



**GREAT LAKE TAUPŌ**  
Taupo District Council



For us, Objective became **the catalyst for changes** well beyond the realms of information management.

**Ms Susan Souren** Information Technology Manager Finance and Corporate Services, Taupo District Council



#### ORGANISATION

Taupo District Council

#### INDUSTRY

Local Government

#### USERS

330

#### SOLUTIONS

 **Objective ECM**

#### BENEFITS AT A GLANCE

Legislative **compliance**

Improved **service delivery**

Improved **provision of information to decision makers**

Enhanced **productivity**

Improved **knowledge sharing culture**

Improved **transparency and accountability**

## Providing better services, meeting compliance regulations and improving business processes

**The growth of Taupo District Council, less stability in the workforce and increased business activities prompted the search for a solution to their information management challenges. The Council faced multiple business challenges including the need to meet legislative requirements, reduce time and process inefficiencies, maintain their public image and reputation and continually improve services to the community.**

Recognising the importance of information to its business, an Enterprise Content Management (ECM) solution was implemented. The Council is responsible for managing the Lake Taupo District located in the central North Island of New Zealand, covering an area of 6970 square kilometres. As one of New Zealand's largest visitor destinations, the Council provides a broad range of quality services and facilities to customers and ratepayers of the District.

### BUSINESS DRIVERS FOR CHANGE

The Council embarked on an Information Management Strategy project that outlined a framework to improve the collection, management and use of reliable and accurate information across the Council.

Prompting this project, was a need to provide better services to internal and external customers, to mitigate risks posed to corporate information, to meet compliance regulations and to improve business processes.

Prior to this project, the Council used a paper-based filing system to manage its paper documents and records, a manual system for its large volume of Microfiche records and an archival database for its scanned documents.

With the growth of Council functions and activities, the need to strategically manage information became business critical.

## KEY METRICS



The initial stages of the project involved surveying staff to discover issues relating to information management. This highlighted the following issues:

- Potential loss of corporate knowledge and information due to an increasingly transient number of employees.
- Email was increasingly being used as a key business communication tool and needed to be captured effectively and stored in a central repository.
- Information stored in physical files increased the risk of documents being lost or misplaced
- The high volume of information that the Council generated meant it was time consuming and difficult to locate files, storage costs were high and space was at a premium.
- Silos of information were formed across the Council as people stored information on network drives, resulting in limited information sharing and duplication of work.

Ms Susan Souren, Information Technology Manager Finance and Corporate Services, Taupo District Council said: “A big change for the Council was an increase in the turn over of its workforce as a result of changes to the economy and employment market.”

“As this changed, corporate knowledge was lost because it was not captured and managed consistently. This was costing the Council a large amount of time and money in trying to locate information, retain corporation knowledge and re-train new employees.”

There were incidents of frustration at the management level with a lack of version control on documents resulting in confusion of documents being presented. A resolution to this business problem helped achieve CEO and management buy-in early in the process.

“Information is vital to the successful and efficient functioning of local government. Communities and ratepayers expect easy and timely access to Council information.”

The Council selected Objective to replace existing systems and create a single corporate information store to eliminate existing silos of information. It is accessed from 11 locations, by 300 Council officers including its management, asset engineers, planners, policy and strategic analysts compliance officers and many more.

### IMPLEMENTATION AND CHANGE MANAGEMENT

The first implementation phase was creating a file classification system for the business and ensuring that all users were trained effectively. A temporary file plan was created on people’s drives prior to implementing Objective. This helped staff get used to working within a structured file plan before they began using Objective.

To assist user uptake, key stakeholders were active participants in the system’s implementation. The Council recognised the importance of training in the change management process. A classroom was set up to train groups of 20 at a time. Once the initial training was completed and users had time to experience working in Objective, supplementary training was provided and will continue.

Taupo District Council created an internal helpdesk that staff could call for immediate assistance with a problem. Training of one to three super users offered staff more support when using the solution.

“Our aim is to have complete user uptake of Objective. To achieve this it is essential that extensive training and support is provided for staff. Project success relies on managing user’s expectations and this means continually revisiting them and offering more training and opportunities for skill enhancement,” said Ms Souren.

“Since the implementation, user uptake to-date has been highly successful.” The Council manages a vast array of information including correspondence, meeting documents, financial information, management plans, district planning documents, property information, maps, plans, emails, resource and building consents, licences, contracts and legal documents, photos and certificates.

To promote Objective Council-wide, they created an animated figure of a trout that represented the lifestyle and cultural change they were encouraging within the organisation by introducing an ECM solution. By selecting Objective, the Council was aiming to promote a knowledge sharing culture across the business.

The character themes all training materials and represents the transition that the Council wanted to make from being unhealthy with too many shared drives to a fit and healthy organisation that works together to manage documents and records efficiently and effectively.

Objective's solution is about enabling a lifestyle change internally which aligned with the Council's corresponding vision for the region. The introduction of Objective gave the Council the opportunity to transfer all archived information previously kept on microfiche or in paper files into Objective.

Data was also migrated from existing shared drives and will be subsequently phased out or limited in size. All new employees to the organisation are trained and immediately begin using Objective to manage their documents and records. For the Council, this builds a single repository that facilitates knowledge sharing across the business. It improves information search and retrieval while securing information for future use.

"Objective's solution, allows us to provide a single version of the truth and a complete source of information to the District and the community," said Ms Souren.

## IMPROVING SERVICES TO THE COMMUNITY

Local governments are under mounting pressure to deliver a multitude of quality services and facilities, more efficiently and effectively. Delivering diverse services across a variety of different work teams makes it vital for the Council to have the ability to share information between departments.

"Delivering the right information, to the right person, at the right time is critical to the function of local government. We selected Objective because it was visionary; the solution is flexible and enables us to manage our information effectively into the future."

Objective underpins enhanced service delivery to the community through the creation of business process efficiencies. The Council's Property System creates a file for every property in the District. There are 22,000 properties listed, with over 16,000 of these having an active file.

When a person wants to buy a house in New Zealand they approach the Council for a Land Information Memorandum (LIM). This is a complete record of the history and all activities that have ever occurred in relation to that property.

Objective plays a key role in managing property and land information and aids in the processing of building and resource consents. Accurate and timely land information is vital for ongoing development planning for the District.

Strict statutory demands are placed on the processing time of both building and resource consent applications. Objective manages scanned consent applications by providing a single point of access to multiple departments.

## IMPROVING OPERATIONAL EFFICIENCIES AND BUSINESS PROCESSES

Local governments are required to promote the social, economic, environmental, and cultural wellbeing of their communities, in the present and for the future. For this to be achieved and successful, they need clear business processes and streamlined operational efficiencies.

"Objective has improved our business processes and positively changed the way people work. It encourages information management to be a routine part of business activities."

"We have found an improvement in record creation. Previously a letter would require three physical copies of each document, a copy for the recipient, a guard file and a copy for file."

"Storing all information in Objective made this activity redundant and reduced time spent on document management. It also proves to be more environmentally friendly because less paper is produced."

Taupo District Council runs a regional internal courier service that delivers files to people's in-trays.

"Now with staff accessing information via Objective directly from their desktops, there is less need for a courier service. Subsequently, the Council has been able to cut its resourcing costs of the courier team."



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“This is just the beginning of many planned and potential productivity and efficiency gains for the Council over the next few years,” said Ms Souren.

## RISK MANAGEMENT AND COMPLIANCE

Local government is highly regulated and accountable to both ratepayers and government. The new Public Records Act 2005 has highlighted accountability for information retention, disposal, storage, transparency, confidentiality and accuracy.

“Councils are information creators. They need to gain access, store and retrieve it accurately, particularly for information that needs to be kept for a long time.”

The risk of not complying with regulatory and legislative requirements has serious legal and financial consequences. Objective’s governance and compliance capability mitigates the risk of litigation and assists risk management for Taupo District Council, through improved security and preventing inappropriate disposal of records. It protects against physical disaster such as fire by minimising the need for physical record storage space.

By improving version control and security of records or documents, it helps the Council ensure their corporate knowledge is secure and protects the privacy of rate payer information.

## PLANNING FOR THE FUTURE

Taupo District Council selected Objective because of its scalability and flexibility to meet operational needs as the organisation grows.

The Council will use Objective workflows to assist its internal processes. Applications being received are required to be actioned by different officers. Workflow will allow these officers to begin their work at the same time or sooner and therefore shorten the time taken to process applications.

The Council has integrated Objective with its corporate system to automatically create property files and store resource and building consents as they are printed. This has been very successful and the Council plans to extend this functionality. Future plans include scanning of creditor invoices and integrating them into the corporate electronic order and creditor system for payment processing. This will reduce the need for invoices to be moved around the organisation, improve storage of invoices and most importantly allow staff immediate access to them.

“Integrating these key business systems will eliminate data re-entry and duplication of information. It will ensure a high return on investment from the ratepayer’s perspective and improve our business processes and operations,” said Ms Souren.

“It will help us achieve the ultimate goal of supporting the needs of the Community by making all information accessible and retrievable wherever they are and whenever they need it.”

Future plans include on-going and improved training for staff, further data migration and using Objective for meeting and committee management.

“Objective provides us with a trusted reliable source of corporate information. It underpins the effective and efficient delivery of accurate information for our business, our customers and the District.

“It supports well informed decision-making, and delivers transparency and accountability in our business processes,” said Ms Souren.

## ABOUT OBJECTIVE CORPORATION

Objective Corporation (ASX:OCL) creates information and process governance solutions that are effortless to use and enable organisations to confidently advance their own digital transformation.

Designed for regulated industries, these solutions turn the imperative of compliance, accountability and governance into an opportunity to streamline business processes and deliver the innovative services that customers expect.

### OBJECTIVE CORPORATION LIMITED

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With a heritage in Enterprise Content Management (ECM), Objective’s expanded solutions extend governance across the spectrum of the modern workplace; underpinning information, processes and collaborative work-spaces.

Through a brilliant user experience, people access the information they need to progress processes from wherever they choose to work.

