

# Agency Progress Reporting Methodology

## September 2007

### 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 Roothing and Passenger Transport Projects<sup>1</sup>

Lead agencies are asked to estimate progress on strategic projects as identified in the proposed Regional Transport Programme.

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.

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<sup>1</sup> This method applies to all Roothing Projects. Different weightings however are applied to the phases of some Passenger Transport Projects to emphasise the relative importance of particular phases.

**Table 1: Roading and Passenger Transport project menus and scoring**

Investigation	Score	Design	Score	Designation and Consents	Score	Construction	Score
Not applicable	0	Not applicable	0	Not applicable	0	Not applicable	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 weighting<sup>2</sup>**

Phase	Investigation	Design	Designation and Consents	Construction
<b>Weighting</b>	5%	10%	10%	75%

<sup>2</sup> 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 proposed Regional Transport Programme is an ongoing activity for Greater Wellington as lead agency. This report covers the first 15 months of the 10-year programme. *Planned progress* is therefore assigned a total of 12.5%. Where passenger transport activities have met delivery expectations, 12.5% *actual implementation* has been assigned.

## 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%. As this report is for the first quarter of 2006/07, work which is *progressing as planned* for the financial year receives a score of 25% (see Table 3). That score is then reported as the *overall progress* for the activity.

*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
Work has not begun on this activity	0
Not reported	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
<b>Progressing as planned</b>	<b>25</b>