

5.0 Tools

This section provides some helpful hints regarding tools for successful long-term planning.

Use the three-year cycle to your advantage – the development of systems and tools can generally be started well in advance ...

The development of tools and systems is an area which need not be bound to the electoral process. Much of the information required to undertake successful long-term planning is required regardless of the political views and priorities of the elected members.

The 12-18 months after adoption of a LTCCP (i.e. up to about 31 December 2007 for the 2009 LTCCPs) are a good time to be testing the rigour of your planning and financial systems, with a view to programming any changes for implementation in the second and (very) early part of the third year. If your local authority needs to do things such as implement a new financial modelling/management system the first or second years are probably better times for this than the third year.

Your systems should fit your planning and information needs, not the other way around.

An information system is a tool to help monitoring and control of the organisation. Although systems needs are an important factor to keep in mind during the process (especially as they apply to day to day management and control of the organisation), they are not the only factor and should not constrain the development of the LTCCP. This points to the need to ensure that your systems are meeting your information needs at an early point in the process.

Standardise as much as you can and advise of the standardisation as early as you can.

Documents such as asset/activity management plans, progress reports, draft budgets and the like tend to lend themselves well to standardisation. Standardisation of this nature promotes efficiency (for example savings in time spent processing and peer reviewing material), focuses attention on the key issues (provided your templates are designed carefully). However the risks in standardisation are that:

- a desire for uniformity can result in key information being missed or hidden into extraneous detail (in particular, if using templates produced outside the organisation be sure to review these carefully)
- imposing a standard form can potentially work against people buying into the process.

It is often wise to both circulate drafts of forms to all of those who will be filling them out and pilot-testing the forms with a smaller, but representative group as part of the development process. This points to the value of developing the tools at an earlier, rather than later, point in the process. Early development and circulation of the tools can also help reinforce that the LTCCP is important, highlight areas where there may be gaps in the information and just occasionally provide a signal or spur for some to start their own processes early.

Some of the templates you may wish to consider developing include:

- a template for analysing a strategy or policy and its implications for the long-term plan
- a template for levels of service reviews
- a template asset management plan
- a template budget
- a template activity statement.