

CASE STUDY

Council Integration with ePlanning Portal



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Document History

Originating Business		LGITSA			
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Endorsement | Authorisation

Name	Position Title	Date
Peter Kiley	LGITSA Board Member	12 April 2022

Glossary

Term	Definition
Application Programming Interface (API)	A software program that facilitates building of software components to allow interaction between systems.
DA	Development Application
DAP	The ePlanning Development Assessment Portal
DPTI	Department of Planning, Transport and Infrastructure
FOI	Freedom of Information
INTRAMAPS	Mapping system
LGITSA	Local Government Information Technology South Australia Inc.
LG R&D Scheme	Local Government Research and Development Scheme
PDI Act	Planning, Development and Infrastructure Act 2016
PLIX	Planning Information Exchange Specification
PRIP	Planning Reform Implementation Program – DPTI program for the implementation of the new planning reform
RFP	Request for Proposal

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Term	Definition
RFQ	Request for Quote

Reference Documents

Title	Version	Record No.	Date
Planning Information Exchange – Council and Agency Data Specification	Version 2.4		06 April 2020

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1 INTRODUCTION

1.1 Document Purpose

The purpose of this document is to provide a summary of the work undertaken by Local Government Information Technology South Australia Inc. (LGITSA) to facilitate integration between the DPTI ePlanning Portal and Council's internal systems.

This document focusses broadly on LGITSA's involvement in the requirements phase of the project.

LGITSA are a volunteer run organisation who embody leadership and advocacy on behalf of information technology and information management professionals working within the local government sector in South Australia. We provide a forum to facilitate the exchange of information and enable collaboration to aid best practice solutions, operations and negotiations within the local government ICT industry. As a group, we support the development of our information technology and information management professionals and better place ourselves to efficiently and effectively assist our organisations in succeeding to meet the needs of our communities now and into the future.

1.2 Overview / Background

During 2020 and 2021, DPTI implemented an ePlanning Portal to support the Planning, Development and Infrastructure Act 2016 (PDI Act). The portal provides South Australians with a centralised, online platform for the lodgement and tracking of development applications.

The Online planning system is to allow South Australians to lodge, monitor and track progress of development applications online, receive decision notices electronically and gain online access to a range to electronic planning services.

Councils previously maintained their own application registers and use this information to facilitate the delivery of services outside of the scope of the DPTI project including:

- Post Approval Activity – e.g. inspections
- Section 7 searches
- Financial reconciliation for DA lodgement fees
- ABS reporting
- 'Complete' view of property
- Records Management
- Names and Address updates
- Reporting to State Valuation Office
- Internal Performance Reporting (volume metrics)
- Production of DA GIS layers

As DPTI have taken over the application registers, data integration is required to provide services that DPTI do not plan to provide. The project was to develop a specification for the data integration requirements between the new DPTI system and the systems used by Councils to allow continuity of services currently provided.

To facilitate integration between the portal and the different development application systems used by councils in South Australia, DPTI developed a document – the Planning Information Exchange (PLIX) document which provides the specifications for transfer of data via the following methods:

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- CSV file containing Development Application (DA) data, exported from the ePlanning Portal via Secure File Transfer Protocols in pre-defined batch runs, at key points in a DA lifecycle; or
- Retrieval of DA specific data on an ad hoc basis via the ePlanning Portal's API.

In order to capitalise on the data made available by DPTI, council systems were required be modified to consume this data.

Through Local Government Information Technology South Australia Inc. (LGITSA) Councils consulted regularly with DPTI regarding the scope and design of the PLIX, arrangements (both technical and commercial) with software vendors, test planning, software development and implementation services.

Funding for external resources was provided by the Local Government Research and Development Scheme.

1.3 Project Objectives

The primary objective of this project was to: accurately capture and document SA Council's requirements for data interchange in a form suitable for use by both DPTI, Councils and Council's software vendors.

The primary objective was facilitated by the following outcomes/deliverables;

- Review of the existing integration documents and design,
- Documentation of the key council processes that rely on the DA process,
- Identification of the data elements required to be consumed by council systems to facilitate council business processes,
- Mapping of the ePlanning data to council data fields within their corporate systems,
- In principal agreement between Vendor council groups on the data mapping/scope of work,
- Development of documents suitable for DPTI's Tendering process so as to obtain formal proposals from software Vendors
- Determination of the timeline and costs associated with integrating DPTI's ePlanning Portal with councils' corporate systems.
- Development of test plans and implementation instructions.

2 EXECUTIVE SUMMARY

The introduction of a statewide development assessment system to support South Australia's Planning, Development and Infrastructure Act 2016 (PDI Act) was an ambitious project on a number of levels. It was openly resisted by several stakeholders and plagued with cost and schedule challenges.

LGITSA saw an opportunity to contribute to the project's success by leveraging its Information System knowledge and experience to assist with determining integration requirements with Council's internal systems. At that time, the reasons for integration were not well defined however it was accepted that there are many downstream processes out of the scope of the DPTI project that rely on the development assessment process.

To fund the resources required to assist LGITSA, a successful application was made to the 2019 Local Government R&D scheme.

This was a difficult project; in late 2019 and early 2020, the DPTI project team were extremely reluctant to engage in any meaningful way. They were happy to provide updates on the project but did not want to agree to anything that would change their approach or scope. Unrealistic dates were requested for document reviews and when comments provided very limited feedback was provided. No realistic progress was made for a number of months.

In Feb/Mar 2020, a new Project Director was appointed. LGITSA reached out to him and a weekly schedule of meetings with LGITSA Board members was established. Based on the LGITSA feedback previously provided, the PLIX was modified to suit a more modern architecture, relationships with Vendors created and they were funded to develop a Proof on Concept to drive out technical risk.

To better understand which actual components of the PLIX would be implemented for Councils, a more detailed review of requirements and their justification was completed. This was achieved by Vendor group – there are 5 software vendors delivering property systems in South Australia. These documents were used to request formal proposals from the software Vendors. LGITSA sources external resources were used for this work but they were funded by DPTI.

Upon receipt of the vendor's tenders, DPTI announced that they would not be funding the software development but would require Council's to do so.

This became a decision for the Councils and was done within the 'vendor groups'. Two Council groups decided not to proceed based on cost. They will be required to replicate any data they require from the eplanning portal in their own systems using manual methods.

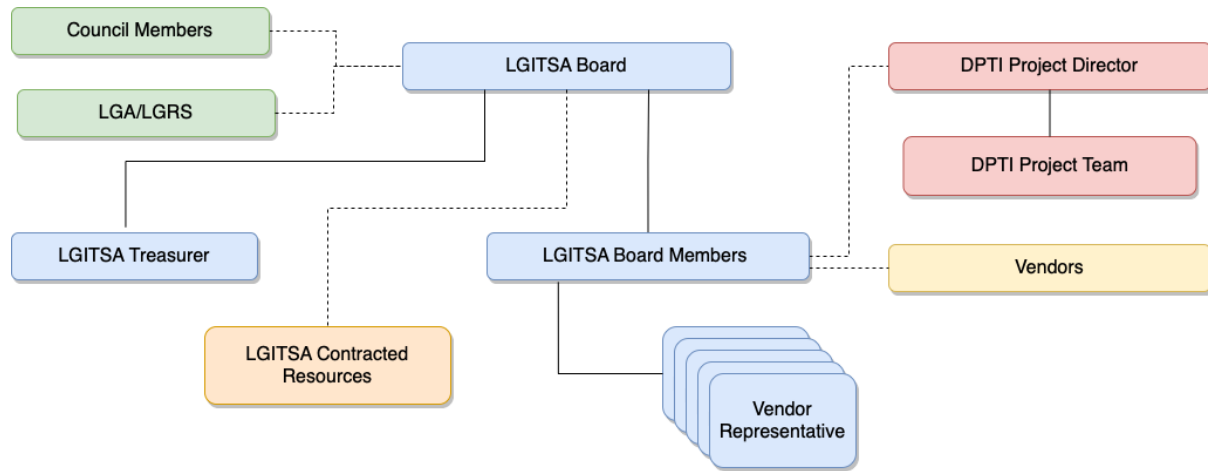
LGITSA proposed to the LG R&D scheme that remaining project funds (created by DPTI funding some of the project) be used to assist with test planning and implementation planning. This was completed with the Infor group of Councils; West Torrens, Salisbury, Playford, Onkaparinga and Barossa. The Infor group expect to 'go live' this quarter. The Civica and IT Vision Councils have successfully implemented integration.

Overall, LGITSA provided a voice for Local Government within the project with direct weekly access to the Project Director, was able to obtain significant improvement to the PLIX, helped drive out technical risk, enabled DPTI to establish relationships with Vendors and obtain formal quotes based on LGITSA developed specifications. This has provided a useable integration solution for any Council who wishes to take it up.

3 ROLES AND RESPONSIBILITIES

3.1 Organisational Structure

The project organisational structure was;



Notes.

1. LGITSA Board members were assigned for each of the major software vendors used by SA Councils. Specifically Technology One, Infor, Civica, IT Vision and Open Office.
2. The DPTI Project Director agreed to fund additional LGITSA external resources to expedite requirements and tender specifications. Although their work was facilitated by LGITSA they invoiced DPTI.

3.2 Roles and Responsibilities

Position	Role
DPTI Program Director, Planning Reform Implementation Program	Overall responsibility for the ePlanning Portal development. Liaison with LGITSA (Councils) regarding integration issues.
LGITSA Board	Oversee the project; approve changes to approach and/or scope. Approve expenditure/invoices for payment. Recruitment of project resources.
LGITSA Board Members (vendor reps)	Liaise with DPTI Program Director on integration issues. Liaise with Vendors on integration issues. Management of the LGITSA arranged (LGRS funded) external resources. Liaise with Council's on integration issues (per Vendor). Update Councils with progress. Update LGA and LGRS with progress. Co-ordinate Council's response to vendor proposals.
LGITSA External Resource	Contribute LGITSA activities relating to integration requirements and design.

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	<p>Co-ordinate and analyse the Council’s requirements for integration with the planning portal including formal document preparation, review and close out.</p> <p>Develop test cases for implementation testing.</p> <p>Develop installation instructions for implementation testing.</p> <p>Represent LGITSA with the DPTI Project Team.</p> <p>Provide expert advice to the LGITSA Board on issues relating to this project.</p>
(Software) Vendors	<p>Complete Proof on Concept (to ensure vendor software can connect to the Planning Portal)</p> <p>Respond to DPTI Tender for implementation services</p> <p>Undertake implementation services</p>

4 PROJECT PROCESSES

This section contains an outline of the major project activities.

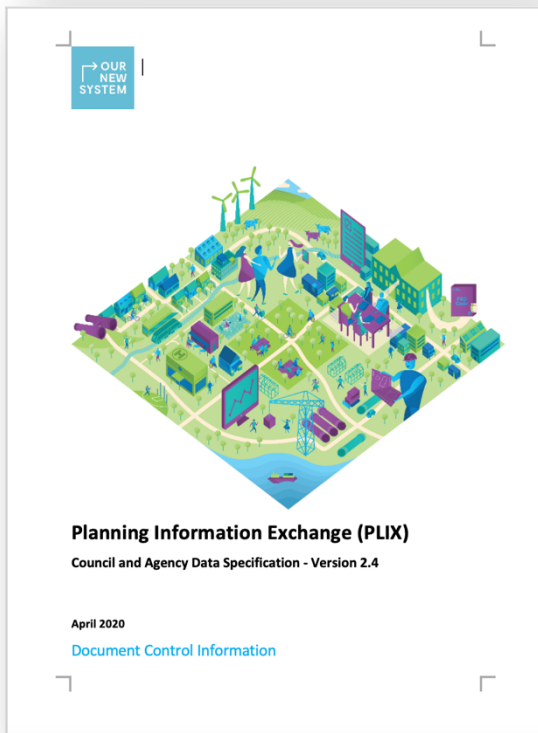


4.1 Resource Engagement.

The proposal to the LG R&D Scheme was to provide funding to define Council's integration requirements between the planning portal and Council's internal systems.

The initial activity after obtaining funding was to engage a resource to undertake the majority of the work.

This was achieved through a Request for Proposal process in which a number of suppliers bid, were assessed by three LGITSA Board members, agreed by the LGITSA Board and engaged.

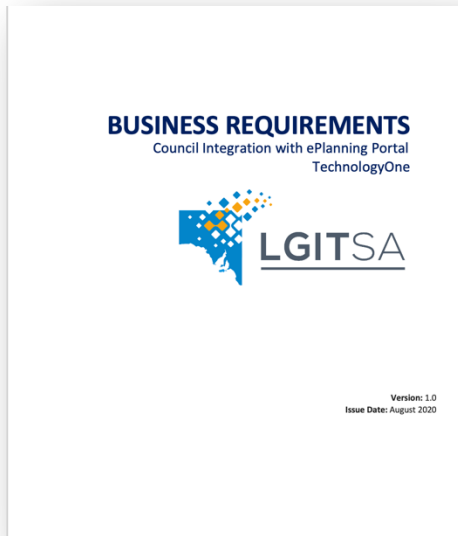


4.2 PLIX Review.

DPTI developed the Planning Information Exchange (PLIX) prior to engagement with LGITSA.

LGITSA established a relationship with DPTI, facilitated a review across all Councils and negotiated changes to the PLIX to incorporate use of Application Programming Interfaces (API).

Version	Name	Role	Date	Comments
2.0	[REDACTED]	Solution Architect	07/11/2019	Implemented review comments and added user interface prototype screens.
2.1	[REDACTED]	Solution Architect	12/11/2019	Added invoice, CoA and variation data items. Updated schema.
2.2	[REDACTED]	Solution Architect	20/03/2020	Direct Access API along with accepted feedback from LGITSA.
2.2	[REDACTED]	Technical Lead	21/03/2020	Review and update of various sections
2.2	[REDACTED]	Solution Architect	22/03/2020	Added detailed data service and supported delivery options along with updates to assumptions and constraints.
2.3	[REDACTED]	Solution Architect	02/04/2020	Updated document based on review with LGITSA on 01/04/2020.
2.4	[REDACTED]	Technical Lead	06/04/2020	Updated the document with comments from LGITSA and finalise the release 2.4 – 06/04/2020



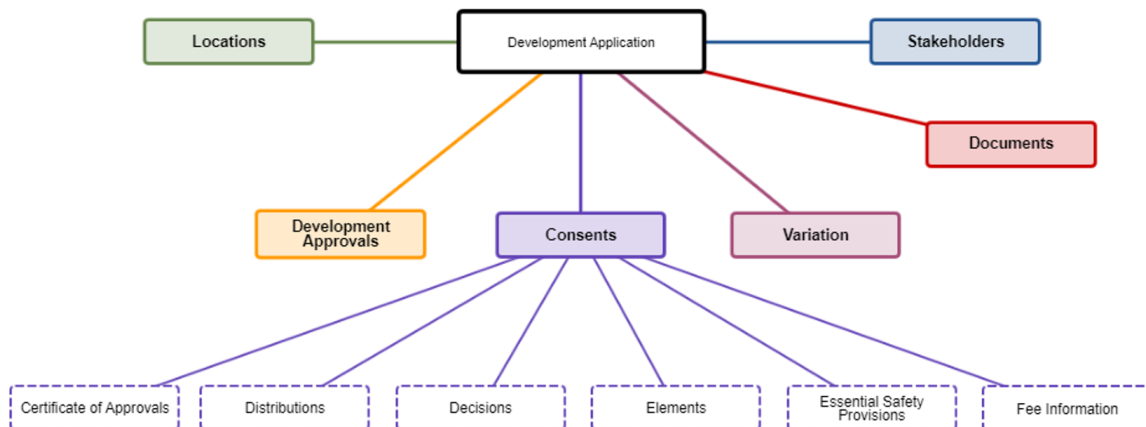
4.3 Council Requirements Specifications

To better understand which actual components of the PLIX would be implemented for Local Government, a more detailed review of requirements and their justification was completed. This was achieved for each Vendor group – there are 5 software vendors delivering property systems in South Australia.

This activity required Council’s to collectively agree the integration points they required based on the business processes being supported.

These documents were used to request formal proposals from the software Vendors. LGITSA external resources were used for this work but they were funded by DPTI.

The PLIX exposes the major entities of the ePlanning Portal to make them available to Council’s systems.



Consideration was given to a range of business processes. Including

- Post Approval Activity – e.g. inspections
- Section 7 searches
- Financial reconciliation for DA lodgement fees
- ABS reporting
- ‘Complete’ view of property
- Records Management
- Names and Address updates
- Reporting to State Valuation Office
- Internal Performance Reporting (volume metrics)
- Production of DA GIS layers

4.4 Vendor engagement and Proof on Concept Support

To facilitate the development of the software to support the integration between Council's system and the ePlanning Portal, LGITSA facilitated the introductions to the software Vendors and the DPTI Project Director.

This allowed DPTI to engage with the Vendor groups to obtain quotes and undertake a Proof of Concept.

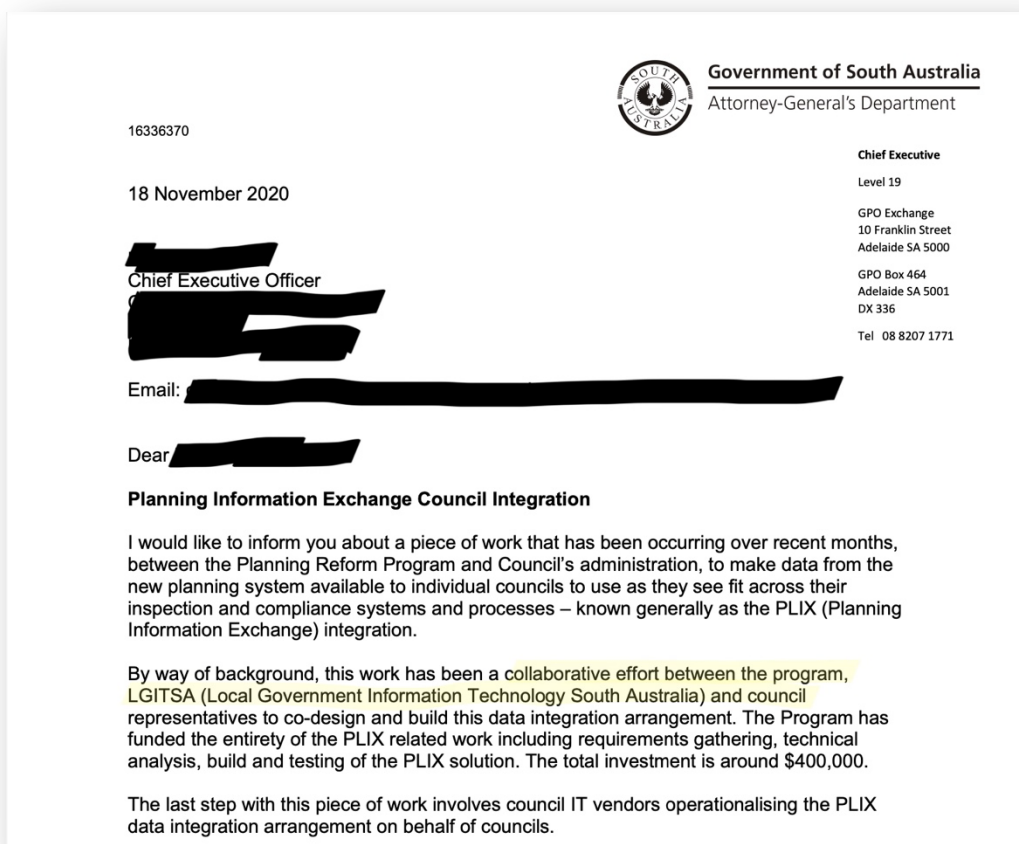
The objective of the Proof of Concept was to drive out technical risk by testing the ability of the software vendors to connect to the ePlanning Portal and consume data based on the PLIX specifications.

LGITSA supported the software vendor by dealing with their questions and interpretation of the PLIX.

4.5 Review of Vendor proposals

Vendor proposals were commercial in confidence to DPTI and LGITSA Board Members were required to sign Non Disclosure Agreements and therefore no details on the proposal can be provided.

Upon receipt of vendor proposals, DPTI decide that they would not fund the software development and advised Council CEO of their decision.



The reason I am writing to you is to seek your assistance and support with delivering this last step in the process which involves two parts.

- Council negotiation with each IT vendor.

A number of cost estimates were received from the IT vendors which vary greatly depending on the vendor, and in many cases are well beyond what was envisaged. On this basis, there seems value in councils grouping together, to test and negotiate the cost estimates with the relevant vendor. Should it be of assistance, the Program Director would be pleased to be involved in such discussions from a technical perspective.

I wish to confirm that the PLIX is a decision for each council to make. It is not a mandatory requirement to operate the ePlanning system. Electronic records of development approvals can be easily extracted from the system.

- Funding by councils of their portion of the re-negotiated IT vendor costs.

Noting the program has already funded \$400,000 on this piece of work, I am asking councils to fund this last step in the process if they believe it is of value to them and where it aligns with their own particular circumstances and IT strategic direction/roadmap. I am supportive of providing a contribution of up to \$5,000 (on completion of the works) to assist smaller councils (where development costs across all development applications in the council area is less than \$10 million¹³) in completing this work.

LGITSA Board members facilitated the quotes from software vendors directly to the Council Groups and discussions between Council's to determine if they would proceed.

Two Council groups decided not to proceed based on cost. This meant that 7 Councils have no plans to implement any integration (other than manual) with the ePlanning Portal.

4.6 Test and Implementation planning

The 'Infor/Pathway' group of Councils used LGITSA funded resources to develop test and implementation plans that were shared across West Torrens, Salisbury, Playford, Onkaparinga and Barossa. Unley and Adelaide City may take up this work in the future.

4.7 Project Governance

Project governance was provided the LGITSA Board. A report on the progress of the project was provided at each of LGITSA's monthly meetings.

Governance activities included;

- nomination and agreement of Board members to represent the vendor groups,
- endorsement of the method and approach to the project,
- approval of recruited resources, and
- approval of expenditure and use of the funds provided by the LG R&D Scheme.

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The LGITSA Board remained very focussed on ensuring the expenditure of the funds provided was entirely consistent with the initial project proposal.