TIMARU
DISTRICT COUNCIL
Te Kaunihera ā-Rohe
o Te Tihi o Maru

Customer Services

Activity Management Plan

2027-37

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Contents

Part 1: Strategic Management

About this Activity

What does it deliver to our community?

Customer Services provides the primary interface between the community and Council, ensuring customers can easily access information, services, facilities and support. The activity delivers front-line service through Council service centres, phone and digital channels, reception services, customer request management, animal control administration, cemetery administration, parking administration, records support, and customer communications.

The activity plays a critical role in shaping the community's experience and view of Council by providing responsive, professional and accessible services. Customer Services acts as a central gateway to Council, helping residents, businesses and visitors navigate Council processes, access information, lodge requests, make payments and connect with the appropriate services.

Over the next ten years, Customer Services will continue to adapt to changing customer expectations, increasing demand for digital service delivery, growing service complexity, and the need to maintain high-quality customer experiences across multiple channels.

Customer Services By The Numbers – Numbers served:

Activity	Reported volume
Phone calls offered	29,485
Phone calls answered	27,917
Phone answer rate	94.7%
Inbound emails	16,377
Email interactions	28,413
Business-hours CRM records	13,185
Receipt transactions	29,051
After-hours calls	2,526
Main Building reception visitors	35,428
Land Information Memorandum Applications	1,216
Venue bookings	975
Rates rebate applications	2,475

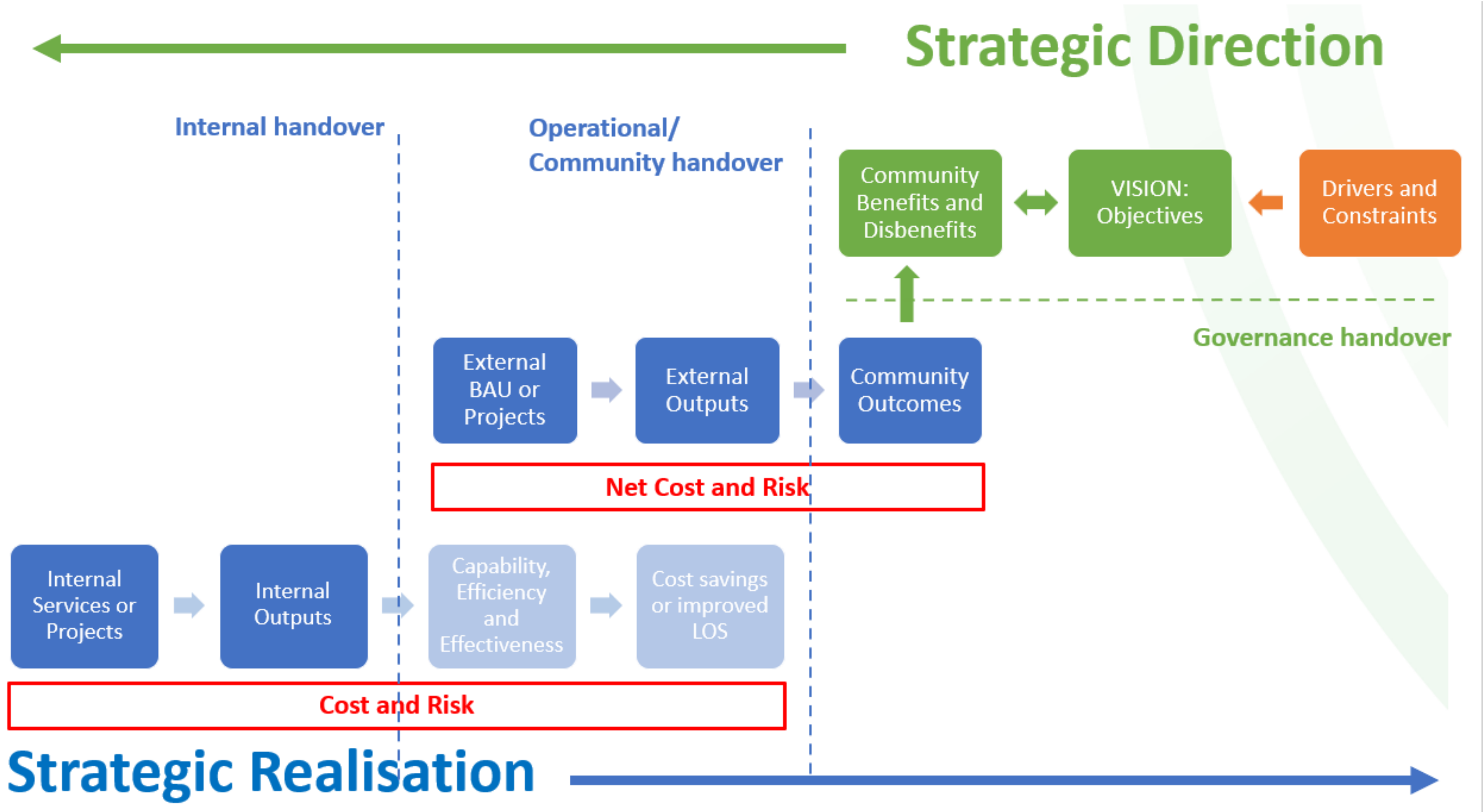
Customer Request Categories

Rank	CRM category	Records	Share
1	Bins & Collection Services	3,950	30.0%
2	3 Waters	2,235	17.0%
3	Noise Complaints	664	5.0%
4	Parking Complaints & Infringements	468	3.6%
5	Parks	455	3.5%
6	Animal Control - Barking	446	3.4%
7	Property	368	2.8%
8	Bylaw Enquiries & Complaints	338	2.6%
9	Animal Control - Wandering	250	1.9%
10	Staff Request CRM	211	1.6%

After Hours Enquiry Categories

Call theme	Calls	Share
Animal Control	630	25%
Noise Complaints	505	20%
Water, Sewer & Drainage	455	18%
Roads, Footpaths & Traffic Hazards	250	10%
Waste, Recycling & Bin Collections	225	9%
General Council Enquiries	150	6%
Facilities, Housing & Property	100	4%
Other / Miscellaneous	86	3%
Alarms, Telemetry & Security	75	3%
Rates, Payments & Accounts	50	2%
Total	**2,526**	**100%**

Strategic Alignment



NB Note that Outcomes and Benefits for *internal* services or projects will *also* be internal in the form of enabling capability, efficiency or effectiveness in *other* business units who can then improve or maintain a LOS or realise cost savings. Outcomes and Benefits for internal services or projects should therefore describe the opportunities they enable *across other business units*

Customer Services BAU Activities: Strategic Alignment Map

Area	BAU Activities	Outputs	Outcomes	Community Benefits	Strategic Priorities	Key Drivers
Customer Services	Efficient and effective front counter service, call handling, customer request management, payments, service centre operations, digital customer support, reception services	Customer enquiries and requests processed, and transactions completed in a timely manner, customer records maintained	Customers of varying ages, abilities, cultures and levels of digital literacy easily and quickly access inclusive and highly responsive Council services through multiple channels including in-person, phone, online and self-service options	Customer satisfaction with the service experience and resulting increased trust in Council, community connectedness Customer issues and queries resolved (personalised benefit varies by customer and by query)	Community Wellbeing, Organisational Excellence	Community expectations, service demand, digital service trends
Customer Request Management	Logging, tracking and coordinating service requests across Council	Service requests managed and reported	Customers access Council information, facilities, programmes and regulatory services with support of Customer Services	Revenue (fees and charges) arising from customer use of facilities, programmes and regulatory services	Excellence in Service Delivery	Customer demand, asset issues, service standards
Customer Contact Centre	Telephone enquiry management and information services	Enquiries answered and referred appropriately			Connected and Informed Communities	Population growth and changing customer needs
Customer Experience & Improvement	Customer feedback management, customer journey improvements, satisfaction monitoring	Customer insights and improvement initiatives implemented		Service/transaction cost as low as possible due to service efficiency and effectiveness	Continuous Improvement	Customer expectations and service innovation
Digital Customer Services	Online forms, self-service systems, website support and digital channels	Digital transactions and accessible services			Digital Transformation	Technology development and customer expectations
Land Information Memorandum	Receipt and collation of subject access request from members of the public	Timely production of memoranda, at least within statutory deadlines	Straightforward and efficient access to Council property information supports customer investment decisions in real estate matters	Social and economic prosperity and confidence in the local housing market	Community Wellbeing	Customer expectations

What are the key constraints, dependencies and assumptions for this activity for the next ten years?

Constraints	Dependencies	Assumptions
Budget availability for staffing and technology improvements	Reliable ICT systems and digital platforms	Customer demand will continue to grow, it would be preferable that growth was primarily in the digital space.
Limited ability to directly control resolution times across all departments	Operational activities responding to customer requests	Council will continue to provide multiple service channels reflecting its high level of older people.
Increasing complexity of customer enquiries	Integration with corporate information systems	Digital service uptake will increase over time
Workforce recruitment and retention challenges	Accurate and timely information from business units	Community expectations for service quality will continue to rise
Regulatory and privacy requirements	Support from all Council activities and contractors	Face-to-face services will remain important for some customer groups

Who are the key stakeholders for this activity?

This activity has a significant or strategic relationship with the following:

Group/Organisation	Relationship
Residents and Ratepayers	Primary customers of Council services
Local Businesses	Access Council services, regulatory support and information
Visitors to the District	Access information, facilities and services
Community Organisations	Service users and partners in community outcomes
Elected Members	Receive customer insights and community feedback
Council Business Units	Customer Services acts as the first point of contact for requests and enquiries
Contractors and Service Providers	Support delivery and resolution of customer requests
Central Government Agencies	Information sharing and service coordination where required

Part 2: Performance Management (Levels of Service)

Levels of service for 2027-37

Performance Measure	Levels Of Service	Community or Technical LOS (C/T)	Benchmarks (Targets)	Future Performance Targets				Method of Measurement (where & how)
				Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Years 4-10 2027/34	
Eg For Project/Activity Output or Outcome	Eg For Project/Activity Outcome or Benefit	C	100%	80%	85%	90%	95%	Follow up customer survey results to consent applicants (CM9 # xxxxxx)

Levels of service are measurable qualities or attributes of an activity that relate to the way people experience the service.

Performance measures are the indicators that are used to determine whether levels of service are being delivered.

Benchmarks relate to your performance measures – for example, are there benchmarks set by industry standards for your activity?

Performance targets are the desired levels of performance against the performance measures.

Proposed Changes to Activities, Projects and Levels of Service

(**Note for any changes that the Investment Summary in Part 7 must be completed for <u>EACH</u> proposed change**)

What changes are being proposed for this activity for the LTP 2027-37 (cf LTP 2024-34 LTP)?

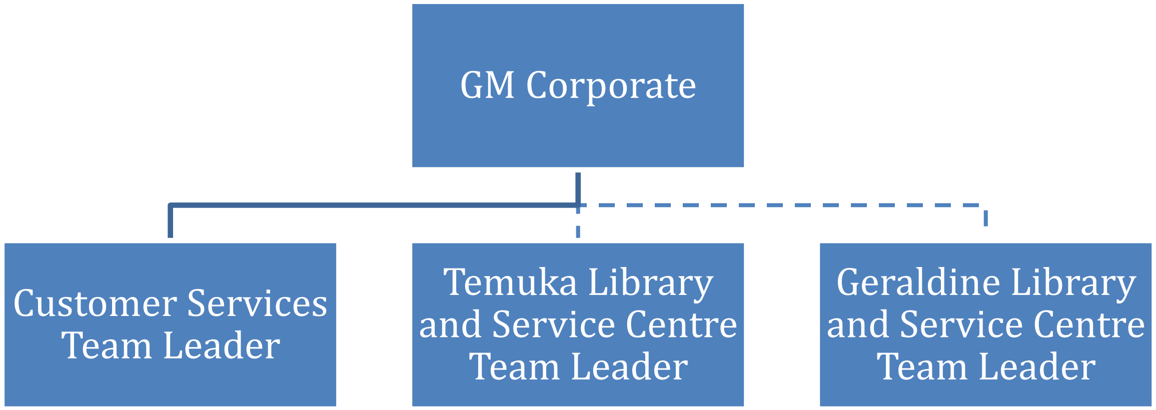
Proposed Activity Change or Project	Change from 2024/34 LTP (New or Amended)	Impact on Level of Service (Start, Stop, Change higher/lower)	Reason/Rationale	Options for consultation	Project Brief or Business Case Completed?
Move to cashless services	New	Stop	More and more councils are going cashless at the front desk as a way of increasing security and operating more efficiently. This could be done at the same time as parking being made cashless at the same time. This would save the direct costs of cash handling, at the same time as reducing the staff time allocated to processing cash transactions. It may also be a motivator for people to pay online rather than over the desk.	Whether or not we would keep taking cash for transactions at customer services or whether we can only take card payments.	No

			Due to the nature of the service, cash could still be taken at CBay and the district pools.		

Part 3: Activity Management

Overall Management

How is the activity managed, including roles, staffing levels, accountabilities, monitoring, evaluation, and reporting



Processes including key delegations

Geraldine and Temuka Service Centres provide the majority of customer services functions in addition to library services. They are formerly part of the libraries group, but are affected by any decisions made on customer services matters and processes. Conversely, any library decisions made (such as opening or closing times) affecting these centres has an effect on customer services.

Workflow Management

How does the activity intersect with other activities and workflows across the business?

Other business unit	Point of intersection	Workflow solution	Relationship owner this unit (role)	Relationship owner other unit (role)
Infrastructure Activities	Receives and coordinates customer requests relating to roads, water, drainage and infrastructure services	Zendesk and authority, procedures captured in flowingly.	Team Leader Customer Services	CIO, Infrastructure GMs
Central South Island Water	Will either continue to receive and coordinate customer requests and billing enquiries, or be a conduit to pass on enquiries to Water Organisation.	Zendesk and whatever CRM system water uses.	Team Leader Customer Services	Water Chief Executive.
Regulatory Services	Supports customers accessing consenting, compliance and regulatory services such as dog registration.	Zendesk, Authority, Simpli	Team Leader Customer Services	GM Regulatory
Community Services	Promotes and facilitates access to community facilities, events and programmes	Zendesk, Atticus	Team Leader Customer Services	Theatre and community facilities managers.
Corporate Services	Works closely with ICT, Communications, Finance and Records Management to	Zendesk, CM	Team Leader Customer Services	Corporate GM, CIO, CFO

	support customer interactions. Also leads			
Property and Facilities	Works closely with ICT, Communications, Finance and Records Management to support customer interactions. Also leads	Zendesk, Atticus	Team Leader Customer Services	Corporate GM, CIO, CFO, Property Manager
Governance and Democracy	Provides information relating to Council decisions, meetings and consultations. Service centres provide support during elections periods.	None	Team Leader Customer Services	Corporate GM
Land Information Memoranda	Collates council held information on behalf of those making subject access requests.	LIM Tool	Team Leader Customer Services	All information holding business units.

Systems Management

What different management systems are used for this activity?

Uses standard suite of council tools and Authority for CRM and financial management and desk transactions. Phone calls are handled through the Zendesk platform and venues bookings are through a software platform called Attekus. It as assumed that the bookable system will be reviewed once Authority Altitude is in place.

Information Management

What are the key information sources used for decision making in this activity, including for asset management/replacement/renewals (as appropriate), and for determining priorities for this activity?

Include how the information is collected, monitored, used, kept up-to-date, and stored.

Source	Purpose
Customer Request Management System	Service demand analysis and performance monitoring
Customer Satisfaction Surveys	Understanding community expectations and service quality
Annual Resident Surveys	Long-term customer experience trends
CRM and Contact Centre Data	Service planning and resourcing decisions
LTP and Annual Plan Feedback	Community priorities and expectations
Service Performance Reporting	Operational monitoring and improvement
Complaints and Compliments Data	Service quality improvement opportunities
Digital Analytics	Online service usage and customer behaviour trends

Commercial Management

What are the key considerations for procurement and contract management in this activity?

Include any parameters or constraints eg legislative or industry imposed and alignment to the Procurement and Contracts Policy and Manual. For example, standard contract types and terms, typical cost structure/types used, typical approach to risk sharing, usual delegations (eg GM vs Engineer to Contract vs Project Manager etc). Link to any related documents eg approved/preferred contractors register etc

Area	Considerations
Customer Systems	Procurement of CRM, telephony and customer experience platforms
Digital Services	Maintaining secure, reliable and user-friendly digital service channels
Technology Contracts	Vendor support, cyber security requirements and system integration
Professional Services	Specialist customer experience and service design expertise as required
Value for Money	Procurement aligned with Council procurement policies and whole-of-life value principles
Privacy and Information Security	Compliance with Privacy Act requirements and Council information governance policies

What are the key estimation and forecasting tools/methodologies relevant to this activity?

Customer Services forecasting is primarily informed by historical customer demand data, service request trends, customer satisfaction results, population growth projections and organisational strategic priorities. These tools assist Council in identifying future service demand, workforce requirements, technology investment needs, and opportunities to improve customer experience.

Forecasting assumptions are regularly reviewed through annual planning, Long Term Plan development, performance reporting and customer feedback processes to ensure service delivery models remain responsive to changing community needs and expectations.

Communication Management

How does this activity ensure effective communication and engagement with governance and the community?

Customer Services is one of Council's most visible functions and is central to how the community experiences Council services. Communication and engagement occurs daily through face-to-face interactions, telephone services, digital channels, service requests, feedback processes and community enquiries.

The activity supports customer access to information, facilitates community participation in Council processes, and provides a critical feedback loop to identify emerging issues, service improvements and changing community expectations. Customer insights gathered through service interactions help inform decision-making across the organisation and contribute to continuous service improvement.

Part 4: Asset Management

Asset Management Overview

How will the assets be managed to deliver the service?

This is not an asset holding business Unit

Asset Management Plan (if relevant)

Not applicable.

Part 5: Financial Management

Ten Year Operating and Capital Budget

What financial resources are needed?

Group	Resource	2026/27 Full Year Budget	2027/28 Year 1	2028/29 Year 2	2029/30 Year 3	2030/31 Year 4	2031/32 Year 5	2032/33 Year 6	2033/34 Year 7	2034/35 Year 8	2035/36 Year 9	2036/37 Year 10
Customer Services	0300. Salaries	777,146	792,689	808,543	824,714	841,208	858,032	875,193	892,696	910,550	928,761	947,337
Customer Services	0330. Superannuation - Council Contribution	54,687	55,781	56,896	58,034	59,195	60,379	61,586	62,818	64,075	65,356	66,663
Customer Services	0345. ACC levy	3,023	3,083	3,145	3,208	3,272	3,338	3,404	3,472	3,542	3,613	3,685

Customer Services	0980. Overheads Allocated	381,055	392,487	404,261	416,389	428,881	441,747	455,000	468,650	482,709	497,190	512,106
Customer Services	0500. Stationery & Office Consumables	2,207	2,273	2,341	2,412	2,484	2,559	2,635	2,714	2,796	2,880	2,966
Customer Services	0603. Sundry Expenses	1,681	1,731	1,783	1,837	1,892	1,949	2,007	2,067	2,129	2,193	2,259
Customer Services	0640. Telephone Charges	7,970	8,209	8,455	8,709	8,970	9,239	9,517	9,802	10,096	10,399	10,711
Customer Services	0503. Subscriptions	44,374	45,705	47,076	48,489	49,943	51,442	52,985	54,574	56,212	57,898	59,635
Customer Services	0640. Telephone Charges	50,597	52,115	53,678	55,289	56,947	58,656	60,415	62,228	64,095	66,018	67,998
Customer Services	0415. Rentals/Leases Office Equipment	2,770	2,853	2,939	3,027	3,118	3,211	3,308	3,407	3,509	3,614	3,723

Customer Services	0527. Minor Capital Items	2,060	2,122	2,185	2,251	2,319	2,388	2,460	2,534	2,610	2,688	2,768
Customer Services	0614. Bank Fees	7,408	7,630	7,859	8,095	8,338	8,588	8,846	9,111	9,384	9,666	9,956
Customer Services	0509. Uniforms / Clothes Purchased	515	530	546	563	580	597	615	633	652	672	692
Customer Services	0691. Cashiers Rounding Adjustments	527	543	559	576	593	611	629	648	668	688	708
Customer Services	0970. Plant Hire - Internal Usage	684	705	726	747	770	793	817	841	866	892	919

Identify the changes to any financial line items and explain the rationale for this change.

Planned Capital Expenditure for Key Capital Projects

How much capital expenditure will be spent, on what asset, and what are the key capital projects for this activity for the next ten years?

(Insert Magiq table here of capex projects. Include whole of Life costs/future operating projections if different from above, and consider NPV. Remember to include officer resource requirements where time will be capitalized, and assets that will be created with corresponding depreciation values). **TABLE TO COME or INSERT FROM Asset Management Plan**

How much capital expenditure will be spent, on what asset, and what are the key capital projects beyond the next ten years?

(Insert Magiq table here of capex projects. Include whole of Life costs/future operating projections if different from above, and consider NPV. Remember to include officer resource requirements where time will be capitalized, and assets that will be created with corresponding depreciation values). **TABLE TO COME or INSERT FROM Asset Management Plan**

Funding Considerations

LGA s101 Funding Considerations

Funding Policy

Funding Principles

User-pays	Exacerbator-pays	Inter-generational equity	Separate funding
Low	Low	Low	Low

Customer services is unusual in that it does charge fees, but primarily these are on behalf of other business units. The function itself is paid through general rates / overheads.

Capital Cost Funding Policy

This capital programme will be funded in accordance with the following principles: (example below)

There is no capital programme.

Operating Cost Funding Policy

This table below shows Council's broad funding target for the activity (i.e. how much is paid by individuals/groups versus the community as a whole), and the associated funding mechanism used (i.e. general rates, targeted rates, user charges etc.). Because there are variations in the balance between individual/group and community funding, the funding target is expressed in broad terms rather than specific percentages. These broad ranges are:

- Low = this source provides 0%-25% of the funding for this activity;
- Medium = this source provides between 26% and 75% of the funding for this activity, and;
- High = this source provides between 76% and 100% of the funding for this activity.

	Funding Target	Funding Mechanisms
Individual/Group	Low	Fees & Charges/Targeted rates (Low, Medium, High)
Community	High	General rates/Grants & Other (Low, Medium, High)

Part 6: Risk and Opportunity Management

What specific risks are identified for this activity, and what controls and mitigations are planned or in place to address these? Consider impacts on climate change/community outcomes in addition to the risk categories signaled below.

Customer Services faces a range of operational, technological, workforce and customer-related risks that could impact Council's ability to deliver accessible, responsive and high-quality services. Risk management focuses on maintaining service continuity, protecting customer information, meeting community expectations and ensuring the activity can adapt to changing customer needs and service delivery models. The risks identified below are actively monitored and managed through established policies, procedures, systems, workforce planning and continuous improvement initiatives.

Description	**Triggered by**	**Resulting**	**Risk Level Likely/Consq**		**Controls and/or Mitigations**	**Residual Score**
Failure to meet customer expectations for service quality, responsiveness or accessibility	Increasing service demand, insufficient resourcing, process inefficiencies, changing customer expectations	Reduced customer satisfaction, reputational damage, complaints and reduced trust in Council	High	High	Customer service standards, performance monitoring, staff training, customer feedback mechanisms, continuous improvement initiatives	Medium
Critical customer service systems or	ICT outages, cyber security incidents, technology failures,	Inability to receive or process customer requests, service	Medium	High	ICT business continuity planning, disaster recovery arrangements, cyber security	Medium

communication channels become unavailable	telecommunications disruptions	disruption, reduced public access to Council services			controls, system redundancy and vendor support agreements	
Customer information is inappropriately accessed, disclosed or managed	Human error, inadequate processes, cyber attack, non-compliance with privacy obligations	Privacy breach, legal liability, reputational harm and loss of public confidence	Medium	High	Privacy policies, staff training, access controls, information management procedures, cyber security measures and auditing	Low-Medium
Workforce capacity or capability is insufficient to meet service demand	Staff turnover, recruitment challenges, increased workload, loss of institutional knowledge	Reduced service levels, longer response times, customer dissatisfaction and increased operational risk	Low	High	Workforce planning, cross-training, succession planning, documented procedures and employee development programmes	Medium
Customer requests are not actioned or resolved within expected timeframes	High request volumes, poor workflow coordination, resource constraints, system limitations	Service delays, customer frustration, reputational impacts and failure to meet service standards	High	High	Customer request management systems, performance reporting, escalation processes and regular monitoring of response times	Medium
Inaccurate, incomplete or inconsistent	Knowledge gaps, outdated information, process failures, communication breakdowns	Customer dissatisfaction, poor decision-making, compliance issues and	High	High	Knowledge management resources, staff training, documented procedures, quality assurance and	Medium

information is provided to customers		reduced confidence in Council services			internal communication processes	
Failure to adapt to changing customer preferences and digital service expectations	Limited investment in digital services, changing technology, evolving customer behaviours	Declining customer satisfaction, reduced service accessibility and inefficiencies in service delivery	Medium	High	Digital transformation initiatives, website improvements, online service delivery, customer feedback and service review programmes	Medium
Significant emergency or civil defence event generates customer demand exceeding available capacity	Natural hazards, severe weather events, infrastructure failures, civil defence activations	Inability to respond effectively to customer enquiries, increased community frustration and pressure on Council resources	Very High	Very High	Emergency management plans, business continuity arrangements, staff redeployment processes and coordinated communication channels	Medium-High

What specific opportunities are identified for this activity, and what measures are planned or in place to exploit these? Consider climate change and community outcome opportunities in addition to the categories signaled below.

Customer Services has significant opportunities to enhance community outcomes through improvements in customer experience, digital service delivery, accessibility and organisational efficiency. As customer expectations continue to evolve, the activity can leverage technology, customer insights and process improvements to provide more responsive and convenient services while maintaining equitable access for all community members.

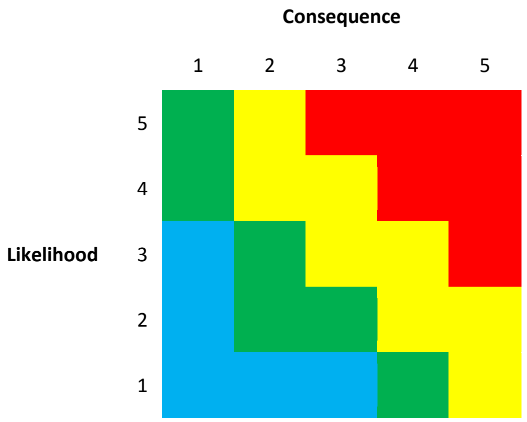
The activity also contributes to Council's climate change and sustainability objectives through the expansion of digital service channels, reducing travel requirements and paper-based processes, while strengthening organisational resilience and the ability to maintain customer services during emergency or disruptive events.

Description	**Triggered by**	**Resulting**	**Controls and/or Mitigations**	**Residual Score**
Increased uptake of digital and self-service channels	Customer preference for online services, technology advancements and improved digital capability	Improved customer experience, greater service accessibility, reduced transaction costs and increased organisational efficiency	Ongoing enhancement of online services, website improvements, digital forms, customer portal development and customer education programmes	Medium Opportunity
Improved customer insights through data and analytics	Enhanced CRM capability, customer feedback collection and data integration	Better decision-making, proactive service planning and more targeted resource allocation	Customer satisfaction surveys, CRM reporting, performance monitoring and customer journey analysis	Medium Opportunity
Development of an organisation-wide customer experience culture	Increased focus on service excellence and continuous improvement	Higher customer satisfaction, stronger community trust and improved organisational performance	Customer service standards, staff development programmes, customer experience initiatives and performance reporting	High Opportunity

Greater accessibility and inclusion for diverse community groups	Evolving community expectations, population change and advances in communication technology	Improved equity of access to Council services and stronger community participation	Multiple service delivery channels, accessible information, digital inclusion initiatives and customer-centred service design	Medium Opportunity
Increased use of automation and artificial intelligence tools	Emerging technologies and increasing demand for efficient service delivery	Faster response times, reduced administrative workload and improved customer experience	Assessment of automation opportunities, AI-assisted enquiry management, process reviews and appropriate governance controls	Medium-High Opportunity
Stronger community engagement and feedback mechanisms	Increased public participation and availability of digital engagement tools	Better understanding of community needs and improved service design	Customer feedback programmes, complaint and compliment monitoring, surveys and engagement through multiple channels	Medium Opportunity
Enhanced organisational resilience during emergencies and disruptions	Investment in systems, business continuity planning and flexible service delivery models	Improved ability to maintain critical customer services during emergencies and climate-related events	Business continuity planning, remote service capability, staff cross-training and resilient technology platforms	Medium-High Opportunity
Supporting climate change adaptation through reduced travel and paper use	Growth in digital service delivery and online transactions	Reduced organisational emissions, reduced paper consumption and increased service convenience for customers	Digital-first service design, online applications and payments, electronic communications and records management systems	Medium Opportunity

Improved integration of customer information across Council activities	Modernisation of systems and improved information sharing	More seamless customer experiences and more efficient service delivery across Council	CRM enhancement, process integration, information governance frameworks and cross-department collaboration	High Opportunity

Risk Matrix



Key (as per Risk Management Policy):

Likelihood

1. Rare
2. Unlikely
3. Possible
4. Likely
5. Almost Certain

Consequences

1. Less than minor
2. Minor
3. Moderate
4. Major
5. Extreme

Risk Categories

- Political
- Environmental
- Social
- Reputational
- Financial
- Operational
- Health & Safety
- Legislative/Regulatory
- Levels of Service

(USE PROMPTS TO COMPLETE ALL FIELDS)

Part 7: New Projects or Programmes Investment Summary

Business Justification and Scope	
Project/Programme	• Name • Scope (what will be delivered, what won't be delivered)
Purpose	• Purpose (drivers, problem or opportunity statement)?
Level of Service	• Impact per Activity Management Plan ie Achieve compliance, Maintain LOS, Improve LOS, Meet demand/growth (select all that apply)
Business Justification	• Implications of Current State/Status Quo Option • Options Considered and Preferred Option, reasons • Outcomes (what changes – business or community) - will successful delivery enable? (per above section, Strategic Alignment) • Benefits (what advantages – internal or community) – are enabled by the outcomes? (per above section, Strategic Alignment) • Evidence to support the case for investment – attach Project Brief, Business Case or Optioneering Assessment if completed
Risks, Opportunities	• Most relevant only, describe key risks/opportunities and mitigations/exploitations – attach supporting evidence if available
Assumptions, Constraints and Dependencies	• Statutory and Regulatory context (compliance parameters, requirements or conditions) • External decision makers or approvals required • Affordability and funding availability • Sustainability, climate change impacts • Coordination with other agencies/projects/activities (internal or external, public or private) • Previous consultation/stakeholder perspectives • User Acceptance Criteria (UACs) or stakeholder requirements • Minimum Viable Product (MVP) for technical parameters

Cost Summary	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Internal Resource to be capitalised	$									
CAPEX (excl internal resource)	$									
OPEX	$									
Revenue	$									
Project Total (excluding GST)	$									
Detailed cost breakdown attached Y/N?										

Investment Summary – Critical Success Factor evaluation

Notes for users

- These criteria are intentionally generic. The terms in **bold** — such as 'compliance', 'strategic priorities', 'LOS', 'growth/demand', and 'other strategies, programmes and projects' — are placeholders. You will need to define these terms for your activity (using the details populated in Parts 1 and 2 of your Activity Management Plan above) before evaluating the investment proposal. Level of Service' (LOS) refers to the agreed performance standard for a given activity per Part 2 above.
- Scoring by the activity/project manager should be reviewed by at least one other person (eg Team Lead, Manager or PMO) to reduce subjectivity. Supporting reasons should be provided.
- This tool operates within Council's Procurement Policy and Procurement Manual and the Procurement Lead must be engaged if/when progressing to formal procurement planning.
- Scoring does not determine funding priority but is one input into decision making to be read alongside the relevant Investment Summary above and any supporting evidence (Project Brief, Business Case, or Optioneering Assessment).

Critical Success Factor (CSF)	Rating	Does Not Meet/Poorly Meets (DNM/PM)	Partially Meets/Mostly Meets (PM/MM)	Fully Meets/Exceeds (FM/E)
Strategic fit and business needs		Non-compliant, poor **compliance**, medium compliance risk Not at all aligned to **strategic priorities** Not required to maintain **LOS or for growth/demand** Disrupts **other strategies, programmes and projects** No/limited **stakeholder** or community support	Not required for **compliance**/low compliance risk Somewhat aligned to **strategic priorities** Not required to maintain **LOS** but may improve **LOS** or meet **growth/demand** Doesn't disrupt other **strategies, programmes and projects** Some **stakeholder**/community support	Required for **compliance**, fully compliant Fully aligns with agreed **strategic priorities** Required to maintain **LOS** or will improve **LOS** or meet **demand** Fits well with other **strategies, programmes and projects** Considerable **stakeholder**/community support
Potential value-for-money		Low value/improbable benefits, insufficient evidence High costs or costs unknown, insufficient evidence High risk or risks unknown, insufficient evidence	Moderate value/possible benefits, limited supporting evidence Moderate costs and reasonable cost confidence Moderate risk and reasonable confidence in risk analysis	Compelling evidence supports investment, high benefits probability and value Low cost and/or costs well understood and acceptable Low risk and/or risks well understood and manageable
Supplier capacity and capability		No suppliers available to deliver required services Risk of diminishing value for money or unsustainable terms	Non-local suppliers can deliver required services Acceptable contract terms/value for money anticipated	Local suppliers can deliver required services Value-for-money arrangement over contract term is anticipated
Potential affordability		Cannot be met from likely available funding, does not align with activity or corporate priorities Funding gap/other funding constraints Other funding opportunities are more appropriate	Can be met from likely available funding, aligns with either but not both activity and corporate priorities Matches/no other funding constraints Does not leverage any other funding opportunities	Can be met from likely available funding, aligns with both activity and corporate priorities Matches/no other funding constraints Leverages other funding opportunities
Potential achievability		Skills and resource required for successful delivery cannot be prioritised without unacceptable impact on BAU delivery	Skills and resource required for successful delivery constrained, resourcing costs or impact on BAU delivery requires consideration	Sufficient skills and resource available to support successful delivery in parallel with BAU delivery
Overall Rating		Comments:		