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Introduction

Welcome to the latest edition of Civica's Changing Landscape™ research series developed in collaboration with the Institute for Public Policy & Governance (UTS:IPPG) and the Centre for Local Government at the University of Technology, Sydney.

Over the nearly 5 years since our first collaboration the Changing Landscape series has sought to explore how technology solutions and IT services will continue to have an increasing role and impact in the delivery of public services for public sector organisations in Australia and New Zealand. The latest edition of the Changing Landscape series took our collaboration one step further this time by seeking first-hand the views of citizens rather than seeking the opinions of public sector (primarily local government) employees and sector commentators as a proxy, and we're delighted that the results are considered to be representative of the Australian population due to the volume of responses and the age and geographical distribution of respondents.

The Changing Landscape series has been tracking the state of digital transformation and public sector service delivery in Australia and New Zealand's public sector for almost 5 years. To date, the series has outlined the factors that have impacted public sector organisations across Australia and New Zealand. It has offered insights into how these institutions have tackled change at local, state and even federal levels to meet the changing needs and growing demands of its communities. The series has delved into the engagement approaches adopted by local authorities, such as involving communities in design and delivery of services, and has offered insights into their digital needs in terms of vendors, or flexible IT systems that offer capabilities such as third-party integration to achieve best practice digital outcomes, workforce and citizen

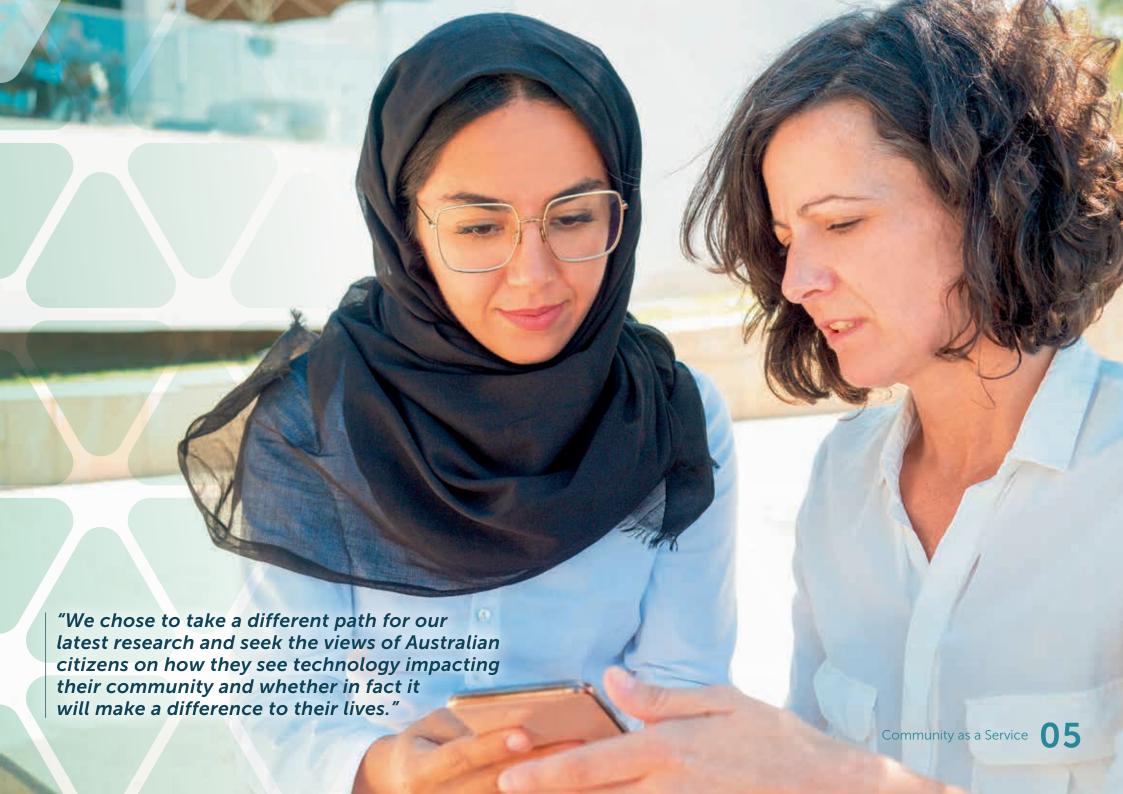
mobility, web-enablement, and automation to drive digital change. In recent reports we have also worked to explore the role of libraries and cultural spaces in the creation, maintenance and development of local communities, and what role we might play in the support of children, guardians and teachers in enhancing the role of technology in schools. Further reports in the series are available from civica com

With the media awash with stories and articles on Smart Cities and how technology will revolutionise our worlds we chose to take a different path for our latest research study and seek the views of Australian citizens on how they see technology impacting their community and whether in fact it will make a difference to their lives. Indeed we also asked them to tell us if they cared whether or not technology would make their lives better rather than assume the answer was yes.

One of the great mainstays of our partnership has been the strong and highly credible research foundation that is underpinned by UTS:IPPG as a research faculty. The results are the results and whilst we may choose to interpret the data in different ways and from different perspectives, (and indeed that has been a fundamental part of the deeper insights driven by the program) the data cannot be questioned.

Thanks as always to the collaborative spirit and great teamwork of the UTS:IPPG and our special thanks to Sophi Bruce and the team.

Community as a Service



Foreword



Thank you for choosing to explore this latest report delivered by Civica in conjunction with the UTS.

When I joined Civica a little over two years ago I was struck by the passion our people have in working with our customers, the vast majority of whom are public sector organisations. There is something uniquely special and different about working in the sector which I think is the ability we have to shape and change not just individual lives but also help build communities. The people I work with are strongly driven by this sense of purpose which is mirrored by the endeavour we see in our customers and partners throughout the Civica businesses.

In just the last two years Civica ANZ has brought two new businesses into the fold, Carelink (Community Care) in 2018 and Asset Edge (Asset Management) in early 2019. Both these software companies bring new and additional technology capabilities into the Civica portfolio. In addition to this we have embarked on a major program to import and localise solutions from the wider Civica Group as we build out our global capabilities.

In just the last 18 months we now have solutions available locally in ANZ for case and complaints management, democracy and community engagement, social housing and tenant administration, and as we launch this latest report I am delighted to be announcing our brand new cloud based management suite for local government, which we will make commercially available in 2020. This new solution, built

from the ground up to be housed in cloud environments marks a significant change to how we deploy solutions for local government and will act as a platform for broader development of cloud ready solutions and technologies such as AI, Robotic Process Automation and machine learning for the foreseeable future. The possibilities are endless and transformative for the delivery of public services in ANZ.

As Civica grows in the region, and as we expand our software solutions portfolio we were keen to understand what is making a difference or could make a difference to the lives of our customers' customers, and what do we need to focus on delivering for the future, to continue to improve the delivery of public services across ANZ. Congratulations to all involved in the project and I thank you for keen interest in our insights and in Civica.

Welcome to Community as a Service.

Ben Cowling
Executive Director
Civica ANZ

Foreword



In a world of rapid digital disruption, it is inevitable that technology is changing the way that people and governments interact.

Across the public sector, governments are achieving innovations and efficiencies that new technologies offer and are also seeking wider understanding of citizen perceptions and experiences as part of their ongoing strategic planning.

To help governments build a further picture of what communities value, we have engaged with citizens from around Australia to find out how they perceive technology is being utilised in their local areas. The findings are presented in this latest report *Community as a Service* as part of our ongoing 'Changing Landscape' thought leadership research partnership between the Institute for Public Policy and Governance at University Technology Sydney and Civica.

Local councils play a significant role in Australian society in terms of democratic representation, community engagement and service delivery, and our findings suggest there is great potential for local governments to utilise new technologies to improve participation, services and quality of life for their communities. Interestingly, this research suggests that

people perceive their political awareness and appetite for involvement in local decision-making as increasing, with social media, self-service technology and smart devices widening the scope for interaction with councils. They also suggest that there are opportunities for governments to build community satisfaction and trust through improved user experiences of technology and keeping their data secure.

These are just a few examples of the insights from citizens outlined in this report. We hope you will find this research useful when planning for technology-enabled services that shape places for the benefit of local communities today and into the future.



Carol Mills
Director
Institute for Public Policy and Governance,
University Technology Sydney

The citizen self-perception of change

Although the majority of citizens are always connected and online, they are sensitive to data security and personal data use.

Issues of security of data and trust of the institutions that hold data are top of mind for the citizens of today. Back in our 2015 report "The changing landscape for local government in Australia and New Zealand" council leaders identified the protection of data as a key enabler of better trust in public services and this thread was again to the fore in our 2019 citizen research. Local government however still has some work convincing their citizens that measures are in place to support the secure use of citizen data.

It was interesting to note from the community responses that citizens assess all levels of government pretty evenly in terms of the level of trust in data security and application of that data. Overall around 60% of citizens agree they are at least somewhat trusting of their governments.

As with other similar studies into trust in government there is a slightly higher level of trust placed in local and state government compared to federal government by citizens, and equally a slight difference between the perceptions of regional Australians and their capital city counterparts who are marginally more trusting overall.

However all layers of government are lagging behind private institutions such as banks in terms of citizen perception of a safe home for their personal data. Our citizens rate hospitals and healthcare services as much more worthy of their trust in general, with around 80% assessing these organisations as at least somewhat trustworthy.

From a generational perspective it is very interesting to note that in almost all cases younger people (18-34) are more trusting overall, perhaps a reflection of their understanding of the benefits to them of sharing data with reputable organisations they interact with. Our 35-54 cohort sits squarely in the middle with older generations (55+) the least trusting of organisations across the board.

The global data mining technology providers (e.g. Facebook and Google) are facing a significant intergenerational challenge in maintaining levels of trust in data security and ethical usage of that data. No single age group had their trust levels above 50% and for the older generations it was just a third of the respondents who felt they had any level of trust for these organisations compared to around 2/3rds of citizens for the three layers of Australian government.

Implication for local government

It would appear that overall, our citizenry is positive about the benefits of data and how we might leverage it for the benefit of all in the future. More reassuringly our younger generations are more comfortable trusting their governments to safely store and use data, so as we all age the opportunity to leverage data for community benefit should increase assuming this is done ethically. Councils should be upfront in articulating the measures they take to

Civica enlightens library search with artificial intelligence

Civica has built a cloud-based AI infused library search and management platform, leveraging technology first developed by Microsoft to search and interpret all the documents associated with the death of President Kennedy. Civica, working with Stonnington Libraries in Victoria, has built a prototype solution. It loaded a large quantity and variety of data from Stonnington's collection into Azure Blob Storage, then used Azure Cognitive Services to create meta data that would allow the repository to be searched. The AI infused approach also supports more comprehensive data tagging than human librarians typically perform, increasingly the likelihood that information would be surfaced during an end user search. Civica expects that the greatest impact will however come from the combination of AI and human effort – bringing together the speed and accuracy of AI, enhanced by the nuance of human insight.

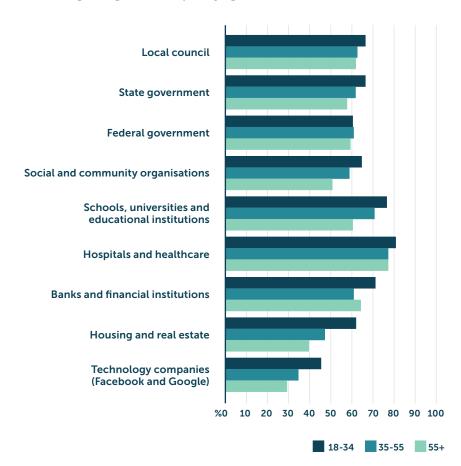
A manual task of cataloguing their digital assets which would take a human thousands of hours was completed in minutes ...

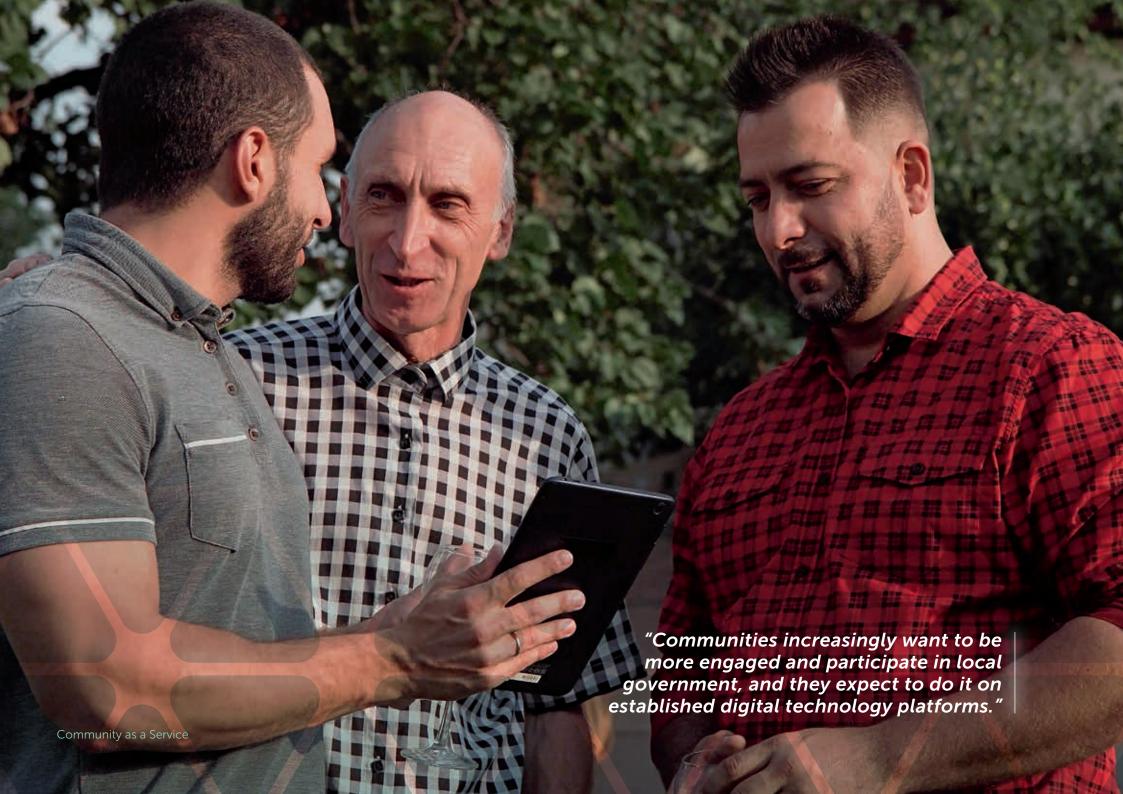
 $Read\ more\ here\ https://news.microsoft.com/en-au/features/civica-enlightens-library-search-with-artificial-intelligence/$

securely use and share data and also how they plan to leverage their data sets to deliver better services to the community.

Whilst the use of cloud based services was not explicitly queried during this survey previous studies have confirmed that providing online self-service access to council services is the key to supporting the citizenry of the future, and delivering better insights and services through data analysis, robotics and artificial intelligence will be broadly supported in the future assuming the security of that data is ensured.

I trust the following organisations/sectors to manage my data, by age (% who somewhat agree, agree or completely agree).





Interactions with local council

The proportion of citizens engaged in local decision-making will grow, with the majority of interactions through self-service technology.

In our first Changing Landscape report in 2015, not surprisingly our study participants (all providers or commentators on local services delivery) identified the move to online self-service as a key enabler for local government of the future.

The broader (now almost ubiquitous) ownership of smart devices is driving change across all sectors and government is increasingly challenged to meet the service delivery benchmarks set by commercial organisations. Citizens now expect council service delivery to be online, effective and designed to save them effort in interacting with council.

Social media, established by our study in 2015 as being a driver of engagement seen as key for community engagement in 2025, is already looking like a sure bet.

Only 27% of our survey respondents currently use social media to engage with their local council however they predict themselves that by 2025 at least half of them it will be their main channel of communication with council. Unsurprisingly it is again the younger generation who will interact more directly with councils via social media in the future. Whilst that is clearly one way in which councils can engage with the community of tomorrow through technology, it is by no means the full picture.

In the intervening period what appears to be emerging is a new movement that wants to engage more broadly with the process of government, over and above receiving effective and efficient services (though they remain key to citizen satisfaction).

What we have uncovered from our latest citizen based research is that communities increasingly want to be more engaged and participate in local government, and they expect to do it on established digital technology platforms (mobile, pc and smart device). And that movement is increasing in momentum to the extent that in 5 years' time our citizens are saying only one third of them will interact less with their local council than today. In fact across all ages councils can expect and should be preparing themselves for around 20% more engagement than they currently experience, and almost 30% in the younger age group (18-34).

In NSW in 2019 it is now mandatory for all councils to live stream their council meetings and whilst we cannot yet comment on whether that change has been successful in improving council citizen engagement, it is clear that this is one way of delivering on the citizens' needs both now and in the future.

Since 2015 the digital transformation predicted by our study participants has continued at a pace, and whilst there is still so much more that can and needs



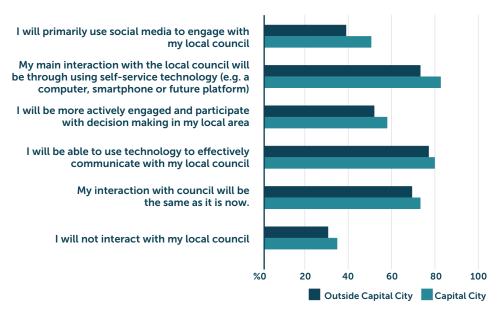
to be done, many councils across ANZ have implemented significant changes to their IT infrastructure, and business processes, to support broader technology adoption and deliver more efficient and effective services to their communities.

Implication for local government

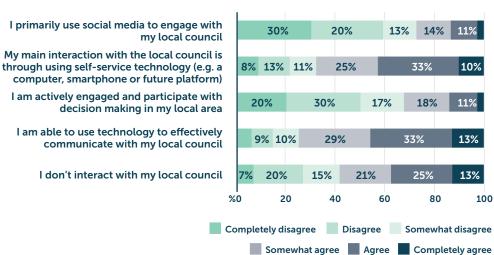
We already know that digital investment is key to improving public sector service delivery engagement and community engagement, and that councils are struggling to fund that digital transformation against increasing demands for capital investment in physical infrastructure (see "The challenges of building digital bridges" in our report from 2017).

Pressingly for our councils and their employees, the demand for deeper and more involved community engagement is accelerating and is likely to exceed their capacity to satisfy quickly. Councils need to be researching new applications, tools and technologies supported by, and in collaboration with their IT partners, to ensure the broad catalogue of citizen engagement and democracy tools that is available to them, is on their shopping list. (Hint: talk to Civica!)

How respondents will interact with their local council in five years' time, by location (% who somewhat agree, agree or completely agree)

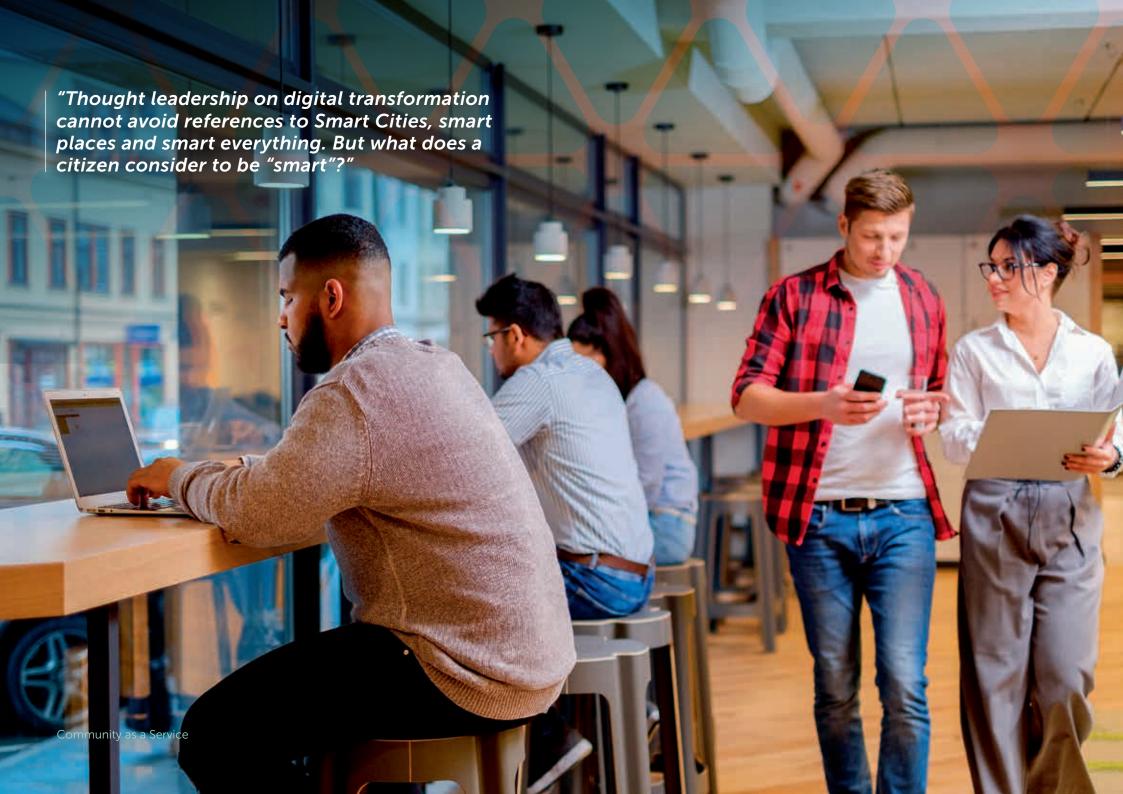


How respondents interact with their local council.



Modern.Gov – City of Sydney

City of Sydney in New South Wales is the first Australian customer to use Modern.Gov, Civica's cloud based solution for paperless meeting management and governance. The Council was looking for a solution that would streamline agenda management, enabling staff to quickly and easily collate and publish agendas and minutes, and chose Modern.Gov as it best suited their requirements. Modern.Gov is used by 80% of local government authorities in England and Wales and has enabled organisations to save money, increase productivity for employees, and improve citizen engagement.



Current experience with technology

There is scope for local councils to improve customer experience through technology. Citizens see a number of areas where technology can improve their day to day and longer term community experience.

In previous research in the Changing Landscape series, we have often referenced the use of technology to enable better delivery of public services. This time around we wanted to dive a little deeper into the lived experience of technology for our citizens, and attempt to understand where the biggest bang for buck is (and will be), from a citizen perspective.

Almost three quarters (72%) of respondents to our recent survey agreed to some extent that they are satisfied with the way technology is being used by their local council. However, the vast majority of those respondents only 'somewhat agreed' with that statement suggesting there is scope for councils to improve this perception/ customer experience.

In our 2017 report "The intrinsic value of libraries as public spaces: Physical-digital, communicating the new normal" we noted how smart councils are blending their physical assets and infrastructure, and their digital infrastructure, to good effect, to provide a modern community with options to engage more deeply and personally.

We note also that thought leadership on digital transformation cannot avoid references to Smart Cities, smart places and smart everything. But what does a citizen consider to be "smart"?

The research findings highlighted that whilst citizens are aware of some smart initiatives that can help shape their future community the notion means different things to different people.

Our citizens are also not sure how technology is being deployed in their communities, or imagining different ways that it could be used.

When asking our respondents what technology is being used in their community today, 49% of citizens were quite aware of the use of community portals and online services to engage with council. A slightly lower percentage identified online systems for booking community spaces as being something they already experience today.

However only one third perceive to be their council is using technology to monitor roads and traffic to improve congestion, traffic flows and parking availability, despite it being one of the key areas of service delivery that citizens expect councils to improve through technology in the future.



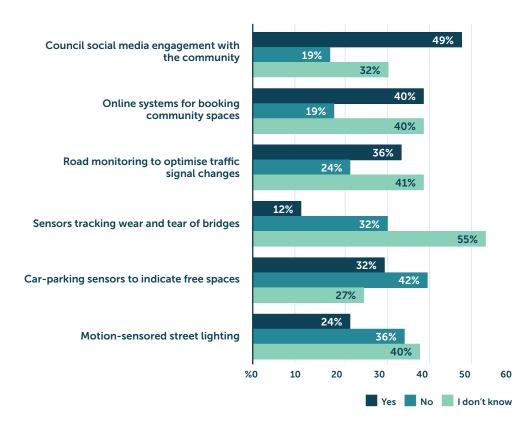
When asking citizens to assess whether smart technologies are deployed by their local council to monitor and protect physical infrastructure, a significant challenge for many councils, only one in ten people think their council has made any attempt to leverage IoT or drone technology to remotely monitor and assess physical infrastructure such as roads and bridges. With all the talk around smart lighting and smart parking it is perhaps no surprise that our capital city dwellers are more likely to believe that their council has adopted the technology to improve their access to environmentally better street lighting and smarter parking solutions for communities.

However even in the capital cities less than 40% perceive that their council has already deployed some form of technology solution to parking woes.

Implication for local government

As much as we want to think citizens are engaged in the improvement of public services, for some councils and their communities that may be far from the truth. And where they are aware to an extent in what ways councils are improving public services, are councils really exploring truly imaginative ways to digitally transform?

Do you know if any of the following technologies are used in your local council?



Asset Edge and Authority Apps suite

Sometimes a single app significantly changes the way councils manage their resources.

For example, Moorabool Shire Council near Melbourne has modernised its maintenance operations by deploying Civica's asset management app, Reflect.

Before the council started using the app in 2018, its field teams didn't have a common digital platform for managing the inspection and maintenance of roads, footpaths and other assets. Managers allocated work orders manually and field teams didn't use a common system to report when they'd finished work.

This not only made asset maintenance tracking labour intensive, it reduced confidence that data was accurate and made it hard for staff members to quickly verify the status of repairs. This also made it challenging to demonstrate compliance with adopted levels of service.

That's changed with the introduction of Reflect. Now, maintenance work is allocated to appropriate crews automatically, using location data and information collected during inspections. Crews' GPS-equipped devices indicate the specific location of defects.

Field workers and contractors record information, which is displayed spatially in the Council's systems. So, when members of the public call to report a defect, the council can now provide accurate information.

Team leaders and management now have a better overall picture of asset maintenance, which helps them to operate more proactively.

Credit: https://www.itnews.com.au/digitalnation/councils-aim-to-make-liveability-easier-529818

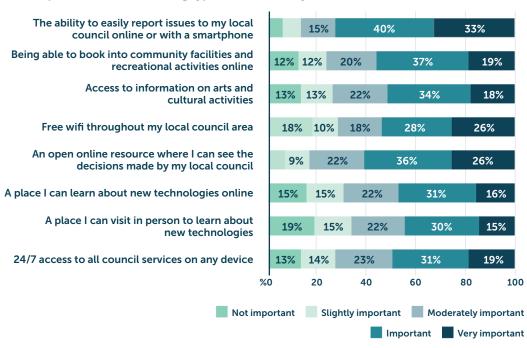


The value of digital services

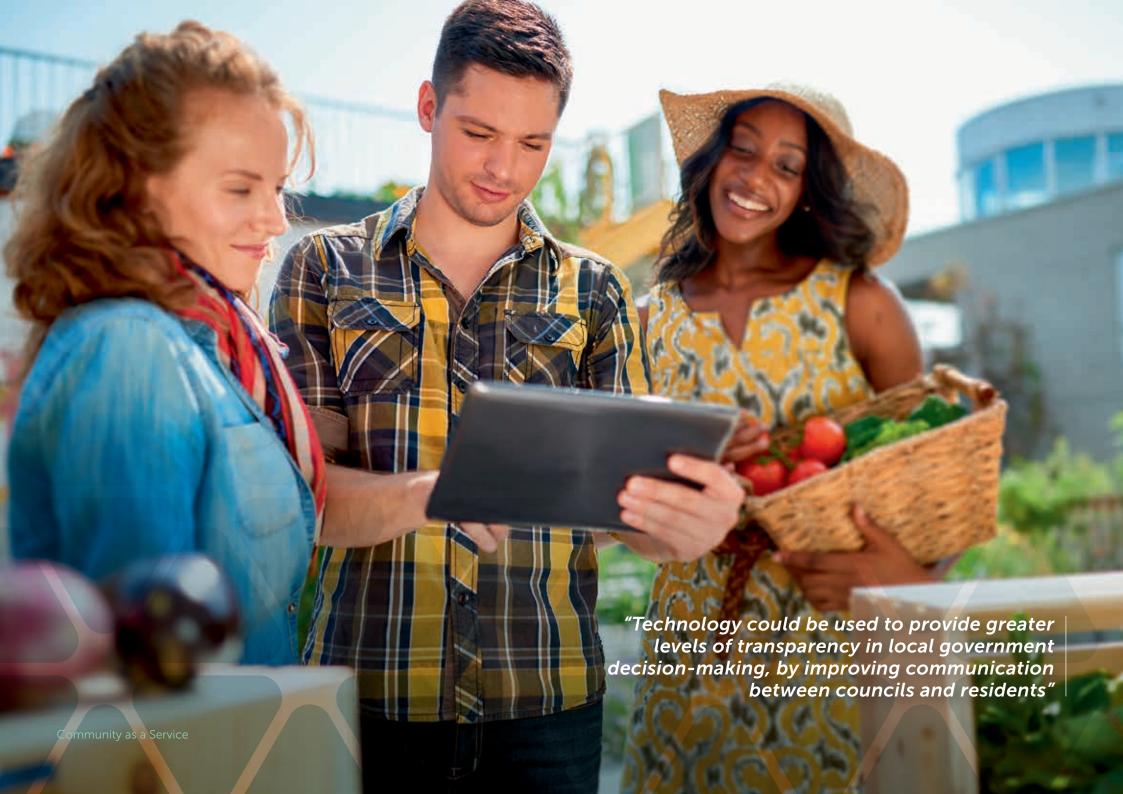
Citizens want services that allow them to easily report issues to their local council online or with a smartphone.

When asked by our survey what types of digital services citizens most wanted there was a clear guidance for our councils to deploy tools that allow citizens to quickly report issues that arise in their locality whether it be roads, rubbish or rates (the traditional services councils are most known for).

How important are the following types of service for you?







Perceived importance of technology for local community services

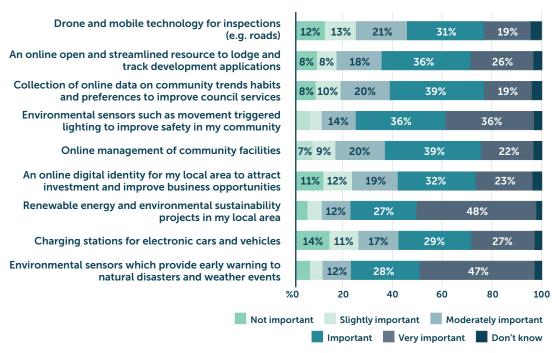
The most important technology/service is for renewable energy and environmental sustainability projects.

One of the most significant reasons for conducting this latest research on the use of technology in local government was to explore perspectives of citizens compared to the views of public sector practitioners.

We hear so much about Smart Cities and smart places that we wanted to understand a little more deeply if our visionary councils are anticipating what problems the public really wants technology help solve, building an unimagined future community supported by an invisible web of technology, or missing the point altogether?

In essence, answering the question "are they on the same page?" when it comes to the deployment of technology solutions to support communities, and address some of the "wicked problems" faced by modern communities.

How important are the following for your community in your opinion?



Benefits of new technologies

Citizens think local councils can improve on roads and infrastructure, health, wellbeing and safety, waste management and environmental sustainability.

The vast majority of respondents agreed to some extent that new technologies can improve community services and have the potential to improve their quality of life. However, a heavy majority (81%) were also concerned that using new technologies to analyse their data could impede their privacy.

Respondents were most likely to rank roads and infrastructure (61%), health, wellbeing and safety (60%) and waste management and environmental sustainability (54%) among the top three areas they believe council could most improve on to benefit their community. There were few notable differences in how capital city and regional respondents perceived the benefits of new technologies.

Respondents outside capital cities were substantially more likely to rank support of small business and local economy among the top three areas they believe council could most improve on to benefit their community. On the other hand capital city respondents were more likely to rank development processes, online services and open shared information among the top areas they believe council could most improve on to benefit their community.

Again when you examine this data against predicted change in citizen engagement with councils over the coming years, you can conclude that there will be a significant need for councils to deploy technology solutions that help them engage with citizens digitally and cost effectively, including the live

streaming examples quoted earlier in the report. The citizen of the future is going to demand more transparency, more ways to engage and contribute and more visibility of their voices in action.

From the following list, what service area do you think your local council could most improve on to benefit your community? Please rank your top three areas.



Democracy and Engagement – Modern.Gov, iCasework and Civica Engage

Civica Group has recently acquired a number of businesses that complement our existing portfolio of technology solutions for government, and many of these new solutions are now available in ANZ for the benefit of local government and other sectors.

These include iCasework, already in use at a number of Australian councils, offers cloud-based case and complaint management solutions to a variety of market sectors. ERS Group is a well-established provider of democracy and community engagement solutions for the public sector and regulated markets including Modern.Gov for governance, compliance and meeting management, whilst Civica Engage is our citizen and stakeholder management solution.



Other ideas for new technologies

Citizens want to see technology applied in a myriad of ways from environmental sustainability to improving communication between councils and residents.

For the final section on our survey into the types of council services that citizens feel could benefit from the deployment of new technology we offered our respondents the opportunity to open up about what they see as the untapped opportunities. UTS were able to group those ideas into 4 broad themes.

Respondents were asked, 'What other ideas do you have for your local government to use new technologies to support your community?' This question received over 300 responses which touched on a range of themes. The most common of these are briefly outlined below, with some selected quotes from the survey.

Communication between councils and residents

Many respondents spoke about their desire for information to be more readily accessible online via council websites, apps or other means.

One respondent suggested an "information board in public spaces that can be managed remotely."

"It needs to be easier for people to go online and see what resources are available in the local community. Sometimes you don't know what's on offer,

until somebody tells you, such as free fitness classes and anything they're putting out to the community."

Some respondents mentioned that technology could be used to provide greater levels of transparency in local government decision-making, by improving communication between councils and residents.

One respondent suggested that councils could "live stream council meetings and decisions."

Another stated, "[It] should be more easy (sic) to access to information regarding where the money goes."

For several respondents, new technologies could enable more effective reporting to council on local issues or problems that require council's attention.

A few respondents believed that councils could use new technologies to undertake stronger levels of community engagement and consultation.

"The council might actually use the technology and listen to what the community want, rather than informing the community of the (non consultative) decisions they've made via that technology."



Crime and safety

Several respondents spoke about the potential for new technologies to improve the level of safety in their community, through greater levels of surveillance and improved lighting to deter crime.

"There's a lot they could do, a lot of the big roads and intersections need cameras. They need more especially with some of the accidents that are happening, and outside shopping centres, where people get bashed and hurt. I know that impacts on privacy so that can be a grey area."

"Parking meters which can refund when you don't use the time."

Transport

A common theme was the potential for new technologies to improve car parking in local areas.

"It's time they made parking meters and things like that where you don't actually need money. I don't know if you can get a card or make it electronic from your smart phone or a tap and go."

"Parking meters which can refund when you don't use the time."

Many respondents suggested that councils could use new technologies to improve traffic management (both vehicle and pedestrian), using more sophisticated traffic light technologies and traffic monitoring systems.

"Technologies to better monitor traffic and traffic flows in the local area."

"Rerouting traffic of major congestion, sensors for traffic light crossings".

A few respondents also expressed the desire for greater access to charging stations for smart cars and electric bikes and scooters.



Environmental sustainability

Respondents mentioned a diverse range of ways that new technologies could be used by council to improve environmental sustainability, examples of which include:

"Aiding the transition from petrol transport to electric transport and also to move to renewable energy."

"Should be buying electric cars and garbage trucks as well as investing in solar panels for schools and for backup power."

"I would like to see new technologies available, to process recycling here instead of sending it off somewhere else."

"Solar power lighting. There is too much ambient light at night. Other solar power usage."

"Monitoring of water wastage."

"Be active in sustainability by improving energy efficiency in delivering services to the area."

"Just a way to manage feral animals."

"I think it would be great to go paperless because everyone has email. It's such a waste of paper, more beneficial to the environment and to us to go to a paperless environment. It's the mail in the letterbox from council, these resources can be used differently, at election time they send me mail. We put hard-copy in the bin. Councils send our accounts via email but everything else is in hard-copy. If something is happening, I have 2 properties, they come once a quarter in a mail out to us and that could come in a (sic) email. At election time I got 3 surveys and so took those calls and then I had to go home and look at something in the mail again. It would be most useful to have this on social media."

"I think it would be great to go paperless because everyone has email. It's such a waste of paper."

Conclusion

Technology in every-day life is growing in importance with the majority of respondents agreeing that their main interaction with local council is through self-service technology, and an even higher proportion agreeing that this will only increase. The use of social media to engage local councils will nearly double over the next five years with nearly half of all respondents agreeing this will be the primary tool for engagement in the future. The vast majority of respondents agree that new technologies can improve community services and have the potential to improve their quality of life.

Regardless of age, respondents were most likely to rank roads and infrastructure, health, wellbeing and safety and waste management and environmental sustainability among the top three areas they believe council could most improve on to benefit their community. Respondents outside capital cities believe council could improve on supporting small business and local economy while capital city respondents cite improved development processes and online services most beneficial.

Respondents perceive that their involvement in local decision making, their political awareness, and their personal affinity with local community will grow. Younger respondents were most likely to agree that they will be more actively engaged in local decision-making in five years' time than they are now.

While almost three quarters of respondents are satisfied with the way technology is being used by their local council, the vast majority of those respondents only 'somewhat agree' they are satisfied suggesting there is scope for councils to improve this perception/ customer experience.

Over a quarter of respondents trust their local councils, state and federal governments to manage their data although greater trust was expressed

in hospitals and healthcare, banks and financial institutions and schools, universities and educational institutions.

Younger respondents are more likely to express trust in local councils to manage their data and capital city respondents expressed higher levels of trust in almost all organisations/sectors compared to those living outside capital cities.

Citizens and local government professionals are mostly in agreement about increasing reliance on self-service technologies and demand for connectivity when comparing this research to previous Changing Landscapes: Vision of 2025 research. Citizens have favourable self-perceptions when it comes to thinking about their engagement with council and their affinity with their local communities will increase in the future.

The findings provide important data on how citizens regard and value technology in their local areas. It offers governments and technology providers with ideas and insights into the types of technologies that are perceived to have the most impact on communities both today and in the short term future.

And finally, ideas expressed by our survey respondents for how local government could use new technologies to support community areas include greater communication and transparency between councils and citizens, improved safety and crime deterrence, parking and traffic management and environmental sustainability. All these areas contributing to better places for living, enabled by Community, as a Service.

For further information on our report or a deeper dive into the data from our survey please contact your Civica Account Manager or email us with your question: marketing@civica.com.au

