



# PLANNING & ENGAGEMENT

## Streamline the planning lifecycle

**“Planning helps to create the kinds of places where people want to live, work, relax and invest. Planning is about improving the economy and productivity of our cities and regions – by making places function better in the face of growth and change.”**

– Professor David Adams, Planning Institute Australia

### HIGHLIGHTS

**Create efficiencies** in the way strategic documents are created, co-authored and managed.

**Centrally manage** the entire document lifecycle for planning.

**Streamline** consultations, stakeholder submissions and analysis of engagement.

**Save time and money** one system for document creation, typesetting, publishing and consultation.

**Increase response rates** with multi-channel engagement with local communities, partners, businesses and stakeholders.

**Integrate social media** policy into stakeholder engagement and embed polls and surveys into popular platforms like Facebook and LinkedIn.

### THE PLANNING PROCESS NEEDN'T BE LITTERED WITH BOTTLENECKS AT EVERY STEP

Local councils are facing increasing challenges to efficiently author, approve and publish strategic plans in the digital formats today's communities expect. Once published, carrying out effective, meaningful community consultation is hampered by inadequate tools to receive, analyse and respond to individual pieces of community feedback - that can number up to tens of thousands in a single consultation event.

As a result, planners frequently fall into a trap of spending more time managing the process as opposed to the document content. Without the right tools, this can be frustratingly inefficient for staff; and very costly to councils.

Planning teams and councils are searching for a solution that:

- Accelerates plan creation and review,
- Increases community involvement;
- Encourages discussion; and
- Ultimately allows development to flourish.

Too often, the complexity of the process overshadows the simplicity of these objectives.

## WHERE IN THE PROCESS DO YOU FEEL THE MOST PAIN?



**AUTHORING** – Applications such as Microsoft Word are prone to crash when handling the large file size of council plans. Links and page numbers easily break when moving sections around. Multiple authors are reliant on each other to write their section of the plan.



**APPROVING** – Multiple versions of one document are often in circulation during the review stage and it's up to one individual to identify changes and merge them into one central document. It's difficult to know which sections have been approved by the relevant stakeholder.



**PUBLISHING** – Relying on internal marketing teams or outsourced graphic designers to publish digital and print formats of plans is risky. Planners spend hours combining all documents into one, checking for accuracy and then publishing. Last minute changes are difficult to turn around quickly and are very expensive.



**CONSULTATION** - Receiving community feedback can be extremely challenging to manage when submissions on a plan can number up to tens of thousands. It can take months for planning teams to compile, analyse and respond to submissions. Teams are often using different systems to do each step.



**REPORTING** - Planners need to show transparency through audits and reporting; maintain historic versions of documents; and keep copies of supporting notes and contextual information. Summary reports of submissions and responses are required for consultation events.



**ADOPTION** - In keeping with statutory regulation, councils must make plans available for public inspection at the council office and online as soon as is reasonably practical. Measuring and monitoring community sentiment over the lifetime of the plan is difficult to do.

Multiple individual contributors and stakeholders enter into and exit out of this process at different stages of the document lifecycle:



## ABOUT THIS BRIEF: THE SIMPLE WAY FOR PLANNERS TO MANAGE THE DOCUMENT LIFECYCLE

### Spend less time on the process and fast-track community development

Objective Keystone is a centralised system where planning teams can manage every step of the document lifecycle. A browser-based application, Objective Keystone helps planners:

- Collaboratively author, approve and publish planning documents much faster; saving valuable overheads.
- Publish plans directly to their council websites; enhancing the council-to-community experience, communication and collaboration.
- Receive formal submissions on plans in a structured format that allows for swift analysis; faster responses back to the community; and easier reporting.
- Gather informal feedback through a variety of response mechanisms such as polls, surveys, discussion boards, and more.

This Solution Brief shows how Objective Keystone reduces overhead to the planning process by bringing efficiency, governance and modern technology to every step. The outcome of this, is the ability to deliver greater community outcomes more efficiently, saving time and money and improving the overall experience for all.

## AUTHOR

The number of individual contributors to a plan brings with it a high level of administration for the person responsible for managing the process. When contributors to the plan are unavailable - either due to leave or other priorities - it can be difficult to know how much of their assigned section of the document they have completed - if at all. This makes authoring plans inefficient due to a lack of transparency.

### Introducing 'Collaborative Authoring' - one master shell allowing for an unlimited number of contributors

Objective Keystone uses one master 'shell' document; where multiple authors, reviewers and approvers can work on different sections at the same time.

We call this 'Collaborative Authoring'. A powerful feature, Collaborative Authoring provides value to planners by:

- 1 Reducing the time it takes to author a plan; because multiple users can work on different sections of the document at the same time.
- 2 Providing process transparency: any authorised user can access the document to see where in the process the document is at and what sections need to be completed, reviewed and approved.
- 3 Saving process owners valuable time collating and merging multiple copies of the plan.

If you have ever had to wait days - or even weeks - for a team member to complete their section of a plan, this feature is for you. We have over 180 councils in the UK, Australia and New Zealand using Objective Keystone for Collaborative Authoring and we've seen average creation times reduced by 30 to 50 percent.

### Minimise the risk inherent in collating and combining multiple versions of the same document

By keeping your team working within one master document, you completely eliminate document versions being created, circulated and sent back to you to merge. If you are the process owner and have been left to combine all these versions, you know all too well how much risk there is in missing critical changes or feedback when having to go through multiple documents.



### Templates stop rogue formatters

Document templates are built to your exact branding, styling and publishing requirements. Although contributors working in Keystone will have access to basic formatting tools such as heading styles (pre-determined by you), bullet points, numbering and tables; they will not be able to change the overall formatting of the document.

What this means, is that nobody will be able to go off-brand. Whether that's resizing a table, changing the margins, or choosing a font.

This allows you and your team to focus on the plan, and not spend hours in rework.

## APPROVE

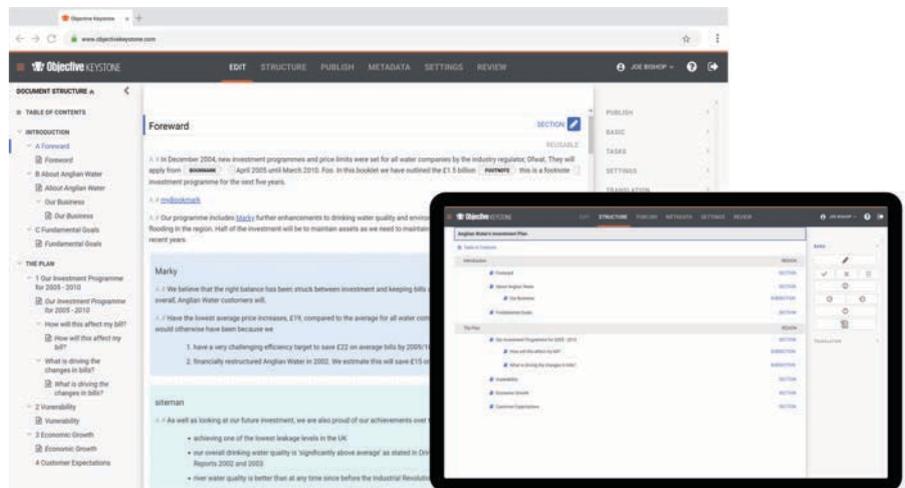
### Other applications may break your document, but we won't

Inevitably during the process of reviewing a plan, paragraphs, chapters or entire sections of a document move around. This is where we see things start to break.

Usually this is in the form of page numbering, table of contents or indexes, hyperlinks, high resolution images, embedded tables. And the bigger the file size, the more likely it is for the file to corrupt or crash.

The benefit of Objective Keystone's browser application is that size doesn't matter. Even if your plan is hundreds of pages long, you can easily move sections around within the document without having to worry about the consequences. It just works.

In the 'Structure' tab, document owners can toggle up or down sections to move them within the document. Here, you can also change the hierarchy of sections; quickly making them sub-sections and changing them back just as easily.



### Streamline your review and approval processes

Speed up your ability to get your plan over the line by assigning subject matter experts, managers and executives specific sections of a document for review and approval. Multiple reviewers and authorised approvers can focus solely on their part of the plan, mitigating distractions. Once sections are approved, they are locked down, reducing the risk of an unauthorised change.

### Comments and reviews can be sectioned off and assigned to individuals

Whether you are sending your plan to Marketing for a plain English/sanity check or to management for executive efficiency approval, you can control how much or how little of the document you wish to assign to others.

This can help drive efficiencies and save time by keeping your contributors focussed preventing them from becoming distracted or caught up in the detail of other parts of the plan that may not be applicable.

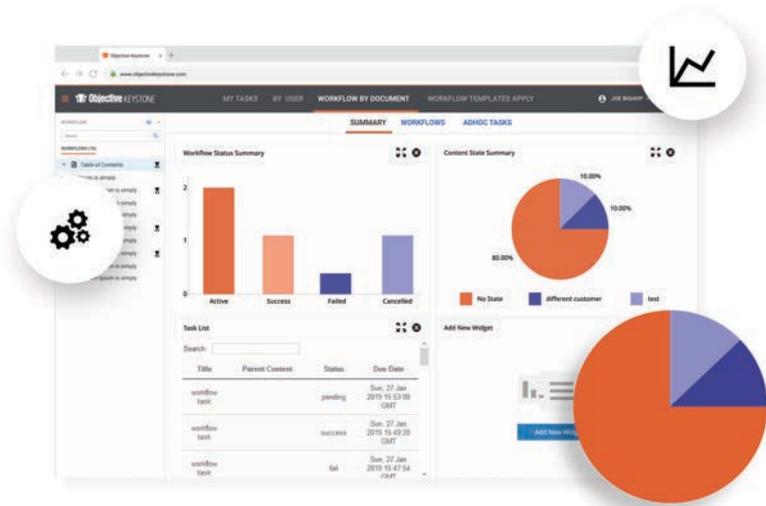
#### **Review notes allow for context**

Review notes allow you to add editor notes or contextual information against a paragraph or section of a document. This can be really useful as you progress this document through its' lifespan – over the course of months or even years. When producing a full audit report, you have the option to include all review notes as part of this report.

#### **Proposed changes allows you to work on a parallel version of a plan**

The proposed change tool works in a similar way to the 'Comments' feature. Users are able to add commentary or suggested edits to a section or paragraph without altering the original text. Reviewers or document owners can then accept or decline this change.

#### **Workflow capabilities allow you to direct the flow of your project.**



Manage your plans and stakeholders effectively Choose between simple and advanced workflows to direct your team through the document life cycle. You can assign tasks to users - these trigger automatic email notifications that flag an action is required.

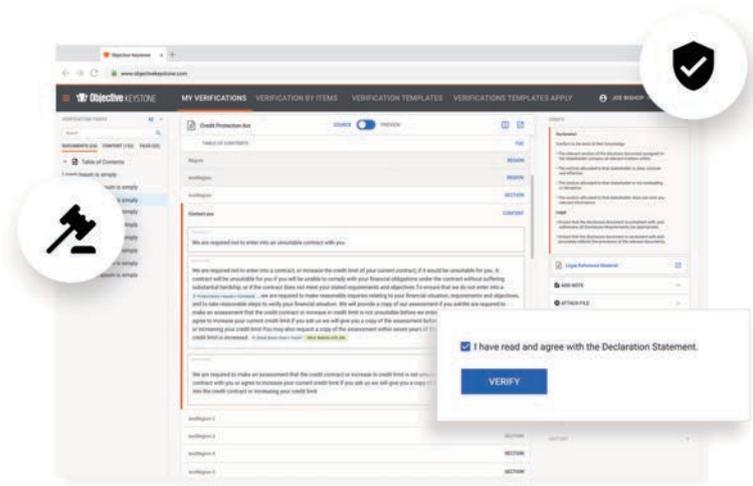
Dashboards show you at a glance where your plan is in the process. This allows you to spot bottlenecks and follow up with your team's tasks.

#### **Governance, risk and compliance management**

Change history, version management, content approvals, comments and actions are audited and tracked. Decisions can be traced back to authorised individuals for each section of the document.

Fully audited review, verification and sign-off processes are managed using workflows ensuring both statutory and policy requirements are adhered to.

Facilitate easy sign-off for legal and executives through the use of automatically generated verification certificates detailing evidence points for key statements and performance data.



## PUBLISH

### Easily produce print-ready, downloadable digital plans

Keystone's publishing engine means that in a few mouse clicks you can produce multiple outputs of your plan, suitable for print and web.

Because all the work is done upfront when building your templates, you can produce a print or digital version regardless of where you are at in your planning process. This allows you to review the content as many times as you need prior to releasing it for distribution to your stakeholders, or the community.

Furthermore, if a last minute change is required after final sign off, you are no longer begging for your typesetter's help to incorporate changes at 5pm on a Friday. You can make these edits yourself, click 'Publish' again and the template takes care of the rest.

### Remove the risk inherent in working with designers and typesetters

Because you've used verified source content (such as tables and images) into your documents; you've removed the manual effort of copying and pasting, and the risk of designers and typesetters incorrectly using old versions of corporate styling or content.



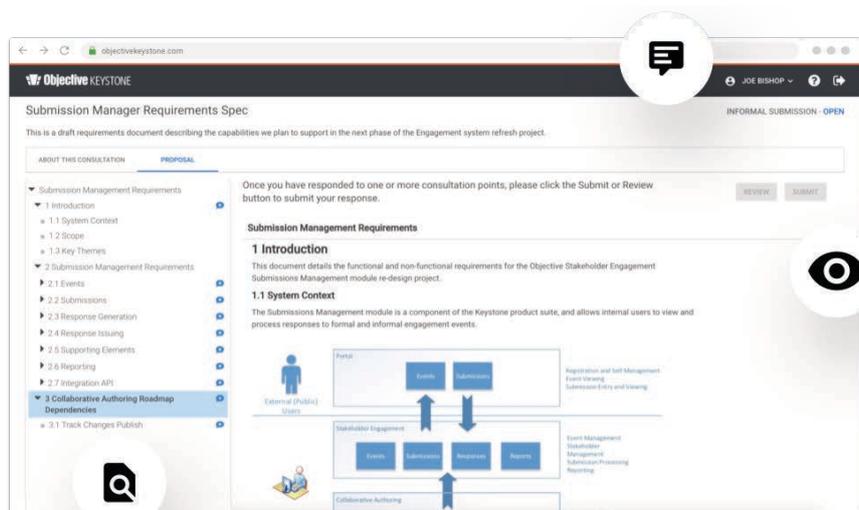
## BRINGING COMMUNITY CONSULTATION TO LIFE

Traditionally, the way in which councils have collected feedback from the community has been painfully slow and inefficient.

A single plan can have up to tens of thousands of individual submissions taking months for a team of planners to review, analyse and respond to. During this time, the plan may have already undergone significant rework, before a council has even managed to respond to the first round of submissions.

In this section, we'll show how our Stakeholder Engagement tools helps councils interact with their communities, partners and all tiers of government to gather feedback in a smart and structured way.

**Make better quality, digital, structured consultation and engagement a reality**



The Objective Keystone Engagement Portal is an multi-channel, engagement platform for consultation management, stakeholder submission and analysis across your entire organisation. Because it's all browser-based, users and the community can access it anywhere, any time.

Providing centralised management of all engagement phases of the planning lifecycle, the Engagement Portal is the hub from which you can consult with all relevant stakeholders, citizens, employees and partners, through a wide variety of response mechanisms.

In direct response to the challenges council planning departments have, the Engagement Portal has been designed to:

- 1 **Make it easier** for planners to receive, process and respond to submissions when publishing plans for community feedback, through document-based responses. We know that submissions on a plan can number up to the tens of thousands.
- 2 **Ensure compliance** with policy and legislation governing your obligations to publish plans; mandatory timeframes to respond; and the types of information you are capturing and storing, including the collection of personal information.
- 3 **Improve reporting** capabilities for councils to manage processes with accountability and transparency. Generate statutory or summary reports including all comments received (including capture from social media platforms) and outlining responses or action taken relating to each stakeholder. Easily identify trends in responses and build up a profile of constituents over time.
- 4 **Allow for informal consultation** such as surveys and polls - at any point during the document lifecycle - even prior to any document even being written.

## CONSULT



### **Pick your communication type to suit your purpose**

Choose from a variety of response mechanisms such as polls, surveys, petitions, and more.

### **Have these conversations where your audience hangs out**

You're able to embed polls and surveys you create within Keystone on Twitter, Facebook and LinkedIn, widening your reach and encouraging greater volumes of responses.

### **Social media integration: making it easier for communities to interact with councils**

In the past, local councils have struggled to successfully gather informal feedback because they have almost made it 'too difficult' for communities to be able to provide information.

This is typically because even informal feedback required creating a detailed profile online (name, address, contact details and other profiling questions) and this laboured process discourages citizens from setting up a profile in order to have their say.

Now, individuals can log in to the Stakeholder Engagement platform using their Facebook, LinkedIn or Google accounts to respond to informal consultation requests without having to provide additional personal information.

Objective Keystone captures all Facebook and Twitter comments in our system of record, to remain compliant with record keeping legislation, as social media comments are considered to be responses.

### **Formal consultation and document-based feedback**

Consolidating, analysing and responding to feedback on large planning documents can be extremely time consuming.

Our Structured Feedback tool provides a unique "comment by section" capability which allows councils to publish plans online and receive feedback directly in-place within the document, section by section.

This allows a council to very targeted in where it wants constituents to provide commentary. It also saves planning departments enormous amounts of time in collecting, responding and analysing commentary.

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#### **Deliver smart, timely responses to submissions easily**

Take the work out of doing hundreds (if not thousands) of response letters thanks to automation. You can easily set up automatic email responders that instantly acknowledge a submission from stakeholders and communities, either individually or at scale. You can:

- Instantly acknowledge a submission with automated responders.
- Mail merge and send mass responses using stakeholder information or output to other systems if you prefer.
- Load decisions into the 'event' within the portal and push out responses to the community.

#### **Stakeholder management**

Ensuring compliance with the legislative framework around consultation and engagement is essential in the Public Sector today.

Objective Keystone Stakeholder Engagement is an integrated Stakeholder Management solution providing all the tools necessary to efficiently store, analyse and retrieve information about your stakeholders and community.

- **Build a profile** of your community and stakeholders - encourage stakeholders to self-register their interests so they can be contacted for future consultations.
- **Build relationships**- build trust and enjoy better relationships with your stakeholders by proactively inviting them to participate in consultations based on their interests and information they provide
- **Maximise compliance**- minimise risk by ensuring legal compliance with items such as Equalities and Data Protection
- **Effective processes**- manage stakeholder relationships and information for a single team or department, or across your organisation
- **Communicate** - mail merge your online and offline stakeholders directly from within the tool.

## ADOPT

The benefits of hosting your plan live in the portal is that you are able to:

- Link to your live GIS system. This increases community interaction with your innovative, digital plan as it drives community citizens to look for their properties and check out other aspects of town or environmental planning that affects them.
- Integrate with your DA lodgement system. Supporting digital transformation by linking disparate systems together and keeping documents online and not lost in paper trails.
- Make your plan online, searchable and easily accessible all the time (rather than breaking it into individual PDFs due to size constraints).



**The introduction of Objective Keystone into South Lanarkshire Council has resulted in a 400% increase in the use of the council's planning website for consultations and a 30% increase in the number of representations taking place online.**

Full case

study: <http://www.objective.com/south-lanarkshire-council>



## REPORT

### Report back to the community and your stakeholders on how you're tracking

With stakeholder details, consultation events and community feedback all stored and analysed in a single database, comprehensive back-office reporting is done intelligently and efficiently. Our comprehensive Report Builder allows you to build and tailor your own reports, including the capability to style your own reports based on your needs and branding.

Our system allows you to upload all your manual submissions that may have traditionally sat in one repository as well as all your online submissions and merge them together. In the past, the data gathering from manual and online responses has been a time consuming nightmare that has been very difficult to do any sort of meaningful analysis on.

With Keystone, you can report on all event-based consultation activities including geo-demographical analysis through integration with GIS systems.

Our engagement tools produce graphical-style reports that can drill down into different themes or look for trends.

Formal reporting allows you to drill down into the information you have gathered and produce reports by individual submitters or by consultation points.

A truly powerful piece of functionality, the full power of this comes to bear when adopted at a departmental or organisational level, enabling greater efficiency and effectiveness in reporting as well as 'raising the bar' through consistency of best practice.

Cost savings are achieved by allowing consultation data and reporting to be shared across the entire organisation.

## SOLUTION BENEFITS

A one stop shop; trusted by more than 180 councils worldwide, to deliver plans and engage communities.

### For planners

- Reduced overhead for producing and updating documents.
- Reduced overhead processing stakeholder engagement.
- More reliable and capable co-authoring of documents.

### For councils

- More consistent and collaborative planning lifecycle.
- Reduced cost of typesetting and publishing.
- Compliant and efficient engagement processes.

### For constituents

- Simplified process for Council engagement.
- Enhanced digital experience.
- Improved decision-making transparency.

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## **ABOUT OBJECTIVE CORPORATION**

Objective 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.

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.

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