

Agency Progress Reporting Methodology

March 2010

1. Definitions

Lead agency: The organisation responsible for the delivery of the project or activity (including development and resourcing).

Key Consultancy/ Contractor or Partner agency: An organisation significantly involved in the development and resourcing of the project or activity.

2. Methodology

2.1 Rooding and Passenger Transport Projects¹

Lead agencies are asked to estimate progress on strategic projects as identified in the Regional Land Transport Programme 2009/2012.

Each agency received a spreadsheet listing its projects. For each project, the lead agency was asked to report:

- Progress by project phase (i.e. investigation, design and construction)
- Progress on obtaining designation and consents.

For each phase (including obtaining designation and consents), the lead agency selects from a menu, the status that best represents progress on that phase. Greater Wellington has given each status a score, with *no progress* receiving zero percent, through to *100% complete* receiving 100% (see Table 1).

Each phase's contribution towards *overall progress* is calculated by multiplying the phase status by a weighting for that phase. A 75% weighting is placed on the construction phase to emphasise the importance of actually making real progress. Overall progress is then the sum of the contributions across investigation; design, obtaining designation and consents, and construction (see Table 2).

As an example, a project that had completed investigation and design phases, and which had the necessary designation and consents, but for which no construction had started, would receive an overall progress score of 25%.

Projects are listed by transport corridor and Regional Transport Programme *project number*. *Progress issues* that may impede a particular project and *comments* are included by the lead agencies where appropriate.

Indicative project start dates for the next 10 years are given where they have been reported and are listed under the three project phases: investigation, design and construction.

A method to estimate *planned progress* is yet to be developed.

¹ This method applies to all Rooding Projects. Different weightings however are applied to the phases of some Passenger Transport Projects to emphasise the relative importance of particular phases.

Table 1: Scoring for the investigation, design and construction phases

| Investigation | Score | Design | Score | Designation and Consents | Score | Construction | Score |
|--|-------|---|-------|---|-------|---|-------|
| Not applicable | 0 | Not applicable | 0 | Not applicable | 0 | Not applicable | 0 |
| Not started | 0 | Not started | 0 | Not started | 0 | Not started | 0 |
| Project feasibility report only - no funding application yet | 0 | Design phase not required | 0 | Notice of requirement lodged | 20 | Construction phase not required | 0 |
| Investigation phase not required | 0 | Design funding applied for - but not yet approved | 10 | Designation obtained | 40 | Construction funding applied for - but not yet approved | 10 |
| Investigation funding applied for - but not yet approved | 10 | Design funding approved - but no work started | 20 | Resource consent applied for - but not approved | 50 | Construction funding approved - but no work started | 20 |
| Investigation funding approved - but no work started | 20 | Design 10% complete | 28 | Resource consent under appeal | 80 | Construction 10% complete | 28 |
| Investigation 10% complete | 28 | Design 20% complete | 36 | Designation &/or resource consent obtained | 100 | Construction 20% complete | 36 |
| Investigation 20% complete | 36 | Design 30% complete | 44 | | | Construction 30% complete | 44 |
| Investigation 30% complete | 44 | Design 40% complete | 52 | | | Construction 40% complete | 52 |
| Investigation 40% complete | 52 | Design 50% complete | 60 | | | Construction 50% complete | 60 |
| Investigation 50% complete | 60 | Design 60% complete | 68 | | | Construction 60% complete | 68 |
| Investigation 60% complete | 68 | Design 70% complete | 76 | | | Construction 70% complete | 76 |
| Investigation 70% complete | 76 | Design 80% complete | 84 | | | Construction 80% complete | 84 |
| Investigation 80% complete | 84 | Design 90% complete | 92 | | | Construction 90% complete | 92 |
| Investigation 90% complete | 92 | Design 100% complete | 100 | | | Construction 100% complete | 100 |
| Investigation 100% complete | 100 | | | | | | |

Table 2: Roading and Passenger Transport project phases and weighting²

| Phase | Investigation | Design | Designation and Consents | Construction |
|-----------|---------------|--------|--------------------------|--------------|
| Weighting | 5% | 10% | 10% | 75% |

² This method applies to all Roading Projects. Different weightings however are applied to the phases of some Passenger Transport Projects to emphasise the relative importance of particular phases.

2.2 Passenger Transport Activities

Implementation of passenger transport activities within the Regional Land Transport Programme 2009/2012 is an ongoing activity for Greater Wellington as lead agency. For this reason no score is assigned to passenger transport activities.

2.3 Travel Demand Management, Cycling, Pedestrian and Road Safety Plan Activities

Lead agencies are asked to estimate progress on implementation plan activities as identified in the respective action programmes.

Each agency received a spreadsheet listing its activities, and was asked to report progress.

For each activity, the lead agency selects from a menu, the status that best represents progress on that activity. Greater Wellington has given each status a score, with *work has not begun on this activity* receiving zero percent, through to *100% complete* receiving 100% (see Table 3).

Comments on the activity, such as issues that may impede progress, are included by the lead agency where appropriate.

Table 3: Implementation plan activity menu and scoring

| Investigation | Score |
|--|-------|
| Not reported | NR |
| Work has not begun on this activity | 0 |
| Funding/Budget unavailable | 0 |
| Investigation phase only - no funding in place yet | 5 |
| Investigation phase - study/research commenced | 5 |
| Funding/Budget applied for - but not yet approved | 10 |
| Funding/Budget approved - but no work started | 15 |
| 10% complete | 28 |
| 20% complete | 36 |
| 30% complete | 44 |
| 40% complete | 52 |
| 50% complete | 60 |
| 60% complete | 68 |
| 70% complete | 76 |
| 80% complete | 84 |
| 90% complete | 92 |
| 100% complete | 100 |

2.4 Project Progress Flags

The final column in the spreadsheets (see **Attachments 2-8**) features a symbol representing progress of the project or activity in comparison to the target and performance measure. If a key project or activity milestone has been achieved during the reporting period there will be

a “tick” progress flag, while a smiley face progress flag indicates a project or activity is progressing as planned. Moderate or significant delay is highlighted as shown in Table 4.

Table 4: Project or activity progress flags

| | |
|---|---|
| Key milestone achieved in this quarter | ✓ |
| Progressing as planned | 😊 |
| Moderate delay | 😐 |
| Significant delay (more than two years) | 😞 |