Strategic Planning

Narration Script

Huon Valley Council | Candidate and Councillor Knowledge Series

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Slide 1 — Title — Strategic Planning

Welcome to Strategic Planning, part of the Huon Valley Council Candidate and Councillor Knowledge Series.

Council does not simply spend money each year. It works to a set of plans that run from a fifteen year community vision down to the activities delivered everyday, and every one of those plans is meant to trace back to the one above it.

This module covers what the Act requires, how Council's plans stack up, the framework that holds them together, and where Councillors decide.

Slide 2 — Before You Begin

Strategic planning is where Councillors have the most influence and the least visibility. A lot of work takes place behind the scenes through workshops and engagements to shape the decisions made by Councillors at Council Meetings.

The Act sets a minimum. Part 7 Division 2 requires a strategic plan, an annual plan, an annual report, and a suite of long-term financial and asset management plans.

Council aims higher than that minimum. A fifteen year Community Vision sits above the statutory documents, and a four year Term Plan sits between the ten year strategic plan and the one year annual plan.

The Liveability Framework ties it together. It is how Council makes plans, budgets and decisions, and how the line of sight from the Community Vision down to the work delivered each day is held.

And there is an annual rhythm. The planning and budgeting cycle runs the same way every year, and Councillors have set points in it where they are consulted and set points where they decide.

Slide 3 — What the Act Requires

Three documents form the statutory core, and each answers a different question.

The Strategic Plan. Council prepares a strategic plan for the municipal area covering at least ten years, and consults the community in preparing it. That is sections 66 to 69.

The Annual Plan. Council prepares one each financial year, consistent with the Strategic Plan. It must include a statement of the manner in which Council will meet the goals and objectives of the Strategic Plan, and summarise the adopted revenue and expenditure estimates. That is section 71.

The Annual Report. It indicates how Council performed against the Annual Plan for the preceding year, and includes the audited financial statements and the audit opinion. Section 72, and it has its own module in this series.

Read them as a sequence and they make sense. Where are we going. What will we do this year. And how did we go. Each depends on the one before it, which is why a strategic plan nobody refers to makes the other two meaningless.

Slide 4 — Other Plans Required by the Act

Sections 70 to 70G require a further set of documents, and the important thing about them is that they must line up with each other.

The long-term financial management plan covers ten years or more. It must be consistent with the Strategic Plan and linked to the long-term strategic asset management plan.

The long-term strategic asset management plan also covers ten years or more, must cover all major asset classes, and must be linked back to the financial plan. The two are a pair. An asset plan that assumes renewal the financial plan cannot fund is not a plan, it is a wish.

Then three ongoing documents. A financial management strategy, consistent with the Strategic Plan. And an asset management strategy and asset management policy, which guides both long-term plans.

Two obligations sit over all of it. Under section 70E, Council reviews its Strategic Plan and all the supporting plans, strategies and policies at least every four years. And under section 70G, Council has one month to publish any adopted plan on its website.

Slide 5 — Council Aims Higher

The Act sets the minimum, and councils can always aim higher. Huon Valley Council prepares and publishes plans and reports to support the requirements of the Act.

The Community Vision looks fifteen years or more ahead. It sets out the long-term aspiration of the community, and guides Council's Strategic Plan. The Community Vision supports and addresses the need for community consultation when developing the Strategic Plan.

The Term Plan covers four years. It sets Councillor term priorities: what must be achieved by Council over the term to deliver the Community Vision and the Strategic Plan. The Term Plan is the one that belongs to an elected Council, set at the start of a term, and measured at the end of it.

In terms of reporting, Council prepares and submits Quarterly Implementation Reports that are used by Councillors to track progress against the Annual Plan, besides the Annual Report.

Council has also opted to review its long-term financial management plan annually in line with the planning and budgeting cycle, instead of every four years as per the Act.

These plans, reports, and reviews are not required by the Act. Council chose to prepare and review them, and that is what aiming higher than the statutory minimum looks like in practice.

Slide 6 — The Hierarchy of Plans

Five levels, running from the community's long-term aspiration down to the activity delivered everyday.

The Community Vision, over fifteen years, setting the aspiration across ten themes. The Strategic Plan, over ten years, setting Council's goals and objectives to help deliver that Vision. The Term Plan, four years, setting the priorities of an elected Council.

Then the Annual Plan and Budget, over one year, setting the outputs Council will deliver and what they cost. And beneath that, the operational plans, holding the detailed activities and budgets beneath each output.

Here is the test that makes the hierarchy useful rather than decorative. If an activity cannot be traced upward to an output, and to a term priority, and to a strategic goal, and to a Vision theme, we should ask whether it belongs in our plans at all.

That is a question Councillors are well placed to ask, and it is a fair one to put to any proposal that arrives at the table.

Slide 7 — The Liveability Framework

Councils Liveability Framework provides a framework for aligning the Community Vision with all the other plans sitting below it. It is a framework to help Council make better plans, better budgets and better decisions, and three pillars hold it together.

The New Way of Planning. Building on existing strategic, asset and financial plans. Integrating plans and strategies rather than writing them in isolation. Ensuring plans consider the unique character of each place in the Valley. And developing plans that can deal with complex issues together with the community.

The New Way of Working. Measuring what matters to the community, not just what is easy to count. Making decisions informed by data and principles. Celebrating the unique culture and identity of each community. And connecting through diverse platforms so all voices are included.

And Community Centred Partnerships. Considering the extent of Council's influence and control, which is a discipline in itself. Valuing and collaborating with community. Engaging with diverse partners. And advocating for our community where the responsibility sits elsewhere.

The purpose of all three is a clear line of sight from the Community Vision down to the work Council delivers each day.

Slide 8 — The Annual Cycle

The planning and budgeting cycle runs the same way every year, and it closes where it opens.

September and October is about reviewing performance. The previous year's Annual Report, the local data and the survey findings are all reviewed. In the final year of a term, so is the Term Review Report.

October to December is departmental planning and budgeting. Each department sets its outputs, activities, costs and indicators against the term priorities, and in the context of the long-term asset management and financial management plans.

January to May is consolidation and Councillor workshops. The draft annual plan and budgets are assembled, and the long-term plans are updated in step rather than afterwards.

In June, Council adopts the Annual Plan and Budget for the year beginning the first of July, along with the long-term financial management plan. Then delivery runs through the year with quarterly reporting against indicators, closing with the Annual Report, which opens the next planning and budgeting cycle.

Slide 9 — Where Councillors Decide

Councillors are consulted at some points in this cycle and decide at others, and knowing which is which, is the difference between influencing a plan and reacting to it.

Councillors decide four things. They adopt the Term Plan early in the term. They adopt the Annual Plan and Budget along with the long-term financial management plan each June.

They adopt the long-term asset management plan, as and when it is reviewed and developed. And when the Strategic Plan is reviewed or developed, they consider community submissions before adopting it.

Councillors receive the quarterly implementation reports through the year, and the Annual Report at the end of it. Those are the monitoring function in practice.

And one question is worth asking of anything put in front of you: which term priority does this serve, and how will we know it worked?

Slide 10 — The Context We Plan In

Six pressures will shape every plan and budget Council makes, and none of them is going away.

Global and economic uncertainty. Cost escalation and volatility make multiyear commitments harder to hold, which is exactly what a ten year asset plan is.

A constrained funding environment. Grant programs are tighter and less certain than they were, and there is no pool of new money waiting to be chased.

Roles shifting to local government. Responsibilities move down from other levels of government without the funding attached, while community expectations rise at the same time.

Dispersed assets and a small rate base. Roads, bridges and facilities are spread right across the Valley, and they are maintained by relatively few ratepayers.

Renewal outpacing capacity. Ageing infrastructure competes with new service demands for the same dollar. And through all of that, sound financial management asks for an underlying surplus year after year, which is increasingly hard to hold.

The Term Plan Review Report sets out the key achievements of the previous term alongside the challenges and opportunities ahead, and it is worth reading before the Term Plan workshop.

Slide 11 — What the Population Data Tells Us

Plans are only as good as the assumptions underneath them, and the most important assumption Council makes is about who will be living here.

This is the high scenario population projection. In 2025, the Valley has just under twenty thousand people, with twenty-three point eight per cent aged sixty-five and over, and a median age of forty-six point seven.

By 2053, it projected to have twenty-seven thousand four hundred people, with twenty-nine point seven per cent aged sixty-five and over, and a median age of fifty-one point four.

Look at what moves. Seven thousand four hundred more residents, up thirty-seven per cent. Three thousand three hundred more people aged sixty-five and over, up seventy-one per cent. And seven hundred and ninety-one more children under fifteen, up twenty-five per cent.

The bulge climbs the pyramid. Growth is real, but it is weighted heavily towards older residents, and that changes what services are needed, what housing is needed, and how accessible everything Council builds has to be.

And one line worth sitting with. Around 2032 deaths overtake births, which means every additional resident from that point on arrives from somewhere else.

Slide 12 — And the Economic Data

Alongside the population sits the economy, and the same discipline applies. Plans rest on what the local economy can actually carry.

Headline gross regional product is one thousand and seventy-four million dollars in 2025, up forty-five per cent since 2013 in constant dollars. Annual growth in the most recent year was zero point seven per cent.

There are three lines on that chart and the gap between them is the interesting part. Local industry, the value produced by businesses in the Valley, is eight hundred and forty-nine million. Local residents, the income earned by residents wherever they work, is one thousand and forty-nine million.

That is two hundred million dollars more earned by residents than is produced locally, about nineteen per cent of gross regional product.

What that says is that a significant share of the Valley's income is earned outside it and brought home. That has consequences for planning. It shapes commuting and road use. And it means economic development here is as much about where people can get to as about what is produced in the Valley.

Slide 13 — Where the Data Comes From

Council makes and effort at using data and statistics to inform its plans and budgets. This data and statistics are available to Councillors and to the community alike.

Council subscribes to proprietary data modules covering three areas. Local economy: output, industry, employment and business activity. Demographics: population, age structure, households and forecasts. And community: housing, income, disadvantage and wellbeing.

Alongside those sits the Community Views Survey, run once every two years and targeted to understand what matters to the community.

All of it is reachable through the community profile on Council's website, and the survey results are published through Engage Huon Valley.

Another survey that Council runs itself is the Customer Satisfaction Survey, ideally also run once every two years, which measures how well Council's services are actually landing.

The point of naming these is simple. When a proposal comes to the table and someone asserts what the community wants or what the local economy needs, there is data available to test it against.

Slide 14 — Four Things to Remember

Five things to take away.

One. The Act sets a floor, not a ceiling. A strategic plan, an annual plan, an annual report and the long-term financial and asset management plans are the minimum, and Council has chosen to add a Community Vision and a Term Plan above and within them.

Two. The Term Plan belongs to you. Four years, set at the start of a term, bridging a ten year strategic plan and a one year annual plan. It is the planning document an elected Council owns.

Three. Everything should trace upward. If an activity cannot be traced to an output, and a term priority, and a strategic goal, and a Vision theme, ask whether it belongs in the plans at all.

Four. Test assertions against the data. The population projections, the economic profile and the survey findings are all published. And of anything put in front of you: which term priority does this serve, and how will we know it worked?