



— INDUSTRY INSIGHTS REPORT

IPR and Technology

Best practice tips for implementing IPR processes and systems in NSW.

IN THIS REPORT

02.

About the report.

03.

Challenge One: Getting staff to take responsibility and ownership for IPR.

05.

Challenge Two: Resourcing – not enough time, people and funds.

07.

Challenge Three: Creating meaningful measures for internal and external stakeholders.

09.

Challenge Four: Fragmented data sets and no centralisation of data.

11.

Challenge Five: The burden of data manipulation, validation and reporting

13.

Key Takeaways.

14.

Using the Good, Better, Best lens to adapt best practice to your council.

About the report

Transparency and openness are essential for building trust between the community and council. A key way local governments in New South Wales maximise trust is by implementing the Integrated Planning and Reporting Framework (IPR) and sharing information with various stakeholders.

Most councils face similar issues when implementing IPR, with people-related problems being the most critical. Time and resource constraints hinder engagement, emphasising the need for data and systems to allocate resources efficiently. Technology is critical for successful IPR implementation, and councils' maturity levels should guide its utilisation.

We interviewed 20 NSW councils to understand their IPR frustrations and uncover emerging best practices. This report aims to present this data in a way that supports councils to manage this process and use technology to effectively support IPR activity.

We encourage councils to adopt the Office of Local Government's (OLG) "Good, Better, Best" perspective to adapt the insights in this report to match your council's level of IPR maturity. To get you started, we've adapted two of the insights which are included as examples at the end of this report.

Here are the results and best practice insights from our study.



"To make good strategic and operational decisions, some level of technological application is necessary. When making decisions on how to use technology to support IPR, maturity of IPR implementation must be considered. Systems should reduce the burden of reporting, encourage engagement and scale in complexity to suit the organisation's maturity."

- Jenna Williams, Redman Solutions

Getting staff to take responsibility and ownership for IPR



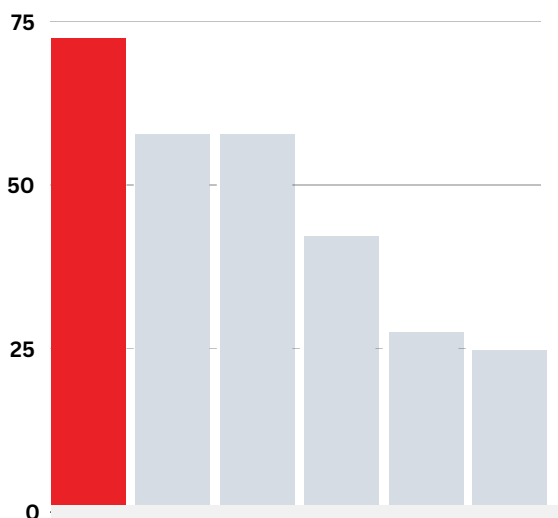
“Internal stakeholders don’t see it as their responsibility to provide the information, they don’t realise they’re the subject matter experts and IPR relies on them to report in a timely manner.”

-NSW IPR Practitioner

Buy-in from internal stakeholders for IPR reporting is one of the most challenging aspects of implementing the IPR framework.

The research found that while some individuals may report willingly, most do not see it as a priority, get frustrated with repeated requests, and need to be educated on how IPR can enable time savings and offer insights to help teams achieve their goals.

Councils have access to a wealth of data across their many service streams. However, accessing and leveraging this data can be difficult, and the manual process of collecting and validating it is cumbersome. This makes it hard to generate insights that engage a broad range of stakeholders.



74%

of respondents said *getting staff to take responsibility and ownership* was their biggest challenge when it comes to preparing and managing the suite of IPR plans.

Negative consequences of reporting are often feared which can contribute to resistance. When periodic reporting shows up a surprise result, defensiveness is a common reaction.

The research indicated that a shift in council mindset is important. Councils need to communicate that benchmarking is not about being the “best” or “worst,” but about using data to deliver better results for residents and key stakeholders. Ensuring there are no surprises in periodic reporting is important for reducing fear.

Real-time reporting on an operational level provides councils with regular opportunities to “fail forward” and embrace internal transparency and accountability as part of driving cultural change.

Reporting is crucial but to encourage that sense of investment from staff, councils must simplify reporting processes to assist staff to engage proactively. They must support teams to access and understand data-driven insights and ensure staff at all levels understand how their roles link to achieving strategic objectives.

Best Practice Tips



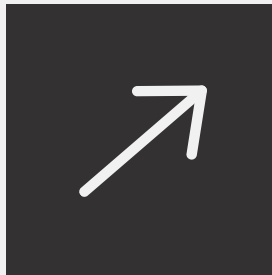
Tie individual purpose to the broader council and community outcomes

- Emphasise how everyday staff activities impact upon organisational and community success.
- Use an empathetic approach to effectively convey the significance of IPR activities.
- Develop a comprehensive communications strategy that highlights the benefits of IPR activities for diverse stakeholder groups.



Welcome questions and stakeholder concerns

- Foster open communication so you can recognise and address concerns.
- Address concerns when expectations are not being met.
- Consider and explain costs and trade-offs to all stakeholders.
- Refresh your approach and continue to engage as priorities and personnel change over time.



Streamline so it's as easy as possible to do the doing

- Eliminate duplication of effort by having stakeholders report only once, in one place.
- Provide a clear outline of everyone's obligations to ensure the process is robust and accurate and reflects their projects and services.
- Simplify the reporting process to make it easier for stakeholders to meet obligations.



“When you ask people for info, they say ‘we *already* told you that’, it’s that constant repetitive asking for the same information that frustrates people.”

-NSW IPR Practitioner

Resourcing – not enough time, people and funds to fulfill the CSP goals



"There's always greater expectations about what we should do or could do versus what we can financially afford."

-NSW IPR Practitioner

However, these plans are often not well-integrated and obtaining accurate data to ensure council has sufficient financial capacity to execute on plans can be difficult.

Political pressure for change adds complexity to the situation, as changes in councillors and senior staff can trigger a shift in priorities and innovation. However, councils tend to be risk-averse due to their inherent stewardship role, making change slower and more complicated than desired.

As councils face the challenge of doing more with less, the feasibility of resourcing for Community Strategic Plans (CSPs) is in focus. CSPs are highly strategic and comprehensive. As visionary documents with an extended timeframe for delivery, they are optimistic by nature.

To bring practicality to council goals, a clear understanding of resourcing is critical.

The integrity of Delivery Programs and Operational Plans rely on the ability of the Resourcing Strategy to articulate the council's resources to implement the projects and programs over time.

To achieve more with limited resources, councils must navigate the challenge of reducing service levels or exiting certain services, which can be operationally and politically difficult.

To manage the associated risks, councils need consistent data collection on their services and simplified means of analysing and interpreting them to support decisions for or against such changes.



58%

of respondents said *resourcing* was their biggest challenge when it comes to preparing and managing the suite of IPR plans.

Best Practice Tips



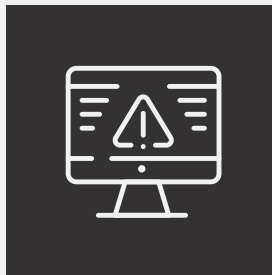
Improve integration and coordination of IPR Plans

- Ensure clearer integration and coordination between the different layers of plans and strategies.
- Cross-reference or link between plans and strategies to help avoid gaps and duplication and ensure accurate oversight.



Optimise the outcomes for mandatory service reviews

- Identify services where demand is decreasing or are being duplicated by other service providers to examine resourcing options.
- Identify KPI's that will help improve service delivery, customer satisfaction, and ultimately, achieve better outcomes for the community.
- Ensure decisions account for the evolving needs of the community over time and set time frames to revisit resourcing decisions.



Invest in data and information management

- Invest in data and information management systems to ensure the correct information is available and easily accessible.
- Ensure systems reduce the overall time to gather data and report and eliminate the duplication of effort. Report once is the ideal.
- Ensure relevant data is available to all necessary stakeholders.



“Everyone is trying to just get on with their day-to-day work and then having this extra layer of work that's required is difficult - just getting the time and the resources to dedicate to that activity is hard”

-NSW IPR Practitioner

Creating meaningful measures for internal and external stakeholders



"No one likes community backlash, so to avoid that, we make the measures fluffy so we can say we did more than we did. Rather than committing to doing something really specific, we report that we just did something general."

-NSW IPR Practitioner

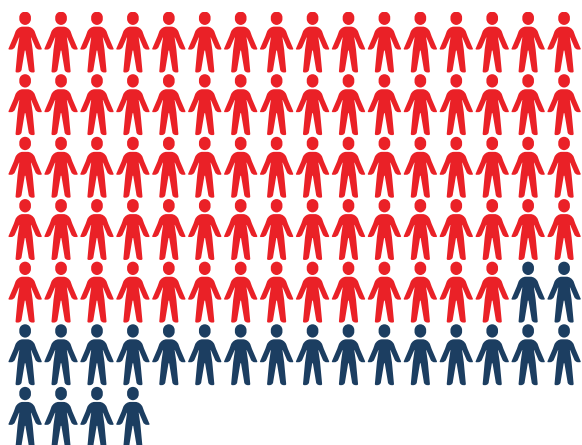
Defining measurable outcomes is a complex activity and the pressure to get it right amidst increased community interest in environmental, social, and governance issues is growing.

Councils have been encouraged to use the United Nations Social Development Goals as measures, but localising them and making them specific enough to be meaningful for local government is a challenge. Further, Council's level of control or influence over affecting change can vary.

Building a culture of accountability requires a degree of comfort with failure, which can be difficult in a politicised environment where the focus is on preventing negative press. To avoid "negative" results, many councils lean towards vague indicators that are easier to meet, rather than making measures pragmatic and realistic.

Additionally, measures aimed at achieving community objectives may focus on something other than day-to-day business operations, and this lack of meaning for internal stakeholders can deter engagement. For example, waste management staff may be more focused on operational issues such as the number of people on the trucks and missed waste calls rather than on the exact weight of waste picked up or waste diverted into recycling, which may be of greater concern to the community.

To enhance the quality of measures and manage conflicting needs, councils should work collaboratively with subject matter experts, external reporting bodies, internal stakeholders, and community members to establish a structured process for defining and prioritising measures. Councils that develop a framework for measuring outcomes that considers both community and business objectives will have a more comprehensive set of specific, locally relevant, and strategically sound measures that cater to the needs of all stakeholders.



78%

of respondents said *creating meaningful measures for internal and external stakeholders* was their biggest challenge when it came to gathering and analysing data for IPR.

Best Practice Tips



Develop clear and specific measures based on stakeholder needs

- Know your audience and their “why” for consuming the data you’re measuring.
- Define the measures that can be controlled or influenced by council actions.
- Develop clear, specific measures that reflect the council's goals in relation to the community goals.



Focus on operational outcomes

- Focus on operational outcomes that reflect the day-to-day activities of the council so measures are relevant to staff.
- Don’t be afraid to track adverse outcomes, even if just internally. While these can be politically challenging, they can be critical for driving impact.



Understand performance trends

- Ensure systems support the visualisation of measures that need to be tracked and compared over time.
- Incorporate this data into continuous improvement efforts to support more evidence-based decision-making and efficient allocation of resources.
- Use individual or group benchmarking to observe, analyse, and report on performance over a specific period.

Fragmented data sets and no centralisation of data

“

"We can't tell people to go look in one place to find stuff. If we want to know how this particular service is travelling, I can't say to a director, 'Here's where that information is' because it's in 16 different places."

-NSW IPR Practitioner

Gathering and analysing data for IPR can be challenging. *Fragmented systems make it difficult to gather data from multiple sources and centralise it in order to effectively analyse across silos. This makes it difficult to provide management with information that tells an accurate story for data-driven decision-making.*

Financial systems, customer relationship management (CRM) systems, and complaints databases are just a few examples of the various data sources available. However, the centralisation of valuable data from different sources is necessary to provide a comprehensive picture of the organisation's situation. This is rare among councils.

The research highlighted situations where data was calculated differently by different people, showing that councils struggle to maintain consistency in the analysis and interpretation of information.

To leverage the value from key datasets, councils must clearly understand where their data is stored and how to access it. This requires a significant business intelligence effort to centralise the data and ensure consistency in tracking and collection, along with identifying the appropriate data steward.

To overcome these challenges, *organisations should adopt a "report once" approach, where the system reporting on IPR become the corporate record of truth.*

Systems should be designed for users to see their objectives and be able to add data and updates easily. Systems should also make it easy to draw data from other systems to allow for "slice and dice" data analysis across council services. This would ensure consistency in how data is stored, calculated, and analysed and help councils more effectively utilise data to guide activity.



58%

of respondents said *fragmented systems* was the biggest challenge their council has with using technology in IPR.

Best Practice Tips



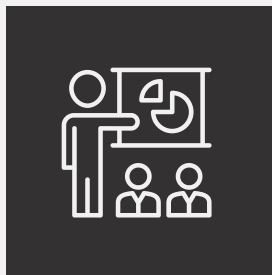
Implement a system that pulls data into one place for analysis

- Ensure relevant IPR data is collected and stored in a central location that serves as the authoritative source for that information.
- Ensure systems allow for simplified analysis, searching, filtering, and visualisations.
- Intuitive systems ensure staff can easily input their data and view reports in real time to help local government be more agile and responsive.



Develop a standardised data collection process

- Create a standardised data collection process that is consistent across all data sources to ensure data is accurate and reliable.
- Aim to compare data across different departments and programs using industry approaches where possible.
- Define consistent terminology and educate staff to ensure better communication between stakeholders and increase ability to identify areas for improvement or success.



Enable staff to utilise data and visualisations

- Train staff on how to collect data and analyse and present it simply, as well as ensuring consistency and accuracy in what is being collected and analysed.
- This will help staff with reporting responsibilities to understand how they can identify trends and patterns that may not have been apparent otherwise.



"The data collection process itself is so ridiculously manual. There's a lot of cutting, pasting and dragging stuff out of systems and moving it around. The real '*integrated*' approach will be difficult simply due to some historical silos within the organisation where plans etc, may have been developed without broad consultation or consideration of other plans/strategies etc."

-NSW IPR Practitioner

The burden of data manipulation, validation and reporting



“Most report generators are really boring, they don’t look at how important it is to create the story that goes with the data, and when you’re reporting externally, you need to think about the story”.

-NSW IPR Practitioner

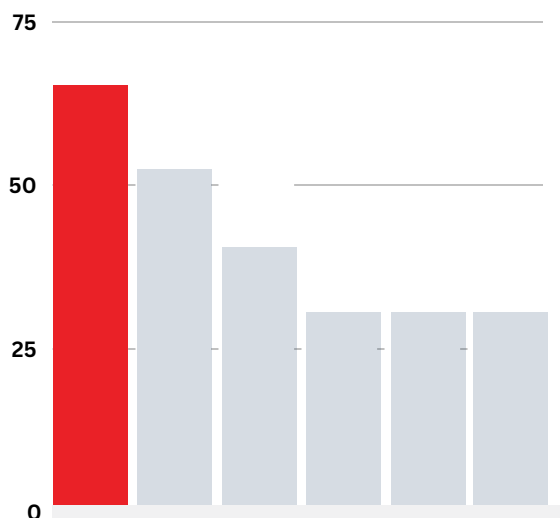
Despite efforts to improve data collection and reporting across councils, there are still isolated pockets of information and failures in processes that hinder accurate reporting. For example, data on workforce statistics and unplanned leave may be getting collected, but more time and resources are required to analyse and draw actionable insights. This is partly *due to the manual nature of the data collection, analysis and reporting process, which involves cutting and pasting data from various sources and creating graphs and reports. This creates a major bottleneck, preventing organisations from being able to access data for timely decision-making.*

Quite often, IPR Practitioners are asked to develop executive level dashboards or reports to portray the health of the organisation.

To solve this problem, council systems must make interpreting and visualising data from multiple sources as simple as possible.

Stakeholders expect timely reporting and delays can impact their confidence in the organisation's ability to manage its IPR responsibilities effectively. *Late reporting can also render the data irrelevant or make accurate interpretation difficult. This can lead to a loss of stakeholder interest and engagement and a lack of ownership and involvement in the reporting process.*

Creating simple but powerful visuals will help to tell the story of the status of strategies, projects, plans or services as a whole, quickly and easily. Templated reports and dashboards tailored to a wide range of stakeholder groups' needs should only be “one-click” away.



68%

of respondents said *pulling reports easily vs having to do a lot of manual handling* was their biggest challenge when it comes to reporting on IPR to external stakeholders.

Best Practice Tips



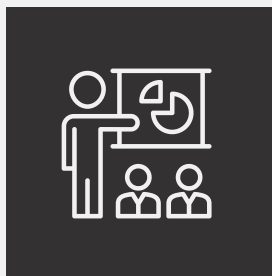
Understand Stakeholder needs and capability

- Interview stakeholders and ensure their needs are fully articulated so that reporting meets their specific needs.
- Map out requirements of different stakeholders and address any potential conflicts upfront.
- Don't shy away from addressing conflicts or assume that they cannot be managed as this will lead to vague reporting.



Automated visual aids

- Develop dashboards and indicators that enable stakeholders to quickly assess the status of projects or services as a whole to better understand and interpret complex data effectively.
- Automate data collection and integration, based on the ongoing needs of various stakeholder groups, to help speed up the reporting process.
- Ensure systems eliminate the need for manual data manipulation.



Training and capacity building

- Encourage staff to think more critically about the data they collect and how it can be used to improve services and decision-making.
- Providing training and capacity-building opportunities for staff members to improve data literacy and foster a culture of data-driven decision-making.



“I'd like visual access to that data, so I would love to be able to have some dashboards, some indicators, some like one page summary, something that kind of means that anyone that's looking for the status of the operational plan over all of the asset works program has got one spot they can go look at.”

-NSW IPR Practitioner

Key Takeaways

The successful implementation of the IPR Framework is crucial for councils to meet the needs of their communities and establish trust between council, elected members, and the community. This requires councils to set meaningful and achievable goals and consistently track their performance.

The research highlighted that building a culture of accountability and open communication with stakeholders can be challenging for councils. Creating a culture of accountability requires a regular focus on activity and progress, with an understanding that “failure” is simply an opportunity for learning and adjustment.

Despite many councils feeling unprepared for these conversations, those who took ownership of their roles as advocates for change and were willing to champion accountability saw positive results. *These councils are investing in overcoming challenges related to stakeholder engagement, resourcing, and measurement by being willing to get it wrong, simplifying reporting processes, and demonstrating the benefits of data-driven decision-making to encourage staff investment in reporting processes.*

With service reviews now mandated, councils have an opportunity to prioritise how services are measured and monitored to ensure the greatest value is being derived from council services or divest to redirect funds where they will be most beneficial.

Investment in data and information management systems should ensure improved integration and coordination of plans and strategies and allow for cross silo analysis of data. Most importantly, staff need a line of sight on how their role contributes to strategic objectives and should be provided with simplified reporting options to reduce barriers to reporting engagement, whether on the road or in the office.

In the past, with reliance on complicated enterprise resource planning (ERP systems) most councils resorted to relying on excel as a key component for implementing the framework. Now, purpose built, Software as a Service solutions can provide councils with easy, cost-effective access to specialised tools to reduce the reliance on spreadsheets without the overhead of more complex ERP modules.

These tools make it increasingly simple for stakeholders to engage with reporting, have oversight across multiple layers of planning and reporting allowing councils to reduce inefficiencies, improve engagement and support IPR adoption. This helps councils to achieve more with limited resources and better serve their communities.

How to use the Good, Better, Best Lens to Adapt Best Practice Tips

The best practice insights in this report can be broken down by council teams into actionable steps that take into account each council's level of maturity in IPR implementation. The Office of Local Government (OLG) has created a "Good, Better, Best" framework for adapting the IPR framework. We encourage councils to use the same framework to adapt the insights in this report into actionable steps. To get you started, we've adapted two of the best practice tips from the first insight into some suggested "Good, Better and Best" actions.

Working out a Practical Next Step using the Good, Better, Best Ideas Framework

Example 1: Tie individual benefits to council and community gains

It's crucial to ensure that everyone understands how IPR activities contribute to their success, as well as that of the organisation and the community. This requires empathy, a communications strategy that clearly articulates benefits to different stakeholder groups, and sufficient training and support to ensure barriers to engagement can be systematically addressed.

<p style="text-align: center;">GOOD</p> <p style="text-align: center;">Align Individual and Organisational Goals</p>	<p style="text-align: center;">BETTER</p> <p style="text-align: center;">Recognise, Reward and Report Contributions</p>	<p style="text-align: center;">BEST</p> <p style="text-align: center;">Measure and Communicate Impact</p>
<ul style="list-style-type: none"> • Establish clear connections between individual goals and the objectives of the council and the community and communicate through position descriptions. • In team meetings, communicate how achieving individual goals contributes to the overall success of the organisation and the desired outcomes for the community. • Encourage professional reflection on how individual activity contributes to strategic goals through standards performance management channels. 	<ul style="list-style-type: none"> • Implement recognition and reward systems to acknowledge and appreciate the contributions of stakeholders involved in IPR activities. • Highlight success stories and showcase examples of individuals or teams that have made significant positive impacts through their engagement. • Tailor the communications strategy to different stakeholder groups, addressing their specific interests and concerns and report achievements. management channels. 	<ul style="list-style-type: none"> • Implement mechanisms to measure and track the impact of IPR activities at both the individual and organisational levels. • Regularly communicate the progress and outcomes achieved as a result of stakeholders' engagement, highlighting their contributions and the positive changes realised in the community. • Create forums or platforms for stakeholders to share their experiences, best practices, and success stories, fostering a sense of community and continuous learning.

Example 2: Streamline so it's as easy as possible to do the doing

Eliminate duplication of effort by having stakeholders report only once, in one place. Provide a clear view of everyone's obligations and progress on all relevant parts of the plan. By simplifying the process, stakeholders will be more likely to engage and meet their obligations, leading to better outcomes for the business and the community.

<p>GOOD Identify Process Bottlenecks</p>	<p>BETTER Streamline Reporting Procedures</p>	<p>BEST Provide Clear Visibility and Tracking</p>
<ul style="list-style-type: none"> • Identify areas where the reporting process becomes burdensome or time-consuming for stakeholders. • Analyse the steps involved and identify any duplication of effort or unnecessary complexities. • Train staff on why engagement and meeting obligations contribute to better outcomes for the business and community. 	<ul style="list-style-type: none"> • Simplify the reporting process by establishing a centralised platform or system. • Design user-friendly interfaces and forms that capture the necessary information efficiently. • Ensure stakeholders report only once, in one place, reducing duplication of effort. • Offer training sessions or resources to educate stakeholders on the simplified reporting process. • Provide clear instructions, user guides, or tutorials to ensure stakeholders understand how to navigate and use the reporting system effectively. 	<ul style="list-style-type: none"> • Implement a comprehensive tracking system that provides a clear view of everyone's obligations and progress. • Enable stakeholders to easily monitor their own tasks and see the overall progress on relevant parts of the plan. • Use visualisations or dashboards to provide a real-time status update, fostering transparency and accountability. • Regularly assess and gather feedback on the streamlined reporting process. • Seek input from stakeholders to identify further opportunities for simplification and improvement. • Implement iterative enhancements to the system based on feedback and emerging best practices.