

Activity Management Planning: A Guide to integrating the NZTA's Business Case Approach & Self-assessment - Draft

8 March 2016

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REG | THE ROAD EFFICIENCY GROUP

Document Control

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NZ Treasury Better Business Case Guidance
 NZTA Business Case Approach guidance & material

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1. Introduction and context

1.1 PURPOSE OF THIS GUIDE AND SELF-ASSESSMENT TOOL

This guide has been developed to help RCAs develop their current Activity Management Plans (AMP) to incorporate the NZTA Business Case Approach (BCA).

The purpose of the self-assessment is to identify areas of learning and development for imbedding BCA into a Road Controlling Authorities (RCA) activity management planning.

1.2 OVERVIEW OF THE BUSINESS CASE APPROACH

The Road Efficiency Group (LGNZ & NZTA) has adopted a business case approach (BCA). A business case approach promotes early engagement with stakeholders and seeks a clear understanding of the problems, consequences and benefits in planning for activities.

It is expected that Council's will take the opportunity, if they decide as part of their ongoing planning improvement cycle to review their AMP, to assess whether they have the BCA approach covered in their AMP.

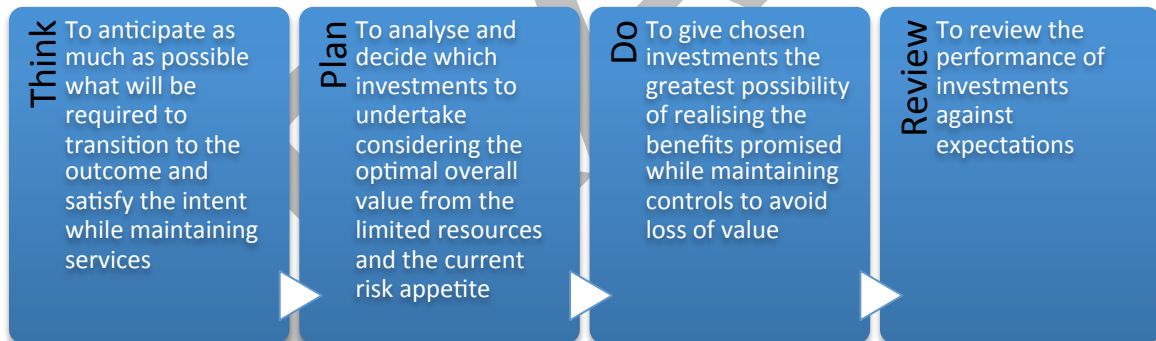


Diagram showing the underlying principles for Treasuries Better Business Case Approach.



2. Business Case Approach

2.1 WHAT IS A BUSINESS CASE APPROACH AND WHY CHANGE THE STATUS QUO?

Previous transport planning approaches have been project management focused on maintenance and improvement solutions. The disadvantage of this approach is the lack of a clear link to organisational priorities and issues through the project or maintenance programme lifecycle. For example a specific project in a 10-year programme may be historic, but the scale of the issue it addresses, and benefits gained to progress that project may have changed. There is no strong link back to why that project is in the programme and if it is still the right solution to invest in.

The business case approach seeks at the earliest stage of the process, to clearly define the problems and contextual state of the district, with engagement of key partners and stakeholders where necessary. This early engagement is to get consensus on and understanding of the cause, scale of consequences and scale of benefits of addressing the problems. This approach will help filter whether a problem is worth investing more time and resource progressing.

The business case also seeks to make sure during the lifecycle of a programme or project that the 'reasons' for doing it are still sound, and that it has a clear link back to organisational priorities and issues.

Key Question the AMP should answer under a Business Case Approach:

“Does the AMP demonstrate the the proposed programme represents value for money by doing the:

Right thing;

In the Right place;

At the Right time;

For the Right price; and

In the Right way to achieve the desired outcomes and benefits for addressing key issues and/or the contextual state of play in the district”

Underpinning this is approach is good quality evidence to support the investment proposed in the AMP.

The above principles underpin the Business Case Approach.



2.2 WHY DO WE HAVE TO DO THE BUSINESS CASE APPROACH?

If you are applying for NZTA funding you will need to demonstrate that you have applied the principles of the business case approach.

It is important that all investments are able to clearly show the value they would have in addressing an RCAs strategic problems and undertaking core business activities, and how this will provide benefit to customers and represent value for money.

There needs to be a clear link between the programme or project proposed in the AMP and the key issues facing your RCA, an understanding of the cause and consequence of the issues, and that different options have been considered for determining the best response or solution.

It is about having early conversations with your key stakeholders and funding partners to get buy-in and alignment to other processes. And it is about right sizing and shaping the AMP to deliver on the issues that matter to provide the most efficient and effective programme.

Applying the business case principles is not about compliance, it is about demonstrating a compelling investment story with rational logic.

2.3 HOW DO I DO THIS?

Depending on what information you already have, and depending on whether you are seeking funding from an existing RLTP approved programme will all have a bearing on the effort required.

The NZTA has identified different steps to guide you on how you could build a robust case for NLTF investment. The diagram in Appendix D of the guide gives a brief definition of the steps you could follow. Your starting point will vary and may be able to be combined, but the first step should always be a discussion with NZTA (a Point of Entry Discussion).



3. Point of Entry Discussion



The Point of Entry (POE) is a discussion about what information you already have (i.e. in terms of existing Activity Management Plan or other strategies or project documents) or don't have and working out what you need to do and where you need to start to imbed the principles of the Business Case in your AMP.

This is a vital step, as it will ensure you right size your effort and resources which is a key principle underpinning the business case approach. Refer to the Appendix 2 for consideration of what a Point of Entry discussion may entail.

4. Applying the BCA to Activity Management Planning



4.1 WHAT DO I NEED TO DO TO DEVELOP A BCA AMP?

AMPs are typically reviewed every three years, so as part of the next review it is recommended you have an upfront strategic section (i.e. a clear strategic drivers section) incorporated into your AMP (the Strategic Case).

The strategic case represents the context and case for change if a variation is needed – it is the Approved Organisation’s depiction of the current state, including the assumptions that underpin this and the outcomes targeted. The strategic case, comprising a strategic assessment and strategic context, will explain why investment is needed.

Note, that in relation to a Strategic Assessment, for a stable network, this will simply be maintaining the network to the agreed levels of service, as depicted by existing performance measures. Note NZTA will be expecting the AMP to show a clear demonstration of how the One Network Road Classification system and its performance framework have been accounted for.

The strategic section in your plan is recommended to cover the following:

- Define the strategic context;
- Set out the key issues or problems facing your Council;
- Identify the consequences of not fixing them;
- Identify the benefits to be gained by fixing them;
- The outcomes (at a strategic level) that are sought;
- Any supporting evidence required to identify the scale of the issues

4.2 HOW DO I DO A STRATEGIC CASE?

Some AMP’s may already have the elements of the strategic case in them scattered throughout the document; it may not exist; it exists but needs updating; or it might be covered in a separate document. The Self Assessment and Point of Entry discussion with NZTA will assist to determine this and will recognise that there is flexibility on how each AO may want approach or format their AMP to imbed Business Case principles

- **I don’t have a strategic case or basis in my AMP?**

To develop a strategic case in your AMP requires that you have a good handle on the key issues. It’s up to you how you do this, but we recommend you follow the principles of early engagement and quality evidence and consider running targeted workshops with key partners and stakeholders. The key is early engagement and getting some high level consensus about the key problems and issues you face. Check later on in this guide for some examples of how you might approach this. Again, its not about reinventing the wheel and writing a big strategy document and having endless meetings.



- There is a separate existing transport strategy document or already a strategic context in my current AMP.

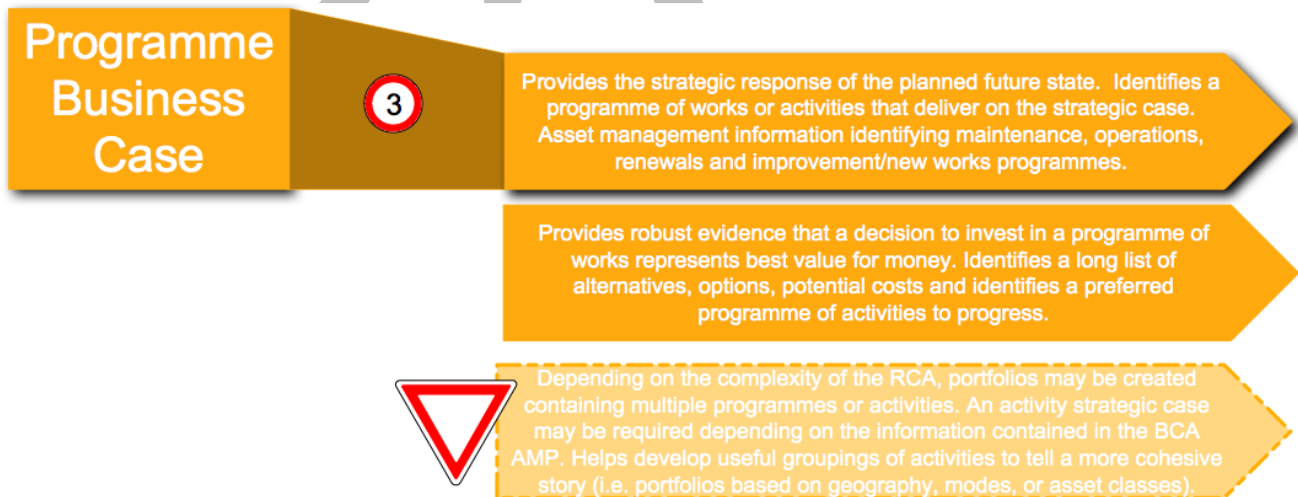
If this is the case it is about reviewing if that strategic context is still fit for purpose i.e. has there been any changes in your district since your last review or changes in the forecast demand assumptions that should be driving your activity investment planning. Again, how you do this is up to you, but you need to ensure that the principles of the business case are applied i.e. good evidence and involvement of key partners and stakeholders

- How big is the Strategic Case section?

This section should be concise and may range from 2 – 6 pages. It does not require a big complex strategic study, rather it is about communicating a clear and concise understanding of what the big problems are and how your programme will respond to them.

4.3 HOW DOES THE STRATEGIC CASE RELATE TO AND TIE IN WITH THE REST OF MY AMP?

For all Councils your current activity management plan is your Programme Business Case. There is no need to produce a separate document. But your AMP needs to analyse network level alternatives and options in developing a preferred programme. The key issues and problems identified in your strategic case section should be driving and informing the prioritisation and timing of your programme. It is making sure during the lifecycle of a programme or project that the ‘reasons’ for doing it are still sound, and that it has a clear link back to addressing the issues. You will need to demonstrate how your programme, and the options you have considered as part of your programme, addresses the issues.



4.4 WHAT IF I HAVE A COMPLEX NETWORK?

Larger RCAs, Metros, and RCAs with complex networks and issues may find it valuable to develop several ‘sub’ Strategic Cases or Programme Cases depending on the RCAs requirements. Again this is a point of entry discussion.



4.5 WHAT IF I HAVE A COMPELLING BUSINESS CASE STORY BUT THE ISSUES WE ARE TRYING TO ADDRESS DON'T ALIGN TO NZTA FUNDING PRIORITIES?

The issues identified and outcomes you may be seeking, as a RCA will not always align with NZTA funding priorities. But what the Business Case approach does is assist NZTA to understand your programme in a more transparent way. It will also provide transparency and a strong investment story for internal council processes.

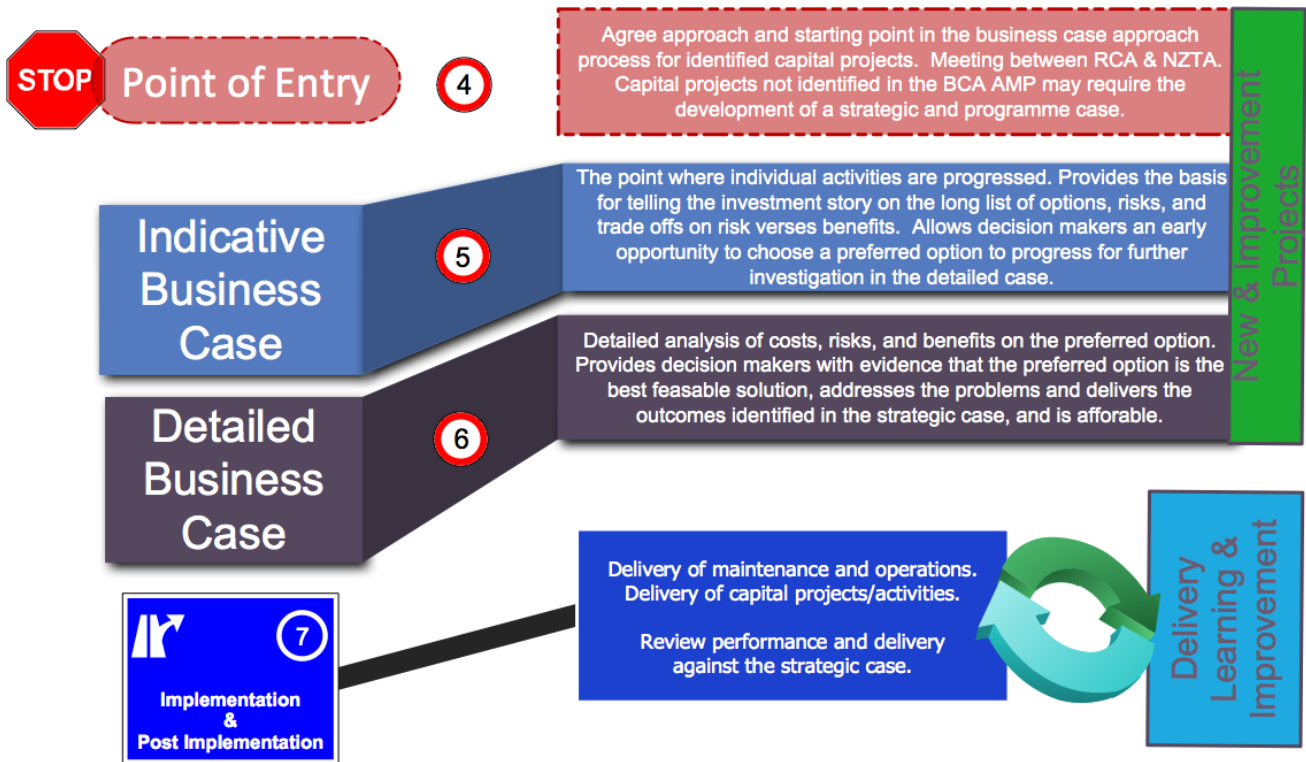
4.6 WHEN DO I NEED TO HAVE DEVELOPED MY NEW AMP UNDER A BUSINESS CASE BY?

Depending on the timing of the review of your AMP it is recommended that Councils take the opportunity in time for the 2018/2021 NLTP to assess whether they have the BCA approach covered in their AMP.

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5. What do I do with new & improvement projects?



The first step with any new or improvement project is the Point of Entry conversation between the RCA and NZTA. This will help clarify where to begin in the BCA process. The Point of Entry will depend on the level of information contained in your BCA AMP.

This guide does not cover the detail of how to utilise the BCA with capital works as the NZTA information sources provide good guidance on how to apply this process. See section 6 below for links to this information.



6. What support and information is available on the Business Case Approach?

- Business Case Approach - Activity Management Continuous Improvement Cycle
<https://www.pikb.co.nz/home/amp-continuous-improvement-cycle/activity-management-continuous-improvement-cycle/>
- Business Case Approach - high level overview -
<https://www.pikb.co.nz/home/planning-to-project-delivery-process/overview-documents/the-business-case-approach-high-level-overview/>
- Business Case Approach - <https://www.nzta.govt.nz/planning-and-investment/planning/planning-process/business-case-approach/>
- Business Case Approach to Transport Planning and Project Development; A guide -
<https://www.nzta.govt.nz/assets/Planning-and-investment/docs/HNO-Business-Case-Web.pdf>
- Business Case Approach to Transport Planning and Project Development -
https://hip.nzta.govt.nz/_data/assets/pdf_file/0011/42041/14223_NZTA_BusinessCaseApproach_final.pdf
- Business Case Templates - <https://hip.nzta.govt.nz/forms/business-case-forms>
- 2015-18 NLTP Investment Assessment Framework - Overview -
<https://www.pikb.co.nz/assessment-framework/2015-18-nltp-investment-assessment-framework-overview/>
- State Highway Activity Management Plan 2 Strategic Case -
<https://www.nzta.govt.nz/assets/Road-Efficiency-Group/docs/SHAMP-strategic-case-v1.3.pdf>
- Strategic Toolkit - <https://www.nzta.govt.nz/assets/Planning-and-investment/docs/BCA-Strategic-Options-Toolkit.xls>



7. Self-Assessment

7.1 HOW DOES YOUR CURRENT ACTIVITY MANAGEMENT PLAN COVER THE AREAS REQUIRED FOR A BCA AMP?

The Strategic Case should cover:

- The strategic context (does the AMP show ‘why’ you are doing it?);
- The strategic assessment, Problem and Benefit Analysis (i.e. make it clear what the problem is and that it needs to be addressed);
- Consequences of not addressing the problems; and
- Snapshot Evidence that supports the problem (high level, not detailed investigation or analysis).
 - Is the scale of problem and timeframe within which it needs to be addressed identified? I.e. the AMP should be clear about whether it is a short (i.e. may need immediate action), medium or long-term problem. A timeline to address the problem will depend on scale and consequences of not addressing.

	Fundamental Elements of the ‘Strategic Case’	Activity/Asset Management Plan (Indicate where, what, and how related information is presented; if at all)
Strategic Context	Identify the Strategic Context	
Strategic Assessment	Identify Problems	
	Identify benefit of addressing the problems	
	Consequences of not addressing the problems identified	
	Snap shot evidence (what has changed since your last document i.e. growth, LoS, natural hazards)	
	Point of Entry Comments/Observations	



Appendix A: Christchurch City Council BCA Development and Framework (example)

CCC DOCUMENTS CONSIDERED IN THE DEVELOPMENT OF THE BCA AMP



Christchurch Transport Strategic Plan
2012-2042

Keep Christchurch moving by providing transport choices to communities

Strategic Assessment

Christchurch City Council's Transport System

November 2015
VERSION 2.0
Strategic Assessment - Part A




Mode Direction Statement		
People have easy access to liveable community amenity (40%)	Encourage freight to use identified freight routes to reduce the impact on community amenity from freight movements	Encourage freight to use identified freight routes to reduce the impact on community amenity from freight movements
People are able to make safe, healthy travel choices (30%)	Manage network demand by encouraging the movement of freight to occur at appropriate times of the day.	Manage network demand by encouraging the movement of freight to occur at appropriate times of the day.
Better able to support economic growth activity (30%)	Provide efficient identified freight routes for the movement of freight	Provide efficient identified freight routes for the movement of freight



Christchurch City Council

2015 Asset Management Plan
Transport
Volume B







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Road Transport Unit

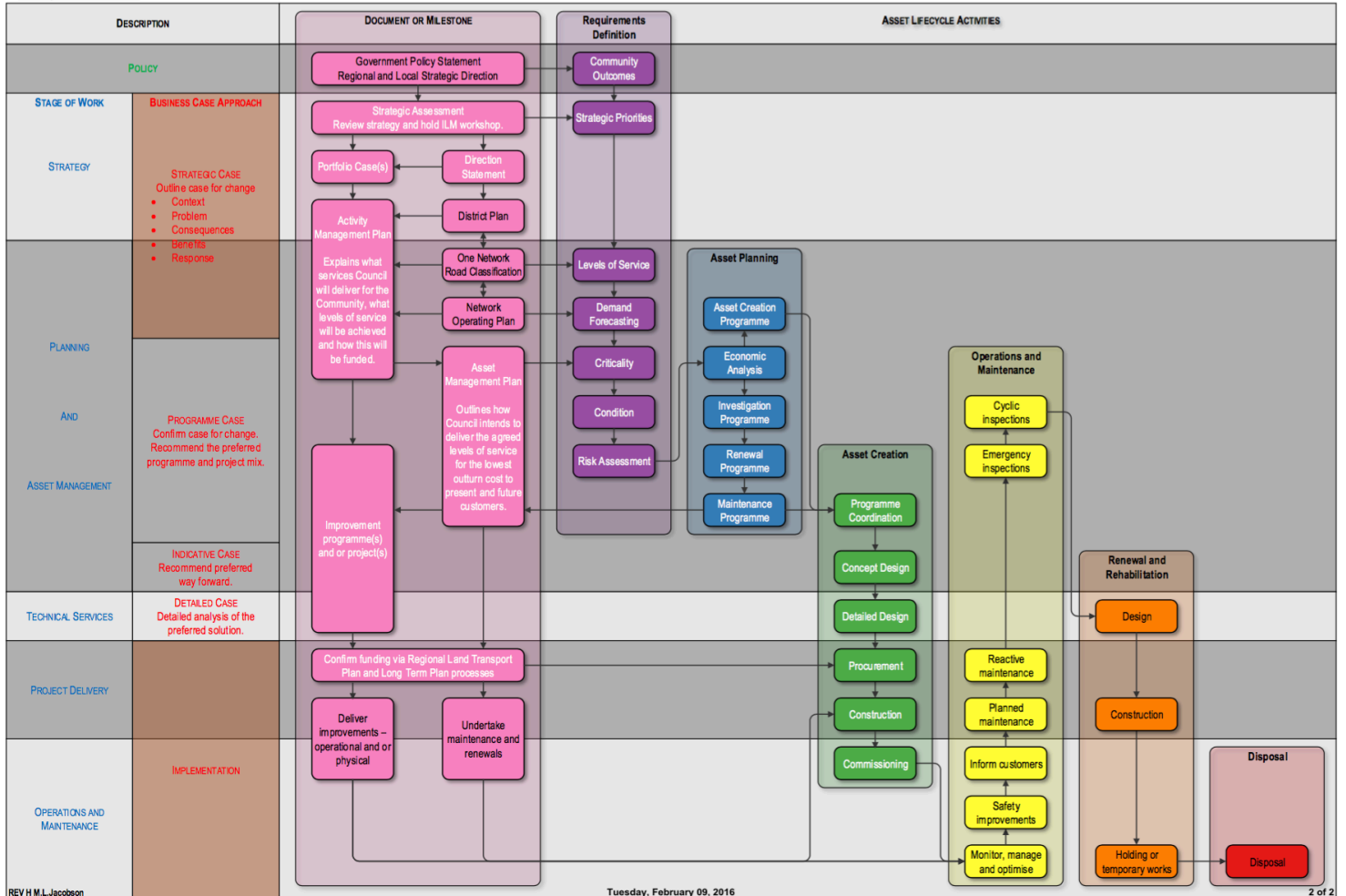


CCC DECISION FLOWCHART (SHOWING WORK STAGE, BCA, AND AMP (NAMS IIMM) COMPARISON)



DECISION FRAMEWORK

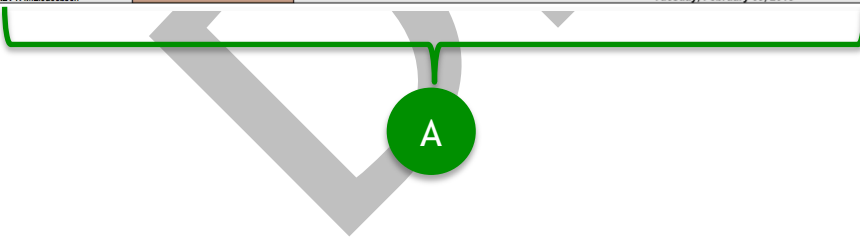
TRANSPORT

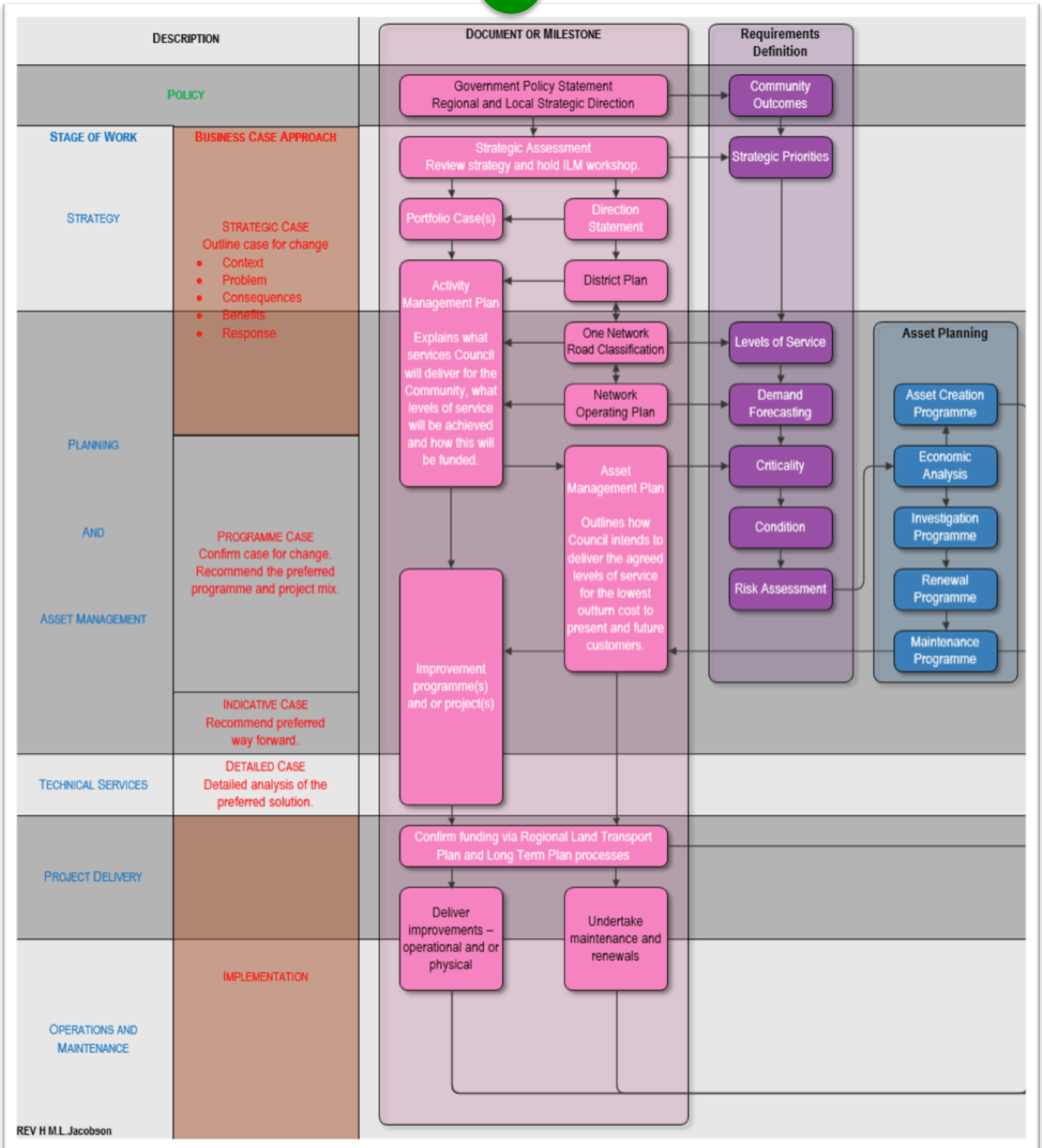


REV H.M.L. Jacobson

Tuesday, February 09, 2016

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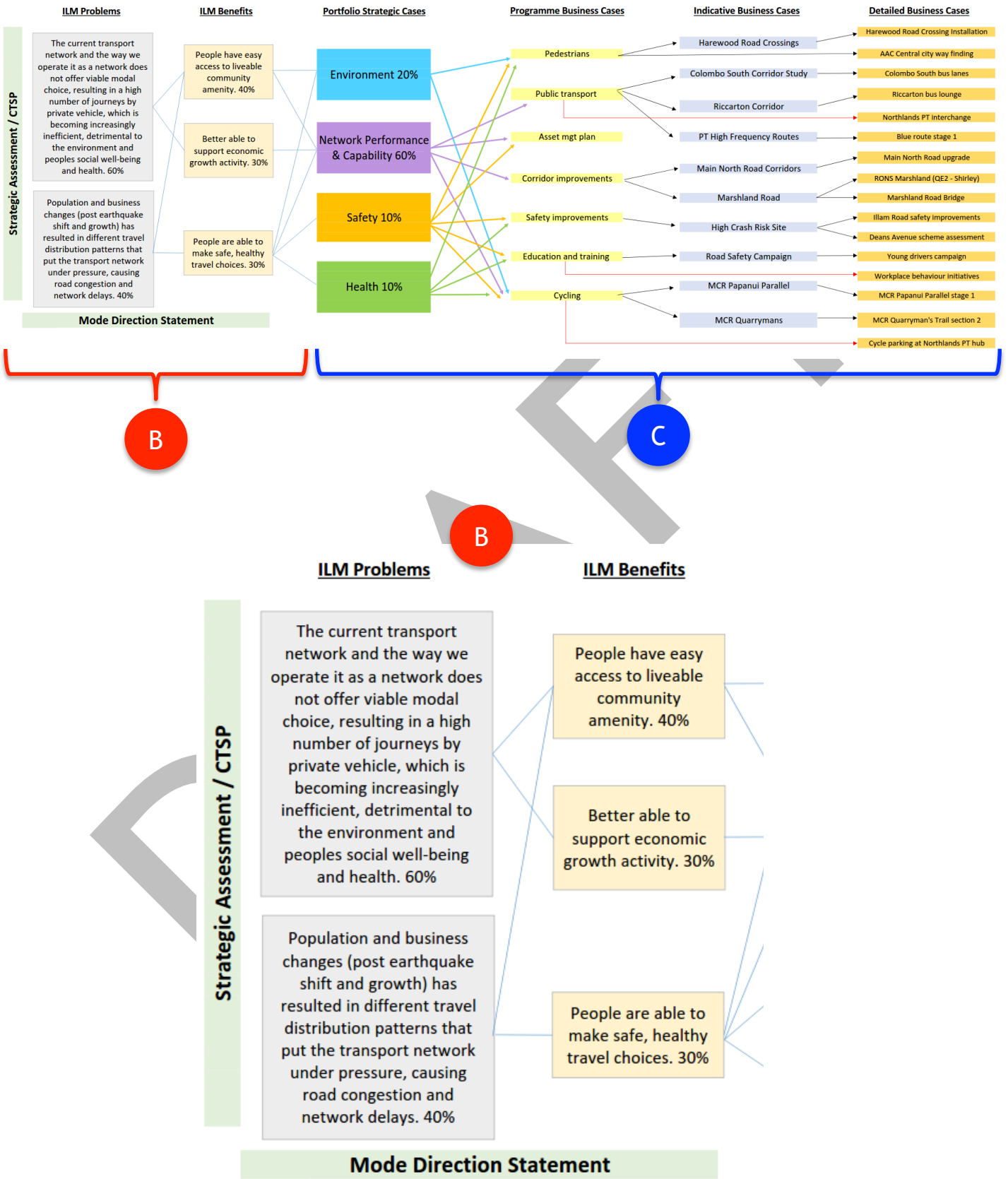




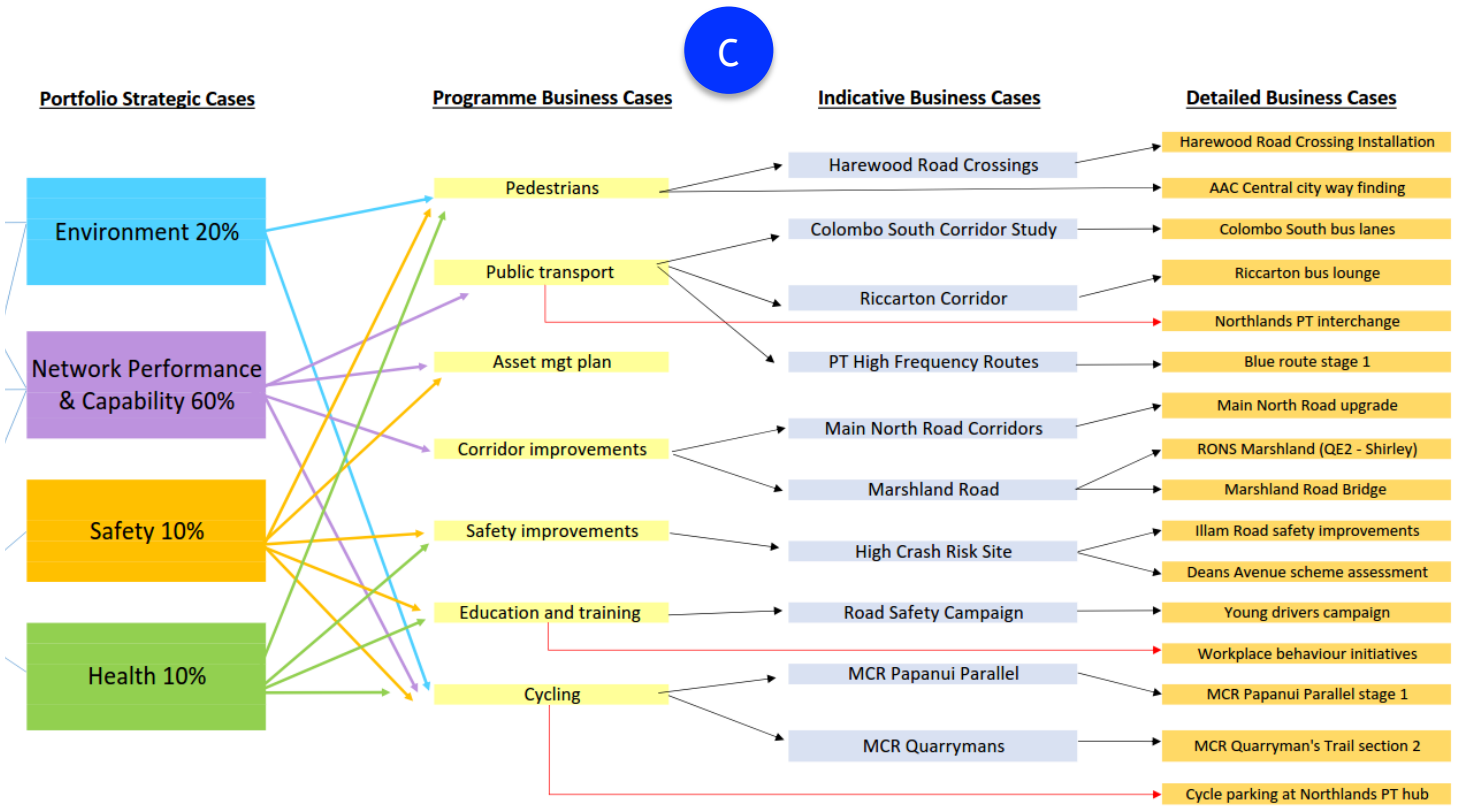
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CCC BUSINESS CASE FRAMEWORK



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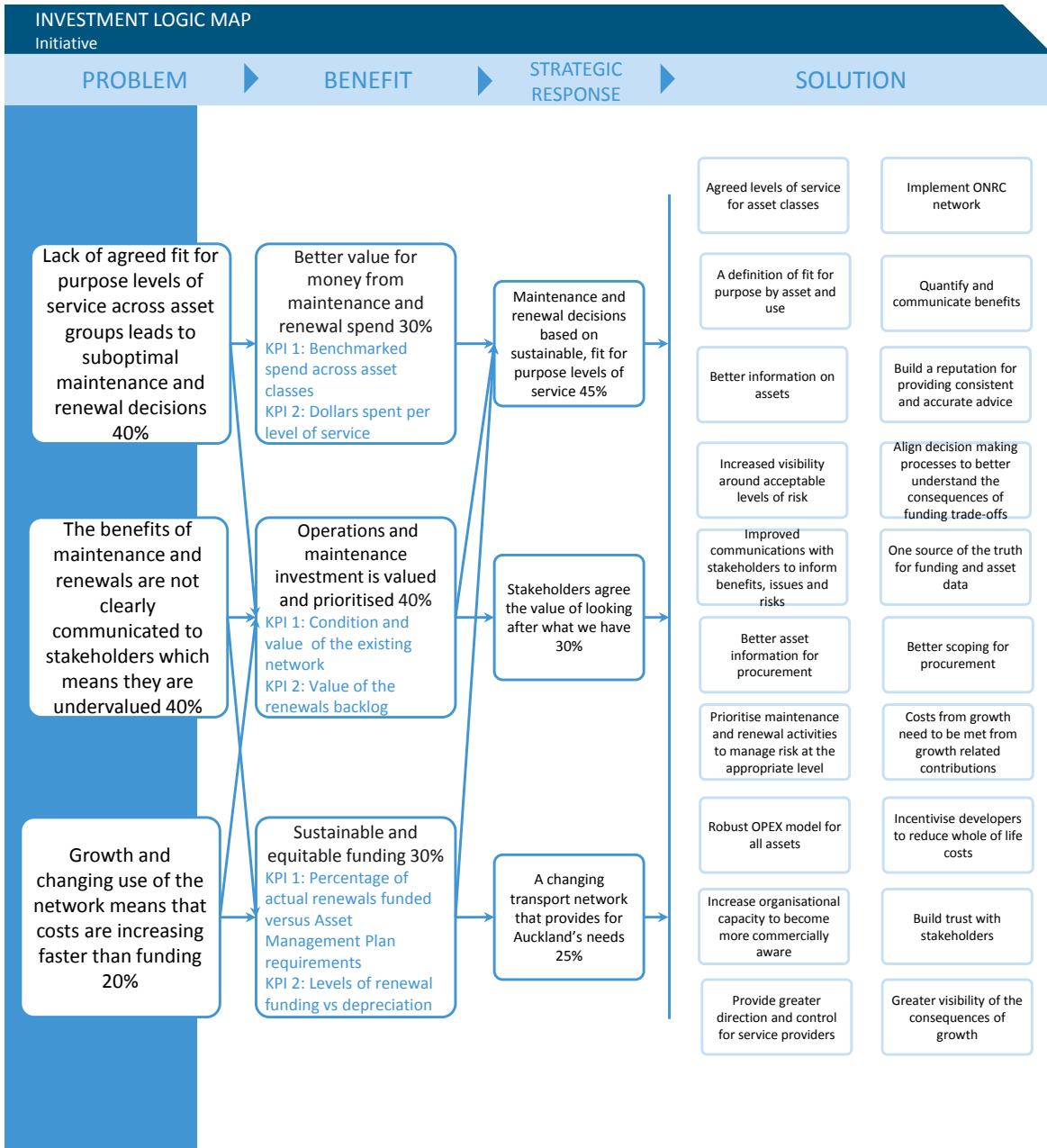
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Appendix B: Auckland Transport Investment Logic Map Example

Auckland Transport

Maintenance and Renewals Spending Implications of the One Network Road Classification Initiative



Investor: Siri Rangamuwa
Facilitator: Lauren Jewell
Accredited Facilitator: No

Version no: 1.0
Initial Workshop: 20/03/2015
Last modified by: Lauren Jewell 10/04/2015
Template version: 5.0



Appendix C: Self Assessment Examples

REVIEW OF SELWYN ACTIVITY MANAGEMENT PLAN 2015-2025 AGAINST STRATEGIC CASE KEY FUNDAMENTAL ELEMENTS

Fundamental Elements of the 'Strategic Case'	Activity/Asset Management Plan (Indicate where, what, and how related information is presented; if at all)
Identify the Strategic Context	Not present
Identify Problems	<p>Identified in the Transport Activity Statement:</p> <ul style="list-style-type: none"> • Increasing commuter and urban traffic post-earthquakes • Increasing freight traffic, particularly on main routes • Deteriorating network (underlying pavement structures are under stress from water ingress and heavier vehicle loads) • Constrained national transport funding • Creating new Rolleston and Lincoln town center's • Further expansion of Rolleston's Industrial Zone, including two Inland Ports • Connecting to Stage 2 of the Southern Motorway at Rolleston and Prebbleton • Lincoln - bringing township and expanding University together • Implementation of the Land Use Recovery Plan and Outline Development Plans • Providing transport choices walk, cycle and public transport <p>Executive Summary Details Challenges:</p> <ul style="list-style-type: none"> • Rapid growth has put considerable pressure on maintenance and renewal works • Obsolete street light replacements (deterioration of the network) • Impact of Earthquakes in terms of unknown damage • Allocating resources away from maintaining low volume unsealed roads to those more highly trafficked arterial and freight routes <p>Executive Summary Details Transport Issues:</p> <ul style="list-style-type: none"> • Growth • Urban Rural Tension • Network Resilience • Alternative Modes • Cost Management • Network (and localised) Performance <p>Change/risk</p>
Identify benefit of addressing the problems	<p>Introduction section details the following that can be read as benefits (but do they have a strong link to issues?):</p> <ul style="list-style-type: none"> • Prudently manage the acquisition, maintenance, operation, renewal and disposal of roading assets in ways that optimise the value of services delivered to the community • Assess the risks of failing to deliver levels of service for its activities and provide appropriate means of mitigating those risks • Justify short, medium and long term funding requirements • Manage the risk of asset failure • Provide adequate funding to manage the assets according to assessed priorities <p>Level of Service Objectives:</p> <ul style="list-style-type: none"> • Provide a well maintained, operated and affordable land transport system • Cater for any significant projected traffic increases in a sustainable manner • Pedestrians, cyclists and motor vehicle users can safely move around the



	<p>Selwyn district Contribute to an integrated and responsive local and regional transportation system</p>
<p>Consequences of not addressing the problems identified</p>	<p>Not present</p>
<p>Snap shot evidence (what has changed since your last document i.e. growth, LoS, natural hazards)</p>	<p>Most AMPs will have a good data set that confirms changes in population, land use growth, economic factors etc.. But what has changed from the last to the current AMP that requires a 'evidence refresh'?</p> <p>Introduction in Selwyn AMP details some of these for the 2014 AMP:</p> <ul style="list-style-type: none"> • A focus on the changes in growth and demand within the district (including LURP actions and CSM2 interactions) • Extensive background work to ascertain the nature of growth and demand, particularly in Rolleston and Lincoln • Further extensive work to prepare options to address the impacts of increasing demand; this includes establishing traffic models, options and indicative designs for solutions • Development of estimates for programmes of capital works • Review of maintenance and renewal budgets to reflect changes across the network and the financial context • Improvements to bridge data and improved future management options • Inclusion of the updated Road Safety Strategy • Complete revision of the risk section of the AMP <p>Chapter 7 of AMP details the evidence around growth and demand. Just make sure this evidence is up to date to inform the issues for transport transparently</p> <p>What evidence don't you have? Why? Is it a big risk to forecasting works on the network?</p>
<p>Point of Entry Comments / Observations</p>	<p>There appears to be a bit of strategic context scattered throughout the document and some recently reviewed evidence on growth trends and other important information.</p> <p>If recent processes have clearly articulated the key issues for the district then should just be able to do a quick 'refresh' to confirm the strategic issues relevant for the AMP. This may be by way of one workshop with councillors and key partners.</p> <p>Require a targeted section up front in the AMP to clearly show the district issues and challenges, the cause and consequence of these, as well as the benefits of addressing them.</p>

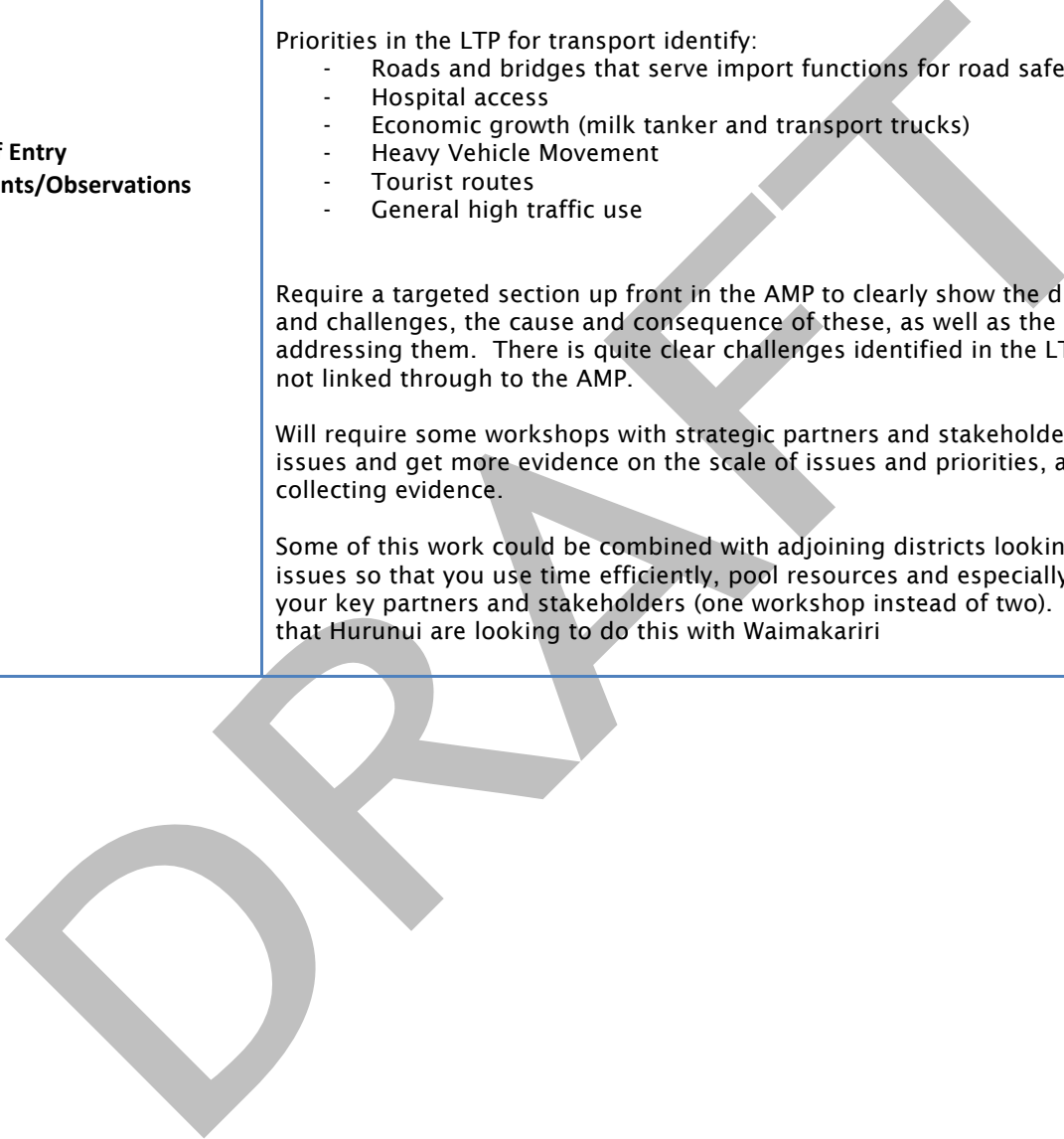


REVIEW OF HURUNI ACTIVITY MANAGEMENT PLAN 2015-2025 AGAINST STRATEGIC CASE KEY FUNDAMENTAL ELEMENTS

Fundamental Elements of the 'Strategic Case'	Activity/Asset Management Plan (Indicate where, what, and how related information is presented; if at all)
Identify the Strategic Context	Not present
Identify Problems	<p>Some renewal issues identified, but at a technical level, no real indication of what the drivers are in terms of the cause.</p> <p>Some indication of future demand, with Hanmer Springs and Amberley identified at the main urban hubs for the district.</p> <p>Some district wide risk factors are identified in an appendix, and include:</p> <ul style="list-style-type: none"> - Large geographical area with a small rating base (is this issue or underling fact?) - Funding - High level of service expectations - Seasonal impacts on roading (is this limited to certain areas? Is this a cause - whats the issue?) - Resourcing and the labour market; - Oil Prices (is this issue or underling fact?) - Climate Change - Demand for Recreational Facilities (just in Hanmer?) - Proportion of unsealed road (why is this an issue? – need to explore) - Geographic issues and fault line - Overweight vehicles and potential for fifty tonne trucks <p>Changes in legislation and regulations (is this issue or underling fact? i.e. just the environment we work within)</p>
Identify benefit of addressing the problems	Lots of objectives and goals identified in the document. But no link back to district issues.
Consequences of not addressing the problems identified	Not present
Snap shot evidence (what has changed since your last document i.e. growth, LoS, natural hazards)	Did not review information to comment



<p>Point of Entry Comments/Observations</p>	<p>There is no strategic context in the document and it is hard to get a feel of the 'scale' of some issues identified.</p> <p>Some key challenges for the district have been identified in the latest LTP and include:</p> <ul style="list-style-type: none"> - Population over next 30 years is expected to be modest - percentage of the population is older higher than the national average; - Growth in tourism (especially accommodation and holiday homes) - Growth in viticulture; - Significant increase in dairy with agriculture still primarily Hurunui's key industry - Hanmer Springs and Amberley continue to be growth areas <p>Priorities in the LTP for transport identify:</p> <ul style="list-style-type: none"> - Roads and bridges that serve import functions for road safety - Hospital access - Economic growth (milk tanker and transport trucks) - Heavy Vehicle Movement - Tourist routes - General high traffic use <p>Require a targeted section up front in the AMP to clearly show the district issues and challenges, the cause and consequence of these, as well as the benefits of addressing them. There is quite clear challenges identified in the LTP but these are not linked through to the AMP.</p> <p>Will require some workshops with strategic partners and stakeholders to confirm issues and get more evidence on the scale of issues and priorities, along with collecting evidence.</p> <p>Some of this work could be combined with adjoining districts looking at similar issues so that you use time efficiently, pool resources and especially the time of your key partners and stakeholders (one workshop instead of two). I understand that Hurunui are looking to do this with Waimakariri</p>
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Appendix D: Point of Entry Discussion Guide

Date *Date*

Author *Authors Name*

File Ref. *File Reference*

Subject *Title of Issue – e.g. Kiwi Council Activity Management Plan*

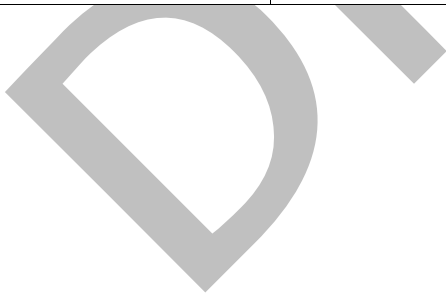
ASSESSING THE POINT OF ENTRY PRE-EXISTING WORK & POINT OF ENTRY ASSESSMENT

Review of Pre-Existing Work:	<ul style="list-style-type: none"> Is there a current fit-for-purpose Strategic Case within your Activity/Asset Management Plan? Y/N. Comment.
If there is an existing Strategic Case	<p>If Yes:</p> <ul style="list-style-type: none"> How up to date is the strategic case? i.e. has there been changes in the district that should be included and updated in your strategic context, as well as the corresponding evidence to demonstrate the change? Is the strategic assessment clear? i.e. clear set of problems/issues, causes, consequences and benefits of addressing the issues in the existing strategic case? Have all the appropriate partners and stakeholders been engaged with to develop consensus on the key issues? i.e. what process has been undertaken with the existing strategy.
If no existing Strategic Work:	<p>If No:</p> <ul style="list-style-type: none"> What other previous work/study has been undertaken that could have a bearing on the way forward or help determine the strategic case? i.e. District Plan, transport strategies, tourism strategy, economic development strategy, growth strategy What is your plan to include key partners and stakeholders in developing your strategic case? i.e. workshops
Recommended Point of Entry:	<p>Select from:</p> <p>Review existing Strategic Case / Develop a Strategic Case</p>
Point of Entry Supported and discussed with NZTA	<p>NZTA & RCA Discussion Names:</p> <p>Date:</p>



PLANNING THE STRATEGIC CASE

Strategic Case Project Manager:	
ILM or Workshop Facilitator.	Internal / External
SCOPING THE WORKSHOP	
Who are the Participants (up to Eight is recommended)	
1.	5.
2.	6.
3.	7.
4.	8.
Who are the proposed invited <u>observers</u> ? (unlimited)	
STRATEGIC CASE TIMING	
Estimated Dates of Workshop (or other as defined)	
Estimated Date of Completion	
EVIDENCE PREPARATION	
What evidence is required to support the issues?	
Detail of evidence required?	



Appendix E: Guidance Steps to imbed a business case approach into AMPs

Business Case Approach Activity Management Planning

