W.S. LONNIE AWARDS

RECOGNISING EXCELLENCE AND ACCOUNTABILITY IN ANNUAL REPORTING IN WESTERN AUSTRALIA

GENERAL AWARD CRITERIA

PHASE ONE

All eligible WA Government Sector organisations are scrutinized (and scored) against the following selection criteria:

1. Agency was in operation throughout the entire financial year.
2. Reports were submitted to Parliament by the due date.
3. Report is available online within a month of the due date.
4. The Auditor General's Individual Auditor Opinion (where required), as presented in the agency's annual report, is dated prior to the due date of the report.
5. "Enabling legislation" for the agency is accurately provided as set out in the Treasurer's instructions.
6. The report's file size is reasonable (one of the accessible formats of the annual report should be <15mb).
7. The report is available in various formats (eg MS Word, PDF, HTML, e-doc etc).
8. Ease of access to which the current annual report can be downloaded (viewed) from the agency's home page. More clicks away from the home page, decreases the score.
9. Ease of navigating through the document (eg bookmarks, hotlinks etc).
10. Report includes a useful Executive Summary (as an executive summary and not part of a forward etc), Organisational Chart and presentation of the Performance Management Framework.
11. Report addresses the Additional Reporting Requirements from the WA Annual Report Guidelines 2022-2023.
12. Report addresses the Other Legal Requirements from the WA Annual Report Guidelines 2022-2023.

PHASE TWO

The W.S. Lonnie Judging Panel is responsible for scoring a set of shortlisted agencies against the following criteria.

JUDGING

1. Presentation and Communication in an Electronic Medium

a. report laid out in an orderly fashion (eg use of headings and sub-headings)
b. clear theme for the annual report (eg key/important messages) clearly conveyed at the outset in introductory statements
c. the language is clear and concise - plain English (lacks use of jargon), technically correct grammar, spelling and punctuation, short sentences, active rather than passive verbs used
d. key design features employed throughout, for example
    - critical messages highlighted
    - images enhance messages
    - copy & paste of text possible and, as well, different sections can be downloaded
e. use of graphs, tables and photographs is constrained, but effective (ie balance between text and visual presentations)
f. easy to read online format
g. allows different reading approaches – skimming, jumping between different sections, in-depth reading etc
h. interactive links used to take reader to relevant sites or documents
i. effective use of videos & flash animation, if present

In summary, the intended audience can read the report with relative ease and thus has the best possible chance to understand the material AND the use of the electronic medium enhances rather than detracts from the message.

2. Performance

a. performance management framework included
b. treatment of agency performance not just a descriptive list of agency activities
c. performance objectives (or measures) and progress toward them reported
d. strategies for prioritising and achieving agency goals, objectives/outcomes discussed
e. both positive and negative aspects of performance, as well as challenges encountered, reported
f. appropriate use of case studies to describe agency performance
g. stakeholder engagement (eg seeking feedback through surveys, accessible complaints 'mechanisms' etc leading to improving agency performance) discussed
h. concise financial report with relevant commentary and cross-referencing
i. building workforce capability to enhance performance discussed

In summary, the agency's capability to perform to an acceptable standard is substantiated.

3. Corporate Governance

a. the following are sufficiently discussed:
   i. statutory authority (enabling legislation) for the operations of the organisation
   ii. organisation history, profile and structure
b. codes of conduct, ethos and values that drive the organisation are clear
c. risk management oversight, management and internal controls are presented
d. boards and advisory committees described
   i. oversight responsibilities
   ii. membership: term of appointment names/photos, brief CV or details of experience, fees paid, meeting attendance (out of possible number)

In summary, the agency's corporate governance system is comprehensively presented.

MAJOR AWARDS

Margaret McAleer Special Commendation

In 1999 for the first time, IPAA awarded the Margaret McAleer award. This is a special commendation to honour the late Margaret McAleer, a Member of Parliament and member of the WS Lonnie Panel for some years. The award is given, at the discretion of the panel, for an outstanding report that, in some respect, establishes a benchmark to which others should aspire in annual report preparation and production. Another factor that is considered for this particular award was the imagery/multimedia and ease in accessing information as stand out qualities.

The Allan Skinner Trophy and Margaret Nadebaum Trophy

The Allan Skinner Trophy can be awarded by the W.S. Lonnie Judging Panel to an organisation in the General Government Sector, and the Margaret Nadebaum Trophy can be awarded by the W.S. Lonnie Judging Panel to a Public Financial and Non-Financial Corporation (as defined in the Western Australia State Budget Papers).

Unlike the General award categories, there is no specific scoring across set criteria. Rather, in addition to whether reports meet the usual annual report requirements, the judges apply their own extensive experience to consider best practice and what makes for a good report. These trophies allow the judging panel to recognise reports that stand out for remarkable progress, creative execution, or a unique approach to engagement, which goes beyond the general award category criteria.

Some focus areas the judges may consider include but are not limited to: significant improvement over previous year/s; unique storytelling; outstanding clarity and/or accessibility; an innovative approach to reporting; a specific organisation activity or initiative as it relates to the organisation reporting requirements; reporting that goes above and beyond standard reporting requirements (for example providing commentary on Auditor General qualifications, or other underperformance issues, and how they are being addressed).

The Allan Skinner Trophy and Margaret Nadebaum Trophy allow the W.S. Judging Panel to highlight an organisation in the General Government Sector and an organisation amongst Public Financial and Non-Financial Corporations that in some regard exemplifies a dedication to excellence that deserves special recognition. It allows the Panel to highlight features of an annual report that may not be considered in the general criteria, but are significant enough to advance reporting standards and encourage continuous improvement for agencies in the General Government Sector and for Public Financial and Non-Financial Corporations.

The W.S. Lonnie Memorial Trophy

Awarded to the best Annual Report as identified by the WS Lonnie Judging Panel.

SPECIALIST AWARDS

The W.S. Lonnie Judging Panel also judges the following awards based on the below criteria:

Office of the Auditor General Award for Transparency and Accountability

The annual report fulfils its duty of being a prime vehicle for accountability of the organisation and is accurate, credible, forthright and sincere.

Acknowledges and addresses the challenges as well as reporting on the successes.

Promotes transparency and openness so that stakeholders – Members of Parliament, interest groups and citizens generally - are able to understand the operations and performance of the organisation.

Presentation of information in a way that that demonstrates appropriate disclosure of information to the Parliament, the community and relevant stakeholder groups and in a way that makes it easy for the stakeholder to comprehend.

Discussion of performance against objectives with meaningful and accurate reflection of performance and with reference to both positive and negative performance.

Uses design to improve the level of disclosure, communication of the issues and facilitate stakeholders' understanding of the report.

Includes clear concise notes to the accounts and comment in the body of the report that assist appropriate disclosure and help stakeholders to understand the financial performance of the organisation.

Award for Complaints Handling

The annual report shows evidence of responsiveness to client concerns about service problems. There is an indication that a clearly articulated client complaint policy and procedure is in place. There is an explanation about how complaints are handled in the organisation.

There is an indication that the organisation values client complaints information as a feedback mechanism to improve performance.

There is evidence that the agency has reviewed its complaint handling system against the Australian Standard Complaints Handling AS 4269 - 1995 and an indication of the extent to which the agency considers that the Standard is met. Where shortcomings have been identified there is an indication of steps being taken to improve compliance.

The annual report fulfils its duty of being a prime vehicle for accountability of the agency and is accurate, credible, forthright and sincere in its reporting on complaints handling. It acknowledges and addresses the challenges as well as reporting on the successes.

Other Awards - Information only

Special judging panels have been established to determine the following awards:

- **Chief Financial Officer of the Year Award** – Sponsored by the Chartered Accountants Australia and New Zealand

- **Excellence in Compliance Reporting Award** – Sponsored by the State Records Commission of Western Australia

- **Performance Management Award** – Sponsored by CPA Australia

- **Good Governance Award** – Sponsored by the Public Sector Commission