

4.1.2 INVESTMENT POLICY FOR 2016/17

File No:	Budget Development
Author:	Manager Finance Corporate Services Department
Appendices:	App A - 2016/17 Investment Policy179

PURPOSE

This report seeks the adoption of an Investment Policy to apply for the 2016/17 financial year.

EXECUTIVE SUMMARY

The *Local Government Regulation 2012*, Section 191 requires Council to prepare an investment policy annually.

This policy forms part of the Council's overall system of financial management, as required under Section 104(5)(c) of the *Local Government Act 2009*.

The Investment Policy sets the boundaries of investment and includes the overall philosophy and strategy for investment of surplus funds, along with detailed guidelines and procedures for officers in the application of the Policy.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled "Investment Policy for 2016/17" and**
- (b) adopt the 2016/17 Investment Policy (Appendix A).**

FINANCE AND RESOURCING

Investment revenue is included in the draft budget and has been calculated on predicted daily cash balances and anticipated interest rates.

CORPORATE PLAN

Corporate Plan Theme: *A public sector leader*

Emerging Priority: 5.2 - A financially sustainable organisation

Strategy: 5.2.2 - Ensure council's finances are well managed and systems are in place to analyse performance, generate revenue, reduce costs and manage contracts

CONSULTATION**Internal Consultation**

No internal consultation was required for this report.

External Consultation

No external consultation was required for this report.

Community Engagement

No community engagement was required for this report.

PROPOSAL

The *Local Government Act 2009* and the *Local Government Regulation 2012* require Council to prepare an investment policy annually.

The *Local Government Regulation 2012* Section 191 requires Council to prepare an investment policy annually. This policy forms part of the council's overall system of financial management, as required under Section 104(5)(c) of the *Local Government Act 2009*.

The Investment Policy must outline Council's overall investment objectives, risk philosophy and procedures for achieving the goals stated in the policy.

Council's overall philosophy is that priority is given to the preservation of capital invested over investment returns.

Legal

The adoption of this policy satisfies Council's legislative obligations.

Policy

The Investment Policy is reviewed annually as part of the budget development process. There have been no material changes to the existing policy.

Risk

A key purpose of this policy is to minimise Council's exposure to credit risk. Proposed investments are assessed against a risk matrix with maximum exposure levels for individual counterparties and for each credit rating.

Previous Council Resolution

The current policy was adopted by Council under resolution SM15/12 at the Special Budget Meeting held on 1 June 2015.

That Council:

- (a) *receive and note the report titled "Investment Policy & Debt Policy for 2015/2016"*
- (b) *adopt the 2015/2016 Investment Policy (Appendix A) and*
- (c) *adopt the 2015/2016 Debt Policy (Appendix B).*

Related Documentation

There is no related documentation for this report.

Critical Dates

This policy underpins elements of the 2016/17 budget which will be presented to Council for final adoption at the Special Meeting (Budget Adoption) to be held 16 June 2015.

Implementation

There are no implementation details to include in this report.



Strategic Policy

2016/17 Investment Policy

Corporate Plan reference:	5. A public sector leader 5.2 A financially sustainable organisation	
Endorsed by Council on:	9 June 2016	Reference Number:
Manager responsible for policy:	Director Corporate Services, Corporate Services Department	

Policy purpose

The intent of this document is to outline Sunshine Coast Council's investment policy and guidelines regarding the investment of surplus funds, with the objective to maximise earnings within approved risk guidelines and to ensure the security of funds.

Policy outcome

The objectives of this policy are to maximise investment earnings within investment parameters whilst ensuring the security of funds.

Policy scope

This policy applies to the investment of all funds held by Sunshine Coast Council (hereafter "Council").

Policy statement

Council will maintain an active investment strategy with the following goals:

- Maximise investment returns from investment activities
- Exceed the benchmark of the Bloomberg AusBond Bill (BAUBIL) Index
- Invest only in investments as authorised under current legislation
- Invest only with approved institutions
- Invest to protect capital value of investments

Guiding principles

Council's overall objective is to invest its funds at the most advantageous rate of interest available to it at the time, for that investment type, and in a way that it considers most appropriate given the circumstances. The investment portfolio will maintain sufficient liquidity to meet all reasonably anticipated operating cash flow requirements of Council, as and when they fall due, without incurring significant transaction costs due to being required to sell an investment.

Investment activities shall preserve capital as a principal objective of the investment portfolio. Investments will be performed in a manner that seek to ensure security of principal of the overall

portfolio. This would include managing credit and interest rate risk with given risk management parameters and avoiding any transactions that would prejudice confidence in Council or its associated entities.

Credit Risk

Council will evaluate and assess credit risk prior to investment. Credit risk is the risk of loss due to the failure of an investment issuer or guarantor. The investment officer will minimise credit risk in the investment portfolio by prequalifying all transactions including the brokers/securities dealers with which they do business, diversify the portfolio and limit transactions to secure investments.

Interest Rate Risk

The investment officers shall seek to minimise the risk of a change in the market value of the portfolio because of a change in interest rates. This would be achieved by considering the cash flow requirements of Council and structuring the portfolio accordingly. This will avoid having to sell securities prior to maturity in the open market. Secondly, interest rate risk can be limited by investing in shorter term securities (ie less than 12 months).

Investment Parameters and Guidelines

Council investments are limited to those prescribed by Section 6 of the *Statutory Bodies Financial Arrangements Act 1982* (hereafter "SBFAA") for local governments with Category 2 investment powers, which allows for investment with Queensland Treasury Corporation or Queensland Investment Corporation, along with a range of other higher-rated counterparties without further approval.

The SBFAA includes a list of prohibited investments that require Treasurer approval including derivative based instruments, non-Australian dollars and maturity maximum greater than three years.

It is noted that for the purposes of this investment portfolio, the percentage limits apply effective from the date of purchase as a percentage of the market value of the portfolio. No more than 20 per cent of the portfolio is to be invested in Floating Rate Notes.

The following table sets Council's investment parameters, where maximum percentage of funds can be invested within each category:

Short Term Rating (S&P Global Ratings) or equivalent	Individual Counterparty Limit	Total Limit
QIC / QTC Pooled Cash Management Fund	100%	100%
A-1+ Financial Institutions	40%	100%
A1+ Bond Mutual Funds	30%	50%
A-1 Financial Institutions	30%	40%
A-2 Financial Institutions	15%	35%
A-3 Financial Institutions	5%	10%
Unrated	Nil	Nil

Maturity

The maturity structure of the portfolio will reflect a maximum term to maturity of three (3) years and includes an interest rate reset of no longer than twelve (12) months.

Liquidity requirement

Given the nature of the funds invested, no more than 20 per cent of the investment portfolio will be held in illiquid securities and at least 10 per cent of the portfolio can be called at no cost or will mature within 0-7 days.

Authority

Council has been granted authority to exercise Category 2 investment power under Part 6 of the SBFAA.

Authority for implementation of the Investment Policy is delegated by Council to the Chief Executive Officer. The Chief Executive Officer has then delegated authority to the Director Corporate Services, Manager Finance and the Coordinator Financial Accounting in accordance with the *Local Government Act 2009*, Section 257 (1) (b) – Delegation of local government powers.

For the purposes of the appointment of an external fund manager pursuant to Section 59 of the SBFAA, to operate in a manner consistent with this policy will constitute compliance.

New investment products

A new investment product requires a full risk assessment by the Manager Finance and Coordinator Financial Accounting (including compliance with the Act).

Breaches

Deposits are in the first instance deemed to be “unbreakable”, that is, no early exit. Where Council holds an investment that is downgraded below the minimum acceptable rating level, as prescribed under regulation for the investment arrangement, or where limits for different risk categories or where counterparty limits are breached, an assessment will be undertaken once the change becomes known. Any breach of this Investment Policy is to be reported to the Director Corporate Services and Manager Finance.

Roles and responsibilities

The Director Corporate Services, the Manager Finance and the Coordinator Financial Accounting are authorised to invest Sunshine Coast Council's operating funds at their discretion in investments consistent with this Investment Policy and legislation. The Financial Accounting Team are responsible for the operations and management of the funds.

Investments will be managed with the care, diligence and skill that a prudent person would exercise in managing the affairs of other persons. This includes having in place appropriate reporting requirements that ensure the investments are being reviewed and overseen regularly.

Investment officers are to manage the investment portfolios not for speculation, but for investment and in accordance with the spirit of this Investment Policy. Investment officers are to avoid any transaction that might harm confidence in Council. They will monitor and manage cash flow when making an investment decision.

Ethics and conflicts of interest

Consideration will be given to ethical investment principles in determining the approved counterparty lists for investment of funds.

Investment officers/employees shall refrain from personal activities that would conflict with the proper execution and management of Sunshine Coast Council's investment portfolio. This includes activities that would impair the investment officer's ability to make impartial decisions.

This policy requires that employees and investment officers disclose to the Chief Executive Officer any conflict of interest or any investment positions that could be related to the investment portfolio.

Delegation of authority

Authority for implementation of the Investment Policy is delegated by Council to the Chief Executive Officer in accordance with the *Local Government Act 2009*, Section 257 (1) (b) – Delegation of local government powers.

Authority for the day-to-day management of Council's Investment Portfolio is to be delegated by the Chief Executive Officer to the Director Corporate Services, the Manager Finance, and to the Coordinator Financial Accounting, in accordance with Section 259 of the *Local Government Act 2009*, and subject to regular reviews from the Chief Executive Officer.

Criteria of authorised dealers and broker

Council will maintain a list of authorised financial institutions and securities brokers that the investment officers may deal with. These financial intermediaries must have a minimum long term rating of at least either BBB (S&P Global Ratings) or the equivalent Fitch or Moody's ratings of BBB and Baa1 respectively.

All transactions undertaken on behalf of the investment portfolio of Council will be executed either by Sunshine Coast Council directly, or through securities brokers registered as Australian Financial Service Licensees (ASIC) with an established sales presence in Australia, or direct issuers that directly issue their own securities which are registered on Sunshine Coast Council's approved list of brokers/dealers and direct issuers.

Safekeeping and custody

Each transaction will require written confirmation by the broker/dealer/bank. Council will hold security documents, or alternatively a third party custodian authorised by the Manager Finance and evidenced by safekeeping receipts may hold security documents.

Measurement of success

A summary of investments, amount invested and comparison above benchmark, at a minimum, is included in the monthly Financial Performance Report to Council Ordinary Meetings.

The benchmark target is to be set equal to or above the Bloomberg AusBond Bank Bill (BAUBIL) Index.

Definitions

BBSW – The **Bank Bill Swap Rate**, commonly known as **BBSW**, is simply the *short term swap rate*. In Australia, BBSW is the term used for interest rate swaps of six months or less, anything dated longer than six months is simply referred to as a *swap rate*

Bloomberg AusBond Bank Bill (BAUBIL) Index - widely considered to be the industry benchmark for short term cash fund performance and is used by market participants as a means of comparing the returns generated by the various cash funds available in the market.

Ethical Investment Principles – Investment in companies or industries that promote positive approaches to environmental, social and corporate governance issues; or the avoidance of investment in industries deemed harmful to health or the environment. These principles have been recognised by the United Nations Principles for Responsible Investment.¹

¹ Further information on the United Nations Principles for Responsible Investment, including a schedule of Australian signatories, can be obtained from the following website <http://www.unpri.org/principles/>

Financial Institution is defined as an authorised deposit-taking institution within the meaning of the *Banking Act 1959 (Cwlth)*, Section 5.²

Illiquid Securities are those that cannot easily be sold or exchanged for cash without a substantial loss in value.

Investments are defined as arrangements that are undertaken or acquired for producing income and apply only to the cash investments of Sunshine Coast Council.

Market Value is the price at which an instrument can be purchased or sold in the current market.

QIC – Queensland Investment Corporation.

QTC – Queensland Treasury Corporation.

Related policies and legislation

Statutory Bodies Financial Arrangements Act 1982

Statutory Bodies Financial Arrangements Regulation 2007

Local Government Act 2009

Banking Act 1959 (Cwlth)

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Created	N	Special Statutory Budget Meeting	9/6/2014
1.1	Annual Review	Y	Manager Finance	19/2/2016
1.1	Endorsement		Council	

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² For a list of authorised deposit taking institutions, refer to the website of the Australian Prudential Regulation Authority: <http://www.apra.gov.au/adli>.

4.1.3 DEBT POLICY FOR 2016/17

File No:	Budget Development
Author:	Manager Finance Corporate Services Department
Appendices:	App A - 2016/17 Debt Policy189

PURPOSE

This report seeks the adoption of the Debt Policy to apply for the 2016/17 financial year.

EXECUTIVE SUMMARY

The *Local Government Regulation 2012*, Section 192 requires council to prepare a debt policy annually.

This policy forms part of the council's overall system of financial management, as required under Section 104(5)(c) of the *Local Government Act 2009*.

The Debt Policy outlines borrowing forecasts for the new budget along with the next nine years. Should there be any amendments to the final loan borrowings schedule, the debt policy will be presented to council for endorsement along with final budget documents at the Special Meeting (Budget Adoption) to be held 16 June 2016.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled "2016/17 Debt Policy"
- (b) adopt the 2016/17 Debt Policy (Appendix A).

FINANCE AND RESOURCING

The proposed borrowings and associated finance costs are included in the draft budget. New loans are generally not drawn down until late in the financial year to minimise interest expenses during that year, with normal repayments commencing in the following period.

CORPORATE PLAN

Corporate Plan Theme: *A public sector leader*

Emerging Priority: 5.2 - A financially sustainable organisation

Strategy: 5.2.2 - Ensure council's finances are well managed and systems are in place to analyse performance, generate revenue, reduce costs and manage contracts

CONSULTATION

Internal Consultation

No internal consultation was required for this report.

External Consultation

No external consultation was required for this report.

Community Engagement

No community engagement was required for this report.

PROPOSAL

The *Local Government Act 2009* and the *Local Government Regulation 2012* require Council to prepare a debt policy annually.

The *Local Government Regulation 2012*, Section 192 requires council to prepare a debt policy annually. This policy forms part of the council's overall system of financial management, as required under Section 104(5)(c) of the *Local Government Act 2009*.

Council's borrowing activities are governed by the *Statutory Bodies Financial Arrangements Act 1982*, and the Debt Policy provides clear guidelines for loan raising, requiring an assessment of the impact of any borrowing decision on council's long-term financial sustainability.

All borrowing proposals remain subject to evaluation by the Department of Infrastructure, Local Government and Planning and periodic Credit Reviews are undertaken by Queensland Treasury Corporation.

The schedule of proposed loan borrowing will be presented to council along with final budget forecasts for adoption in June 2016. This schedule will outline proposed borrowing over a ten year period, and will be guided by recent decisions around the nature and scope of the proposed capital works program over that period.

Legal

The adoption of these policies satisfies council's legislative obligations.

Policy

The Debt Policy is reviewed annually as part of the budget development process. There have been no changes to the existing policy.

Risk

The Debt Policy provides the opportunity for restructure of the debt portfolio in the event of significant fluctuations in borrowing interest rates. Further, borrowing is restricted to Queensland Treasury Corporation under legislation without specific approval from the Treasurer under the advice of the Department of Infrastructure, Local Government and Planning.

Previous Council Resolution

The current policy was adopted by council under resolution SM15/12 at the Special Budget Meeting held on 1 June 2015.

That Council:

- (a) receive and note the report titled "**Investment Policy & Debt Policy for 2015/2016**"
- (b) adopt the 2015/2016 Investment Policy (Appendix A) and
- (c) adopt the 2015/2016 Debt Policy (Appendix B).

Related Documentation

There is no related documentation for this report.

Critical Dates

This policy underpins elements of the 2016/17 budget which will be presented to council for final adoption at the Special Meeting (Budget Adoption) to be held 16 June 2016.

Implementation

There are no implementation details to include in this report.



Strategic Policy	
2016/17 Debt Policy	
Corporate Plan reference:	5. A public sector leader 5.2 A financially sustainable organisation
Endorsed by Council on:	Reference Number:
Manager responsible for policy:	Director Corporate Services, Corporate Services Department

Policy purpose

The purpose of this policy is to ensure the sound management of council's existing and future debt.

Policy outcome

The policy will provide clear guidance for staff in the management of council's debt portfolio and maintenance of appropriate debt and debt service levels.

Policy scope

This policy applies to all Councillors and council staff and extends to all borrowing activities of council and any controlled entities.

Policy statement

New borrowings will only be made to fund capital expenditure, for a period less than or equal to the estimated useful life of the asset(s) and for no more than 20 years.

New borrowings will be undertaken in accordance with the Queensland Treasury Corporation Guidelines, the *Statutory Bodies Financial Arrangements Act 1982* and Section 192 of the *Local Government Regulation 2012*.

Borrowing Purposes

- Council will not utilise loan funding to finance operating activities or recurrent expenditure.
- Council undertakes full analysis of all funding options as outlined in the Long Term Financial Forecast, including a forward program of capital works, to determine loan funding requirements.
- Council recognises that infrastructure demands placed upon council can often only be met through borrowings, but will always be mindful of the additional cost incurred by the community when assets are acquired through borrowings which increases the cost of providing capital infrastructure.
- Council will endeavour to fund all capital renewal projects from operating cash flows and borrow only for new or upgrade capital projects, having regard to sound financial management principles and giving consideration to inter-generational equity for the funding of long term infrastructure projects.

- Where capital expenditure is deferred from one year to the next, the drawdown of approved loan funds will be reviewed to minimise interest expenses.
- Borrowings for infrastructure that provides a return on assets will take priority over borrowing for other assets.

Debt Term

Where capital projects are financed through borrowings, council will repay the loans within a term not exceeding the life of those assets, and over a term that optimises cash flow efficiency. Loans undertaken for core Sunshine Coast capital investment are planned to be repaid within a twelve (12) year period. From 2015/16, loans undertaken for Region Making projects (the loan period has been increased to a term of 20 years.

- Council currently re-balances the portfolio back to a 12-year term following each transaction and with any draw down of new loan funds.
- If surplus funds become available, and where it is advantageous to council, one-off loan repayments will be made to reduce the term of existing loans.
- In an environment of fluctuating interest rates, and where there is a distinct economic advantage to council, consideration will be given to renegotiating any outstanding loans to obtain the best long-term benefit to council.

Repayment Ability

Council will maintain close scrutiny of debt levels to ensure that relative sustainability indicators will not exceed target parameters recommended by Queensland Treasury Corporation and *Local Government Regulation 2012*.

Borrowing Sources

Council will raise all external borrowings at the most competitive rates available and from sources available as defined by legislation. Consideration will be given to provision of loans to business units from surplus cash reserves held by council by way on an internal loan.

Proposed Borrowings

Proposed Borrowings planned for the current financial year and the next nine financial years are outlined in Appendix A, in accordance with Section 192 *Local Government Regulation 2012*.

Internal Loans

The provision and approval of an internal loan will depend on the availability of surplus funds at the time of application and the capacity of the business unit or operational activity to repay the loan.

- All applications for internal loans will be made by reference to the Finance Branch for consideration in accordance with the Long Term Financial Forecast.
- The term of the loan will be appropriate to the life of the asset being financed.
- In all cases, where business units are subject to the provisions of the National Competition Policy, the cost to the business unit will be no less than what would apply to an equivalent private sector business. The interest rate will be the sum of:
 - (a) the equivalent QTC borrowing rate for the proposed term;
 - (b) the QTC administration charge; and
 - (c) an additional margin above the QTC borrowing rate.
- The interest rate applicable to internal loans relating to operational activities of council will be the actual borrowing cost from QTC including administrative charges.

Council may, upon reasonable notice being given, require repayment of part or all of the balance of the loan at any time, which would require the business unit to convert the outstanding balance of the loan to an external facility.

- Provision for the repayment of the loan will be included in the annual budget for the business unit.

Guiding principles

The purpose of establishing this policy is to:

- Provide a comprehensive view of council's long term debt position and the capacity to fund infrastructure growth for the Region;
- Increase awareness of issues concerning debt management;
- Enhance the understanding between Councillors, community groups and council staff by documenting policies and guidelines;
- Demonstrate to government and lending institutions that council has a disciplined approach to borrowing.

Roles and responsibilities

Pursuant to Section 192 *Local Government Regulation 2012*, council must prepare a debt policy each year that states the new borrowings planned for the current financial year and the next nine financial years.

The Finance Branch will review the cash flow requirements prior to loan proceeds being drawn down to minimise interest expenses.

Measurement of success

Financial sustainability indicators remain within target ranges and the provision of necessary infrastructure is not constrained through the lack of capital funding.

Details of outstanding loans will be reported annually in council's Financial Statements and Annual Report.

Definitions

Business unit – A business activity within council structure subject to the application of full cost pricing principles as defined under the National Competition Policy.

Inter-generational equity – This relates to the fairness of the distribution of the costs and benefits of a policy when costs and benefits are borne by different generations. (i.e. The principle whereby those who derive a direct benefit from the service or infrastructure provided actually pay for that service).

QTC – Queensland Treasury Corporation.

Maroochydore City Centre – Maroochydore City Centre was declared by the state government as a Priority Development Area (PDA) on 19 July 2013, at the request of council to renew the region by supporting economic development, providing such needed infrastructure and creating a new central business district for the Sunshine Coast.

Related policies and legislation

- *Local Government Act 2009*
- *Local Government Regulation 2012*
- *Statutory Bodies Financial Arrangements Act 1982*
- *Statutory Bodies Financial Arrangements Regulation 2007*

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Adopted			2 June 2015
1.1	Annual Review	Y		19 February 2016
	Endorsement		Council	16 June 2016

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Appendix A

Schedule of proposed external borrowings:

	2016/17 \$000	2017/18 \$000	2018/19 \$000	2019/20 \$000	2020/21 \$000	2021/22 \$000	2022/23 \$000	2023/24 \$000	2024/25 \$000	2024/25 \$000
Total SCC Proposed Borrowings	61,036	75,356	91,887	196,772	43,373	10,798	12,498	26,205	29,047	17,350
SCC + Business Units	15,740	14,612	9,688	10,999	5,066	7,136	5,704	10,052	8,615	8,350
Maroochydore City Centre Project	13,906	10,574	12,787	18,920	3,590	3,662	6,794	16,153	20,432	9,000
Palmview Development	6,500									
Sunshine Coast Airport Runway Project	24,890	50,170	69,412	166,853	34,717					
Capital works projects as outlined in the adopted budget schedule										

Note that council operates a central treasury model and as such does not generally provide debt funding for specific projects or assets but rather uses debt funding to finance council's balance sheet, with the exception being for strategic projects.

4.1.4 REVENUE POLICY 2016/17

File No:	Budget Development
Author:	Manager Finance Corporate Services Department
Appendices:	App A - 2016/17 Revenue Policy197

PURPOSE

A local government must review its Revenue Policy annually and in sufficient time to allow an annual budget that is consistent with the Revenue Policy to be adopted for the next financial year.

Section 169(2)(c) of the *Local Government Regulation 2012* requires that council include in the budget a Revenue Policy.

EXECUTIVE SUMMARY

A local government must review its Revenue Policy annually and in sufficient time to allow an annual budget that is consistent with the revenue policy to be adopted for the next financial year. The 2016/17 Revenue Policy (**Appendix A**) per Section 193 of the *Local Government Regulation 2012* sets out the principles used by council for:

- a) levying rates and charges;
- b) granting concessions for rates and charges;
- c) recovering overdue rates and charges; and
- d) cost-recovery methods.

When adopting the annual budget, council sets rates and charges at a level that will provide for both current and future community requirements and grant concessions for pensioners to assist property owners to remain in their own home. Council also provides concessions to charity organisations and community and sporting groups as they contribute to the health and well-being of the community.

The Revenue Policy also provides council guidance with principals of equity, transparency and flexibility when acting to recover overdue rates and charges.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled “2016/17 Revenue Policy 2016/17” and**
- (b) adopt the 2016/2017 Revenue Policy (Appendix A).**

FINANCE AND RESOURCING

The framework does not place any financial and resourcing obligations on council, but provides the principles for revenue raising for the 2016/17 budget.

CORPORATE PLAN

Corporate Plan Theme: *A public sector leader*

Emerging Priority: 5.2 - A financially sustainable organisation

Strategy: 5.2.2 - Ensure council's finances are well managed and systems are in place to analyse performance, generate revenue, reduce costs and manage contracts

CONSULTATION

Internal Consultation

Internal consultation was conducted within the Corporate Services Department.

External Consultation

No external consultation was required for this report.

Community Engagement

No community engagement was required for this report.

PROPOSAL

As part of the annual budget, council is required to adopt a Revenue Policy which states the guidelines that may be used for preparing the local government's Revenue Statement, including the principles used by council in:

a) levying of rates and charges:

Council will set the rates and charges at a level to provide for both current and future community requirements. This includes general rates, special & separate rates and charges and other charges.

Council continues to issue half yearly rates notices and promotes by various means of communication to ratepayers the issue date of rate notices and the early payment discount date. Council offers a wide number of payment options and in certain circumstance allows flexible payment arrangements to ratepayers with financial difficulties.

b) granting concessions for rates and charges:

Council may grant a concession for pensioners, charitable organisations, community groups and sporting associations. Also a concession may be granted for economic development, per the provisions of the Sunshine Coast Investment Incentive Scheme.

c) recovering overdue rates and charges:

To reduce the overall rate burden on ratepayers, council is guided by principles of equity, treating all ratepayers in similar circumstances in a similar manner with regards to their capacity to pay; making clear the obligations of the ratepayer; and allowing flexibility for short-term payment arrangements.

The reference to capacity to pay only refers to the recovery of overdue rates and charges.

d) cost-recovery methods:

All fees and charges will be set with reference to full cost pricing and cost recovery fees will be charged up to a maximum of full cost. Commercial charges will be at commercial rates.

Council acknowledges the community benefit associated with not-for-profit organisations conducting activities on the Sunshine Coast, and therefore all not-for-profit organisations are exempt from cost recovery fees for applications to conduct activities requiring an approval on public and private land within the region.

A local government must review its Revenue Policy annually and in sufficient time to allow an annual budget that is consistent with the revenue policy to be adopted for the next financial year.

Legal

Section 169(2)(c) of the *Local Government Regulation 2012* requires that council include in the budget a Revenue Policy.

Section 193 of the *Local Government Regulation 2012* details what must be included in the Revenue Policy.

Policy

The Revenue Policy states the guidelines that may be used in preparing the Revenue Statement. There have been no changes to the existing policy.

Risk

No risks have been identified in relation to this report.

Previous Council Resolution

The Revenue Policy for 2015/16 was adopted by council under resolution SM15/13 at the meeting held 1 June 2015.

That Council:

- (a) receive and note the report titled "**Revenue Policy 2015/2016**"; and
- (b) adopt the 2015/2016 Revenue Policy (Appendix A).

Related Documentation

The Revenue Statement must form part of the annual budget.

Critical Dates

A local government must review its Revenue Policy annually and in sufficient time to allow an annual budget that is consistent with the Revenue Policy to be adopted for the next financial year.

Implementation

The Revenue Policy sets out the principles for the making and levying of rates and charges for the 2016/17 financial year.



Strategic Policy

2016/17 Revenue Policy

Corporate Plan reference:	5. A public sector leader 5.2 - A financially sustainable organisation	
Endorsed by Council on:	9 June 2016	Reference Number:
Manager responsible for policy:	Director Corporate Services, Corporate Services Department	

Policy purpose

The purpose of this Revenue Policy is to set out the principles used by Council for:

- levying rates and charges;
- granting concessions for rates and charges;
- recovering overdue rates and charges; and
- cost-recovery methods.

Policy outcome

The Revenue Policy will be applied by Council in the development of the annual budget for the 2016/17 financial year.

Policy scope

The Revenue Policy applies to all areas identified in Section 193 of the *Local Government Regulation 2012*.

Policy statement

The Levying of Rates and Charges

Council levies rates and charges to fund the provision of valuable services to our community. When adopting its annual budget Council will set rates and charges at a level that will provide for both current and future community requirements. Council will apply the principle of transparency in making rates and charges.

1. General Rates

General Rate revenue provides essential whole of community services not funded through subsidies, grants, contributions or donations received from other entities, or not provided for by other levies or charges. Council will consider all full cost recovery options before calculating the general rate.

Council is required to raise an amount of revenue it sees as being appropriate to maintain assets and provide services to the region as a whole. In deciding how that revenue is

raised, Council has formed the opinion that a differential general rating scheme, based primarily on land use, provides the most equitable basis for the distribution of the general rate burden.

The rateable value for each property is the basis for determining the amount of the general rate levied. Council recognises that significant valuation fluctuations may have an adverse effect on pensioners. Council has implemented a Deferment of General Rates Policy to provide eligible pensioners with the opportunity to apply for a deferment of general rates.

2. Special and Separate Rates and Charges

Where appropriate Council will fund certain services, facilities or activities by means of separate or special rates or charges.

In accordance with Section 94 of the *Local Government Regulation 2012* Council will levy special rates and charges on certain properties that are considered to be specially benefited by the provision of a specific service, facility or activity.

Special rates are based on the rateable value of the land and special charges are a flat charge per property, where this is considered to provide a more equitable basis for the sharing of the cost.

In accordance with Section 103 of the *Local Government Regulation 2012* Council will levy a separate rate or charge on all rateable land in the region to fund a particular service, facility or activity where Council believes that the service, facility or activity is a key in achieving council's vision to be Australia's most sustainable region - vibrant, green, diverse.

3. Other Charges

In general, Council will be guided by the principle of user pays in making all other charges.

The Levying of Rates and Charges

In levying rates and charges, Council will apply the principles of:

- consistency, by scheduling the issue of rate notices on a half yearly basis;
- communication, by advising ratepayers about rate notice issue dates and discount dates;
- clarity, by providing meaningful information on rate notices to enable ratepayers to clearly understand their responsibilities; and
- flexibility, by providing payment arrangements to ratepayers in financial difficulty, along with a wide array of payment options.

In making and levying rates and charges, Council will be guided by the principles of:

- equitable distribution of the general rates burden as broadly as possible;
- transparency in the making and levying of rates;
- flexibility, to take account of changes in the local economy;
- clarity in terms of responsibilities (council's and ratepayers') in regard to the rating process;
- National Competition Policy legislation where applicable; and
- having in place a rating regime that is efficient to administer.

The Purpose of and Granting of Concessions for rates and charges

Under Chapter 14, Part 10, section 121 of the *Local Government Regulation 2012* Council may grant a concession. The concession may only be of the following types;

- a rebate of all or part of the rates or charges;
- an agreement to defer payment of the rates and charges;
- an agreement to accept a transfer of unencumbered land in full or part payment of rates.

In accordance with Section 120(1)(a) of the *Local Government Regulation 2012*, Council has determined that eligible pensioners who are property owners are entitled to receive concessions on rates and various other services that Council provides to the community. The purpose of the concessions for pensioners are to assist pensioner property owners to remain in their own home by reducing the financial impact of rates and charges.

In accordance with Section 120(1)(b) of the *Local Government Regulation 2012* other charitable organisations, community groups, and sporting associations may also be entitled to concessions. The purpose of these concessions is to encourage and support charitable organisations, community groups, and sporting associations as they contribute to the health and well-being of the community and the social cohesion of the region.

In accordance with Section 120(1)(d) of the *Local Government Regulation 2012* concessions may be granted if the concession will encourage the economic development of all or part of the local government area. In accordance with the provisions of the Sunshine Coast Investment Incentive Scheme an approved business or enterprise may be entitled to a concession in the form of a deferment of general rates for such period as Council may determine from time to time.

In exercising these concession powers Council will be guided by the principles of:

- transparency, by making clear the requirements necessary to receive concessions; and
- communication, by raising the awareness of target groups that may qualify for these concessions; and
- equity, by ensuring that all applicants of the same type receive the same concession.

The Recovery of Rates and Charges

Council will exercise its rate recovery powers pursuant to the provisions of Chapter 4 Part 12 of the *Local Government Regulation 2012* in order to reduce the overall rate burden on ratepayers, and will be guided by the principles of:

- equity, by treating all ratepayers in similar circumstances in the same manner and by having regard to their capacity to pay;
- transparency, by making clear the obligations of ratepayers and the processes used by Council in assisting them to meet their financial obligations; and
- flexibility, by accommodating ratepayers' needs through short-term payment arrangements.

Cost Recovery Fees

All fees and charges will be set with reference to full cost pricing. Cost recovery fees will be charged up to a maximum of full cost. Commercial charges will be at commercial rates. Council acknowledges the community benefit associated with not-for-profit organisations conducting activities on the Sunshine Coast, and therefore all not-for-profit organisations are exempt from cost recovery fees for applications to conduct activities requiring an approval on public and private land within the region.

New Development Costs

Developer contributions for infrastructure are determined each year in accordance with the philosophy that a developer should pay reasonable and relevant contributions towards the capital cost of the provision of infrastructure to meet past and future augmentation costs associated with this new development, subject to State Government requirements. Infrastructure agreements are negotiated outcomes between Council and the developer.

Guiding principles

Council is required to prepare and adopt a Revenue Policy in accordance with Section 193 of the *Local Government Regulation 2012*. The Revenue Policy must be reviewed annually and in sufficient time to allow an annual budget that is consistent with the Revenue Policy to be adopted for the next financial year.

Accordingly, the principles contained within the Revenue Policy are applied in the determination of the Revenue Statement, rates, fees and charges.

Roles and responsibilities

All council staff are bound by the principles outlined in this policy in determining the level of rates, fees and charges, and in the application of concessions relating to those rates, fees and charges.

Measurement of success

Financial sustainability indicators remain within target ranges and Council maintains a strong financial position through adequate and equitable revenue streams.

Definitions

All words within this policy have the meaning assigned under the Dictionary from the schedule contained within the *Local Government Regulation 2012*

Related policies and legislation

Local Government Act 2009

Local Government Regulation 2012

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Created	N	Special Statutory Budget Meeting	02/06/2014
1.1	Annual Review	Y	Manager Finance	20/05/2016
1.1	Endorsement	N	Council	09/06/2016

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4.2 PLANNING AND ENVIRONMENT

4.2.1 ENVIRONMENT LEVY POLICY 2016

File No:	Council meetings
Author:	Manager Environment and Sustainability Policy Planning and Environment Department
Appendices:	App A - Environment Levy Policy 2016..... 205
Attachments:	Att 1 - Environment Levy Policy 2016 - proposed changes 213

PURPOSE

The purpose of this report is to present the 2016 Environment Levy Policy for Council consideration and adoption.

EXECUTIVE SUMMARY

The Sunshine Coast Council operates an Environment Levy to raise additional revenue for programs, projects and initiatives that complement council's core environmental activities in the delivery of strategic conservation, waterway and coastal management outcomes.

On an annual basis, Council reviews the Environment Levy Policy that guides the development and implementation of an annual Environment Levy Program to ensure funds continue to support the delivery of strategic and emerging environmental priorities.

The Environment Levy Policy for 2016 (**Appendix A**) accommodates the proposed 2016/17 Environment Levy Program and incorporates two minor changes which are shown in **Attachment 1**. These include:

- wording in the *Acquisition of environmentally significant land* Theme that gives consideration to the creation of strategic and new habitat areas that build connectivity, when identifying properties for acquisition and
- a clause under the *Major projects* Theme which supports council's consideration of an environmental flagship project that facilitates access to the Sunshine Coast's natural assets.

The policy is supported by an Environment Levy Organisational Guideline which provides further direction for the effective, open and transparent implementation of the annual program by outlining administrative, financial management and governance processes.

This report recommends Council adopt the revised Environment Levy Policy 2016.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled "Environment Levy Policy 2016" and
- (b) adopt the Environment Levy Policy 2016 (Appendix A).

FINANCE AND RESOURCING

There are no finance and resourcing implications associated with this report.

CORPORATE PLAN

Corporate Plan Goal:	<i>A public sector leader</i>
Outcome:	5.2 - A financially sustainable organisation
Operational Activity:	5.2.4 - Coordinate the delivery of the tourism, environment, heritage and transport levies and report outcomes to Council as part of annual budget deliberations

CONSULTATION

Internal Consultation

Internal consultation in preparing the Environment Levy Policy has included:

- Manager Environmental Operations, Infrastructure Services
- Manager community Response, Community Services
- Integrated Environment Team

External Consultation

There has been no external consultation undertaken in relation to this report.

Community Engagement

There has been no community engagement undertaken in relation to this report.

PROPOSAL

The Sunshine Coast Council operates an Environment Levy to raise additional revenue for programs, projects and initiatives that complement council's core environmental activities in the delivery of strategic conservation, waterway and coastal management outcomes.

On an annual basis, Council reviews the Environment Levy Policy that guides the development and implementation of an annual Environment Levy Program to ensure funds continue to support the delivery of strategic and emerging environmental priorities.

The Environment Levy Policy for 2016 (**Appendix A**) accommodates the proposed 2016/17 Environment Levy Program and incorporates two minor changes which are shown in **Attachment 1**. These include:

- wording in the *Acquisition of environmentally significant land* Theme that gives consideration to the creation of strategic and new habitat areas that build connectivity, when identifying properties for acquisition and
- a clause under the *Major projects* Theme which supports council's consideration of an environmental flagship project that facilitates access to the Sunshine Coast's natural assets.

The policy is supported by an Environment Levy Organisational Guideline which provides further direction for the effective, open and transparent implantation of the annual Program by outlining administrative, financial management and governance processes.

This report recommends Council adopt the revised Environment Levy Policy 2016.

Legal

There are no legal implications in relation to this report.

Policy

The Environment Levy Policy guides the development and implementation of an annual Environment Levy Program, with outcomes contributing to the corporate vision for the Sunshine Coast to be 'Australia's most sustainable region – vibrant, green, diverse'.

The Environment Levy is a key funding source for the implementation of Council's Sunshine Coasts Biodiversity Strategy 2010-2020, Sunshine Coast Waterways and Coastal Management Strategy 2011-2021 and Sunshine Coast Local Government Area Pest Management Plan 2012-2016.

Risk

There is no risk associated with this report

Previous Council Resolution

Ordinary Meeting – 18 June 2015 – Council Resolution (OM15/86)

That Council:

- (a) receive and note the report titled "Environment Levy Program 2015/2016"*
- (b) endorse the expenditure of the Environment Levy Program 2015/2016 (Appendix A)*
- (c) note the indicative 4 year Environment Levy Program (Appendix A)*

Ordinary Meeting – 19 June 2014 – Council Resolution (OM14/85)

That Council:

- (a) receive and note the report titled "**2014/2015 Sunshine Coast Environment Levy Policy and Program**"*
- (b) adopt the revised Environment Levy Policy 2014 (Appendix A) and*
- (c) adopt the 2014/2015 expenditure of the indicative 4-year Environment Levy Program (Appendix B).*

Related Documentation

- Sunshine Coast Corporate Plan 2014-2019
- Sunshine Coast Biodiversity Strategy 2010-2020
- Sunshine Coast Waterways and Coastal Management Strategy 2011-2021
- Sunshine Coast Local Government Area Pest Management Plan 2012-2016
- Environment Levy Organisational Guideline

Critical Dates

There are no critical dates associated with this report.

Implementation

The Environment Levy Policy and associated organisational guideline will guide the implementation of the 2016/17 Environment Levy Program.



Strategic Policy Environment Levy

Corporate Plan Reference:	3. An enviable lifestyle and environment: Maintaining and enhancing the region's natural assets, liveability and environmental credentials 3.1 Healthy natural ecosystems and protected remnant vegetation 3.2 Well managed and maintained open space, waterways and foreshore assets 3.3 A reputation for innovative environmental practices 3.4 A region shaped by clever planning and design
Endorsed by Council on:	
Policy Owner and Department:	Manager, Environment and Sustainability Policy Regional Strategy and Planning Department

BACKGROUND

The Sunshine Coast is valued for its environmental values, including its waterways and coastal foreshores and its diversity of native vegetation and animals—all of which help support the lifestyles and livelihoods of the region.

To assist in achieving Council's vision to be "*Australia's most sustainable region – vibrant, green, diverse*", the *Corporate Plan 2014-2019* identifies the organisation's responsibility to maintain and enhance the region's natural assets, which include our biodiversity, waterways and foreshores.

The Environment Levy is a key revenue source to assist in the implementation of council endorsed environmental strategies/plans.

POLICY PURPOSE

The purpose of this policy is to:

- inform the allocation of revenue raised through an Environment Levy on rateable properties in the Sunshine Coast Regional Council Local Government Area; and
- outline the arrangements for managing the Environment Levy allocations and program.

POLICY OUTCOMES

The outcomes of the application of this policy are:

- support for council to achieve its vision for the Sunshine Coast to be "Australia's most sustainable region – vibrant, green, diverse";
- ecological sustainable development;
- action which supports the implementation of council's environmental strategies/plans;
- action on key Sunshine Coast environmental challenges;
- acquisition, protection and management of environmentally significant land;
- effective environmental partnerships with a range of community, industry and government stakeholders;

- community environmental engagement and support initiatives; and
- an increased level of community awareness and engagement with regard to environmental issues.

POLICY SCOPE

The policy:

- provides direction for the allocation of funds and management of Environment Levy projects and initiatives that complement council's core environmental activities; and
- applies to all council endorsed projects and initiatives, that are funded or supported, wholly or partly with revenue from the Environment Levy.

POLICY STATEMENT

The Sunshine Coast Council recognises the protection and enhancement of the environment as a priority in maintaining the Sunshine Coast's natural advantage as a sustainable region.

The Environment Levy Program provides an important funding source for projects and initiatives, associated with the implementation of council's environmental strategies/plans. These directly address the protection and enhancement of the Sunshine Coast's environmental values including the region's biodiversity, waterways and coastal foreshore assets.

GUIDING PRINCIPLES

This policy is guided by the following principles:

- Effective, open and accountable program delivery;
- Protection, conservation, enhancement and effective and responsive management of the Sunshine Coast environment; and
- Working in partnership with the community, industry and government stakeholders.

ALLOCATION OF ENVIRONMENT LEVY REVENUE TO THE ENVIRONMENT LEVY PROGRAM

1. Environment Levy Program

The Environment Levy Program (the Program) consists of a range of projects and initiatives that deliver strategic and effective outcomes that protect and enhance the health of the Sunshine Coast's environmental values including the region's biodiversity, waterways and coastal foreshore assets.

A four year Program is developed and reviewed annually, in consultation with Council, preceding budget preparations.

The development of the Program, including annual revisions based on priorities and emerging needs and available funding is prepared.

The annual Program including proposed funding allocations is presented to Council for consideration and adoption during annual budget preparations.

2. Environment Levy Funding Themes

Environment Levy revenue is allocated to funding themes which are determined by council. The four themes are:

a) Acquisition of environmentally significant land

Acquisition of environmentally significant lands are part of a strategic approach to assist in the future protection and enhancement of the region's biodiversity values and ecological processes by protecting and expanding our ecological conservation areas.

Determining which properties will be acquired shall be achieved by compiling a regional acquisition priority list which will be guided by council's *Biodiversity Strategy 2010 – 2020* and considering other proposals in their own right. The identification and assessment of suitable properties is undertaken by the Integrated Acquisition Steering Committee.

In identifying properties for acquisition, the primary considerations include, existing biodiversity values, whole of life management costs, planning considerations, level of risk and threat and existing and future opportunities including, the creation of strategic and new habitat areas that build connectivity and the ability to secure the lands in a legally binding protection agreement in perpetuity. Ancillary values such as complementary recreation and economic opportunities are also considered.

In some circumstances appropriate properties may be considered for re-sale following the application of a legally binding protection mechanism.

b) Major projects

Delivery of major on ground rehabilitation projects and regional planning, management and research projects which inform the implementation of council's environmental strategies/plans to:

- provide viable and resilient ecosystems that maintain biodiversity values; and
- provide healthy waterways and foreshores.

The identification of suitable projects is determined by the Integrated Environment Team which is guided by council's environmental strategies/plans and considers a project's alignment with policies and plans, its environmental, economic and social benefits and financial implications.

High profile and integrated flagship projects that deliver major environmental outcomes for a given location may be considered by council to facilitate access to the Sunshine Coast's natural assets.

c) Community engagement and support

To build community capacity and stronger, effective partnerships with a range of stakeholders involved in the protection and enhancement of the Sunshine Coast environment. Funding is distributed to support the ongoing delivery of environmental partnership, grant, assistance and engagement initiatives and projects which:

- engage, value and support community organisations, landowners and volunteers across the region; and
- support community initiatives through appropriate provision of information, expertise and resources.

d) Environmental Operational Management

To support the delivery of Council's operational activities to manage the Sunshine Coast environment in accordance with Council's environmental strategies/plans and service levels.

The following environmental operational management activities will be supported:

- planning and operational management of Environment Levy acquired lands;
- fire management planning and operations for council managed lands;
- planning, programming and operational management of Council's environment education facilities;
- delivery of catchment conservation partnership initiatives;
- implementation of the *Sunshine Coast Local Government Area Pest Management Plan 2012-2016*, including education and engagement initiatives; and
- addressing flying fox community environmental issues including research, education and non-lethal dispersal in accordance with the Sunshine Coast Regional Flying Fox Management Plan 2013-2016.

3. Phase Out Arrangements

The funding associated with the '10 year transitional phase out arrangement' has been incorporated as an ongoing initiative within the Environmental Operational Management Theme. This initiative will be maintained at the 2013/14 allocation of \$1,683,204 and recognised as 'Environmental Management Expenses' within this theme.

MANAGEMENT OF ENVIRONMENT LEVY REVENUE ALLOCATIONS AND PROGRAM

The management of Environment Levy revenue allocations and the Program is guided by the following principles. Further details on the implementation of the Program are provided in the associated Environment Levy Policy Guideline.

1. Environment Levy revenue and restricted cash management

- The annual Environment Levy charge per rateable property is reviewed and determined by council annually as part of adopting its annual revenue statement.
- A four-year program of projects and initiatives is developed and supported by project management plans which outline expenditure and deliverables for each project.
- All revenue collected from the Environment Levy is allocated to council endorsed projects, and initiatives associated with the Environment Levy funding themes.
- All revenue collected including any revenue raised through approved Environment Levy business activities is held and accounted for separately from Council's general revenue.
- The amount of Environment Levy revenue allocated to each of the four primary funding themes is determined based on an assessment of annual priorities and emerging needs and endorsed by council.
- Environment Levy revenue, including restricted cash should not be available at any time for expenditure as general revenue.
- Any unspent funds associated with each of the four funding themes is returned to the Environment Levy restricted cash.
- Environment Levy restricted cash funds can be used in the development of the annual Environment Levy Program.
- Environment Levy restricted cash can be used to fund the acquisitions of land on the endorsed Land Acquisition Forward Program when allocated funds for this theme have been expended during the financial year (SM10/029).

- If an endorsed project can demonstrate a need for additional funds during the financial year, anticipated underspends from other endorsed projects within the same funding theme can be used. These budget amendments will be reflected in the quarterly budget reporting to Council.
- The Environment Levy Policy and Program can be used for leveraging funding through grants and partnership opportunities offered by government and other organisations. However, future financial commitments cannot be made unless endorsed by council.

2. Environment Levy communication and reporting

- An annual Environment Levy progress report is prepared and presented to Council each year.
- Quarterly updates of the Environment Levy's endorsed Program are provided to Council using the appropriate reporting tool.
- The promotion and communication of Environment Levy funded projects and initiatives are to comply with the council endorsed Environment Levy "Look and Feel Guidelines".

3. Acquisition of environmentally significant land

- Allocated funding can be expended on costs associated with the land purchase, establishing legally binding protection mechanisms, planning and legal matters, and the establishment of the acquired land.
- Property development initiatives that maintain or enhance conservation and appropriate nature based recreational and environmental educational values may be undertaken on land acquired through the Environment Levy to raise additional revenue or recoup some of the costs associated with the acquisition.
- The Environment Levy revenue is not to be used to acquire land for parks where the primary purpose is recreation although recreation and economic opportunities are considered as ancillary values.
- If approved by council, additional funds may be borrowed to assist with purchasing environmentally significant land.
- Any acquisition and disposal of land is carried out in accordance with the *Local Government Act 2009*.
- Newly acquired land is established as per the requirements determined by an initial site assessment and property management plans.
- Establishment costs are allocated as a percentage of the annual capital acquisition funding allocation.
- Opportunities for purchasing environmentally significant lands through state and federal government funding programs are maximised.
- Acquisition funding may contribute towards the purchase of strategic land that contains environmental values that are consistent with the Environment Levy Acquisition Program and which provide a range of other corporate and strategic outcomes.

4. Major projects

- Major projects are to deliver regional or catchment scale environmental outcomes.
- Major projects are to align with the strategic directions of council's endorsed environmental strategies.
- Major projects are to deliver either environmental:
 - improvements through on-ground rehabilitation activities; or

- planning, management or research outputs to inform and assist with the implementation of council's endorsed environmental strategies, including catchment action plans.
- Major projects are to complement existing Environment Levy funded projects and the organisation's environmental management activities.

5. Community engagement and support

The Environment Levy's Partnerships and Grants funding is distributed in accordance with the endorsed guideline and associated policies. Community engagement and support initiatives / projects are to align with the strategic directions of council's environmental strategies/plans.

Community engagement and support initiatives / projects are to deliver:

- environmental improvements through on-ground activities; and
- increased environmental awareness through extension and training services.

Community engagement and support initiatives are to complement existing Environment Levy funded projects and the organisation's environmental management activities.

6. Environmental operational management

Funding supplements operational expenditure relevant to employee costs, materials and services costs and on-costs and overheads associated with the delivery of those nominated environmental operational management activities delivered by the Regional Strategy and Planning, Infrastructure Services and Community Services Departments.

A review of the environmental operational management theme is to be undertaken on an annual basis.

Annual allocations for ongoing maintenance costs of the conservation estate including Environment Levy acquired land are indexed to growth in the size of the Estate and the Consumer Price Index.

ROLES AND RESPONSIBILITIES

Council will review the Environment Levy charge and the associated Policy and Program annually.

Council officers will implement the Environment Levy Program and report on achievements in accordance with the endorsed Policy and associated guidelines.

The implementation of the Environment Levy Policy and Program is integrated across the organisation with Infrastructure Services, Community Services, Corporate and Legal Services and Regional Strategy and Planning involved in different aspects.

DEFINITIONS

Biodiversity - refers to the variety of all life forms - all the different plants, animals and micro-organisms, and the ecosystems of which they are a part.

Catchment – The area where water is collected by the natural landscape. In a catchment, all rain and run-off water eventually flows to a creek, river, lake or ocean, or into the groundwater system.

Ecological Sustainable Development (ESD) - refers to the principle of ensuring a continued quality of life now and for future generations. A widely used definition drawn up by the World Commission on Environment and Development in 1987 states 'development that meets the needs

of the present without compromising the ability of future generations to meet their own needs.' In practice ESD refers to social progress, environmental protection, sustainable resource use, and stable economic growth and is realised through the incorporation of social, economic and environmental considerations into decision-making processes.

Environment - refers to the term used to describe the natural (not man-made) environment of the region and includes the natural ecological systems of air, water, soil and associated species of flora and fauna.

Environmental Challenges – management challenges associated with the delivery of viable ecosystems that maintain biodiversity values and healthy waterways and foreshores.

Environment Levy - refers to a Levy raised by the Sunshine Coast Regional Council (in accordance with section 971 of the Queensland Local Government Act 2009), on all rateable properties within its jurisdiction, in order to assist with environmental protection and management.

Environment Levy Partnerships and Grants Funding– The Environment Levy Partnerships and Grants Program offers three levels of funding to assist private rural landholders and not-for-profit community groups to achieve a landscape approach to protecting and enhancing the region's natural assets. The delivery of the Program is supported by the Environment Levy Grants and Partnerships Guideline and the associated policy.

Environmentally significant lands - lands identified due to their environmental / biodiversity values, including their contribution to strategic ecological linkages and consolidation of core habitat areas.

Environmental Strategies/plans – refers to the council endorsed Biodiversity Strategy 2010-2020, Waterways and Coastal Management Strategy 2011-2021, Sunshine Coast Local Government Area Pest Management Plan 2012-2016, Sunshine Coast Regional Flying Fox Management Plan 2013-2016 and associated documentation.

Integrated Environment Team – refers to a team of representatives from Environmental Operations, Environment Policy and Development Services that oversee the development and implementation of the Environment Levy Program.

Major on ground rehabilitation projects – refers to large and specific environmental improvement projects that are implemented in any of the Sunshine Coast's catchments and dunal systems which deliver on ground actions including revegetation and associated maintenance, environmental weed management and livestock management in riparian areas. These projects are guided by respective catchment action plans and other council environmental strategies/plans.

Regional projects – refers to projects which have an outcome applicable to environmental management and improvement across the entire Sunshine Coast.

RELATED POLICIES AND LEGISLATION

- Animal Care & Protection Act 2001

- Environment Protection and Biodiversity Conservation Act 1999
- Local Government Act 2009
- Nature Conservation Act 1992
- Vegetation Management Act 1999
- Any other relevant State and Federal environmental, planning or cultural heritage legislation
- South East Queensland Regional Plan 2009-2031; and any future amendments
- Council's Corporate Plan 2014 - 2019
- Sunshine Coast Biodiversity Strategy 2010-2020
- Sunshine Coast Local Government Area Pest Management Plan 2012-2016
- Sunshine Coast Regional Flying Fox Management Plan 2013-2016
- Sunshine Coast Waterways and Coastal Management Strategy 2011-2021
- All other relevant Council Local Laws and Policies

Any other Council Policy, guideline or report that provides guidance to the Environment Levy Policy and Programs.

Version Control	Reason Trigger	Change (Y/N)	Date
1.0	Revised Environment Levy Policy	Yes	25 June 2013 (SM13/09)
2.0	Review of Environment Levy Policy and Program	Yes	19 June 2014 (OM14/85)
3.0	Review of Environment Levy Policy and Program	Yes	



Strategic Policy Environment Levy

Corporate Plan Reference:	3. An enviable lifestyle and environment: Maintaining and enhancing the region's natural assets, liveability and environmental credentials 3.1 Healthy natural ecosystems and protected remnant vegetation 3.2 Well managed and maintained open space, waterways and foreshore assets 3.3 A reputation for innovative environmental practices 3.4 A region shaped by clever planning and design
Endorsed by Council on:	19 June 2014
Policy Owner and Department:	Manager, Environment and Sustainability Policy Regional Strategy and Planning Department

BACKGROUND

The Sunshine Coast is valued for its environmental values, including its waterways and coastal foreshores and its diversity of native vegetation and animals—all of which help support the lifestyles and livelihoods of the region.

To assist in achieving Council's vision to be "*Australia's most sustainable region – vibrant, green, diverse*", the *Corporate Plan 2014-2019* identifies the organisation's responsibility to maintain and enhance the region's natural assets, which include our biodiversity, waterways and foreshores.

The Environment Levy is a key revenue source to assist in the implementation of council endorsed environmental strategies/plans.

POLICY PURPOSE

The purpose of this policy is to:

- inform the allocation of revenue raised through an Environment Levy on rateable properties in the Sunshine Coast Regional Council Local Government Area; and
- outline the arrangements for managing the Environment Levy allocations and program.

POLICY OUTCOMES

The outcomes of the application of this policy are:

- support for council to achieve its vision for the Sunshine Coast to be "Australia's most sustainable region – vibrant, green, diverse";
- ecological sustainable development;
- action which supports the implementation of council's environmental strategies/plans;
- action on key Sunshine Coast environmental challenges;
- acquisition, protection and management of environmentally significant land;
- effective environmental partnerships with a range of community, industry and government stakeholders;

- community environmental engagement and support initiatives; and
- an increased level of community awareness and engagement with regard to environmental issues.

POLICY SCOPE

The policy:

- provides direction for the allocation of funds and management of Environment Levy projects and initiatives that complement council's core environmental activities; and
- applies to all council endorsed projects and initiatives, that are funded or supported, wholly or partly with revenue from the Environment Levy.

POLICY STATEMENT

The Sunshine Coast Council recognises the protection and enhancement of the environment as a priority in maintaining the Sunshine Coast's natural advantage as a sustainable region.

The Environment Levy Program provides an important funding source for projects and initiatives, associated with the implementation of council's environmental strategies/plans. These directly address the protection and enhancement of the Sunshine Coast's environmental values including the region's biodiversity, waterways and coastal foreshore assets.

GUIDING PRINCIPLES

This policy is guided by the following principles:

- Effective, open and accountable program delivery;
- Protection, conservation, enhancement and effective and responsive management of the Sunshine Coast environment; and
- Working in partnership with the community, industry and government stakeholders.

ALLOCATION OF ENVIRONMENT LEVY REVENUE TO THE ENVIRONMENT LEVY PROGRAM

1. Environment Levy Program

The Environment Levy Program (the Program) consists of a range of projects and initiatives that deliver strategic and effective outcomes that protect and enhance the health of the Sunshine Coast's environmental values including the region's biodiversity, waterways and coastal foreshore assets.

A four year Program is developed and reviewed annually, in consultation with Council, preceding budget preparations.

The development of the Program, including annual revisions based on priorities and emerging needs and available funding is prepared.

The annual Program including proposed funding allocations is presented to Council for consideration and adoption during annual budget preparations.

2. Environment Levy Funding Themes

Environment Levy revenue is allocated to funding themes which are determined by council. The four themes are:

a) *Acquisition of environmentally significant land*

Acquisition of environmentally significant lands are part of a strategic approach to assist in the future protection and enhancement of the region's biodiversity values and ecological processes by protecting and expanding our ecological conservation areas.

Determining which properties will be acquired shall be achieved by compiling a regional acquisition priority list which will be guided by council's *Biodiversity Strategy 2010 – 2020* and considering other proposals in their own right. The identification and assessment of suitable properties is undertaken by the Integrated Acquisition Steering Committee.

In identifying properties for acquisition, the primary considerations include, existing biodiversity values, whole of life management costs, planning considerations, level of risk and threat and existing and future opportunities including, the creation of strategic and new habitat areas that build connectivity and the ability to secure the lands in a legally binding protection agreement in perpetuity. Ancillary values such as complementary recreation and economic opportunities are also considered.

In some circumstances appropriate properties may be considered for re-sale following the application of a legally binding protection mechanism.

b) *Major projects*

Delivery of major on ground rehabilitation projects and regional planning, management and research projects which inform the implementation of council's environmental strategies/plans to:

- provide viable and resilient ecosystems that maintain biodiversity values; and
- provide healthy waterways and foreshores.

The identification of suitable projects is determined by the Integrated Environment Team which is guided by council's environmental strategies/plans and considers a project's alignment with policies and plans, its environmental, economic and social benefits and financial implications.

High profile and integrated flagship projects that deliver major environmental outcomes for a given location may be considered by council to facilitate access to the Sunshine Coast's natural assets.

c) *Community engagement and support*

To build community capacity and stronger, effective partnerships with a range of stakeholders involved in the protection and enhancement of the Sunshine Coast environment. Funding is distributed to support the ongoing delivery of environmental partnership, grant, assistance and engagement initiatives and projects which:

- engage, value and support community organisations, landowners and volunteers across the region; and
- support community initiatives through appropriate provision of information, expertise and resources.

d) *Environmental Operational Management*

To support the delivery of Council's operational activities to manage the Sunshine Coast environment in accordance with Council's environmental strategies/plans and service levels.

The following environmental operational management activities will be supported:

- planning and operational management of Environment Levy acquired lands;
- fire management planning and operations for council managed lands;
- planning, programming and operational management of Council's environment education facilities;
- delivery of catchment conservation partnership initiatives;
- implementation of the *Sunshine Coast Local Government Area Pest Management Plan 2012-2016*, including education and engagement initiatives; and
- addressing flying fox community environmental issues including research, education and non-lethal dispersal in accordance with the Sunshine Coast Regional Flying Fox Management Plan 2013-2016.

3. Phase Out Arrangements

The funding associated with the '10 year transitional phase out arrangement' has been incorporated as an ongoing initiative within the Environmental Operational Management Theme. This initiative will be maintained at the 2013/14 allocation of \$1,683,204 and recognised as 'Environmental Management Expenses' within this theme.

MANAGEMENT OF ENVIRONMENT LEVY REVENUE ALLOCATIONS AND PROGRAM

The management of Environment Levy revenue allocations and the Program is guided by the following principles. Further details on the implementation of the Program are provided in the associated Environment Levy Policy Guideline.

1. Environment Levy revenue and restricted cash management

- The annual Environment Levy charge per rateable property is reviewed and determined by council annually as part of adopting its annual revenue statement.
- A four-year program of projects and initiatives is developed and supported by project management plans which outline expenditure and deliverables for each project.
- All revenue collected from the Environment Levy is allocated to council endorsed projects, and initiatives associated with the Environment Levy funding themes.
- All revenue collected including any revenue raised through approved Environment Levy business activities is held and accounted for separately from Council's general revenue.
- The amount of Environment Levy revenue allocated to each of the four primary funding themes is determined based on an assessment of annual priorities and emerging needs and endorsed by council.
- Environment Levy revenue, including restricted cash should not be available at any time for expenditure as general revenue.
- Any unspent funds associated with each of the four funding themes is returned to the Environment Levy restricted cash.
- Environment Levy restricted cash funds can be used in the development of the annual Environment Levy Program.
- Environment Levy restricted cash can be used to fund the acquisitions of land on the endorsed Land Acquisition Forward Program when allocated funds for this theme have been expended during the financial year (SM10/029).

- If an endorsed project can demonstrate a need for additional funds during the financial year, anticipated underspends from other endorsed projects within the same funding theme can be used. These budget amendments will be reflected in the quarterly budget reporting to Council.
- The Environment Levy Policy and Program can be used for leveraging funding through grants and partnership opportunities offered by government and other organisations. However, future financial commitments cannot be made unless endorsed by council.

2. Environment Levy communication and reporting

- An annual Environment Levy progress report is prepared and presented to Council each year.
- Quarterly updates of the Environment Levy's endorsed Program are provided to Council using the appropriate reporting tool.
- The promotion and communication of Environment Levy funded projects and initiatives are to comply with the council endorsed Environment Levy "Look and Feel Guidelines".

3. Acquisition of environmentally significant land

- Allocated funding can be expended on costs associated with the land purchase, establishing legally binding protection mechanisms, planning and legal matters, and the establishment of the acquired land.
- Property development initiatives that maintain or enhance conservation and appropriate nature based recreational and environmental educational values may be undertaken on land acquired through the Environment Levy to raise additional revenue or recoup some of the costs associated with the acquisition.
- The Environment Levy revenue is not to be used to acquire land for parks where the primary purpose is recreation although recreation and economic opportunities are considered as ancillary values.
- If approved by council, additional funds may be borrowed to assist with purchasing environmentally significant land.
- Any acquisition and disposal of land is carried out in accordance with the *Local Government Act 2009*.
- Newly acquired land is established as per the requirements determined by an initial site assessment and property management plans.
- Establishment costs are allocated as a percentage of the annual capital acquisition funding allocation.
- Opportunities for purchasing environmentally significant lands through state and federal government funding programs are maximised.
- Acquisition funding may contribute towards the purchase of strategic land that contains environmental values that are consistent with the Environment Levy Acquisition Program and which provide a range of other corporate and strategic outcomes.

4. Major projects

- Major projects are to deliver regional or catchment scale environmental outcomes.
- Major projects are to align with the strategic directions of council's endorsed environmental strategies.
- Major projects are to deliver either environmental:
 - improvements through on-ground rehabilitation activities; or

- planning, management or research outputs to inform and assist with the implementation of council's endorsed environmental strategies, including catchment action plans.
- Major projects are to complement existing Environment Levy funded projects and the organisation's environmental management activities.

5. Community engagement and support

The Environment Levy's Partnerships and Grants funding is distributed in accordance with the endorsed guideline and associated policies. Community engagement and support initiatives / projects are to align with the strategic directions of council's environmental strategies/plans.

Community engagement and support initiatives / projects are to deliver:

- environmental improvements through on-ground activities; and
- increased environmental awareness through extension and training services.

Community engagement and support initiatives are to complement existing Environment Levy funded projects and the organisation's environmental management activities.

6. Environmental operational management

Funding supplements operational expenditure relevant to employee costs, materials and services costs and on-costs and overheads associated with the delivery of those nominated environmental operational management activities delivered by the Regional Strategy and Planning, Infrastructure Services and Community Services Departments.

A review of the environmental operational management theme is to be undertaken on an annual basis.

Annual allocations for ongoing maintenance costs of the conservation estate including Environment Levy acquired land are indexed to growth in the size of the Estate and the Consumer Price Index.

ROLES AND RESPONSIBILITIES

Council will review the Environment Levy charge and the associated Policy and Program annually.

Council officers will implement the Environment Levy Program and report on achievements in accordance with the endorsed Policy and associated guidelines.

The implementation of the Environment Levy Policy and Program is integrated across the organisation with Infrastructure Services, Community Services, Corporate and Legal Services and Regional Strategy and Planning involved in different aspects.

DEFINITIONS

Biodiversity - refers to the variety of all life forms - all the different plants, animals and micro-organisms, and the ecosystems of which they are a part.

Catchment – The area where water is collected by the natural landscape. In a catchment, all rain and run-off water eventually flows to a creek, river, lake or ocean, or into the groundwater system.

Ecological Sustainable Development (ESD) - refers to the principle of ensuring a continued quality of life now and for future generations. A widely used definition drawn up by the World Commission on Environment and Development in 1987 states 'development that meets the needs

of the present without compromising the ability of future generations to meet their own needs.' In practice ESD refers to social progress, environmental protection, sustainable resource use, and stable economic growth and is realised through the incorporation of social, economic and environmental considerations into decision-making processes.

Environment - refers to the term used to describe the natural (not man-made) environment of the region and includes the natural ecological systems of air, water, soil and associated species of flora and fauna.

Environmental Challenges – management challenges associated with the delivery of viable ecosystems that maintain biodiversity values and healthy waterways and foreshores.

Environment Levy - refers to a Levy raised by the Sunshine Coast Regional Council (in accordance with section 971 of the Queensland Local Government Act 2009), on all rateable properties within its jurisdiction, in order to assist with environmental protection and management.

Environment Levy Partnerships and Grants Funding– The Environment Levy Partnerships and Grants Program offers three levels of funding to assist private rural landholders and not-for-profit community groups to achieve a landscape approach to protecting and enhancing the region's natural assets. The delivery of the Program is supported by the Environment Levy Grants and Partnerships Guideline and the associated policy.

Environmentally significant lands - lands identified due to their environmental / biodiversity values, including their contribution to strategic ecological linkages and consolidation of core habitat areas.

Environmental Strategies/plans – refers to the council endorsed Biodiversity Strategy 2010-2020, Waterways and Coastal Management Strategy 2011-2021, Sunshine Coast Local Government Area Pest Management Plan 2012-2016, Sunshine Coast Regional Flying Fox Management Plan 2013-2016 and associated documentation.

Integrated Environment Team – refers to a team of representatives from Environmental Operations, Environment Policy and Development Services that oversee the development and implementation of the Environment Levy Program.

Major on ground rehabilitation projects – refers to large and specific environmental improvement projects that are implemented in any of the Sunshine Coast's catchments and dunal systems which deliver on ground actions including revegetation and associated maintenance, environmental weed management and livestock management in riparian areas. These projects are guided by respective catchment action plans and other council environmental strategies/plans.

Regional projects – refers to projects which have an outcome applicable to environmental management and improvement across the entire Sunshine Coast.

RELATED POLICIES AND LEGISLATION

- Animal Care & Protection Act 2001

- Environment Protection and Biodiversity Conservation Act 1999
- Local Government Act 2009
- Nature Conservation Act 1992
- Vegetation Management Act 1999
- Any other relevant State and Federal environmental, planning or cultural heritage legislation
- South East Queensland Regional Plan 2009-2031; and any future amendments
- Council's Corporate Plan 2014 - 2019
- Sunshine Coast Biodiversity Strategy 2010-2020
- Sunshine Coast Local Government Area Pest Management Plan 2012-2016
- Sunshine Coast Regional Flying Fox Management Plan 2013-2016
- Sunshine Coast Waterways and Coastal Management Strategy 2011-2021
- All other relevant Council Local Laws and Policies

Any other Council Policy, guideline or report that provides guidance to the Environment Levy Policy and Programs.

Version Control	Reason Trigger	Change (Y/N)	Date
1.0	Revised Environment Levy Policy	Yes	25 June 2013 (SM13/09)
2.0	Review of Environment Levy Policy and Program	Yes	19 June 2014 (OM14/85)
<u>3.0</u>	<u>Review of Environment Levy Policy and Program</u>	<u>Yes</u>	

4.2.2 TRANSPORT LEVY POLICY 2016

File No:	Traffic and transport
Author:	Coordinator Transport Strategy and Policy Planning and Environment Department
Appendices:	App A - Proposed Transport Levy Policy 2016225 App B - Proposed Transport Futures Fund Plan233
Attachments:	Att 1 - Proposed Transport Levy Policy 2016 (showing track changes)239

PURPOSE

The purpose of this report is to formalise discussions with Council regarding the continuation of the Transport Levy in 2016/17, minor adjustments to the Transport Levy Policy and the introduction of a Transport Futures Fund Plan.

EXECUTIVE SUMMARY

It is proposed that the Policy be subject to minor updates to become the Transport Levy Policy 2016 at **Appendix A – Proposed Transport Levy Policy 2016** and be applied in 2016/17.

The Policy assists in ensuring that there is a positive and focused provision for the strategic transport network now and into the future to facilitate economic activity and benefits to the Sunshine Coast. The Policy maintains a focus on public transport improvements to support modal shift.

The Transport Futures Fund Plan at **Appendix B – Proposed Transport Futures Fund Plan** has been developed to guide the allocation of funding from the Transport Futures Fund.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled “Transport Levy Policy 2016”
- (b) adopt the Transport Levy Policy 2016 (Appendix A) and
- (c) endorse the proposed Transport Futures Fund Plan (Appendix B).

FINANCE AND RESOURCING

There are no finance and resourcing issues relevant to this report.

CORPORATE PLAN

Corporate Plan Goal:	<i>A new economy</i>
Outcome:	1.2 - New capital investment in the region
Operational Activity:	1.2.3.1 - Work closely with the Queensland Government and Building Queensland to elevate consideration and prioritisation of major infrastructure needs (in particular, road, rail and transport infrastructure) for the region

Corporate Plan Goal: *A strong community*
Outcome: 2.4 - People and places are connected
Operational Activity: 2.4.2.1 - Facilitate the delivery of efficient transport systems and connections through multi modal network planning and studies, and planning partnerships with the Department of Transport and Main Roads

Corporate Plan Goal: *A public sector leader*
Outcome: 5.2 - A financially sustainable organisation
Operational Activity: 5.2.4 - Coordinate the delivery of the tourism, environment, heritage and transport levies and report outcomes to Council as part of annual budget deliberations.

CONSULTATION

Internal Consultation

Internal communication has been maintained with relevant staff. Internal workshops have occurred with councillors.

External Consultation

There has been no external consultation for policy review and development of the Transport Futures Fund Plan.

Community Engagement

No direct community engagement has occurred as part of compiling this report.

PROPOSAL

The Transport Levy Policy receives annual review and is confirmed as required by Council. This report requests Council to:

- adopt an updated Transport Levy Policy 2016; and
- endorse the proposed Transport Futures Fund Plan.

Appendix B – Proposed Transport Futures Fund Plan has been developed to guide the consideration of any proposal seeking funding from the Transport Futures Fund. The proposed Transport Futures Fund Plan outlines the criteria and processes that a proposal should address, to enable a complying Council funding decision.

Legal

There are no legal implications relevant to this report.

Policy

The existing *Transport Levy Policy 2014* which is proposed to be superseded by the Transport Levy Policy 2016 at **Appendix A – Proposed Transport Levy Policy 2016**, applies to this report.

This report is in line with and supports Council's adopted *Sustainable Transport Strategy 2011* as follows:

Sustainable Transport Strategy Goal 1: *A shift to public and active transport modes is achieved*

Integrated Policy

1.1 Integrate services, pricing and passenger information systems and improve access to create a connected public transport network.

1.2 In partnership with State Agencies, improve public transport travel speed, frequency, reliability and patronage to increase vehicle productivity to more effectively compete with the reliability, speed and convenience of the private motor vehicle leading to increased patronage and revenues relative to service provision costs.

1.3 Improve accessibility, safety, convenience, coverage, and comfort of public transport service for all users including the disabled, seniors, and residents with limited access to services.

Risk

There are no apparent significant risks associated with continuing the Transport Levy Policy and its related initiatives.

Previous Council Resolution

Council Resolution (OM14/86) Ordinary meeting 19 June 2014

That Council:

- (a) *receive and note the report titled "Transport Levy Policy Report 2014/2015"*
- (b) *adopt the Transport Levy Policy 2014 (Appendix A) and*
- (c) *adopt the Proposed 2014/2015 Transport Levy Program (Appendix B).*

Related Documentation

The following documents have been referenced as a possible source of information for this report:

External documents: Nil

Council documents: *Transport Levy Policy 2014* (proposed to be superseded by the Transport Levy Policy 2016)

Sustainable Transport Strategy 2011.

Critical Dates

There are no critical dates relevant to this report.

Implementation

The implementation of the **Appendix A – Proposed Transport Levy Policy 2016** and the **Appendix B – Proposed Transport Futures Fund Plan** will be effective from 1 July 2016.



Strategic Policy Transport Levy 2016

Corporate Plan Reference:	<ol style="list-style-type: none"> 1. A New Economy – Providing the regional policy, regulatory settings and identity that shape a globally competitive economy <ol style="list-style-type: none"> 1.2 New capital investment in the region 1.2.3 Pursue commitments from other levels of government to progress significant regional infrastructure priorities. 2. A Strong Community – Supporting an engaged, resilient and inclusive community that embraces diversity <ol style="list-style-type: none"> 2.4 People and places are connected <ol style="list-style-type: none"> 2.4.2 Improve accessibility within and between communities. 2.4.4 Continue to deliver the <i>Sustainable Transport Strategy 2011-2031</i> and <i>Active Transport Plan 2011-2031</i> 2.4.5 Progress and deliver major road infrastructure projects.
Endorsed by Council on:	19 June 2014
Policy Owner and Department:	Manager Transport and Infrastructure Policy, Planning and Environment

BACKGROUND

The Transport Levy Policy ("Policy") is aimed to improving the strategic transport network and supporting its users. The Transport Levy Policy, while providing a strong focus on improvement of the public transport system for the Sunshine Coast, has an additional element related to securing and supporting the future strategic major transport needs of the Sunshine Coast, primarily relating to multi-modal corridors and infrastructure which assist economic activity.

POLICY PURPOSE

The purpose of this Policy is to provide a basis for utilising revenue raised through a Transport Levy ("Levy") on rateable properties in the Sunshine Coast Regional Council.

POLICY OUTCOMES

This Policy provides guidance to ensure the effective allocation of revenue raised from a Transport Levy.

This Policy applies to selected eligible transport improvements considered of value to residents, delivered in a timely manner and supporting economic activity.

This Policy will bring forward beneficial multi-modal transport outcomes beyond the reach of currently available funding streams

The creation of strong partnerships, particularly with the State, will be required which facilitate:

- Policy development;
- Improved advocacy capacity;

- Delivering catalyst projects with economic development potential;
- Directing 'seed funding' to attract improved and earlier transport investment by the State; and
- Partnering the delivery of mutually beneficial transport projects.

The outcomes of this policy include:

- Utilising transport levy revenue to fund or leverage selected eligible transport infrastructure for multi-modal transport outcomes that have priority but cannot be provided in a timely manner through existing funding mechanisms;
- Allowing Council to influence State and Federal Government transport network investments, or bringing forward of investments, to attract State and Federal funding;
- Enabling Council to enter into partnerships with the State Government, and potentially third party interests, to jointly fund selected eligible transport infrastructure and services;
- Enabling Council to fund selected eligible initiatives, projects and services for community benefit;
- Enabling Council to raise awareness within the community of travel choices, leading to a change of travel behaviour, to increase the use of sustainable transport and related network operation;
- An increased level of community awareness on the current and future transport issues facing the Sunshine Coast; and
- Building a transport futures fund directed at achieving long term multi-modal transport infrastructure outcomes.

POLICY SCOPE

This policy:

- Complements Council's vision for the Sunshine Coast to be Australia's most sustainable region;
- Supports the objectives of the *Sustainable Transport Strategy 2011-2031*;
- Applies to any new or continuing initiative that is funded with revenue from the Transport Levy;
- Applies to all councillors, Council staff, contractors and others that are associated with any existing or new transport levy initiatives;
- Supports multi-modal transport corridor planning and development providing for the future transport needs of the Sunshine Coast either as a sole participant or in a partnered way, primarily with the State Government;
- Assists in leveraging investment in projects to improve multi-modal transport infrastructure and services and to influence State and Federal Government funding priorities;
- Look to leverage outcomes related to major non-road based projects with the State and Federal Governments;
- Enables bringing forward selected major transport projects to achieve economic development outcomes for business and industry, particularly in partnership with others;
- Enables Council to create a 'Transport Futures Fund' to apply strategically and with a focus on the light rail initiative;
- Enables ready reaction to emerging issues;
- Seeks modal shift from private cars to public transport;

- Allows Council to be approached by external agencies, institutions and partners offering significant opportunities for consideration; and
- Applies to external agencies, institutions and partners to the extent possible.

POLICY STATEMENT

Sunshine Coast Council recognises the important role of all transport modes in providing for the movement of people and goods, thereby creating an economically viable and sustainable region. This commitment is demonstrated by activity through this levy and will assist in ensuring the Sunshine Coast is provided with sustainable travel choices and is able to cope with expected growth.

The State Government co-ordinates and delivers State roads, public transport (rail, bus, etc) and strategic cycle networks throughout Queensland through various Divisions of the Department of Transport and Main Roads (DTMR). Council expects the State to meet this role and the associated responsibilities but would consider providing ancillary support.

Council has a role in the local road, pedestrian and cycle networks predominantly. It is not intended for the Transport Levy to be linked directly to established transport programs financed through existing funding streams and mechanisms, except as indicated by the policy or as resolved by Council.

Integration of initiatives and timely programming of projects are essential to achieve viable transport networks to move people and goods.

The transition of people using cars to using more sustainable transport modes of travel (public and active transport) for some of their journeys, as growth continues, is necessary. This will help utilize the capacity of existing alternative networks and alleviate or delay the need for investment addressing road capacity constraints. This may be more relevant if there is any sustained onset of peak oil related travel impacts.

Resources and actions are primarily directed to purely local government and community outcomes. However, Sunshine Coast Regional Council could consider directing resources into partnering beneficial multi-modal transport projects in a timely manner and potentially consider participation in non-traditional areas in an informed, selected and limited way if there is direct community benefit.

The policy should not replace what can realistically be achieved through the effective use of existing revenues and mechanisms for effective land use planning and its integration with multi-modal transport solutions.

Potential examples of outcomes of the desired aims are:

- Roads – bring-forward selected beneficial multi-modal projects/initiatives with the State, solely by Council or with development, and
- Public Transport – improvements to infrastructure, services, stops, user systems, information systems, priority works

GUIDING PRINCIPLES

All revenue collected from the Transport Levy will be allocated to infrastructure, service improvement projects and initiatives and a Transport Futures Fund, in line with an indicative Five Year Program. Any unspent or uncommitted revenue raised each year identified at financial year's end (excluding valid commitments attracting carryover approval) will be transferred into the Transport Futures Fund.

All revenue collected will be accounted for separately to ensure that established guidelines governing collection and the management of allocations to specific qualifying projects and outcomes are followed. Any subsidy, grant or revenue generated by the application of this funding

should also be included in the accounting of the Levy, with accrued interest on funds held in the Transport Futures Fund remaining with the Transport Futures Fund.

An indicative Five Year Program will be developed containing infrastructure, services and other initiative categories. It should contain a generic outline of the types of projects or categories, expected timeframes, the proposed budget or its expected indicative cost. A high level indicative Five Year Program will be incorporated as part of the annual Budget process and be used as a guide. A longer planning horizon will be applied when considering investing in a Transport Futures Fund.

Activities for which revenue from the levy can be used include:

- Investing in major transport works that have a genuine multi-modal outcome, with significant benefit(s) to public transport capability, including road improvements which may include bus and transit priority measures on Council roads and green links to provide penetration through developed areas;
- Contributing to trial flexible public transport services to meet specific community needs (subject to investigation, demonstration of value for money, consideration of other benefits, and approvals);
- Supporting DTMR, and specifically its TransLink Division, with meeting Disability Discrimination Act, (DDA) compliance in relation to kerbside public transport infrastructure assigned as Council assets;
- Take advantage of other activities benefitting public transport by supporting issues such as roll out of real time information, education material, etc.;
- Advancing selected investigations to bring forward beneficial strategic transport outcomes on the Sunshine Coast (includes light rail);
- Working in partnership with DTMR to bring forward infrastructure improvements giving public transport an advantage (priority measures) on State roads and corridors, such as queue jumps and green links which have local benefit;
- Selected major planned multi-modal infrastructure improvements which have a significant economic and community benefit; and
- Transport network improvements related to maximizing the use of the existing network, providing greater capacity, adding resilience and limiting delays while maintaining safety. This may include network connectivity improvement works;
- Assist with strategies and actions to improve transport outcomes for specific eligible events;
- Generally, investments in selected travel behaviour programs to improve economic outcomes and increased public transport patronage on the Sunshine Coast;
- The establishment of a 'Transport Futures Fund' to focus on the light rail initiative and to target specific strategic, long term, staged, transport projects which secure the transport needs of the Sunshine Coast; and
- Provision of short term (project based) resources to specifically plan, develop or deliver approved projects and initiatives under the Levy.

Activities for which revenue from the levy cannot be used include:

- Funding must not be directed towards maintenance costs for transport infrastructure;
- Funding must not be directed towards employing long term resources to specifically plan, develop or deliver approved projects and initiatives under the Transport Levy;
- Funding must not be applied to programs or projects beyond the scope of this policy;

- Funding must not be applied to initiatives that could be identified as funding 'business as usual' activities by DTMR which would normally occur or be required if the Levy was not in place, except as directed by Council. This also includes the:
 - provision of new services, or the improvement of existing services, related to known development proposals or specific milestones;
 - ability to procure improvement through statutory or other mechanisms; and
 - improvement of a minor change or an operationally necessary matter.

ROLES AND RESPONSIBILITIES

Council as a Local Government is not tasked with managing or operating public transport. This is legislated as a State responsibility and the community would expect this responsibility to be met.

Council will set and monitor the Transport Levy Policy and associated activities.

The Mayor and Transport Portfolio Councillor will establish a relationship with the Minister(s) for Transport and Main Roads.

Council staff will establish and maintain a working relationship with relevant officers of the Department of Transport and Main Roads and public transport providers.

Implementation responsibility

An indicative Five Year Program and a longer term plan relating to a Transport Futures Fund are to be developed and managed through the Planning and Environment Department with input from Infrastructure Services Department.

Any application of the Transport Futures Fund will be guided by the Transport Futures Fund Plan and applied through a resolution of Council or through a budget review process.

Implementation of annual initiatives will occur in line with the substantive role of the respective Council Department or under direction, as appropriate.

Implementation guidelines

Projects and initiatives approved for funding under the Transport Levy should conform to the guiding principles of this Policy. Additionally they should conform to any existing business policy or specifically introduced guidelines to apply across all or to specific projects.

The amount of the Levy and its method of application will be determined through the annual budget process. The status of the Levy will be reported at least annually to Council and overall progress monitored by the Chief Executive Officer.

An indicative Five Year Program will be:

- developed and reviewed annually, to ensure the transport infrastructure and services improvements needs of the Sunshine Coast is being best served;
- incorporated with budget papers/submissions; and
- reviewed annually as part of the Council budget cycle or as directed to ensure the Policy outcomes remain in focus.

Recognise and promote the results of the Levy through effective signing of infrastructure projects and services.

Communications

All relevant matters will primarily be communicated through the Council website and other methods as appropriate and as opportunities arise.

Review

This Policy will be reviewed in line with all policies upon the election of a new Council, every four years or as directed by Council.

MEASUREMENT OF SUCCESS

A reduced rate of vehicle registrations compared to the rate of population growth.

Increased patronage levels of public transport on the Sunshine Coast.

Successfully partnered transport projects between Council and the State Government

Improved funding levels for future multi-modal transport infrastructure improvements on the Sunshine Coast.

Progress toward meeting the requirements of the Disability Standards for Accessible Public Transport under the Disability Discrimination Act 1992 which sets the following timelines by which all bus stops are required to comply:

- 31 Dec 2107 – 90% of bus stops, and
- 31 Dec 2022 – 100% of bus stops.

Improvements to public transport services in terms of coverage of urban residential areas.

DEFINITIONS

Department of Transport and Main Roads (DTMR) – plans, integrates and manages the road, rail and bus networks across Queensland through:

- TransLink Division dealing with the current and short term public transport network and also regulates and manages taxi services, limousine services and other transport services
- Policy, Planning and Investment Division dealing with planning for longer term public transport infrastructure and service network as well as the strategic road network
- Regional Offices dealing with local road planning studies and delivery of State transport programs

Business as usual – describes all activities through the usual roles and responsibilities by any entity which would normally have occurred, or be required, without the existence of the levy.

RELATED POLICIES AND LEGISLATION

Legislation

The following is a listing of legislation which may play a role in this policy:

- Local Government Act 2009
- Local Government Regulation 2012
- Transport Operations (Road Use Management) Act 1995
- Traffic Regulation 1962
- Transport Operations (Road Use Management—Road Rules) Regulation 2009
- Transport Planning and Coordination Act 1994
- Transport Planning and Coordination Regulation 2005
- Transport Operations (Passenger Transport) Act 1994
- Transport Operations (Passenger Transport) Regulation 2005
- Transport Operations (Passenger Transport) Standard 2010
- Transport Infrastructure Act 1994

- Transport Infrastructure (Rail) Regulation 2006
- Transport Infrastructure (State-controlled Roads) Regulation 2006
- Disability Discrimination Act 1992

Standards

- Australian Standards – various
- Public Transport Infrastructure Manual

Internal Documents (include)

- Sustainable Transport Strategy 2011-2031
- Indicative 5 Year Transport Levy Program (annually reviewed)
- Transport Futures Fund Plan (when adopted)
- Expenditure Guidelines (when developed)

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Create new Transport Levy Policy 2014		OM14/86	19 June 2014
2.0	Non-material change. [Clarification of treatment of accrued interest related to the Transport Futures Fund.]	Y	Policy Owner	9 February 2015
3.0	Present to new 2016 Council for endorsement. Non-material change. [Minor wording and title updating]			



Transport Futures Fund Plan 2016

Corporate Plan Reference:	1.2 New capital investment in the region 2.4 People and places are connected 3.4 A region shaped by clever planning and design
Policy Reference:	Transport Levy Policy
Endorsed by Council on:	
Policy Owner and Department:	Manager Transport and Infrastructure Policy, Planning and Environment

BACKGROUND

The Transport Futures Fund Plan ("Plan") is required to guide investment of the Transport Futures Fund ("Fund") and support the Transport Levy Policy ("Policy").

PURPOSE

This Plan provides a basis for utilising the funding raised through the Policy and allocated to the Fund which:

- Gives Council a funding capacity for specific projects
- Will be applied selectively by Council direction after consideration of a detailed proposal lodged under the Plan
- Enables decisions which help secure the strategic long term transport needs for the community

SCOPE

The Transport Futures Fund is tasked with the funding of strategically beneficial transport outcomes for the Sunshine Coast, where such funding would not otherwise be available in a timely manner.

This is likely to include the provision of projects and initiatives aimed at achieving major, long term, multi-modal infrastructure outcomes and strategies such as:

- Major transport projects
- Major transport corridors – protection or acquisition
- Light Rail contribution (and potential precursors)
- Bring forward of major transport elements
- Futures Fund accumulation

The Fund should not replace the funding of projects that can realistically be delivered through the timely and effective use of existing capital programs, revenues and mechanisms for effective land use planning.

FINANCIAL

The Fund can receive contributions from the revenue raised through the Levy applied under the Policy on a regular or irregular basis. Additional funding can be received from any dedicated increases to the Levy applied under the Policy as directed by Council.

The accumulation of revenue in the Fund is a valid scenario awaiting the direction of Council.

The Fund can only be expended through a formal direction of Council.

The intention is that the Fund be directed at achieving major long term multi-modal transport infrastructure outcomes beyond the reach of currently available funding streams.

EVALUATION CRITERIA

Sunshine Coast Council recognises the important role transport plays in providing for the movement of people and goods, thereby creating an economically viable, egalitarian and sustainable region. A number of current transport programs and funding mechanisms exist and it is not intended that the Fund replaces or relies on these. It can be used as complementing existing arrangements to achieve desired outcomes.

Any proposal will initially need to be assessed for qualification and subjected to the attached 'Proposal Filtering Process'.

Qualifying projects or initiatives will then be evaluated against the following criteria:

- Strategic - wider transport network benefit
- Long term – deals with today but provides for future needs ['beyond now']
- Multi-Modal – provides for more than car based solution (preferable)
- Infrastructure – creates or results in a Council asset (preferable)
- Timing / Bring forward
- Scale – physical and financial.

The following matters inform further consideration and refinement of a proposal:

- Sole or Partnered
- Staged or ultimate solution
- Multi-Modal – provides for more than car based solution (preferable).

To assist evaluation, proposals will respond to each of the above criteria and associated matters and describe the scope and timing of work to which any funding will be applied. Additionally, the funding required, its timing and how it is provided will be detailed.

Any proposal provided to Council for use of the Transport Futures Fund will include a core of information which includes these evaluations, options considerations, risks in progressing or not, the community benefit to be derived and all other relevant supporting information.

ROLES AND RESPONSIBILITIES

Implementation responsibility

All proposal submissions and preliminary evaluations will be submitted to the Transport and Infrastructure Policy Branch for compliance check, review and submission to Council for decision.

Any application of the Fund will be through a resolution of Council. As such, the supporting documentation considered by Council will outline the overall process and the relevant roles and responsibilities to achieve the timely outcome including ongoing status reporting.

Implementation guidelines

Projects funded under the Transport Futures Fund should conform to the Policy requirements and to any existing business policy or specifically introduced guidelines to apply across all, or to specific, projects.

The amount of the funds in the Transport Futures Fund and its application will be reported at least annually to Council.

Review

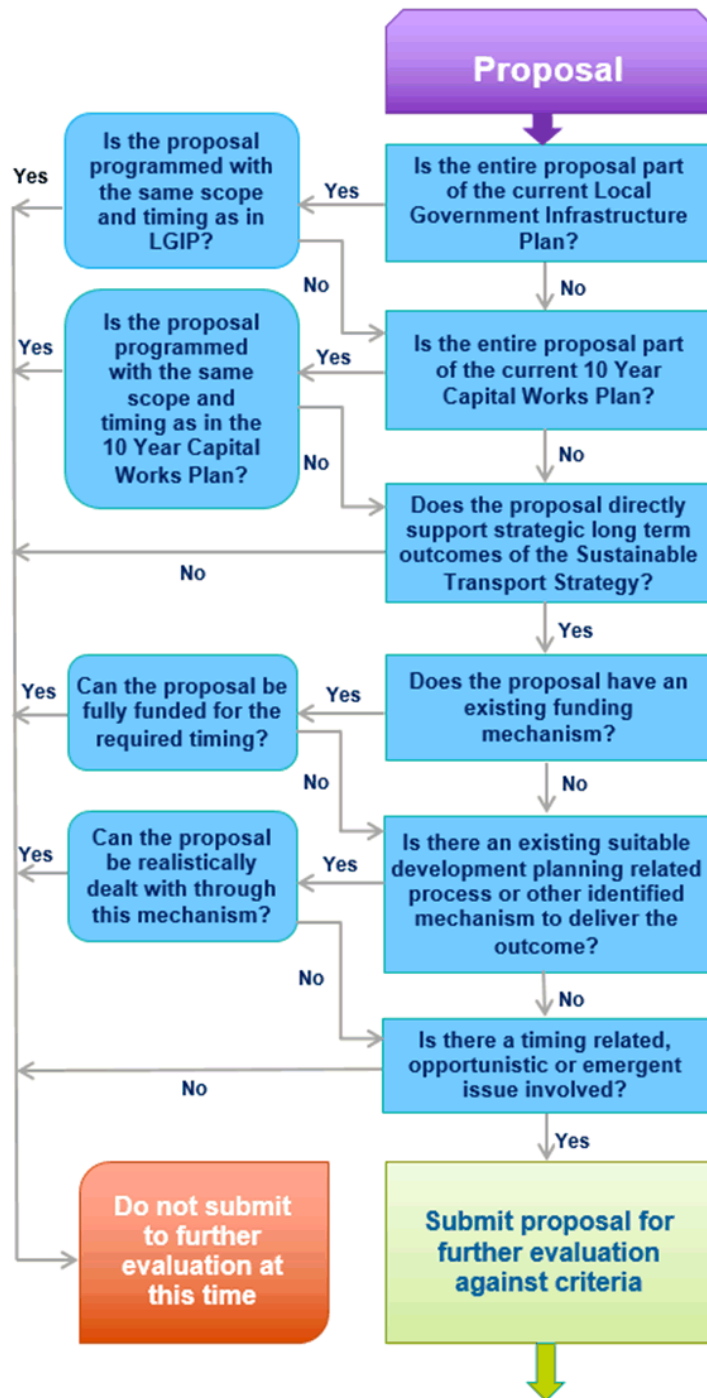
The Plan will be reviewed in line with any review of the Policy.

ALLOCATIONS

All allocations of funding directed by Council will be recorded in the following schedule for ready reference.

Ref	Project / Initiative	Funds Allocated	Direction Reference	Timing

Proposal Filtering Process



Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Draft Transport Futures Fund Plan 2016			



Strategic Policy Transport Levy 201~~6~~⁴

Corporate Plan Reference:	<ol style="list-style-type: none"> 1. A New Economy – Providing the regional policy, regulatory settings and identity that shape a globally competitive economy <ol style="list-style-type: none"> 1.2 New capital investment in the region 1.2.3 Pursue commitments from other levels of government to progress significant regional infrastructure priorities. 2. A Strong Community – Supporting an engaged, resilient and inclusive community that embraces diversity <ol style="list-style-type: none"> 2.4 People and places are connected <ol style="list-style-type: none"> 2.4.2 Improve accessibility within and between communities. 2.4.4 Continue to deliver the <i>Sustainable Transport Strategy 2011-2031</i> and <i>Active Transport Plan 2011-2031</i> 2.4.5 Progress and deliver major road infrastructure projects.
Endorsed by Council on:	19 June 2014
Policy Owner and Department:	Manager Transport and Infrastructure Policy, Regional Strategy and Planning and Environment

BACKGROUND

The Transport Levy Policy ("Policy") ~~lists options for~~ is aimed to improving the strategic transport network and supporting its users. The Transport Levy Policy, while providing a strong focus on improvement of the public transport system for the Sunshine Coast, has an additional element related to securing and supporting the future strategic major transport needs of the Sunshine Coast, primarily relating to multi-modal corridors and infrastructure which assist economic activity.

POLICY PURPOSE

The purpose of this Policy is to provide a basis for utilising revenue raised through a Transport Levy ("Levy") on rateable properties in the Sunshine Coast Regional Council.

POLICY OUTCOMES

This Policy provides guidance to ensure the effective allocation of revenue raised from a Transport Levy.

This Policy applies to selected eligible transport improvements considered of value to residents, delivered in a timely manner and supporting economic activity.

This Policy will bring forward beneficial multi-modal transport outcomes beyond the reach of currently available funding streams

The creation of strong partnerships, particularly with the State, will be required which facilitate:

- Policy development;
- Improved advocacy capacity;

- Delivering catalyst projects with economic development potential;
- Directing 'seed funding' to attract improved and earlier transport investment by the State; and
- Partnering the delivery of mutually beneficial transport projects.

The outcomes of this policy include:

- Utilising transport levy revenue to fund or leverage selected eligible transport infrastructure for multi-modal transport outcomes that have priority but cannot be provided in a timely manner through existing funding mechanisms;
- Allowing Council to influence State and Federal Government transport network investments, or bringing forward of investments, to attract State and Federal funding;
- Enabling Council to enter into partnerships with the State Government, and potentially third party interests, to jointly fund selected eligible transport infrastructure and services;
- Enabling Council to fund selected eligible initiatives, projects and services for community benefit;
- Enabling Council to raise awareness within the community of travel choices, leading to a change of travel behaviour, to increase the use of sustainable transport and related network operation;
- An increased level of community awareness on the current and future transport issues facing the Sunshine Coast; and
- Building a transport futures fund directed at achieving long term multi-modal transport infrastructure outcomes.

POLICY SCOPE

This policy:–

- Complements Council's vision for the Sunshine Coast to be Australia's most sustainable region;
- Supports the objectives of the *Sustainable Transport Strategy 2011-2031*;
- Applies to any new or continuing initiative that is funded with revenue from the Transport Levy;
- Applies to all councillors, Council staff, contractors and others that are associated with any existing or new transport levy initiatives;
- Supports multi-modal transport corridor planning and development providing for the future transport needs of the Sunshine Coast either as a sole participant or in a partnered way, primarily with the State Government;
- Assists in leveraging investment in projects to improve multi-modal transport infrastructure and services and to influence State and Federal Government funding priorities;
- Look to leverage outcomes related to major non-road based projects with the State and Federal Governments;
- Enables bringing forward selected major transport projects to achieve economic development outcomes for business and industry, particularly in partnership with others;
- Enables Council to create a 'Transport Futures Fund' to apply strategically and with a focus on the light rail initiative;
- Enables ready reaction to emerging issues;
- Seeks modal shift from private cars to public transport;

- Allows Council to be approached by external agencies, institutions and partners offering significant opportunities for consideration; and
- Applies to external agencies, institutions and partners to the extent possible.

POLICY STATEMENT

Sunshine Coast Council recognises the important role of all transport modes in providing for the movement of people and goods, thereby creating an economically viable and sustainable region. This commitment is demonstrated by activity through this levy and will assist in ensuring the Sunshine Coast is provided with sustainable travel choices and is able to cope with expected growth.

The State Government co-ordinates and delivers State roads, public transport (rail, bus, etc) and strategic cycle networks throughout Queensland through various Divisions of the Department of Transport and Main Roads (DTMR). Council expects the State to meet this role and the associated responsibilities but would consider providing ancillary support.

Council has a role in the local road, pedestrian and cycle networks predominantly. It is not intended for the Transport Levy to be linked directly to established transport programs financed through existing funding streams and mechanisms, except as indicated by the policy or as resolved by Council.

Integration of initiatives and timely programming of projects are essential to achieve viable transport networks to move people and goods.

The transition of people using cars to using more sustainable transport modes of travel (public and active transport) for some of their journeys, as growth continues, is necessary. This will help utilize the capacity of existing alternative networks and alleviate or delay the need for investment addressing road capacity constraints. This may be more relevant if there is any sustained onset of peak oil related travel impacts.

Resources and actions are primarily directed to purely local government and community outcomes. However, Sunshine Coast Regional Council could consider directing resources into partnering beneficial multi-modal transport projects in a timely manner and potentially consider participation in non-traditional areas in an informed, selected and limited way if there is direct community benefit.

The policy should not replace what can realistically be achieved through the effective use of existing revenues and mechanisms for effective land use planning and its integration with multi-modal transport solutions.

Potential examples of outcomes of the desired aims are:

- Roads – bring-forward selected beneficial multi-modal projects/initiatives with the State, solely by Council or with development, and
- Public Transport – improvements to infrastructure, services, stops, user systems, information systems, priority works

GUIDING PRINCIPLES

All revenue collected from the Transport Levy will be allocated to infrastructure, service improvement projects and initiatives and a Transport Futures Fund, in line with an indicative Five Year Program. Any unspent or uncommitted revenue raised each year ~~and~~ identified at financial year's end (excluding valid commitments attracting carryover approval) will be transferred into the Transport Futures Fund.

All revenue collected will be ~~strictly~~ accounted for separately to ensure that established guidelines governing collection and the management of allocations to specific qualifying projects and outcomes are followed. Any subsidy, grant or revenue generated by the application of this funding should also be included in the accounting of the Levy, with accrued interest on funds held in the

Transport Futures Fund remaining with the ~~Transport Levy and in particular, the~~ Transport Futures Fund.

An indicative Five Year Program will be developed containing infrastructure, services and other initiative categories. It should contain a generic outline of the types of projects or categories, expected timeframes, the proposed budget or its expected indicative cost. A high level indicative Five Year Program will be incorporated as part of the annual Budget process and be used as a guide. A longer planning horizon will be applied when considering investing in a Transport Futures Fund.

Activities for which revenue from the levy can be used include:

- Investing in major transport works that have a genuine multi-modal outcome, with significant benefit(s) to public transport capability, including road improvements which may include bus and transit priority measures on Council roads and green links to provide penetration through developed areas;
- Contributing to trial flexible public transport services to meet specific community needs (subject to investigation, demonstration of value for money, consideration of other benefits, and approvals);
- Supporting DTMR, and specifically its TransLink Division, with meeting Disability Discrimination Act, (DDA) compliance in relation to kerbside public transport infrastructure assigned as Council assets;
- Take advantage of other activities benefitting public transport ~~benefited activities~~ by supporting issues such as roll out of real time information, education material, etc.;
- Advancing selected investigations to bring forward beneficial strategic transport outcomes on the Sunshine Coast (includes light rail);
- Working in partnership with DTMR to bring forward infrastructure improvements giving public transport an advantage (priority measures) on State roads and corridors, such as queue jumps and green links which have local benefit;
- Selected major planned multi-modal infrastructure improvements which have a significant economic and community benefit; and
- Transport network improvements related to maximizing the use of the existing network, providing greater capacity, adding resilience and limiting delays while maintaining safety. This may include network connectivity improvement works;
- Assist with strategies and actions to improve transport outcomes for specific eligible events;
- Generally, investments in selected travel behaviour programs to improve economic outcomes and increased public transport patronage on the Sunshine Coast;
- The establishment of a 'Transport Futures Fund' to focus on the light rail initiative and to targeted to specific strategic, long term, staged, transport projects which secure the transport needs of the Sunshine Coast; and
- Provision of short term (project based) resources to specifically plan, ~~and~~ develop or deliver approved projects ~~and initiatives under to be implemented through~~ the Levy.

Activities for which revenue from the levy cannot be used include:

- Funding must not be directed towards maintenance costs for transport infrastructure;
- Funding must not be directed towards employing long term resources to specifically plan, ~~and~~ develop or deliver approved projects ~~and initiatives to be implemented through~~ under the Transport Levy ~~revenue~~;
- Funding must not be applied to programs or projects beyond the scope of this policy;

- Funding must not be applied to initiatives that could be identified as funding 'business as usual' activities by DTMR which would ~~be~~ normally occur or be required if the Levy was not in place, except as directed by Council. This also includes the:
 - provision of new services, or the improvement of existing services, related to known development proposals or specific milestones;
 - ability to procure improvement through statutory or other mechanisms; and
 - improvement of a minor change or an operationally necessary matter.

ROLES AND RESPONSIBILITIES

Council as a Local Government is not tasked with managing or operating public transport. This is legislated as a State responsibility and the community would expect this responsibility to be met.

Council will set and monitor the Transport Levy Policy and associated activities.

The Mayor and Transport Portfolio Councillor will establish a relationship with the Minister(s) for Transport and Main Roads ~~and the Assistant Minister for Public Transport~~.

Council staff will establish and maintain a working relationship with relevant officers of the Department of Transport and Main Roads and public transport providers.

Implementation responsibility

An indicative Five Year Program and a longer term plan relating to a Transport Futures Fund are to be developed and managed through the ~~Regional Strategy and Planning~~ and Environment Department with input from ~~the~~ Infrastructure Services Department.

Any application of the Transport Futures Fund will be guided by the Transport Futures Fund Plan and applied through a resolution of Council or through a budget review process.

Implementation of annual initiatives will occur in line with the substantive role of the respective Council Department or under direction, as appropriate.

Implementation guidelines

Projects and initiatives approved for funding under the Transport Levy should conform to the guiding principles of this ~~P~~policy. Additionally they should conform to any existing business policy or specifically introduced guidelines to apply across all or to specific projects.

The amount of the Levy and its method of application will be determined through the annual budget process. The status of the Levy will be reported at least annually to Council and overall progress monitored by the Chief Executive Officer.

An indicative Five Year Program will be:

- developed and reviewed annually, to ensure the transport infrastructure and services improvements needs of the Sunshine Coast is being best served;
- incorporated with budget papers/submissions; and
- reviewed annually as part of the Council budget cycle or as directed to ensure the Policy outcomes remain in focus.

Recognise and promote the results of the Levy through effective signing of infrastructure projects and services.

Communications

All relevant matters will primarily be communicated through the Council website and other methods as appropriate and as opportunities arise.

Review

This Policy will be reviewed in line with all policies upon the election of a new Council, every four years or as directed by Council.

MEASUREMENT OF SUCCESS

A reduced rate of vehicle registrations compared to the rate of population growth.

Increased patronage levels of public transport on the Sunshine Coast.

Successfully partnered transport projects between Council and the State Government

Improved funding levels for future multi-modal transport infrastructure improvements on the Sunshine Coast.

Progress toward meeting the requirements of the Disability Standards for Accessible Public Transport under the Disability Discrimination Act 1992 which sets the following timelines by which all bus stops are required to comply:

- 31 Dec 2107 – 90% of bus stops, and
- 31 Dec 2022 – 100% of bus stops.

Improvements to public transport services in terms of coverage of urban residential areas.

DEFINITIONS

Department of Transport and Main Roads (DTMR) – plans, integrates and manages the road, rail and bus networks across Queensland through:

- TransLink Division dealing with the current and short term public transport network and also regulates and manages taxi services, limousine services and other transport services
- Policy, Planning and Investment Division dealing with planning for longer term public transport infrastructure and service network as well as the strategic road network
- Regional Offices dealing with local road planning studies and delivery of State transport programs

Business as usual – describes all activities through ~~the~~ usual ~~the~~ roles and responsibilities by any entity which would normally have occurred, or be required, without the existence of the levy.

RELATED POLICIES AND LEGISLATION

Legislation

The following is a listing of legislation which may play a role in this policy:

- Local Government Act 2009
- Local Government Regulation 2012
- Transport Operations (Road Use Management) Act 1995
- Traffic Regulation 1962
- Transport Operations (Road Use Management—Road Rules) Regulation 2009
- Transport Planning and Coordination Act 1994
- Transport Planning and Coordination Regulation 2005
- Transport Operations (Passenger Transport) Act 1994
- Transport Operations (Passenger Transport) Regulation 2005
- Transport Operations (Passenger Transport) Standard 2010
- Transport Infrastructure Act 1994

- Transport Infrastructure (Rail) Regulation 2006
- Transport Infrastructure (State-controlled Roads) Regulation 2006
- Disability Discrimination Act 1992

Standards

- Australian Standards – various
- Public Transport Infrastructure Manual (~~May 2012~~)

Internal Documents (include)

- Sustainable Transport Strategy 2011-~~2031~~
- Indicative 5 Year Transport Levy Program (annually reviewed)
- Transport Futures Fund Plan (when ~~developed~~adopted)
- Expenditure Guidelines (when developed)

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Create new Transport Levy Policy 2014		OM14/86	19 June 2014
2.0	<u>Non-material change.</u> <u>[Clarification of treatment of accrued interest related to the Transport Futures Fund.]</u>	<u>Y</u>	<u>Policy Owner</u>	<u>9 February 2015</u>
<u>3.0</u>	<u>Present to new 2016 Council for endorsement.</u> <u>Non-material change.</u> <u>[Minor wording and title updating]</u>			

4.3 COMMUNITY SERVICES**4.3.1 HERITAGE LEVY POLICY 2016**

File No:	Council meetings	
Author:	Coordinator Cultural Heritage Services Community Services Department	
Appendices:	App A - Heritage Levy Policy 2016	253
Attachments:	Att 1 - Heritage Levy Policy Tracked	261

PURPOSE

The purpose of this report is to present the revised Strategic Policy – Heritage Levy to Council for consideration and adoption.

EXECUTIVE SUMMARY

Sunshine Coast Council initially endorsed the Strategic Policy - Heritage Levy in June 2010. The purpose of the policy is to outline cultural heritage and administrative principles that provide direction for allocation of the Heritage Levy revenue in an effective, open and accountable way.

Amendments to the current Strategic Policy – Heritage Levy were recommended and discussed during the 2016/2017 budget deliberations. The amendments made to the 2010 Policy acknowledge the role of the more recently endorsed Sunshine Coast Heritage Plan 2015-2020, including the five year program of projects outlined in the implementation plan, in informing the annual Cultural Heritage Levy Program.

The changes to the Strategic Policy specifically:

- Reference the Sunshine Coast Heritage Plan throughout the document.
- Align the Policy Outcomes to the five key heritage outcomes in the Heritage Plan (ie Knowledge, Conservation, Support, Communication and Advocacy).
- Introduce a Heritage Futures Fund aimed at ensuring potential infrastructure requirements that may be identified as part of a number of actions outlined in the Heritage Plan.

The introduction of a futures fund will ensure a percentage of the levy is set aside to create an ongoing sinking fund for the Heritage Plan outcomes.

The revised Strategic Policy – Heritage Levy is provided as Appendix A. A tracked change version of the policy which shows all amendments is provided as Attachment 1.

OFFICER RECOMMENDATION

That Council:

- receive and note the report titled “Heritage Levy Policy 2016” and**
- endorse the revised Strategic Policy – Heritage Levy 2016 (Appendix A).**

FINANCE AND RESOURCING

The Strategic Policy – heritage Levy directs the allocation of the Heritage Levy revenue towards endorsed projects and programs.

The revised Policy allows for a percentage of the levy, as determined annually by Council, to be set aside to create an ongoing “Heritage Futures Fund” to deliver infrastructure outcomes as outlined in the endorsed Sunshine Coast Heritage Plan 2015-2020.

Council reviews both the amount of the Cultural Heritage Levy Program and the proposed levy program as part of adopting its annual revenue statement.

CORPORATE PLAN

Corporate Plan Goal:	<i>A strong community</i>
Outcome:	2.3 - Culture, heritage and diversity are valued and embraced
Operational Activity:	2.3.1 - Finalise the Heritage Plan to guide the identification, protection, conservation, management, celebration and communication of the region’s heritage

CONSULTATION

Portfolio Councillor Consultation

- February 2016: Councillor Jenny McKay (Former Community Policy and Programs Portfolio Councillor, Chairperson Sunshine Coast Heritage Reference Group)
- May 2016: Councillor Rick Baberowski, Portfolio Councillor Transport, the Arts and Heritage, Chairperson Sunshine Coast Heritage Reference Group.

Internal Consultation

- Director, Community Services Branch
- Manager, Community Relations, Community Services
- Coordinator, Community Programs and Events, Community Services
- Manager, Strategic Planning, Regional Strategy and Planning

External Consultation

The revisions to the Policy were developed in consultation with the endorsed Sunshine Coast Heritage Reference Group (SCHRAG).

Community Engagement

There has been no further community engagement undertaken in relation to this report. The Cultural Heritage Levy Program 2016/2017 aligns with the Sunshine Coast Heritage Plan 2015-2020 which underwent an extensive community engagement process.

PROPOSAL

Sunshine Coast Council initially endorsed the Strategic Policy - Heritage Levy in June 2010. The purpose of the Policy is to outline cultural heritage and administrative principles that provide direction for allocation of the Heritage Levy revenue in an effective, open and accountable way.

Amendments to the current Strategic Policy – Heritage Levy were recommended and discussed during the 2016/2017 budget deliberations. The amendments made to the 2010 Policy acknowledge the role of the more recently endorsed Sunshine Coast Heritage Plan 2015-2020, including the five year program of projects outlined in the implementation plan, in informing the annual Cultural Heritage Levy Program.

The proposed amendments broadly respond to the delivery of Sunshine Coast Heritage Plan 2015-2020:

Action 3.2.2 Review the Heritage Levy Policy in consideration of this Plan to ensure, and to maximum benefit and equitable distribution of heritage levy funds.

The amendments to the Strategic Policy specifically:

- Reference the Heritage Plan throughout the document.
- Align the Policy Outcomes to the five key heritage outcomes in the Heritage Plan (i.e. Knowledge, Conservation, Support, Communication and Advocacy).
- Introduce a Heritage Futures Fund aimed at ensuring potential infrastructure requirements that may be identified as part of a number of actions outlined in the Heritage Plan.

The revised Strategic Policy – Heritage Levy is presented to Council for consideration and endorsement (Appendix B). A tracked change version of the policy is available at Attachment 1.

Heritage Futures Fund

The amended Strategic Policy – Heritage Levy (Appendix B) proposes that a percentage of the levy, as determined annually by Council, be set aside to create an ongoing Heritage Futures Fund to deliver infrastructure outcomes as outlined in the endorsed Sunshine Coast Heritage Plan 2015-2025 – implementation plan. It also proposes that at the end of each financial year unspent funds could be available for expenditure in the following financial year or moved to the Heritage Futures Fund.

The Heritage Futures Fund (the Fund) is recommended because while the annual Levy program is developed to implement a schedule of Heritage Plan actions, within agreed timeframes, there is concern that the anticipated outcomes of two actions specifically in the Heritage Plan, would be shelved due to a lack of resourcing. The specific actions in the Sunshine Coast Heritage Plan 2015-2020 are:

Action 3.1.5: Undertake a feasibility study for additional storage space for the Sunshine Coast Region, to ensure the region is equipped with sufficient storage space to house council-owned and non-council owned heritage items and collections (2018).

Action 4.1.2: Undertake a feasibility study to investigate the establishment of a regional interpretation space/precinct on the Sunshine Coast and pending the outcome, review the master plan for the Landsborough heritage precinct (2017).

The Policy identifies a Fund to provide a deliberate financial reserve that will be quarantined for any anticipated infrastructure costs, due to the delivery of these actions, in future years.

The Fund could also be used to better leverage grant and investment opportunities to support heritage outcomes and initiatives.

Legal

There are no legal implications relevant to this report.

Policy

This proposal is consistent with the Heritage outcomes and directions as provided in Council's *Corporate Plan 2014-2019*, *Social Strategy 2015*, Strategic Policy – Heritage Levy, Sunshine Coast Heritage Plan 2015-2020.

Risk

There is no significant risk associated with this report.

Previous Council Resolution**OM15/6134 – Ordinary Meeting 20 August 2015**

That Council:

- (a) receive and note the report titled “**Sunshine Coast Heritage Plan 2015-2020**”
- (b) adopt the Sunshine Coast Heritage Plan 2015-2020 (Appendix A) and
- (c) note that the Chief Executive Officer may make minor amendments to the “Sunshine Coast Heritage Plan 2015 – 2020” to allow for final editing and publication

OM15/67 – Ordinary Meeting 21 May 2015

That Council:

- (a) receive and note the report titled “Sunshine Coast Heritage Reference Group: Membership 2015/2016” and
- (b) endorse the nominated applicants as the members of the Sunshine Coast Heritage Reference Group 2015/2016.

OM15/68 – Ordinary Meeting 21 May 2015

That Council:

- (a) receive and note the report titled “Sunshine Coast Draft Heritage Plan 2015-2020”
- (b) endorse the Sunshine Coast Draft Heritage Plan 2015-2020 (Appendix A) for public exhibition and comment
- (c) request the Chief Executive Officer collate and consider all feedback received during the public exhibition period before presenting the final Sunshine Coast Heritage Plan 2015-2020 to Council for adoption.

OM14/103 – Ordinary Meeting 24 July 2014

That Council

- (a) receive and note the report titled “Draft Cultural Heritage Levy Program 2014/2015” and
- (b) endorse the “Draft Cultural Heritage Levy Program 2014/2015” (Appendix A)

OM14/10 – Ordinary Meeting 30 January 2014

That Council:

- (a) receive and note the report titled “Sunshine Coast Cultural Heritage Reference Group Membership 2014/2015” and
- (b) endorse the nominated applicants as the members of the Sunshine Coast Heritage Reference Group.

SM11/35 – Special Meeting 16 May 2011

That Council:

- (a) *receive and note the report titled “Heritage Levy Progress Report”;*
- (b) *endorse the indicative program of Cultural Heritage Projects outlined in the Heritage Levy Progress Report (Appendix A) for implementation in 2011/2012;*
- (c) *acknowledge and thank the members of the Sunshine Coast Cultural Heritage Reference Group for their work in relation to the Heritage Levy;*
- (d) *endorse the criteria for assessing and prioritising items for expenditure in relation to the Heritage Levy developed by the Cultural Heritage Reference Group and Council’s Cultural Heritage and Collections Unit;*
- (e) *endorse the indicative program of Cultural Heritage projects for implementation in 2011/2012; and*
- (f) *support a \$5.00 Heritage Levy per rates notice for the 2011/2012 rates notice with the amount to be reviewed in the 2012/2013 year.*

SM10/21 – Special Meeting 22 April 2010

That Council:

- (a) *receive and note the report entitled “Introduction of a heritage levy on all rateable land across the Council region” and consider in their budget deliberations on all rateable land in the Council region, for the:*
 - i. *promotion of heritage values and strategies across the region;*
 - ii. *implementation of heritage programs and projects across the region;*
 - iii. *recording and preserving the history of the region including its oral and social history;*
 - iv. *establishing partnerships that have the capacity to enhance preservation of heritage facilities and resources;*
 - v. *identification, recording and protection of cultural heritage including Aboriginal heritage, landscape heritage, historical heritage and collections;*
- (b) *support \$5.00 rates notice for the 2010/2011 year with the amount reviewed in the 2011/2012 year;*
- (c) *note the prepared program scope included in the Sunshine Coast Heritage Levy Program (Attachment A)*
- (d) *support the formation of a regional Cultural Heritage Reference group to provide support and advice and appoint Cr Anna Grosskreutz as portfolio councillor of Social Policy to chair the group;*
- (e) *endorse the commitment of the remaining funds of the Northern Area Heritage Levy to a relevant and eligible project in the Noosa area; and*
- (f) *continue discussion with the State Government and traditional owners and Aboriginal people of the region to strengthen Council’s response to Aboriginal heritage on the Sunshine Coast.*

Related Documentation

There are a number of related policies and plans guiding and informing the draft Cultural Heritage Levy Program 2016/2017. These include:

- Sunshine Coast Heritage Plan 2015-2020
- Sunshine Coast Planning Scheme (2014)
- Community Grants Policy (2013)
- Cultural Development Policy (2012)
- Sunshine Coast Reconciliation Action Plan 2011-2016
- Strategic Policy – Heritage Levy (2010)

Critical Dates

The annual budget process requires Council to endorse the Strategic Policy – Heritage Levy to then enable the direction of the Heritage Levy Program.

Implementation

The Strategic Policy - Heritage Levy will be used, to develop the annual Heritage Levy Program 2016/17. The implementation of the program is integrated across the organisation with Community Services, Infrastructure Services, Corporate Services and Planning and Environment Departments involved in the delivery of the separate programs, guided by the Policy.



Strategic policy

STRATEGIC POLICY

HERITAGE LEVY

Corporate Plan reference:	2. A strong community 2.3 Culture, heritage and diversity are valued and embraced 5. A public sector leader 5.1 Robust and transparent decision making
Endorsed by Council on:	June 2016
Manager responsible for policy:	Community Services Department – Community Relations Branch

Policy purpose

The purpose of this policy is to outline cultural heritage and administrative principles that provide direction for allocation of the Heritage Levy (HL) revenue towards endorsed projects and programs in an effective, open and accountable way.

Specific policy objectives are drawn from:

- the Corporate Plan vision for the Region:

to be Australia's most sustainable region - vibrant, green, diverse.

- The Sunshine Coast Heritage Plan 2015-2020: our heritage is our gift for the future.

The primary purpose of this Policy is to direct investment towards cultural heritage projects that protect and respond to the region's emerging and most critical heritage challenges, in line with the endorsed Sunshine Coast Heritage Plan 2015-2020.

This levy will be set aside specifically for facilities, programs, projects and activities concerned with the preservation and promotion of the region's history and cultural heritage and to trigger other government and non-government support and partners.

Policy outcome

It is the intention of Council that the levy will be used to document, research, conserve, , protect, promote and provide access to those tangible and intangible items, places, facilities and events that define the stories, history and values of the people, communities and culture of the Sunshine Coast.

Specifically, the levy will be used to achieve the five key heritage outcome areas, as identified in the Sunshine Coast Heritage Plan 2015-2020:

1. Knowledge: comprehensively research, understand, identify, record and share the region's heritage.
2. Conservation: protect and conserve the region's natural and cultural heritage for future generations.
3. Support: stimulate pride in and growth of the heritage via programs, events, training, financial assistance, incentives and specialist advice
4. Communication: raise the profile of and demand for heritage through cultural activities, exhibitions, creative expression, education, partnership and community development
5. Advocacy work with key stakeholders to increase the awareness and appreciation of the region's diverse heritage.

Policy scope

This policy applies to all programs, projects, activities or incentives that are directly or indirectly funded or supported, wholly or partly, by the Heritage Levy..

The scope of this Policy is to provide direction for funding initiatives that complement the core business captured by the organisation's endorsed Heritage Plan.

Council will review the amount of the Heritage Levy as part of adopting its annual revenue statement and the annual Heritage Levy program as part of adopting its annual financial budget, to ensure it aligns with the Policy.

Policy statement

Council demonstrates its commitment to supporting cultural heritage through the collection of a heritage levy, recognising the important role that heritage plays in building social capital. The resources generated from the levy will encourage greater knowledge, protection, awareness, advocacy and celebration of cultural heritage within the Sunshine Coast given the increasing impacts of growth on cultural sites, places, knowledge and artefacts.

Council will provide transparent and equitable processes in the management and administration of the heritage levy. All requests for support, information and access to funds will be managed through a consistent process in accordance with the five year Sunshine Coast Heritage Plan and any other associated council strategies, priorities and guidelines.

Guiding principles

This policy is guided by the following principles:

- Effective, open and accountable program delivery
- Best practice conservation and innovative solutions to protect, conserve and share the Sunshine Coast's cultural heritage
- Strong working partnerships with the endorsed Sunshine Coast Heritage Reference Group (SCHRAG), the heritage industry and networks, the community, and government stakeholders.

Allocation of Heritage Levy funding to the Heritage Levy Program

Revenue collected from the Heritage Levy will be allocated for activities as described in the annual Heritage Levy Program, which will be developed in alignment with the Sunshine Coast Council Heritage Plan 2015-2020, associated cultural heritage priorities and strategies, and in consultation with SCHR, for Council's consideration and endorsement during annual budget preparations.

Management of Heritage Levy revenue allocations and program

All revenue including any revenue raised through approved Heritage Levy business activities is to be held separately from Council's general revenue and shall not at any time be available for expenditure as general revenue.

The amount of revenue allocated will be determined based on annual priorities outlined in the Sunshine Coast Heritage Plan 2015-2020 and will be endorsed by Council as part of adopting its annual budget.

- A percentage of the levy, as determined annually by Council, will be set aside to create an ongoing "Heritage Futures Fund" to deliver infrastructure outcomes as outlined in the endorsed Sunshine Coast Heritage Plan 2015-2025 – implementation plan.
- At the end of each financial year unspent funds may be available for expenditure in the following financial year or moved to the "Heritage Futures Fund" for infrastructure projects planned in future years as outlined in Council's adopted heritage plan.
- The Heritage Levy can be used for leveraging grants and partnership opportunities from the state and federal governments and other agencies, provided there is no impediment to achieving the agreed outcomes of Levy funding.
- The principles of the Burra Charter should be considered in all applications of this policy.
- Financial management of Heritage Levy revenue must be in accordance with relevant legislation and Council policies, plans and strategies.

Raising Additional Revenue

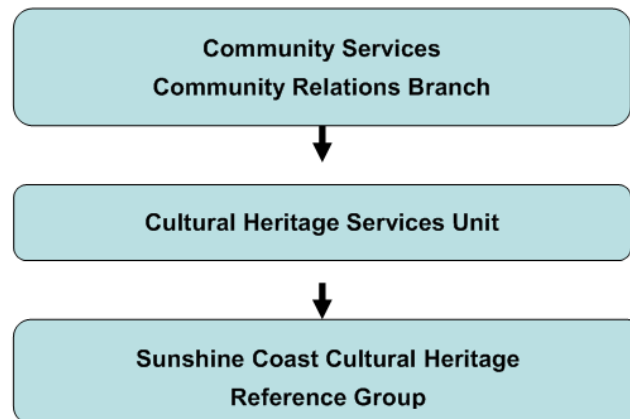
Where approved by the Manager or Council as appropriate, revenue may be raised through the following business activities of the Heritage Levy:

- Other investment funds set up for direct benefit and management of Heritage Levy monies including borrowings, sinking funds and possibly carry-over funds (where approved by Council);
- Charging public and private individuals and organisations for goods and services rendered through programs and activities conducted under the HL.
- Offering opportunities for rate payers and other interested entities to donate additional funds into an HL trust for future investment in protection of the region's cultural heritage values.

Roles and responsibilities



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Council:

- acts as owner/ trustee and steward for the region’s significant cultural heritage assets;
- sets corporate vision through its corporate plan and related strategies;
- approves and reviews heritage management plans; and
- ensures appropriate resources and funding for heritage management activities are made available.

Community Relations Branch - Cultural Heritage Services Unit:

The Cultural Heritage Services Unit, Community Relations Branch will manage and facilitate the levy. This will include:

- develop and deliver an annual Heritage Levy Program that aligns with the five year Sunshine Coast Heritage Plan. partner with community museums, community and private collections, government and corporate agencies to deliver a range of initiatives that preserve and promote the unique cultural heritage of the Sunshine Coast;
- work as part of Integrated Teams to plan and deliver significant community and capital projects;

Sunshine Coast Cultural Heritage Reference Group:

The External Reference Group members:

- attend scheduled meetings of the External Reference Group;
- provide expert advice on areas of cultural heritage that will be strengthened by their personal qualifications and experience;
- identify opportunities for partnerships and additional resources to improve the level of cultural heritage activities and community cultural development in the Sunshine Coast region;

provide comment and suggestions on behalf of the heritage industry on the delivery of the Sunshine Coast Heritage Plan 2015-2020 and the development of the annual Heritage Levy program for consideration of Council.

Measurement of success

The key measurements for success of the Heritage Levy will be the successful implementation of the levy funded actions identified in the Sunshine Coast Heritage Plan 2015-2020, including the associated Key Performance Indicators outlined in the Plan.

Definitions

Built heritage	Buildings or structures and their environments valued by a community because of their historic, scientific, aesthetic, social or architectural significance to that community and which, because of their heritage significance, may appear on the Register of the National Estate, the register of the National Trust of Australia and/or state, territory or local government heritage registers.
Cultural heritage	The preservation of culture through the collection, protection and management of valued objects, places, history and ideas that represent ways of life of particular groups of people, both indigenous and non-indigenous, connected with a particular place.
Cultural facilities/venues	Spaces, facilities and infrastructure that are focal points for community to develop cohesion, cultural identity and a sense of place.
Culture	The identity and values that a community develops over time which defines them as a distinctive group and which are to be remembered, celebrated and preserved for future generations.
Indigenous	Persons of Aboriginal or Torres Strait Islander descent who identify as an Aboriginal or Torres Strait Islander and who are accepted as such by the community in which they live.
Intangible cultural heritage	Knowledge, traditions, rituals, skills, stories and histories associated with a particular community and place, created over time and transmitted (in most cases orally) from generation to generation within that community and which contribute to a sense of a community identity and continuity.
Movable cultural heritage	Objects and artefacts, whether artistic, technological or natural, that people create or collect because they are considered to be an important part of a community's cultural heritage. Such objects and artefacts are usually housed and preserved in museums, galleries, libraries, archives or keeping places.
Natural heritage	Areas used for outdoor recreation such as national or state parks or reserves, and other natural areas on the Register of the National Estate or similar state or territory registers.

Related policies and legislation

The Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance 2013

Local Government

- *Corporate Plan 2009-2014*
- *Placemaking Policy and Charter 2012*
- *Public Art Policy 2011*
- *Events Policy 2010*
- *Community Engagement Policy 2009*
- *Memorials and Plaques Policy 2009*
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- *Cultural Development Policy 2012*
- *Draft Sunshine Coast Planning Scheme 2012*
- *Maroochy Plan*
- *Caloundra Plan*

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- *Local Government Act 2009*
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- *National Trust of Queensland Act 1963*
- *Queensland Planning Provisions 2009*

- *Aboriginal Cultural Heritage Act 2003*
- *Torres Strait Islander Cultural Heritage Act 2003*
- *Environmental Protection Act 1994*
- *Queensland Heritage Act 1992*
- *Libraries Act 1988*
- *Queensland Art Gallery Act 1987*
- *Tourism Queensland Act 1979*

Australian Government

- *Environment Protection and Biodiversity Act 1999*
- *Disability Discrimination Act 1992*
- *Aboriginal and Torres Strait Islander Heritage Protection Act 1984*

Version control:

Version	Reason/ Trigger	Change (Y/N)	Endorsed/ Reviewed by	Date
1.0	Create new			24 June 2010
2.0	Amended to align with amended corporate structure and update strategic framework. Non-material changes.			February 2014
2.01	Draft amendments following policy review Feb 2015			March 2015



Strategic policy

STRATEGIC POLICY

HERITAGE LEVY

Corporate Plan reference:	2. A strong community 2.3 Culture, heritage and diversity are valued and embraced 5. A public sector leader 5.1 Robust and transparent decision making
Endorsed by Council on:	24 June 2010 , June 2016
Manager responsible for policy:	Community Services Department – Community Relations Branch

Policy purpose

The purpose of this policy is to outline cultural heritage and administrative principles that provide direction for allocation of the Heritage Levy (HL) revenue towards endorsed projects and programs in an effective, open and accountable way.

Specific policy objectives are drawn from:

- the Corporate Plan vision for the [Region](#):

to be Australia's most sustainable region - vibrant, green, diverse.

- [The Sunshine Coast Heritage Plan 2015-2020: our heritage is our gift for the future.](#)

The primary purpose of this Policy is to direct investment towards cultural heritage projects that protect and respond to the region's emerging and most critical heritage challenges, [in line with the endorsed Sunshine Coast Heritage Plan 2015-2020.](#)

This levy will be set aside specifically for facilities, programs, projects and activities concerned with the preservation and promotion of the region's history and cultural heritage and to trigger other government and non-government support and partners.

Policy outcome

It is the intention of Council that the levy will be used to document, research, conserve, [rehabilitate](#), [restore](#), protect, promote and provide access to those tangible and intangible items, places, facilities and events that define the stories, history and values of the people, communities and culture of the Sunshine Coast.

~~The levy will also be used to maximise partnerships with a range of stakeholders from the community, native title holders, corporate and government agencies.~~

~~Specifically, the levy will be used to achieve the five key heritage outcome areas, as identified in the [Sunshine Coast Heritage Plan 2015-2020](#):~~

1. Knowledge: comprehensively research, understand, identify, record and share the region's heritage.
2. Conservation: protect and conserve the region's natural and cultural heritage for future generations.
3. Support: stimulate pride in and growth of the heritage via programs, events, training, financial assistance, incentives and specialist advice
4. Communication: raise the profile of and demand for heritage through cultural activities, exhibitions, creative expression, education, partnership and community development
5. Advocacy work with key stakeholders to increase the awareness and appreciation of the region's diverse heritage.

Policy scope

As at 22 April 2010, the rate for the HL was set at \$5 per rateable property per annum.

Council will review the amount of the HL each year as part of adopting its annual revenue statement.

This policy applies to all programs, projects, activities or incentives that are directly or indirectly funded or supported, wholly or partly, by the Heritage Levy.HL.

The scope of this Policy is to provide direction for funding initiatives that complement the core business captured by the organisation's cultural heritage programs and strategies endorsed Heritage Plan.

Council will review the amount of the Heritage Levy as part of adopting its annual revenue statement and the annual Heritage Levy program as part of adopting its annual financial budget, to ensure it aligns with the Policy.

Policy statement

Council demonstrates its commitment to supporting cultural heritage through the collection of a heritage levy, recognising the important role that heritage plays in building social capital. The resources generated from the levy will encourage greater knowledge, protection, awareness, advocacy and celebration of cultural heritage within the Sunshine Coast given the increasing impacts of growth on cultural sites, places, knowledge and artefacts.

Council will provide transparent and equitable processes in the management and administration of the heritage levy. All requests for support, information and access to funds will be managed through a consistent process in accordance with the five year Sunshine Coast Heritage Plan and any other associated council strategies, priorities and guidelines.

Guiding principles

This policy is guided by the following principles:

- Effective, open and accountable program delivery
- Best practice conservation and innovative solutions to protect, conserve and share the Sunshine Coast's cultural heritage

- Strong working partnerships with the endorsed Sunshine Coast Heritage Reference Group (SCHRAG), the heritage industry and networks, the community, and government stakeholders.

- ~~1. Promotion of heritage values and strategies across the region~~
- ~~2. Implementation of heritage programs and projects across the region~~
- ~~3. Recording and preserving the history of the region including its oral and social history~~
- ~~4. Establishing partnerships that have the capacity to enhance the preservation of heritage facilities and resources~~
- ~~5. Identification, recording, protection and restoration of cultural heritage including Aboriginal heritage, landscape heritage, historical heritage and collections.~~

Allocation of Heritage Levy funding to the Heritage Levy Program

Revenue collected from the Heritage Levy will be allocated for activities as described in the annual Heritage Levy Program, which will be developed in alignment with the Sunshine Coast Council Heritage Plan 2015-2020, associated cultural heritage priorities and strategies, and in consultation with SCHRAG, for Council's consideration and endorsement during annual budget preparations.

~~Council's cultural heritage programs and strategies.~~

Management of Heritage Levy revenue allocations and program

- ~~All revenue including any revenue raised through approved Heritage Levy business activities is to be held separately from Council's general revenue and shall not at any time be available for expenditure as general revenue.~~

- ~~The amount of revenue allocated will be determined based on annual priorities outlined in the Sunshine Coast Heritage Plan 2015-2020. The amount of revenue allocated as part of the five year program will be determined based on an assessment of annual priorities and emerging needs and will be endorsed by Council as part of adopting its annual budget.~~

- A percentage of the levy, as determined annually by Council, will be set aside to create an ongoing "Heritage Futures Fund" to deliver infrastructure outcomes as outlined in the endorsed Sunshine Coast Heritage Plan 2015-2025 – implementation plan.

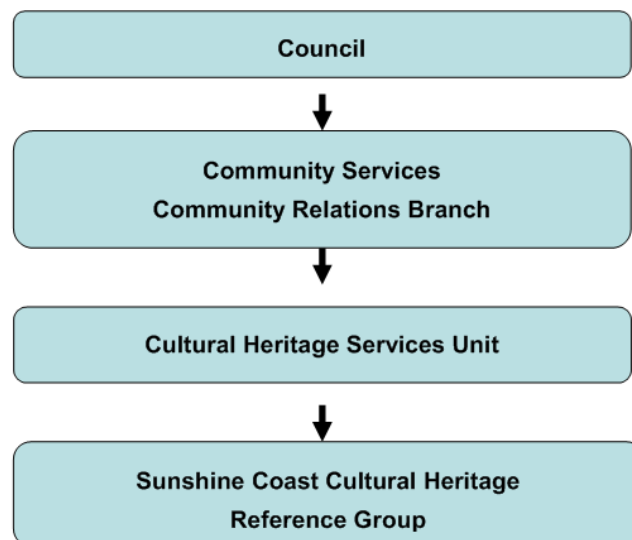
- At the end of each financial year unspent funds may be available for expenditure in the following financial year or moved to the "Heritage Futures Fund" quarantined for infrastructure projects planned in future years as outlined in Council's adopted cultural heritage plan_s and strategies.
- The Heritage Levy can be used for leveraging grants and partnership opportunities from the state and federal governments and other agencies, provided there is no impediment to achieving the agreed outcomes of Levy funding.
- The principles of the Burra Charter should be considered in all applications of this policy.
- Financial management of Heritage Levy revenue must be in accordance with relevant legislation and Council policies, plans and strategies.

Raising Additional Revenue

Where approved by the Manager or Council as appropriate, revenue may be raised through the following business activities of the Heritage Levy:

- Other investment funds set up for direct benefit and management of Heritage Levy monies including borrowings, sinking funds and possibly carry-over funds (where approved by Council);
- Charging public and private individuals and organisations for goods and services rendered through programs and activities conducted under the HL.
- Offering opportunities for rate payers and other interested entities to donate additional funds into an HL trust for future investment in protection of the region's cultural heritage values.

Roles and responsibilities



Council:

- acts as owner/ trustee and steward for the region's significant cultural heritage assets;
- sets corporate vision through its corporate plan and related strategies;
- approves and reviews heritage management plans; and
- ensures appropriate resources and funding for heritage management activities are made available.

Community Relations Branch - Cultural Heritage Services Unit:

The Cultural Heritage Services Unit, Community Relations Branch will manage and facilitate the levy. This will include:

- ~~develop and deliver and annual Heritage Levy Program that aligns with the five year Sunshine Coast Heritage Plan. activities and programs to improve awareness and involvement;~~
- partner with community museums, community and private collections, government and corporate agencies to deliver a range of initiatives that preserve and promote the unique cultural heritage of the Sunshine Coast;
- work as part of Integrated Teams to plan and deliver significant community and capital projects;
- ~~develop a priority for projects, programs and activities for a five year period~~
- ~~align the five year levy program with Council endorsed Cultural Heritage plans, programs and strategies.~~

Sunshine Coast Cultural Heritage Reference Group:

The External Reference Group members:

- attend scheduled meetings of the External Reference Group;
- provide expert advice on areas of cultural heritage that will be strengthened by their personal qualifications and experience;
- identify opportunities for partnerships and additional resources to improve the level of cultural heritage activities and community cultural development in the Sunshine Coast region;
- ~~provide comment and suggestions on suggestions on behalf of the heritage industry on the delivery of the Sunshine Coast Heritage Plan 2015-2020 and the development of the annual Heritage Levy program collection and analysis of community feedback and requests and the development and implementation of the cultural heritage strategy;~~

~~Provide advice to the Cultural Heritage Services Unit in their deliberations identifying priorities for the allocation of revenue generated through a heritage levy for consideration of Council.~~

Measurement of success

The key measurements for success of the Heritage Levy will be the successful implementation of the levy funded actions identified in the Sunshine Coast Heritage Plan 2015-2020, including the associated Key Performance Indicators outlined in the Plan.:

- ~~protection of significant items, places and facilities of heritage value through conservation, rehabilitation, restoration, and maintenance;~~
- ~~maximised partnerships with a range of stakeholders, community based and government;~~
- ~~documentation and promotion of those items, places, facilities and events that define the stories, history and values of the communities of the Sunshine Coast Region.~~

Definitions

Built heritage	Buildings or structures and their environments valued by a community because of their historic, scientific, aesthetic, social or architectural significance to that community and which, because of their heritage significance, may appear on the Register of the National Estate, the register of the National Trust of Australia and/or state, territory or local government heritage registers.
Cultural heritage	The preservation of culture through the collection, protection and management of valued objects, places, history and ideas that represent ways of life of particular groups of people, both indigenous and non-indigenous, connected with a particular place.
Cultural facilities/venues	Spaces, facilities and infrastructure that are focal points for community to develop cohesion, cultural identity and a sense of place.
Culture	The identity and values that a community develops over time which defines them as a distinctive group and which are to be remembered, celebrated and preserved for future generations.
Indigenous	Persons of Aboriginal or Torres Strait Islander descent who identify as an Aboriginal or Torres Strait Islander and who are accepted as such by the community in which they live.
Intangible cultural heritage	Knowledge, traditions, rituals, skills, stories and histories associated with a particular community and place, created over time and transmitted (in most cases orally) from generation to generation within that community and which contribute to a sense of a community identity and continuity.
Movable cultural heritage	Objects and artefacts, whether artistic, technological or natural, that people create or collect because they are considered to be an important part of a community's cultural heritage. Such objects and artefacts are usually housed and preserved in museums, galleries, libraries, archives or keeping places.
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4.4 OFFICE OF THE MAYOR AND THE CEO**4.4.1 ANNUAL OPERATIONAL PLAN 2016-2017****File No:** D2015/20328**Author:** Coordinator Corporate Planning and Performance
Office of the Mayor and Chief Executive Officer**Attachments:** Att 1 - Annual Operational Plan 2016-2017 275

PURPOSE

This report presents the draft Annual Operational Plan for 2016-2017 as required under the *Local Government Act 2009* and the *Local Government Regulation 2012*.

EXECUTIVE SUMMARY

The *Sunshine Coast Council Corporate Plan 2014-2019* (the Corporate Plan) is the organisation's primary strategic planning document, guiding the work program and resource management arrangements for the organisation. The Corporate Plan is supported by a range of other corporate documents. The implementation of the Corporate Plan is addressed each year through Council's Operational Plan.

The proposed Operational Plan 2016-2017 (see **Appendix A**) incorporates the operational activities identified through the annual process of reviewing the Corporate Plan and which are proposed for implementation during the forthcoming financial year.

Each activity included in the proposed Operational Plan is aligned to one of the five strategic goals that frame the Council's strategic direction articulated within the Corporate Plan.

To develop the operational activities for 2016-2017, the following influencers have been considered:

1. The emerging issues, opportunities and challenges prioritised by Council through a range of strategic discussions and workshops, which collectively form the process for the annual review of Council's Corporate Plan;
2. Those 2015-2016 operational activities where implementation extends beyond one financial year;
3. Resolutions and commitments of Council since the adoption of the 2015-2016 Operational Plan;
4. Implementation plans associated with Council-endorsed strategies and commitments; and
5. Statutory and legal obligations on Council.

The proposed Operational Plan provides the basis for reporting to Council on progress towards achieving Corporate Plan goals. Aligned to each of the five Corporate Plan goals are performance measures and annual performance targets. The quarterly reports to Council on the Operational Plan include actual performance against the annual target. In addition, departments provide relevant performance data on core services, operational activities and projects allocated to their business areas.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled “Annual Operational Plan 2016-2017”
- (b) resolve to adopt the Operational Plan 2016-2017 (Appendix A) and
- (c) authorise the Chief Executive Officer to make minor amendments to the Operational Plan 2016-2017 at Appendix A prior to 1 July 2016 to ensure it remains consistent with any resolutions that Council may adopt prior to the commencement of the 2016-2017 financial year.

FINANCE AND RESOURCING

Preparation of the Operational Plan has occurred within the core operational budget for the Strategy and Coordination branch. The Annual Operational Plan 2016-2017 and the Annual Budget 2016-2017 are complementary documents and are developed in parallel to ensure consistency between commitments in Council’s work program and the resourcing allocations determined as part of the annual Budget.

CORPORATE PLAN

Corporate Plan Goal: *A public sector leader*

Outcome: We serve our community by providing this great service

Operational Activity: S31 - Governance - providing internal leadership, legal opinion, governance and audit functions ensuring legislative accountability, transparency and ethical obligations are supported

CONSULTATION

Internal Consultation

Consultation with Councillors, Directors and Branch Managers occurred primarily through the process undertaken to review and update the *Sunshine Coast Council Corporate Plan 2014-2019* and in the context of the development of the 2016-2017 Budget. This process includes:

- Identification of major policy and regulatory changes, emerging issues and matters of community interest through an environmental scan;
- identification of existing operational activities extending beyond one year;
- review and inclusion of council resolutions with material financial commitments.

The Executive Leadership Team considered and allocated responsibility for delivering operational activities to individual departments and branches.

External Consultation

There has been no external consultation undertaken in relation to this report.

Community Engagement

The goals and outcomes endorsed in the *Sunshine Coast Council Corporate Plan 2014-2019* were guided by the policy foundations considered and developed through prior community consultation processes. 2016-2017 operational activities reflect a one year program of priorities to progress the achievement of the Corporate Plan.

PROPOSAL

The Operational Plan provides the annual operational activities and identifies corporate responsibilities and resources to support the delivery of the *Sunshine Coast Council Corporate Plan 2014-2019*. It is supported by Council's annual budget which allocates resources for key activities, projects and core service delivery.

Each operational activity proposed in Appendix A aligns with one of Council's strategic goals, these being:

1. A new economy
2. A strong community
3. A healthy environment
4. Service excellence
5. An outstanding organisation.

In the proposed 2016-2017 Operational Plan, lead responsibility for each operational activity is allocated to a department and a branch of Council. Each area of Council is responsible for delivering their allocated operational activities and reporting on implementation through quarterly and annual reporting processes.

Operational activities are incorporated into departmental business plans and individual performance plans. Each department is responsible for managing the scheduling, delivery, performance and reporting for those activities, projects and services for which they have lead responsibility in line with the commitments and expectations of Council, as well as identifying, managing and monitoring operational risks.

The specific responsibilities and deliverables of each employee that are featured in their performance plans should link directly to one or more actions, projects or services described in the Operational Plan.

Performance

Performance measures in the 2016 Update to the Sunshine Coast Council Corporate Plan 2014-2019 are incorporated in the Operational Plan 2016-2017 as Goal Performance Statements.

The Goal Performance Statements list:

- each of the agreed performance measures for the goal
- a nominated target for each measure for the current financial year (where one exists)
- an estimated actual for performance against that target (given Council's consideration of the Operational Plan occurs before the end of the financial year) and
- a proposed target for 2016-2017 for each measure.

Reporting

Council receives a report on the implementation of the Operational Plan each quarter. Departments will provide relevant performance data on those operational activities and the new performance measures allocated to their business areas as part of the quarterly reporting process. Employee performance appraisals are conducted every six months with their immediate supervisors

Legal

Section 104(5) of the *Local Government Act 2009* and Section 175 of the *Local Government Regulation 2012* set out the requirements and content for an operational plan. The regulation provides that the operational plan must:

- (a) be consistent with the annual budget
- (b) state how a council will progress the implementation of the five-year corporate plan
- (c) state how a council will manage operational risks and
- (d) include annual performance plans for each commercialised business unit where applicable.

The proposed 2016-2017 Operational Plan has been prepared consistent with these requirements.

Policy

The Operational Plan is based on the *Sunshine Coast Council Corporate Plan 2014-2019* – the organisation's primary strategic planning document that guides the direction, work program and allocation of resources to achieve Council's vision for the region.

Risk

Availability of resources and achieving delivery timeframes are the two identifiable risks associated with adopting the Operational Plan. These risks are managed through the annual budget process and the implementation of the risk management framework. The resourcing of the operational activities is considered by Council in finalising and adopting its 2016-2017 Budget. Council has developed and implemented a risk management framework based on ISO31000 which assists managers and staff to identify, manage and monitor risks associated with implementing the operational activities in the Operational Plan.

Previous Council Resolution

Council resolved on 18 June 2016 (SM15/99) as follows:

That Council:

- (a) *receive and note the report titled "Annual Operational Plan 2015-2016"*
- (b) *adopt the Annual Operational Plan 2015-2016 (Appendix A) and*
- (c) *authorise the Chief Executive Officer to make minor amendments to the Annual Operational Plan 2015-2016 at Appendix A prior to 1 July 2015 to ensure it remains consistent with the intent of any resolutions that Council may adopt prior to the commencement of the 2015-2016 financial year.*

Council resolved on 19 June 2014 (SM14/90) as follows:

That Council:

- (a) *receive and note the report titled "Annual **Operational Plan 2014-2015**" and*
- (b) *adopt the Annual Operational Plan 2014-2015 (Appendix A) as amended.*

Related Documentation

Sunshine Coast Council Corporate Plan 2014-2019

Critical Dates

The Operational Plan needs to be adopted before the start of the 2016-2017 financial year and prior to Council's adoption of its 2016-2017 Annual Budget (which is scheduled to occur on 16 June 2016).

Implementation

Following adoption, Directors and Branch Managers will incorporate the operational activities into department and branch plans and report progress to Council through the Operational Plan Quarterly Progress report.



Sunshine Coast
Annual Operational Plan
2016-2017



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Acknowledgements

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involved in the development of this document.

Disclaimer

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Introduction

What is an Operational Plan?

The *Sunshine Coast Council Corporate Plan 2014-2019* is Council's strategic blueprint for the future. It defines how the organisation services and supports the community.

The Corporate Plan 2014-2019 lists council endorsed strategies designed to guide the achievement of our vision and goals.

Strategies are supported by plans that identify specific activities and projects to achieve the strategic outcomes.

The **Operational Plan** apportions corporate responsibility and resources to progress implementation of the *Sunshine Coast Council Corporate Plan 2014-2019* over the 2016-2017 financial year. It informs the annual budget which apportions the funding for key activities, projects and core service delivery.

How are operational activities determined?

The operational activities are drawn from implementation plans associated with council endorsed strategies, Council decisions, legislative requirements and emerging issues.

Emerging issues having potential to impact Council's operating environment in the next and future financial years are identified, assessed and prioritised as part of the annual review of the Corporate Plan.

Each operational activity aligns with one of Council's strategic goals:

- A new economy
- A strong community
- A healthy environment
- Service excellence
- An outstanding organisation

All operational activities are allocated to a business area of the organisation. The successful implementation and resulting contribution to achieving the outcomes described in the *Corporate Plan 2014-2019* relies on assistance and support from many areas within the organisation, community volunteers and external partners.

How is the plan used?

Operational activities, projects and core services are incorporated into departmental business plans and service profiles. Each department is responsible for:

- managing the scheduling, delivery, performance and reporting for those activities projects and services for which they have lead responsibility in line with policy decisions of Council;

- the successful achievement of the operational plan as a whole; and
- identifying, managing and monitoring operational risk.

The specific responsibilities and deliverables for each employee, link directly to one or more of the operational activities, projects and services described in the Operational Plan. Employee performance appraisals are conducted every six months with their immediate supervisors.

How is progress reported?

The Operational Plan provides the basis for reporting to Council on progress towards achieving corporate plan goals each quarter.

Goal Performance Statements detail actual performance against targets for measures relating to Council's Corporate Plan 2014-2019 strategic outcomes. In addition, business areas provide performance data on services, operational activities and operational projects¹ for which they have responsibility.

How are operational risks managed?

In 2016 a risk review was completed on the ability to deliver services outlined in the Corporate Plan. Actions are in place to minimise these risks to ensure council continues delivering quality service to the community through its Operational Plan. Council's approach to risk management is based on International Standard ISO31000.

¹ Operational projects are determined by Council to require resourcing above core budget for the current financial year.

Goal: A new economy

To achieve our goal - A new economy - we serve our community by providing these great services

S1 ²	Airport – providing aeronautical operations, passenger related services and management services for Sunshine Coast Airport and Caloundra Aerodrome
S2	Economic development – providing industry and business programs and initiatives to support the growth of the regional economy
S3	Holiday parks – providing and operating holiday parks including caravan, camping and cabin facilities

Relevant strategies and plans

Sunshine Coast – The Natural Advantage: Regional Economic Development Strategy 2013-2033
Sunshine Coast Major and Regional Events Strategy 2013-2017
Sunshine Coast Planning Scheme 2014

1.1 Strong economic leadership, collaboration and identity

Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ³
1.1.1.1	Continue to support the activities of the Sunshine Coast Economic Futures Board, including the development of the New Economy Annual Report	Office of Mayor and CEO	Strategy and Coordination	Amend
1.1.1.2	Continue to implement the regional investment brand	Economic Development & Major Projects	Economic Development	Amend
1.1.1.3	Tactically promote the investment opportunities associated with major capital projects and the high-value industries	Office of Mayor and CEO	Strategy and Coordination	Amend
1.1.1.4	Continue to administer the Sunshine Coast Planning Scheme including progression of Council nominated investigations and priority amendments, responding to changes to Queensland's planning legislation and the two year review of the Planning Scheme	Planning and Environment	Strategic Planning	Amend

² S = Service (Services are numbered sequentially throughout document)

³ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A new economy

1.2 New capital investment in the region				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ⁴
1.2.1.1	Secure all statutory approvals to advance the expansion of the Sunshine Coast Airport	Economic Development & Major Projects	ED&MP Directorate	Amend
1.2.1.2	Source the required investment to facilitate expansion of the Sunshine Coast Airport	Economic Development & Major Projects	ED&MP Directorate	Amend
1.2.1.3	Commence construction of the new east-west runway	Economic Development & Major Projects	ED&MP Directorate	New
1.2.2.1	Continue to provide support to SunCentral Maroochydore Pty Ltd and manage Council's shareholder interests in the company	Economic Development & Major Projects	ED&MP Directorate	Amend
1.2.2.2	Commence implementation of smart city principles across the Maroochydore Priority Development Area (PDA) and the Sunshine Coast Enterprise Corridor to build connectivity, improve accessibility to information and services and build the value proposition of the region	Infrastructure Services	Project Delivery	Amend
1.2.2.3	Work with SunCentral Maroochydore Pty Ltd to assess and determine the appropriate timing and process for the development of a premium hotel and entertainment, convention and exhibition centre facilities	Office of Mayor and CEO	Strategy and Coordination	Amend
1.2.2.4	Investigate options for a Council presence in the Maroochydore PDA	Corporate Services	Property	New
1.2.3.1	Work closely with the Queensland Government to elevate consideration and prioritisation of major infrastructure needs (in particular, road, rail and transport infrastructure) for the region	Office of Mayor and CEO	Strategy and Coordination	Amend
1.2.3.2	Work with the Australian Communications and Media Authority on the business case for a cable protection zone to facilitate investment in an international submarine cable to come onshore on the Sunshine Coast	Economic Development & Major Projects	ED&MP Directorate	Amend
1.2.3.3	Support the implementation of the integrated planning, infrastructure and services identified for key development areas at Kawana, Palmview and Caloundra	Planning and Environment	Major Urban Developments	Amend
1.2.4	Finalise the procurement arrangements to progress the development of the Brisbane Road carpark site at Mooloolaba	Economic Development & Major Projects	ED&MP Directorate	Amend

⁴ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A new economy

1.3 Investment and growth in high-value industries				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ⁵
1.3.1	Progress implementation of the industry and investment plans for high-value industries: <ul style="list-style-type: none"> • Health and well-being • Education and research • Tourism, sport and leisure • Clean technologies • Aviation and aerospace • Knowledge industries and professional services • Agribusiness 	Economic Development and Major Projects	Economic Development	Amend
1.3.2.1	Facilitate local business access to specialist advice, information and services	Economic Development and Major Projects	Economic Development	Continue
1.3.2.2	Target Council's procurement policies and practices to support local businesses	Corporate Services	Procurement and Contracts	Continue
1.3.3	Continue to work with the University of the Sunshine Coast, TAFE and the broader education and training sector to implement Study Sunshine Coast, and better prepare and connect young people to education opportunities in the region	Economic Development and Major Projects	Economic Development	Amend
1.3.4	Develop a comprehensive business case to support further implementation of the Caloundra Aerodrome Master Plan and associated investment attraction, property management and leasing arrangements	Corporate Services	Property Management	Amend
1.3.5	Encourage private sector investment in the Oceanside Health Precinct	Economic Development and Major Projects	Economic Development	New
1.3.6	Engage peak industry bodies in the promotion of the region's success in implementing the <i>Regional Economic Development Strategy 2013-2033</i> and the investment credentials of the region	Economic Development and Major Projects	Economic Development	Continue

⁵ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A new economy

1.4 Strong local to global connections				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ⁶
1.4.1	Organise, undertake and report on the outcomes of, international investment, trade and export missions, and manage incoming international delegations	Office of Mayor and CEO	Strategy and Coordination	Amend
1.4.2	Ensure Queensland Government Trade Commissioners and Austrade officials have access to up to date information on the strengths and competitiveness of the Sunshine Coast	Office of Mayor and CEO	Strategy and Coordination	Continue
1.4.3	Continue to support local business participation in the Sunshine Coast Export Network and associated programs	Economic Development & Major Projects	Economic Development	Amend
1.5 A natural, major and regional event destination				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment
1.5.1.1	Manage Council's major and regional events sponsorship commitments	Economic Development & Major Projects	Economic Development	Continue
1.5.1.2	Support the activities of the Sunshine Coast Events Board	Economic Development & Major Projects	Economic Development	Continue
1.5.1.3	Source and secure new major and regional events	Economic Development & Major Projects	Economic Development	Continue

A new economy – 2016-2017 Goal Performance Statement

Measures	Target 2015-16	Est. Actual 2015-16	Target 2016-17
Council actions in the Regional Economic Development Strategy implemented in accordance with agreed timelines	60%	77%	88%
Local business graduates' satisfaction with Council's Export Capability Program	75%	80%	75%
Estimated economic impact from Council-supported major and regional events	\$53m	\$52.8m	\$63m
Development applications decided within target decision time frames	90%	95%	90%

⁶ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A strong community

To achieve our goal - A strong community - we serve our community by providing these great services

S4	Community and cultural development and partnerships – providing planning, partnering and supporting the community through a range of community development, civic and cultural programs and grants
S5	Community venues – providing, managing and administering the hiring and leasing of community and cultural venues including The Events Centre and other performance venues
S6	Disaster management – providing regional disaster management coordination including prevention, preparation, response and recovery
S7	Libraries – providing access to information and learning opportunities through static and mobile libraries and loanable items
S8	Lifeguards – providing regular patrols of beaches to ensure the safety and enjoyment of residents and visitors
S9	Public lighting – providing and managing public lighting
S10	Roads, cycleways and pathways – maintaining and improving the road network and associated assets (sealed and gravel roads, bridges and pathways), vegetation management, construction and project delivery services, permit fees, private works and levies
S11	Road network management – providing road transport infrastructure planning, design and delivery, road safety and traffic management, public education programs, streetscapes planning and place making
S12	Sporting facilities – providing regional, district and community sport and recreation facilities including aquatic centres, showgrounds and multi-sports fields
S13	Stormwater drainage – managing and maintaining functional stormwater drainage

Relevant strategies and plans

Sunshine Coast Open Space Strategy 2011
Sunshine Coast Sustainable Transport Strategy 2011-2031
Sunshine Coast Community Events and Celebrations Strategy
Sunshine Coast Affordable Living Strategy 2010-2020
Sunshine Coast Domestic Animal (Cats and Dogs) Strategy 2014-2020
Sunshine Coast Youth Strategy 2010-2015
Sunshine Coast Social Infrastructure Strategy 2011
Sunshine Coast Council Positive Ageing Strategy 2011-2016
Sunshine Coast Performance and Community Venues Service Plan 2014-2019
Sunshine Coast Access and Inclusion Plan 2011-2016
Sunshine Coast Council Reconciliation Action Plan 2010-2016
Sunshine Coast Active Transport Plan 2011-2031
Sunshine Coast Libraries Plan 2014-2024
Sunshine Coast Sport and Active Recreation Plan 2011-2026
Sunshine Coast Aquatics Plan 2011-2026
Sunshine Coast Planning Scheme 2014

Goal: A strong community

2.1 Safe and healthy communities				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ⁷
2.1.1	Manage the Local Disaster Management Group and provide disaster management services, information and advice	Infrastructure Services	IS Directorate	Continue
2.1.2	Develop contemporary flood studies and models to support appropriate land use decisions, disaster preparation and response	Planning and Environment	Transport and Infrastructure Policy	Continue
2.1.3.1	Implement prioritised projects from community facility master plans and facility development plans	Community Services	Community Facilities and Planning	Amend
2.1.3.2	Implement prioritised actions as identified in the <i>Sunshine Coast Aquatic Plan 2011-2026</i>	Community Services	Community Facilities and Planning	New
2.1.3.3	Implement prioritised actions as identified in the <i>Sunshine Coast Sports and Active Recreation Plan 2011-2026</i>	Community Services	Community Facilities and Planning	New
2.1.3.4	Implement prioritised actions as identified in the <i>Sunshine Coast Skate and BMX Plan 2011-2020</i>	Community Services	Community Facilities and Planning	New
2.1.3.5	Further develop corporate events and sporting opportunities at the Sunshine Coast Stadium and Kawana Sports Precinct	Community Services	Community Facilities and Planning	Amend
2.1.3.6	Progress open space network planning including planning for recreational activities and identify options for difficult to locate sports	Planning and Environment	Environment and Sustainability Policy	Continue
2.1.3.7	Undertake a feasibility study for establishment of a water splash park in association with Nambour Aquatic Centre	Community Services	Community Facilities and Planning	New
2.1.4.1	Implement the annual program of actions in the <i>Sunshine Coast Domestic Animal Management (Cats and Dogs) Strategy 2014-2020</i>	Community Services	Community Response	Amend
2.1.4.2	Continue to manage the implementation of Council's <i>Regional Flying Fox Management Plan</i>	Infrastructure Services	Environmental Operations	Continue

⁷ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A strong community

2.1.4.3	Continue to focus on education and communication to enhance responsible pet management practices	Community Services	Community Response	Continue
2.1.5	Continue to implement 'smart LED deployment' for public lighting in accordance with Council's endorsed program	Economic Development and Major Projects	Commercial Projects	Amend
2.1.6	Prepare demographic reports, updates, profiles and forecasts to facilitate a wider range of housing choice in the region	Planning and Environment	Environment and Sustainability Policy	Amend
2.1.7	Develop partnerships and programs which encourage residents to lead more active healthy lifestyles	Community Services	Community Facilities and Planning	Continue
2.1.8	Develop community safety partnerships with state agencies and community groups to enhance resident and visitor safety	Community Services	Community Facilities and Planning	Continue
2.1.9	Implement the annual program of actions in the <i>Sunshine Coast Road Safety Plan 2016-2020</i>	Infrastructure Services	Transport Infrastructure Management	New
2.2 Resilient and engaged communities				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment⁸
2.2.1	Implement prioritised actions as identified in the <i>Sunshine Coast Social Strategy 2015</i>	Community Services	Community Facilities and Planning	Continue
2.2.2	Implement the annual program of actions in the <i>Sunshine Coast Libraries Plan 2014-2024</i>	Community Services	Community Relations	Continue
2.2.3	Implement the annual program of actions in the <i>Sunshine Coast Performance and Community Venues Service Plan 2014-2029</i>	Community Services	Community Facilities and Planning	Continue
2.2.4	Continue to ensure the manner in which Council distributes grant monies to community and not-for-profit organisations supports Council's vision for the region	Community Services	Community Relations	Amend
2.2.5	Continue to build community resilience to natural disasters through proactive communications and implementation of digital technologies	Infrastructure Services	Project Delivery	Continue

⁸ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A strong community

2.2.6	Strengthen the leadership and governance arrangements associated with the coordination of the community recovery phase following natural disaster events	Community Services	Community Facilities and Planning	Amend
2.3 Culture, heritage and diversity are valued and embraced				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment⁹
2.3.1	Implement the annual program of actions in the <i>Sunshine Coast Heritage Plan 2015-2020</i>	Community Services	Community Relations	Amend
2.3.2	Progress approvals, and ongoing project development for the Nambour Heritage Tramway	Infrastructure Services	Project Delivery	Amend
2.3.3	Deliver a celebration, events and cultural program which encourages community participation and capacity and celebrates diversity	Community Services	Community Relations	Continue
2.3.4	Develop and implement an events program to celebrate the 50th Anniversary of the naming of the Sunshine Coast, including a grants program to support community groups to participate in these celebrations	Community Services	Community Relations	New
2.4 People and places are connected				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment
2.4.1	Implement appropriately sequenced smart region initiatives to provide inclusive and dynamic community places for linking people, technology and culture	Corporate Services	Information Communication Technology Services	Continue
2.4.2.1	Facilitate the delivery of efficient transport systems and connections through multi modal network planning and studies, and partnerships with the Department of Transport and Main Roads	Planning and Environment	Transport and Infrastructure Policy	Continue
2.4.2.2	Continue to plan and deliver the coastal pathway and pedestrian pathway network	Infrastructure Services	Parks and Gardens	Continue
2.4.3	Progress the Sunshine Coast Light Rail business case and corridor securement in partnership with key stakeholders	Planning and Environment	Major Urban Developments	Amend

⁹ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A strong community

2.4.4	Continue to implement actions in the <i>Sustainable Transport Strategy 2011-2031</i> and <i>Active Transport Plan 2011-2031</i>	Planning and Environment	Transport and Infrastructure Policy	Continue
2.4.5	Develop a Sunshine Coast Parking Management Strategy and associated Local Area Parking plans	Planning and Environment	Transport and Infrastructure Policy	Amend
2.4.6	Progress and deliver major road infrastructure projects	Infrastructure Services	Project Delivery	Amend
2.4.7	Maintain and upgrade the region's sealed and unsealed roads network	Infrastructure Services	Civil Asset Management	Amend
2.4.8	Progress the concept design development and detailed design for the Mooloolaba Master Plan	Infrastructure Services	Transport Infrastructure Management	New

Service excellence – 2016-2017 significant operating projects

P1	Undertake stage 1 of the Stormwater Asset Identification Project	Infrastructure Services	Transport Infrastructure Management
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A strong community – 2016-2017 Goal Performance Statement

Measures	Target 2015-16	Est. Actual 2015-16	Target 2016-17
Council actions in the Social Strategy implemented in accordance with agreed timelines	17%	17%	32%
Average patron satisfaction with Council venues provided for hosting community events and programs	70%	85%	75%
Increased patronage of Council controlled major sporting facilities, performance and community venues	≥ 5%	5%	≥ 5%
Increase in new library memberships	≥ 5%	5%	≥ 5%
Desexed animals registered with Council as a percentage of total animal registrations	91%	91%	91%

Goal: A healthy environment

To achieve our goal – A healthy environment - we serve our community by providing these great services

S14	Beaches, foreshores, coastal infrastructure and canals – providing dredging and sand replenishment, maintenance of dune fencing, revetment walls, jetties, boat ramps, pontoons, groynes and beach access, canal locks, weirs and pumps
S15	Bushland conservation and habitat – partnerships and education programs to protect and enhance biodiversity assets, pest animal and plant mitigation, natural area reserve network protection, enhancement and management, fire management programs
S16	Recreation parks, trails and facilities – providing design, maintenance and management of Council's public open space for active and passive recreation
S17	Rivers, streams, estuaries and water bodies – providing policy and programs, maintenance of stormwater quality devices, water quality monitoring, litter collection and riverbank rehabilitation
S18	Sustainable growth and network planning – providing land use planning, social policy, infrastructure planning and charges, flood mapping, transportation planning and environmental initiatives

Relevant strategies and plans

Sunshine Coast Biodiversity Strategy 2010-2020
Sunshine Coast Waterways and Coastal Management Strategy 2011-2021
Sunshine Coast Climate Change and Peak Oil Strategy 2010-2020
Sunshine Coast Energy Transition Plan 2010-2020
Sunshine Coast Council Carbon Neutral Plan 2010-2020
Sunshine Coast Local Government Area Pest Management Plan 2012-2016
Sunshine Coast Planning Scheme 2014

3.1 Healthy and natural ecosystems and protected remnant vegetation

Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ¹⁰
3.1.1.1	Analyse biodiversity data to inform biodiversity conservation, management actions and reporting	Planning and Environment	Environment and Sustainability Policy	Amend
3.1.1.2	Maintain and manage Council's existing environmental reserves	Infrastructure Services	Environmental Operations	Continue

¹⁰ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A healthy environment

3.2 Well-managed and maintained open space, waterways and foreshore assets				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ¹¹
3.2.1.1	Continue to implement the Shoreline Erosion Management Plan	Infrastructure Services	Environmental Operations	Amend
3.2.1.2	Continue to implement the Maroochydore Beach Protection Plan	Infrastructure Services	Environmental Operations	Amend
3.2.1.3	Continue to implement the Bribie Island - Golden Beach Protection Plan	Infrastructure Services	Environmental Operations	Amend
3.2.1.4	Trial new approaches to beach nourishment to provide for healthy and resilient beach systems	Infrastructure Services	Environmental Operations	New
3.2.1.5	Investigate and implement initiatives and partnerships to respond to marine debris collection on non-bathing reserve beaches	Infrastructure Services	Environmental Operations	New
3.2.2	Implement the Constructed Water Bodies Asset Management Plan	Infrastructure Services	Environmental Operations	Amend
3.2.3	Manage the region's high quality urban and rural open space network	Infrastructure Services	Parks and Gardens	Continue
3.2.4	Finalise the Sunshine Coast Recreation Parks Plan	Infrastructure Services	Parks and Gardens	Amend
3.3 A reputation for innovative environmental practices				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment
3.3.1.1	Highlight the region's natural assets and environmental credentials in the definition and promotion of our regional identity	Office of Mayor and CEO	Strategy and Coordination	New
3.3.1.2	Develop a community environmental and sustainability benchmarking report to inform future program development and delivery	Planning and Environment	Environment and Sustainability Policy	New
3.3.1.3	Implement a range of sustainability programs and incentives which complement Council's vision for the region	Planning and Environment	Environment and Sustainability Policy	Amend

¹¹ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A healthy environment

3.3.1.4	Continue to engage, support and grow community partnerships and volunteerism in managing and enhancing the region's natural assets on public and private lands	Infrastructure Services	Environmental Operations	Amend
3.3.1.5	Review conservation volunteer engagement initiatives and develop additional opportunities to broaden engagement and the participation base	Infrastructure Services	Environmental Operations	New
3.3.2	Actively foster corporate and small business sponsorship and investment in council and community based environmental initiatives	Infrastructure Services	Environmental Operations	New
3.3.3	Strengthen council's approach to working with the Queensland Government, industry, community groups and land owners to manage pest plants and feral animals in the region	Community Services	Community Response	Continue
3.3.4	Partner with Universities, including the University of the Sunshine Coast, and other peak research institutions to attract research investment to inform Council's decision making on the management and protection of environmental and coastal assets	Infrastructure Services	Environmental Operations	New
3.3.5	Deliver construction of the Mary Cairncross Scenic Reserve Environmental Visitor Education Centre and Café	Infrastructure Services	Environmental Operations	Amend
3.3.6	Investigate the feasibility of appropriate and sensitively-managed nature based recreation activities including eco-tourism opportunities associated with key natural settings	Planning and Environment	Environment & Sustainability Policy	Amend
3.4 A region shaped by clever planning and design				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment¹²
3.4.1.1	Finalise the Caloundra Centre Master Plan and identified high priority implementation actions, including catalyst site	Planning and Environment	Strategic Planning	Amend
3.4.1.2	Deliver place management projects and initiatives in line with Council's endorsed schedule	Infrastructure Services	Transport Infrastructure Planning	Continue

¹² The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: A healthy environment

3.4.1.3	Assign and monitor a program of actions to enhance local amenity and place making	Office of Mayor and CEO	Strategy and Coordination	New
3.4.2	Provide input to, and endeavour to influence, the South East Queensland Regional Plan review in accordance with Council's policy direction, including the preservation of the inter-urban break straddling the Moreton Bay and Sunshine Coast local government areas	Planning and Environment	Strategic Planning	Amend

A healthy environment – 2016-2017 significant operating projects

P1	Minyama Canal Desilting	Infrastructure Services	Environmental Operations
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A healthy environment – 2016-2017 Goal Performance Statement

Measures	Target 2015-16	Est. Actual 2015-16	Target 2016-17
Council's greenhouse gas emissions reduced (tonnes per employee)	23	28 ¹³	TBA ¹⁴
Audited parks meeting maintenance standards	90%	95%	90%
Hectares of land per resident acquired through environment levy for conservation and preservation purposes maintained	1.5	1.9	97m ²¹⁵
Increase in landholders and community groups partnering with Council in environmental and conservation programs	7.5%	12%	7.5%

¹³ This figure is based on a 2014-2015 benchmarking report.

¹⁴ Performance target for next financial year is dependent on end-of-year financial reconciliations.

¹⁵ Calculation of measurement corrected.

Goal: Service excellence

To achieve our goal – Service excellence - we serve our community by providing these great services

S20	Cemeteries – providing and maintaining cemeteries for burial and ashes interment
S21	Customer and community relations – providing customer contact channels, media and public relations, civic and community events to keep the public informed, engaged and celebrating community life
S22	Development services – planning, engineering, plumbing and landscaping approvals, provision of specialist advice to the community on planning requirements, audit of private development works, investigation of complaints from the public around land use or development, management of appeals
S23	Local amenity and local laws – maintaining and regulating local amenity through local laws, regulated parking, community land permits and management of animals, overgrown land and abandoned vehicles
S24	Property management ¹⁶ - comprehensive management of Council's land and building assets to ensure that Council's property dealings are optimised, centrally managed, and support Councils objectives
S25	Public health – protecting public health by managing declared pests, controlling mosquitoes and administering environmental health regulations
S26	Quarries – providing quarry products for construction, architectural and landscaping purposes
S27	Waste and resource management – collection and disposal of solid and liquid wastes, operation of waste transfer facilities and landfills, recycling and materials recovery, community education programs

Relevant strategies and plans

Customer Charter
Community Engagement Policy
Sunshine Coast Council Asset Management Plan 2012
Compliance and Enforcement Policy

¹⁶ Service S19 Building and Facilities maintenance was consolidated with Property Management at the beginning of the 15-16 financial year.

Goal: Service excellence

4.1 Customer focussed services				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ¹⁷
4.1.1	Assign and monitor a program of actions to enhance customer experience, increase service standards and resourcing, and enhance service delivery	Office of Mayor and CEO	Strategy and Coordination	New
4.1.2	Continue to improve services to the community by implementing new digital technologies (social, mobility, big data/analytics and 'internet of things')	Corporate Services	Information Communication Technology Services	Continue
4.1.3	Continue to deliver Council's development assessment services in a manner that supports Council's economic, community and environmental goals and is consistent with statutory obligations	Planning and Environment	Development Services	Continue
4.1.4	Assign and monitor a program of actions to enhance development control flexibility	Office of Mayor and CEO	Strategy and Coordination	New
4.1.5	Administer and review council's local laws and relevant State legislation in a manner that supports council's economic, community and environmental goals for the region and is consistent with statutory obligations	Community Services	Community Response	Amend
4.1.6	Implement the annual program of activities in the <i>Sunshine Coast Cemetery Plan 2011-2027</i>	Community Services	Community Response	Amend
4.2 Services and assets are efficient, appropriately maintained and managed to meet the needs of a growing community				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment
4.2.1	Develop the <i>Capital Works Program</i> for 2017-2018 and subsequent years, including determining timing, sequencing and identification of funding opportunities for supporting key Council projects.	Infrastructure Services	Project Delivery	Amend
4.2.2	Deliver the <i>Capital Works Program</i> for 2016-2017	Infrastructure Services	Project Delivery	Amend

¹⁷ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: Service excellence

4.2.3	Assign and monitor a program of actions to improve project delivery	Office of Mayor and CEO	Strategy and Coordination	New
4.2.4	Manage the infrastructure network planning and charges to optimise funding for future growth assets	Planning and Environment	Transport and Infrastructure Policy	Continue
4.2.5	Finalise the construction and commissioning of the Sunshine Coast Solar Farm	Economic Development and Major Projects	Commercial	Amend
4.2.6	Undertake community engagement activities to inform the future design and delivery of Council services and programs	Office of Mayor and CEO	Strategy and Coordination	Continue
4.2.7	Oversee the Stage 2 construction of a new Animal Pound at Sippy Downs	Community Services	Community Response	Continue
4.2.8	Actively participate in and contribute to advocacy initiatives for the Australian Local Government Association and Council of Mayors South East Queensland, including lobbying against changes to the Natural Disaster Relief and Recovery Arrangements funding formula and conditions	Office of Mayor and CEO	Strategy and Coordination	Amend
4.2.9	Develop quality road base and asphalt products to meet the internal needs of the organisation	Infrastructure Services	Fleet and Quarry Services	New
4.3 Sustainable waste and resource management services				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment¹⁸
4.3.1	Continue to implement the objectives and actions of the <i>Sunshine Coast Waste Strategy 2015-2025</i>	Infrastructure Services	Waste & Resource Management	Amend
4.3.2	Continue to manage Council's waste contracts	Infrastructure Services	Waste & Resource Management	Continue

¹⁸ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: Service excellence

Service excellence – 2016-2017 significant operating projects			
P2	Progress the development of the Field Services Management Centre to coordinate field service operations and response	Infrastructure Services	Project Delivery
P3	Asset Revaluation Review	Corporate Services	Finance
P4	Customer Relationship Management System (Phase 1)	Community Services	Community Relations

Service excellence – 2016-2017 Goal Performance Statement			
Measures	Target 2015-16	Est. Actual 2015-16	Target 2016-17
Operating surplus ratio	3.5%	TBA	TBA ¹⁹
Asset sustainability ratio	70%	TBA	TBA
Asset consumption ratio	80%	80%	TBA
Capital works achieving physical completion	90%	88.3%	90%
Percentage of successful prosecutions relating to vicious dog attacks	97%	97%	97%
Percentage of calls to customer contact centres answered within 60 seconds	80%	85%	80%
Total waste diversion rate	32%	34%	34%
Customer interactions conducted online compared to other contact channels	27%	27%	27%

¹⁹ Financial ratio figures will be inserted following Council's adoption of the 2016-2017 annual budget on 16 June 2016.

Goal: An outstanding organisation

To achieve our goal – An outstanding organisation – we serve our community by providing these great services

S28	Elected Council – providing community leadership, democratic representation, advocacy and decision-making
S29	Financial and procurement services – financial and procurement management and governance, ensuring effective business management and legislative compliance, coordination and development of Council's budget process, administration of financial systems, sundry debtors, accounts payable, financial and asset accounting, treasury, procurement, contract and supply functions
S30	Fleet management – providing procurement, maintenance and support to Council's light fleet, heavy fleet, trucks and equipment and co-ordination of externally hired plant and equipment
S31	Governance – providing internal leadership, legal opinion, governance and audit functions ensuring legislative accountability, transparency and ethical obligations are supported
S32	Human resource management – cross organisational guidance and support to staff at all levels
S33	Information and communication technology – providing agile and transformative information and technology enabling Council to be a leader in delivering innovative and sustainable services to its community

Relevant strategies and plans

Sunshine Coast Council Financial Sustainability Plan 2010-2020
Governance Framework
Corporate Planning and Reporting Framework
Contracts Governance and Probity Framework
Information and Technology Strategy and Roadmap 2010-2016
Human Resource Management Policies

5.1: Robust and transparent decision-making

Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment ²⁰
5.1.1	Assign and monitor a program of actions to enhance elected Council support	Office of Mayor and CEO	Strategy and Coordination	New
5.1.2	Assign and monitor a program of actions to enhance organisation accountability and performance, including the continued integration of Council's corporate performance framework	Office of Mayor and CEO	Strategy and Coordination	New

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Goal: An outstanding organisation

5.1.3	Continue to develop and publish 'Open Data' sets to increase availability of high quality and reliable information for use by industry, business and community	Corporate Services	Information Communication Technology Services	Continue
5.1.4	Create greater community awareness and understanding of Council's services, programs and advocacy for the region through a range of contemporary communication channels	Economic Development and Major Projects	Communication	Continue
5.1.5	Develop an organisational Sustainability and Innovation Policy	Planning and Environment	Environment and Sustainability Policy	New
5.1.6	Identify a suite of organisational sustainability outcomes for resources, energy, waste etc. for integration into organisation performance monitoring and reporting	Planning and Environment	Environment and Sustainability Policy	New
5.1.7	Develop a strategic policy on the use of unmanned aviation vehicles (UAV)	Corporate Services	Corporate Governance	New
5.2 A financially sustainable organisation				Treatment ²¹
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		
5.2.1.1	Continue to refine and implement long-term financial management plans to guide the optimal utilisation of resources	Corporate Services	Finance	Continue
5.2.1.2	Continue to refine and implement long-term asset management plans to guide the optimal utilisation of resources	Infrastructure Services	Project Delivery	Continue
5.2.2.1	Ensure Council's finances are well managed and systems are in place to analyse performance, generate revenue and reduce costs	Corporate Services	Finance	Continue
5.2.2.2	Ensure systems are in place to manage contracts and contracts performance	Corporate Services	Procurement and Contracts	Continue
5.2.3	Assign and monitor a program of actions to investigate revenue and incentive options	Office of Mayor and CEO	Strategy and Coordination	New
5.2.4.1	Coordinate the delivery of Council's tourism and events levy and report outcomes to Council as part of annual budget deliberations	Economic Development and Major Projects	Economic Development	Continue
5.2.4.2	Coordinate the delivery of Council's environment levy and report outcomes to Council as part of	Planning and Environment	Environment and Sustainability	Continue

²¹ The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: An outstanding organisation

	annual budget deliberations		Policy	
5.2.4.3	Coordinate the delivery of Council's heritage levy and report outcomes to Council as part of annual budget deliberations	Community Services	Community Relations	Continue
5.2.4.4	Coordinate the delivery of Council's transport levy and report outcomes to Council as part of annual budget deliberations	Planning and Environment	Transport and Infrastructure Policy	Continue
5.2.5	Continue planning for the strategic implementation of biodiesel in council vehicles in line with state and federal government initiatives	Infrastructure Services	Fleet and Quarry Services	New
5.3 An employer of choice				Treatment ²²
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		
5.3.1	Progress the negotiation of revised industrial arrangements for the council workforce in accordance with State Government policy and legislative arrangements	Corporate Services	Human Resources	Continue
5.3.2	Continue to embed sustainability and innovation into processes, systems and organisational culture	Planning and Environment	Environment and Sustainability Policy	Amend
5.3.3	Consider the appropriate introduction of new digital technologies in the development and prioritisation of the Information and Technology Capital program for 2017-2018	Corporate Services	Information Communication Technology Services	Amend
5.3.4	Design and deliver a whole of organisation staff readiness program to appropriately equip and prepare staff for digital business transformation	Corporate Services	Information Communication Technology services	New
5.3.5	Maximise the safety and wellbeing of employees, contractors and volunteers	Corporate Services	Human Resources	Continue
5.4 Productive, professional partnerships				
Corp Plan ref	Operational Activities 2016-2017	Department and Branch		Treatment
5.4.1	Continue to implement the new corporate brand for Council	Economic Development & Major Projects	Communication	Continue
5.4.2	Continue to enhance the region's and Council's reputation nationally and globally through strong partnerships and alliances	Office of Mayor and CEO	Strategy and Coordination	Continue

²² The treatment column identifies whether the operational activity is continuing or amended from 2015-2016, or is a new activity commencing in 2016-2017. This column will be removed prior to publication.

Goal: An outstanding organisation

5.4.3	Manage incoming sponsorship arrangements for Council's community programs and events	Community Services	Community Relations	Continue
5.4.4	Explore sponsorship and programming opportunities for Council's major venues in order to support other businesses within the region while also looking to generate alternative revenue streams	Community Services	Community Planning and Facilities	Continue
5.4.5	Build and maintain productive working relationships with governments, industry and community bodies	Office of Mayor and CEO	Strategy and Coordination	Continue
5.4.6	Engage with the University of Sunshine Coast, TAFE and broader education sector to ensure higher education and training courses include those critical skill sets required by Council in the future	Corporate Services	Human Resources	Continue
5.4.7	Investigate the development of a centre of excellence in community engagement	Community Services	Community Relations	New
5.4.8	Develop the policy framework to drive a regional focus on innovation and to leverage commonwealth and State Government science and innovation agendas	Office of Mayor and CEO	Strategy and Coordination	New

An outstanding organisation – 2016-2017 Goal Performance Statement

Measures	Target 2015-16	Est. Actual 2015-16	Target 2016-17
Reduction in work time (days per month) lost due to workplace injuries	85	50	45
Right to information decisions set aside or amended on external review	5	0	5
Net financial liabilities	46.8%	TBA	TBA ²³
Debt servicing ratio	4.8	TBA	TBA
Unqualified Audit	Yes	Yes	Yes
'Open data sets' published on Council's website increased	112	135	185
Percentage of employees who would recommend Council as an employer	Not applicable ²⁴		76%

²³ Financial ratio figures will be inserted following Council's adoption of the 2016-2017 annual budget on 16 June 2016.

²⁴ The Organisation Climate Survey is conducted biennially. Next survey due during 2016-2017 financial year.



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4.4.2 2016 UPDATE TO 2014-2019 SUNSHINE COAST COUNCIL CORPORATE PLAN

File No: F2015/20326

Author: Coordinator Corporate Planning and Performance
Office of the Mayor and Chief Executive Officer

PURPOSE

This report presents a summary of the review process and proposed consequential amendments to the Corporate Plan 2014-2019 for Council's consideration.

EXECUTIVE SUMMARY

The Sunshine Coast Council Corporate Plan 2014-2019 took effect on 1 July 2014. In line with contemporary corporate and strategic planning practice, Council has recently completed its annual review of the Corporate Plan.

The intent of the annual review is to confirm that the vision, goals and outcomes remain appropriate and relevant, to update the operational activities and projects and to confirm performance measures and targets for 2016-2017.

The process for the 2016 annual review focused on an initial assessment of major policy and regulatory changes by other levels of government, emerging issues and matters of community interest that have potential to impact Council's operating environment in future years. That 'environmental scan', together with a review of strategic direction following the commencement of the 2016-2020 Council term and the results from a community satisfaction survey undertaken in November 2015, have largely confirmed the existing vision and purpose of the Corporate Plan. Only a small number of refinements to the goals and descriptors are proposed at this time. Councillors discussed the amendments at a Strategic Planning Workshop on 18 May 2016.

The review has also informed the identification of proposed operational activities for 2016-2017. These activities are the subject of a separate report, Operational Plan 2016-2017, also to be presented to Council for consideration prior to the adoption of the 2016-2017 Budget.

OFFICER RECOMMENDATION

That Council:

- (a) receive and note the report titled "2016 Update to Sunshine Coast Council Corporate Plan 2014-2019"**
- (b) resolve under section 165(3) of *Local Government Regulation 2012* to update the Sunshine Coast Council Corporate Plan 2014-2019 with the following amendments:**
 - (i) Inclusion of updated messages from the Mayor (page 8) and Chief Executive Officer (page 9)**
 - (ii) Goal 3 to read 'A healthy environment'**
 - (iii) Goal 5 to read 'An outstanding organisation'**
 - (iv) Descriptor for Goal 5 to read 'delivering a high performance organisation, supported by good governance, robust decision making and regional leadership'**

- (v) Minor grammatical changes resulting from (iii), (iv) and (v) above on pages 7, 18, 19, and the “Corporate Plan overview”
- (c) note the operational activities, approved by Council in its adoption of the Operational Plan 2016-2017, will replace the 2015-2016 operational activities on pages 21 to 35 of the Corporate Plan and
- (d) subject to recommendation (b) and (c) above, note that the online version and hard copies of the Sunshine Coast Council Corporate Plan 2014-2019 be adjusted accordingly.

FINANCE AND RESOURCING

The allocation of funding to deliver those operational activities for the 2016-2017 identified in the 2016 update to the Corporate Plan is considered through Council’s annual budget development process. The Corporate Plan guides and informs that process.

The annual review of the Corporate Plan is a core business function of the Strategy and Coordination Branch and attributable costs were managed primarily using 2015-2016 operational budget and internal resources of the branch.

CORPORATE PLAN

Corporate Plan Goal: *A public sector leader*
Outcome: We serve our community by providing this great service
Operational Activity: S31 - Governance - providing internal leadership, legal opinion, governance and audit functions ensuring legislative accountability, transparency and ethical obligations are supported

CONSULTATION

Internal Consultation

- Mayor and Councillors
- Chief Executive Officer
- Executive Leadership Team
- Manager Finance
- Coordinator Department Business Performance, Regional Strategy and Planning Department
- Coordinator Departmental Projects, Corporate Services Department
- Executive Officer Community Services Department
- Executive Officer Infrastructure Services Department
- Coordinator Corporate Plan Reporting and Risk Management, Corporate Governance Branch

External Consultation

There has been no external consultation undertaken in relation to this report.

Community Engagement

The results of a Community Satisfaction Survey undertaken in 2015 has provided high-level feedback in relation to Council’s overarching strategic direction, together with the importance of, and satisfaction with, the range of services provided.

PROPOSAL

On 12 May 2014, Council adopted the Sunshine Coast Council Corporate Plan 2014-2019

(SM14/12). In presenting the Corporate Plan to Council, it was foreshadowed that the Corporate Plan would be subject to regular review in line with contemporary corporate and strategic planning practice. In particular, the report considered by Council referenced “a commitment to an annual review of the Corporate Plan and its priority actions to enable the organisation to remain focused on achieving its strategic goals and servicing the community well into the future”.

The 2016 annual review focused on the following elements:

1. Major policy or regulatory changes by other levels of government, emerging issues or matters of community interest which potentially have implications for Council's operating environment (i.e. an Environmental Scan)
2. Initial review of strategic direction following the commencement of the 2016-2020 Council term
3. Consideration and development of operational activities for 2016-2017 to replace the 2015-2016 list of operational activities
4. Consideration and proposal of performance targets for the Operational Plan 2016-2017 and
5. Issues raised during the Council Election and at the Councillors Strategic Planning Workshop.

The environmental scan broadly considered a range of current impacts (and those which are on the horizon) that could influence and shape the policy settings, products and services which Council continues to deliver to the community.

Emerging challenges and opportunities since adoption of the Corporate Plan were distilled from the environmental scan. These were further considered by Councillors as part of a recent Strategy Workshop where refinements to key elements of the Corporate Plan were considered to reflect the priorities for the new term. Essentially, Council's discussions confirmed the current vision and purpose as articulated in the Corporate Plan. A small number of refinements to the goals and descriptors are proposed at this time, as reflected in the recommendations in this report at (b) (ii), (iii) and (iv).

It is important to note that these discussions have occurred within the context of the recent local government election, the new term of this Council and the legislative imperatives for the Corporate Plan, Operational Plan and Annual budget to be completed by end June 2016. Accordingly, Council has undertaken to more fully review the Corporate Plan in the period July – November 2016, with a view to establishing this Councils' strategic direction well in advance of the 2017-2018 budget process.

At the conclusion of the environment scan and strategy planning processes, the operational activities for 2016-2017 have been refined to respond to the prioritised opportunities and challenges agreed by Council. Those proposed operational activities are the subject of a separate report to Council. When approved, the 2016-2017 operational activities will replace the 2016-2016 operational activities list contained in the existing Corporate Plan. These operational activities also provide the basis for the activities that will be proposed in the Operational Plan 2016-2017 for Council's consideration prior to the adoption of the 2016-2017 Budget.

Performance Measures and Targets

Council's progress towards achieving the goals and outcomes in the Corporate Plan are monitored through a suite of performance measures aligned to each of the Corporate Plan goals. The majority of targets set for 2015-2016 have been achieved (and in some cases, exceeded).

The Operational Plan will contain updated Goal Performance Statements, listing:

- each of the agreed performance measures for the goal
- a nominated target for each measure for the current financial year (where one existed)
- an estimated actual for performance against that target (given the adoption of the proposed Operational Plan 2016-2017 will occur before the end of the financial year) and
- a proposed target for 2016-2017 for each measure.

Performance will be reported quarterly to Council as part of the Quarterly reports on the implementation of the Operational Plan (noting that some measures are only the subject of data collection on an annual or half-yearly basis). Explanatory notes will be included where the estimated actual constitutes a significant variance from the target that was established for that year.

Production and Distribution

Council's endorsement of the recommendations in this report will result in the replacement of pages 21-35 of the existing Corporate Plan. Other refinements to the Corporate Plan will include an updated message from the Mayor and a new message from the Chief Executive Officer. It is intended to republish the *Sunshine Coast Council Corporate Plan 2014-2019* (incorporating the 2016 update) in an electronic format, with a limited production run of hard copies of the document.

Legal

Under section 165 (3) of the *Local Government Regulation 2012*, a local government may, by resolution, amend its five year corporate plan at any time.

Policy

There are no direct policy implications for Council arising from this report. In conducting the annual review of the Corporate Plan however, extensive review was undertaken of policy directions and statements by other levels of government as well as new policy undertakings committed to by Council (including the adoption of the *Sunshine Coast Social Strategy* in June 2015)

Risk

There are no significant risks relevant to this report. The implementation of the proposed operational activities for 2016-2017 will be considered by Council in finalising and adopting its Budget for the next financial year.

Previous Council Resolution

On 12 May 2014, Council resolved (SM14/12) as follows:

That Council:

- (a) receive and note the report titled "Sunshine Coast Council Corporate Plan 2014-2019"*
- (b) adopt the Sunshine Coast Council Corporate Plan 2014-2019 (Appendix A) and*
- (c) note that the Chief Executive Officer may make minor amendments to the Sunshine Coast Council Corporate Plan 2014-2019 to allow for final editing and publication consistent with Council's resolution.*

Related Documentation

- Sunshine Coast Council Corporate Plan 2014-2019
- Sunshine Coast Council's current strategies, including the recently adopted Social
- A range of government and industry data reference documents were sourced to inform the environmental scan process, including economic data through the National Institute of Economic and Industry Research and social demographic data through the Australian Bureau of Statistics.

Critical Dates

Sequentially, the 2016 Update to the Sunshine Coast Council Corporate Plan 2014-2019 requires adoption prior to Council considering the Annual Operational Plan 2016-2017.

Council must have an adopted Annual Operational Plan prior to adopting its 2016-2017 operating budget, which Council is scheduled to consider on 16 June 2016.

Implementation

Following Council's consideration of this report, action will be taken to:

- (a) amend the electronic version of the Sunshine Coast Council Corporate Plan 2014-2019 and publish the amended document on Council's website and
- (b) inform key stakeholders, partners and the community of the updated Corporate Plan.

5 CONFIDENTIAL SESSION

Nil

6 NEXT MEETING

Nil

7 MEETING CLOSURE