated reporting in various forms.

KPI data can be managed in the interplan data base and 'linked' to elements of both the corporate planning and organisational structure frameworks. The indicator reporting will be developed via individual KPI data linked to:

- 'Key Result Areas' in the CSP,
- 'Activities' in the Delivery Program and Operational Plan, and
- 'Sections' in the organisational structure.

While some reporting will be based on direct use of the KPI data at the Activities level, most of the reporting will present this data in various 'consolidated' forms.

An extensive series of KPI data sets already in use across the organisation has been identified, and will provide the source for much of the KPI data under the new framework. Most data sets will require the entry of original raw data on performance, inputs, outputs or outcomes at some part of the process.

Continuous improvement

Through its on-going monitoring and review processes, Council will continue to develop and improve ways to measure performance and results across the IPR framework, as experience and feedback is gained during initial implementation. This will include:

- review of the framework on a yearly basis,
- confirmation of the SoE reporting cycle,
- consideration of the appropriate community survey cycle that will inform the Community Progress Indicators,
- consideration of further 'benchmarking' with other like organisations,
- confirmation of the purpose and practical use of 'targets' for KPI data sets.

The development of software and database/s to support the indicators framework should provide sufficient flexibility for adjustments to accommodate continuous improvements.

FRAMEWORK FOR REPORTING ON INDICATORS

	Quarterly	6 Monthly	Annual
Community and Government		Delivery Program <ul style="list-style-type: none"> • <i>General Manager's Six Monthly Report to Community and Stakeholders</i> 	Community Strategic Plan Annual Report (includes) <ul style="list-style-type: none"> • <i>Strategic Indicators</i> • <i>Resourcing Strategy Indicators</i> • <i>State of the Environment Scorecard</i> End of Term Report (4 year cycle) <ul style="list-style-type: none"> • <i>Community Indicators (Community Strategic Plan)</i>
Council	Delivery Program + Operational Plan <ul style="list-style-type: none"> • <i>Quarterly Progress Reports</i> Financial reporting <ul style="list-style-type: none"> • <i>Quarterly Budget Review</i> 	Delivery Program <ul style="list-style-type: none"> • <i>General Manager's Six Monthly Progress Report to Council</i> 	Community Strategic Plan Annual Report (includes) <ul style="list-style-type: none"> • <i>Strategic Indicators</i> • <i>Resourcing Strategy Indicators</i> • <i>State of the Environment Scorecard</i> End of Term Report (4 year cycle) Community Indicators (Community Strategic Plan)
Group Directors	Delivery Program + Operational Plan <ul style="list-style-type: none"> • <i>Quarterly Progress Reports</i> Group Directors Monthly Reporting <ul style="list-style-type: none"> • <i>Monthly – WHS / Workers Compensation / Sick Leave</i> • <i>Quarterly – Management (Finance) Report, Fleet Performance, Workforce Indicators, Energy use, WaSIP*</i> 	Group Directors' Performance <ul style="list-style-type: none"> • <i>KPI's and progress, by group*</i> 	
Managers and GDs (by Group)	Delivery Program + Operational Plan <ul style="list-style-type: none"> • <i>Quarterly and Six Monthly Progress Reports</i> • <i>Group level reports at Activity or Task level*</i> 		

* *Under development*

IPR Reporting Framework

