Long Term Plan 2018-28
Project Update and Scope Discussion
Councillor Update 6 July 2017
Today

• Background
• Where are we at?
• Update
• Expectations (Group Discussion)
• What’s next?
Background

• A legal requirement

• Key strategic document

• Conveys a sense of direction

• Sets out desired community outcomes
Background cont...

• Goods and services Council will provide to meet these objectives

• Sets council priorities

• Major accountability document
Background cont...

• Provides guidance

• Assists decision-makers to act in long term interests of communities (especially when under pressure from special interest groups)

• Avoids being diverted from established direction.
Background
Background - where does it fit?

- Vision and Outcomes
  - Strategies and Plans: These show what we will do to deliver on the vision and outcomes
  - Long Term Plan/Annual Plans: This is a summary of what we will do, when and how much it will cost

- Annual Report
  - Quarterly Reports, Monitoring Strategies and Plans: These are reports showing what's happening in the community, what we did and how well we did it
Where are we at?
Update - what have we been up to?

MDC-LTP-Methodology

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LTP-Processes

A process is a cohesive set of related activities that make up a specific project objective. A process results in one or more deliverables. A process is a cohesive set of thread-related activities that make up a particular project objective. A process results in one or more deliverables and outcomes. Each process is also a discipline that leverages the use of similar skills.

The LTP life cycle project involves all of the following processes below which overlap in time with software and are intended through common deliverables.

Suggested Processes:

<table>
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<tr>
<th>Process</th>
<th>Description</th>
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<tr>
<td>Content Development</td>
<td>The process creates the content that will be used by other processes (MXR documents, presentations, reports).</td>
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<tr>
<td>Collection &amp; Analysis</td>
<td>The process collects and analyzes data or information relevant to the LTP.</td>
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<tr>
<td>Decision-Making</td>
<td>The process identifies possible project issues and provides guidance on how to make decisions that improve the development of the LTP.</td>
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<tr>
<td>Engagement &amp; Communication</td>
<td>The process involves internal and external stakeholders, including the community, in the process and decision to create the LTP.</td>
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<td>Document Production</td>
<td>The process designs, edits, and produces all LTP documents (word copy and electronic).</td>
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<td>Financial Modelling</td>
<td>The process identifies, analyzes, and models the budget and financial data to support the decision-making and document production.</td>
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<tr>
<td>Quality Assurance</td>
<td>The process ensures that the methods and deliverables used to produce the LTP meet the quality requirements.</td>
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<td>Systems Management</td>
<td>The process ensures that the project is delivered on time, within budget, and to the required standard.</td>
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<tr>
<td>Project Management</td>
<td>The process involves the project team in the project, ensuring that all tasks are completed on time, within budget, and to the required standard.</td>
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LTP-Phases

Dividing project life phases provides a higher degree of management control and reduces flakiness. The end of each phase reflects the completion of a major set of project deliverables which can be reviewed and signed-off by the client. Each phase builds on representation as a significant product of the project, providing an opportunity to confirm the client’s business needs. Collectively, the project life phases are known as the project life cycle.

The approach for the LTP has 8 phases which are as follows:

Phase 1: Project Set Up
Phase 2: Situation Analysis
Phase 3: Direction Setting
Phase 4: Policy/Strategy Setting
Phase 5: Levels of Service Setting
Phase 6: Budget Development
Phase 7: Community Consultation
Phase 8: Project Closure
What have we been up to? Phase One example
What to expect from your LTP project team

• Elected Members document “LTP is their plan and they should be involved throughout the process”
• Mayor Helen’s “team approach”
• Workshops and SP&P - booked throughout the year

• Information to assist decision making
• Early notification of key dates
• Key Project Status Reports
  • Risks
  • Budget
  • Issues
Group discussion - what expectations do you have for your LTP project team?

- Any particular concerns, issues to be resolved through Long Term Plan? For example - key issues, policies, decision making, fees and charges, rates, levels of service etc.

- Communication about the project - form, timing etc.

- Community Engagement Planning

- Consultation Document.
What do I need to do?

• Attend meetings
• Participate in decision making
• Ambassadors for the LTP
• Early notification of financial limits
• Ask questions.
What’s coming up next?

• Confirmation of timelines – similar to Annual Plan

• Finalisation of Forecast Assumptions
• Finalisation of Significance and Engagement Policy
• Introduction Revenue and Financing Policy
• Introduction Financial Strategy
• Confirmation of Activity Groupings
• Introduction Levels of Service Reviews
Questions?