



Pathway Local Government

Rates Modelling

Steve Carter

Date: August 2025

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LOCAL
GOVERNMENT



Agenda – Rates Modelling

1

**AcQuum Consulting in
partnership with Infor Pathway**

<https://www.acquumconsulting.com.au/>

<https://www.youtube.com/watch?v=oYY4m3IzGUs>

2

Rates Modelling

Key Features:

- Scenario Wizard
- Model multiple scenarios
- Comparison reporting and dashboards

3

Demonstration

Demonstration of key features.

Rates Modelling

AcQuum Consulting, in partnership with Infor Pathway, have developed a Rates Modelling Tool to help local councils accurately model and analyse property rates revenue.

It enables scenario planning, policy impact assessment and audit-ready financial modelling aligned with legislative and council requirements.

Rates Modelling

Initial phased completed (and is what we will demonstrate)

Acknowledge the assistance, input and collaboration of multiple councils such as City of Adelaide

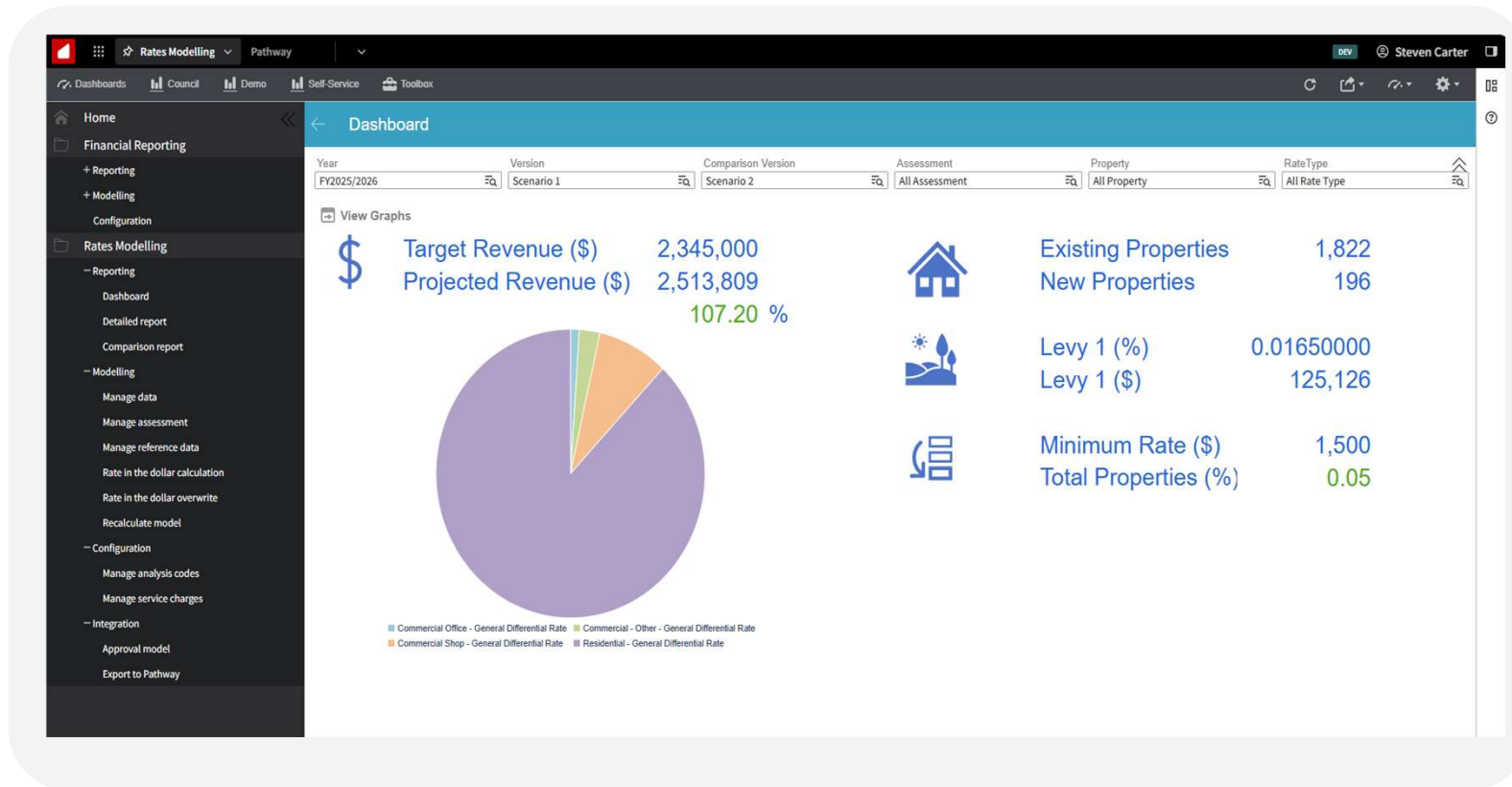
Acknowledge the many others who indirectly contributed by providing requirements

Next phase will be working with other councils to validate and extend functionality

Aim that by end of this next phase to have a fully functional integrated solution in production

Rates Modelling

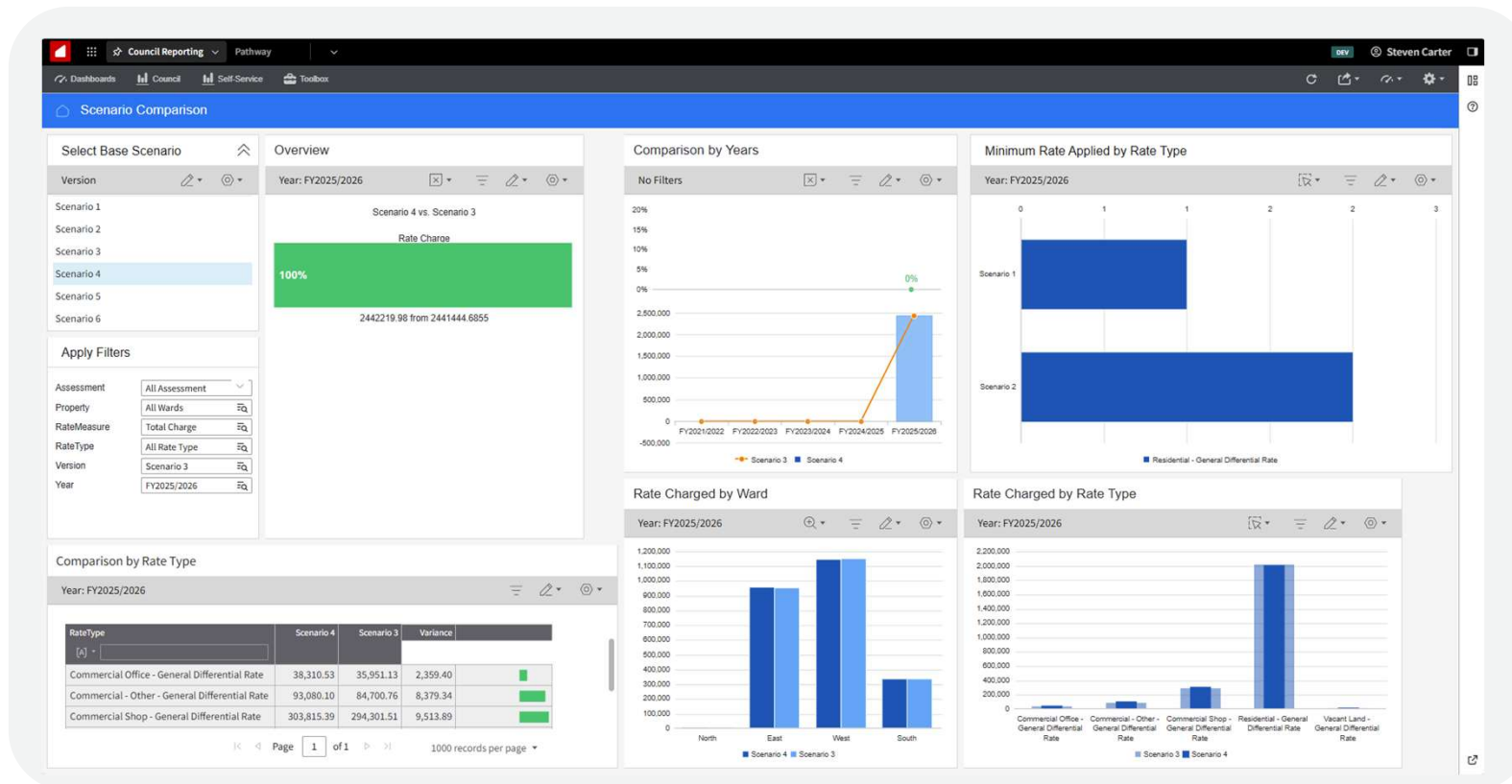
Interactive Dashboards allowing the user to filter and compare



- View results of the model
- Compare scenarios
- Filter on ward, suburb, rate type, assessment

Rates Modelling

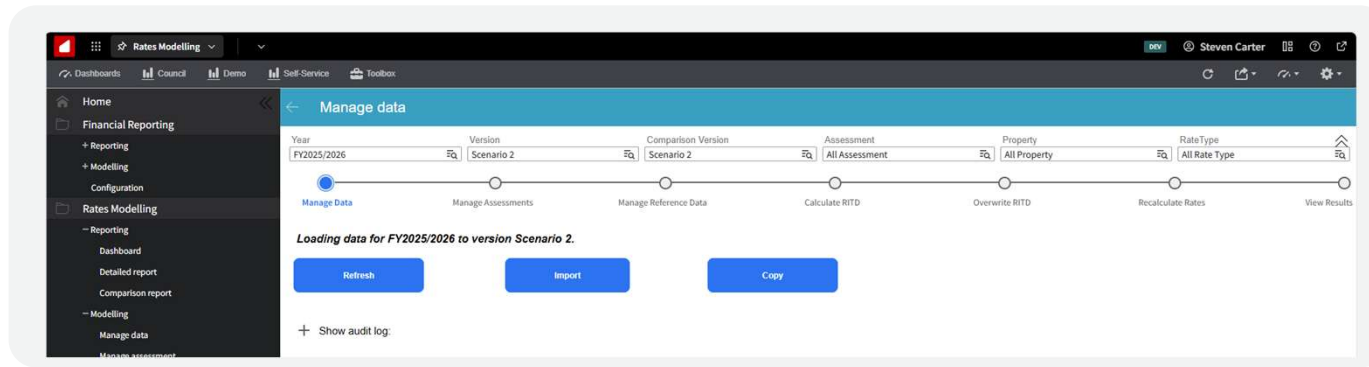
Interactive Dashboards allowing the user to filter and compare



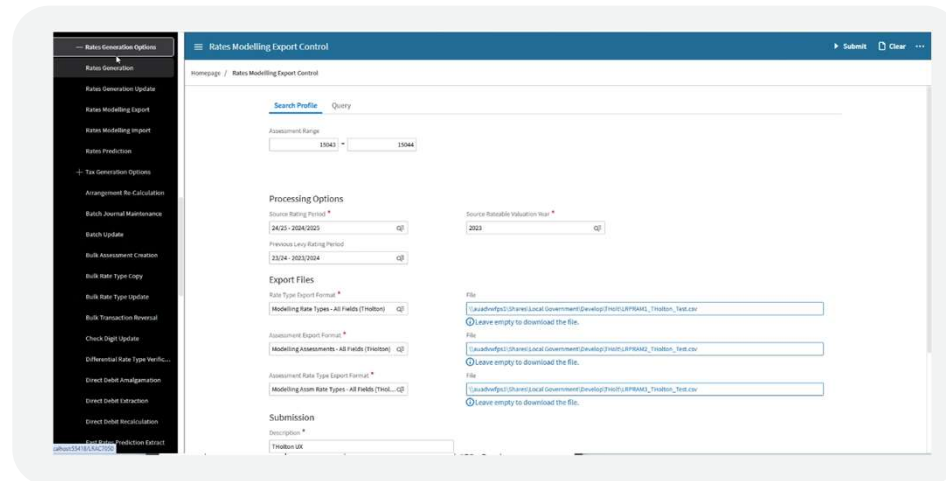
- Overview dashboard with various charts, graphs, data grids

Rates Modelling

Rates Modelling Wizard – Managing Data



- Wizard style – steps the user through the modelling process
- Import from Pathway and/or other sources e.g. additional assessments for modelling purposes
- Copy from another scenario
- Pathway Extract available 2025.04



Rates Modelling

Rates Modelling Wizard – Managing Assessments

The screenshot shows the 'Manage assessment' step in the Rates Modelling Wizard. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with filters and a table of assessments.

Filters:

- Year: FY2025/2026
- Version: Scenario 2
- Comparison Version: Scenario 2
- Assessment: All Assessment
- Property: All Property
- RateType: All Rate Type

Progress Bar:

- Manage Data
- Manage Assessments (Current Step)
- Manage Reference Data
- Calculate RITD
- Overwrite RITD
- Recalculate Rates
- View Results

Table of Assessments:

Assessment	Property	Name	Rate Type	Valuation	
Assessment 1236203	172051	2 Allen Street South Townsville Queensland	Residential - General Differential Rate	750,000	X
Assessment 1236204	172052	3 Allen Street South Townsville Queensland	Residential - General Differential Rate	490,000	X
Assessment 1250	140000	123 Maple Avenue Oakwood Victoria	Residential - General Differential Rate	1,831,143	X
Assessment 1251	140001	456 Elm Street Rivertown Victoria	Residential - General Differential Rate	1,897,141	X
Assessment 1252	140002	789 Pine Road Greenfield Victoria	Residential - General Differential Rate	1,982,300	X
Assessment 1253	140003	101 Cedar Lane Springtown Victoria	Residential - General Differential Rate	1,219,115	X
Assessment 1254	140004	202 Birch Boulevard Lakeview Victoria	Residential - General Differential Rate	1,141,465	X
Assessment 1255	140005	Riverside Florist 303 Willow Way Hillcrest Victoria	Commercial Shop - General Differential Rate	1,896,634	X
Assessment 1256	140006	Heritage Bookstore 404 Ash Street Brookside Victoria	Commercial Shop - General Differential Rate	1,697,569	X
Assessment 1257	140007	505 Oak Street Meadowbrook Victoria	Residential - General Differential Rate	1,312,444	X

- View assessments
- Remove assessments from the scenario model

Rates Modelling

Ability to drill directly to Pathway Assessments

Detailed report

Year: FY2025/2026 | Version: Scenario 2 | Comparison Version: Scenario 2 | Assessment: All Assessment | Property: All Property | Rate Type: All Rate Type

Assessment	Property	Property Name	Rate Type	Valuation	Valuation (Inc)	Rate Charge	Min Charge App
1236203	172051	2 Allen Street South Townsville Queensland	Residential - General Differential Rate	750,000	778,500	3,000	0
1236204	172052	3 Allen Street South Townsville Queensland	Residential - General Differential Rate	400,000	508,620	3,000	0
1250	140000	123 Maple Avenue Oakwood Victoria	Residential - General Differential Rate	1,831,143	1,900,726	6,379	0
1251	140001	456 Elm Street Rietown Victoria	Residential - General Differential Rate	1,897,141	1,969,232	6,609	0
1252	140002	789 Pine Road Greenfield Victoria	Residential - General Differential Rate	1,982,300	2,057,827	6,905	0
1253	140003	101 Cedar Lane Springtown Victoria	Residential - General Differential Rate	1,219,115	1,265,441	4,247	0
1254	140004	202 Birch Boulevard Lakeview Victoria	Residential - General Differential Rate	1,141,465	1,184,841	3,976	0
1255	140005	Riverside Floral 303 Willow Way Hildcrest Victoria	Commercial Shop - General Differential Rate	1,896,634	1,963,016	6,588	0
1256	140006	Heritage Bookstore 404 Ash Street Brookside Victoria	Commercial Shop - General Differential Rate	1,697,569	1,756,984	5,896	0
1257	140007	505 Oak Street Meadowbrook Victoria	Residential - General Differential Rate	1,312,444	1,362,317	4,572	0

Page 1 of 31

Pathway Integration

Assessment Summary

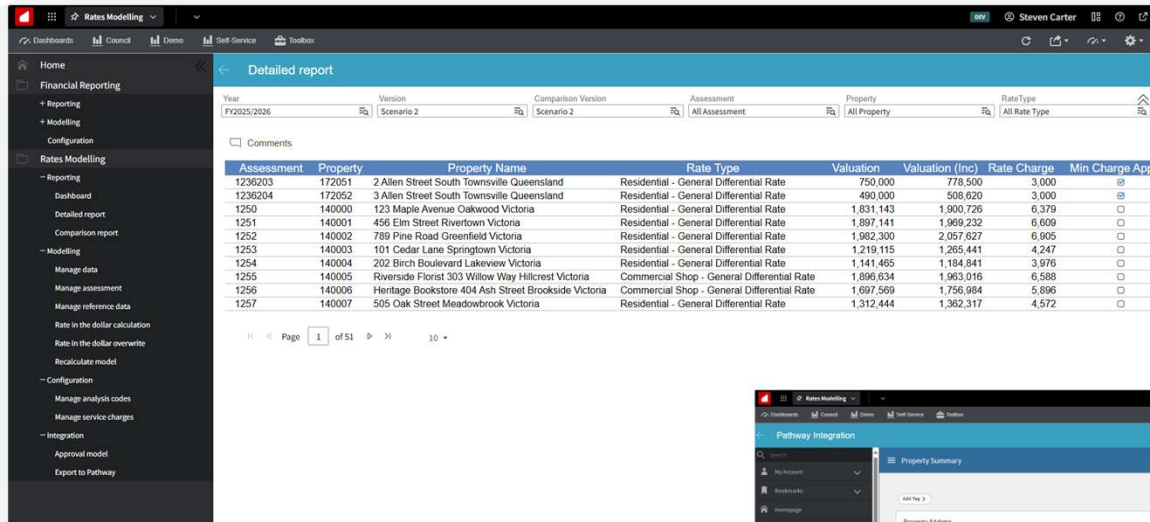
Add Tag

Assessment		Names																	
Primary Location:	2 Allen Street, SOUTH TOWNVILLE QLD 4810	Location Status:	Current																
Assessment Number:	1236203 (4)	Assessment Status:	Current																
Valuation:	1236203	Valuation Number:																	
Valuations (1 result) <table border="1"> <thead> <tr> <th>Land Value</th> <th>750,000</th> </tr> </thead> <tbody> <tr> <td>Page 1 of 1</td> <td>15 records per page</td> </tr> </tbody> </table>		Land Value	750,000	Page 1 of 1	15 records per page	Rateable Valuations (1 result) <table border="1"> <thead> <tr> <th>Land Value</th> <th>750,000</th> </tr> </thead> <tbody> <tr> <td>Page 1 of 1</td> <td>15 records per page</td> </tr> </tbody> </table>		Land Value	750,000	Page 1 of 1	15 records per page								
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Financial Summary (18 results) <table border="1"> <thead> <tr> <th>Amounts</th> <th>0.00</th> </tr> </thead> <tbody> <tr> <td>Amounts Fines</td> <td>0.00</td> </tr> <tr> <td>Current</td> <td>5,753.08</td> </tr> <tr> <td>Current Adjustments</td> <td>0.00</td> </tr> </tbody> </table>		Amounts	0.00	Amounts Fines	0.00	Current	5,753.08	Current Adjustments	0.00	Assessment Details <table border="1"> <thead> <tr> <th>Application</th> <th>Notice Group</th> </tr> </thead> <tbody> <tr> <td>Rate</td> <td>DEFAULT - Residential</td> </tr> <tr> <td>Rate Application Status</td> <td>Not Processed</td> </tr> <tr> <td>Assessment Due Date</td> <td></td> </tr> </tbody> </table>		Application	Notice Group	Rate	DEFAULT - Residential	Rate Application Status	Not Processed	Assessment Due Date	
Amounts	0.00																		
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Assessment Due Date																			

- Drill to Pathway assessment summary screen for selected record

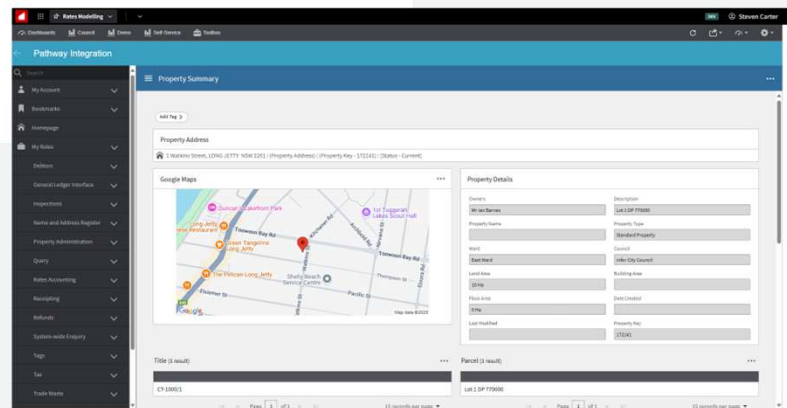
Rates Modelling

Ability to drill directly to Pathway Property



Assessment	Property	Property Name	Rate Type	Valuation	Valuation (Inc)	Rate Charge	Min Charge App
1236203	172051	2 Allen Street South Townsville Queensland	Residential - General Differential Rate	750,000	778,500	3,000	
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- Drill to Pathway property summary screen for selected record



Rates Modelling

Rates Modelling Wizard – Managing Reference Data

Manage reference data

Year: FY2025/2026 | Version: Scenario 2 | Comparison Version: Scenario 2 | Assessment: All Assessment | Property: All Property | RateType: All Rate Type

Progress: Manage Data (✓) | Manage Assessments (✓) | **Manage Reference Data** | Calculate RITD | Overwrite RITD | Recalculate Rates | View Results

Comments

Input	Amount
Minimum Rate Amount	3,000
Levy 1 Rate in the Dollar	0.00017500

Rate Type	Valuation % Increase	Max % Cap	Minimum Rate
Commercial Office - General Differential Rate	4.00%	3.00%	-
Commercial - Other - General Differential Rate	4.20%	3.25%	-
Commercial Shop - General Differential Rate	3.50%	4.00%	-
Residential - General Differential Rate	3.80%	3.10%	-

Target Revenue	Amount	
Staff costs	900,000	x
Capex - Land & Buildings	1,075,000	x
IT Costs	350,000	x
Other	20,000	x
Additional Revenue	200,000	x
Total Target Revenue	2,545,000	

- Set and configure scenario parameters
- Set target revenue
- Option to apply valuation %
- Set Minimum rates
- Used to determine rate in the dollar (rid) to achieve target revenue

Rates Modelling

Rates Modelling Wizard – Calculate Rate in the Dollar (RID)

The screenshot displays the 'Rate in the dollar calculation' step of the Rates Modelling Wizard. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with a progress bar, filters, a table of rate types, and two donut charts.

Filters:

- Year: FY2025/2026
- Version: Scenario 2
- Comparison Version: Scenario 2
- Assessment: All Assessment
- Property: All Property
- RateType: All Rate Type

Progress Bar:

- Manage Data
- Manage Assessments
- Manage Reference Data
- Calculate RID**
- Overwrite RID
- Recalculate Rates
- View Results

Table:

Rate Type	Weight	Calculated
Commercial Office - General Differential Rate	1.0000	0.00335461918
Commercial - Other - General Differential Rate	1.0000	0.00335461918
Commercial Shop - General Differential Rate	1.0000	0.00335461918
Residential - General Differential Rate	1.0000	0.00335461918

Weighting:

Properties per rate type:

- Calculate Rate in the Dollar (RID)
- Option to apply weighting to rate types which is applied to determine calculated RID

Rates Modelling

Rates Modelling Wizard – Overwrite Rate in the Dollar (RID)

The screenshot shows the 'Rate in the dollar overwrite' step in the Rates Modelling Wizard. The progress bar indicates that the 'Overwrite RID' step is currently active. The table below shows the calculated and overwritten rates for various rate types.

Rate Type	Calculated	Overwrite
Commercial Office - General Differential Rate	0.00335461918	0.00335461918
Commercial - Other - General Differential Rate	0.00335461918	0.00335461918
Commercial Shop - General Differential Rate	0.00335461918	0.00335461918
Residential - General Differential Rate	0.00335461918	0.00335461918

Two donut charts are displayed on the right side of the screen:

- Weighting:** A donut chart showing the distribution of rates across different categories. The legend indicates: Commercial Office - General Differential Rate (blue), Commercial - Other - General Differential Rate (green), Commercial Shop - General Differential Rate (orange), and Residential - General Differential Rate (purple).
- Properties per rate type:** A donut chart showing the distribution of properties across different categories. The legend indicates: Commercial Office - General Differential Rate (blue), Commercial - Other - General Differential Rate (green), Commercial Shop - General Differential Rate (orange), and Residential - General Differential Rate (purple).

- Ability (option) to override the calculated RID per rate type

Rates Modelling

Rates Modelling Wizard – Recalculate Rates

The screenshot shows the 'Recalculate model' wizard in the Infor Rates Modelling application. The interface includes a sidebar with navigation options: Home, Financial Reporting, Reporting, Modelling, Configuration, and Rates Modelling. The main area displays a progress bar with six steps: Manage Data, Manage Assessments, Manage Reference Data, Calculate RiTD, Overwrite RiTD, and Recalculate Rates. The 'Recalculate Rates' step is currently active. Below the progress bar, the text reads: 'Recalculating FY2025/2026 to version Scenario 2. Last updated: Feb 17 2025 2:21AM'. A 'Reload' button is also visible.

Year: FY2025/2026 | Version: Scenario 2 | Comparison Version: Scenario 2 | Assessment: All Assessment | Property: All Property | Rate Type: All Rate Type

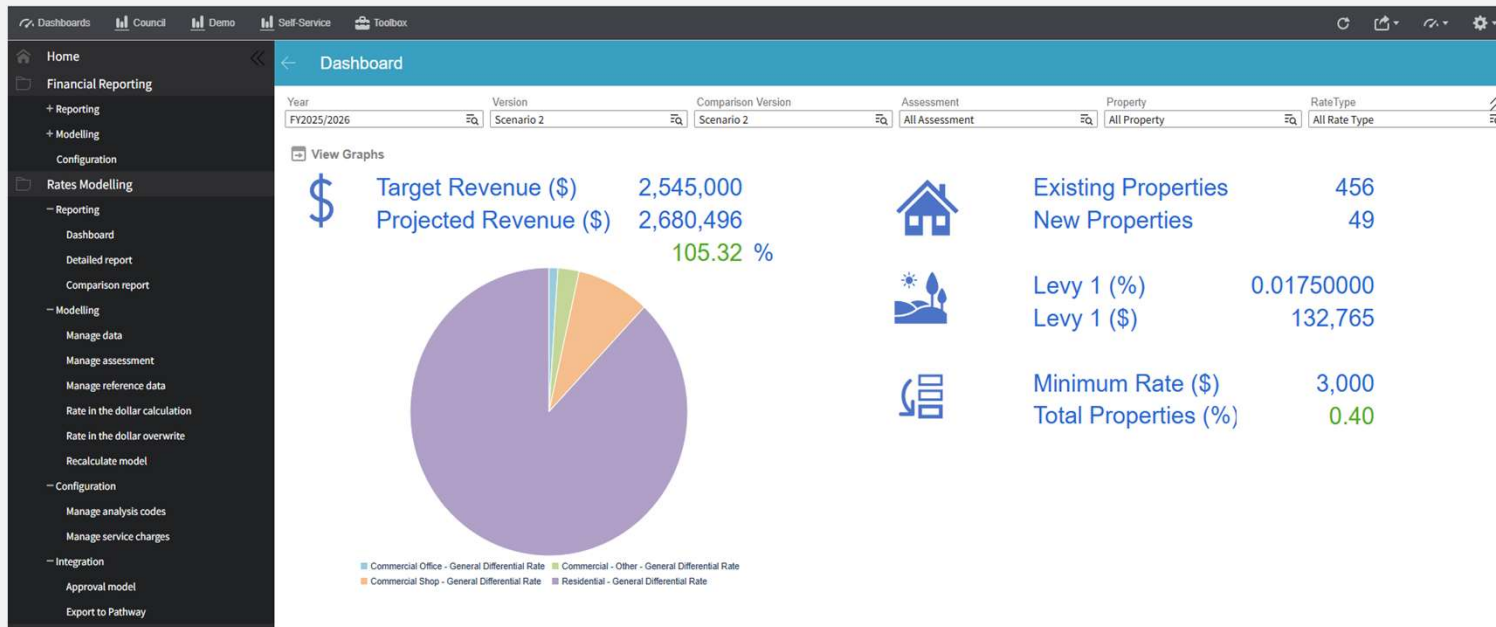
Manage Data | Manage Assessments | Manage Reference Data | Calculate RiTD | Overwrite RiTD | **Recalculate Rates** | View Results

Recalculating FY2025/2026 to version Scenario 2.
Last updated: Feb 17 2025 2:21AM
Reload

- Recalculate Rates – apply the scenario to rates assessments

Rates Modelling

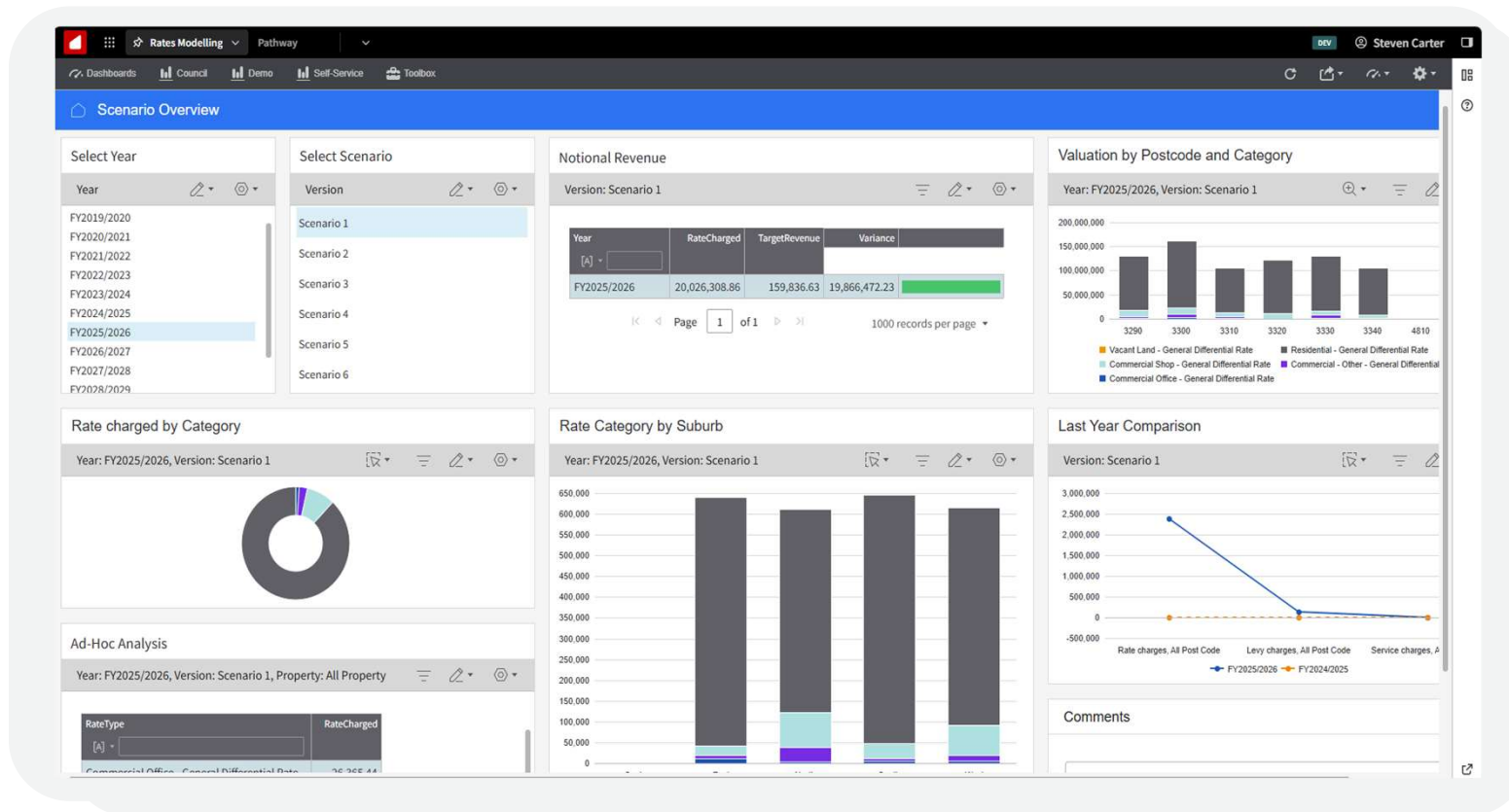
Rates Modelling Wizard – View Results



- View the results of the scenario model
- Compare the projected revenue to the target revenue
- Applies filters

Rates Modelling

Interactive Dashboards allowing the user to filter and compare.



- View dashboards by scenario
- Analyse the results

Rates Modelling

Comparison Reporting – Compare scenarios / Apply Filters

	Scenario 1	Scenario 2	Variance (\$)	Variance (%)
Target Revenue	2,345,000	2,545,000	200,000	7.86%
Projected Revenue	2,513,809	2,680,496	166,687	6.22%
Revenue %	107.20%	105.32%		(1.87%)
Existing Properties	1,822	1,822	0	0.00%
New Properties	0	0	0	0.00%
Total Properties	1,822	1,822	0	0.00%
Minimum Rate (\$)	1,500	3,000	1,500	50.00%
Total Properties with Min Rate	1	2	1	50.00%
% Total Properties	0.05%	0.11%		50.00%
+ All Rate Type				
+ All Wards				
RL Levy (%)	0	0	0	5.71%
RL Levy (\$)	125,126	132,765	7,638	5.75%
CIV Increase (%)	15.50%	15.50%		0.00%
Rate in the Dollar	0.01424815	0.01341848		0.00%
Total Rates	2,388,682	2,547,731	159,049	6.24%

- Compare scenarios side by side
- Apply filters
- Expand to compare rate types and wards

Rates Modelling

Comparison Reporting – Compare scenarios / Apply Filters

The screenshot displays the 'Comparison Report' interface in the Infor Rates Modelling software. The top navigation bar includes 'Council Reporting', 'Pathway', and a user profile 'Steven Carter'. The left sidebar lists various modules: Home, Financial Reporting, Rates Modelling, Reports, Modelling, Integration, and Configuration. The main content area shows a comparison between Scenario 1 and Scenario 2 for the year FY2025/2026. The table includes columns for Scenario 1, Scenario 2, Variance (\$), and Variance (%). Key metrics include Target Revenue, Projected Revenue, Revenue %, Existing Properties, New Properties, Total Properties, Minimum Rate (\$), Total Properties with Min Rate, % Total Properties, RL Levy (%), RL Levy (\$), CIV Increase (%), Rate in the Dollar, and Total Rates. A secondary table on the right shows 'Commercial Office - General Differential Rate' for all wards.

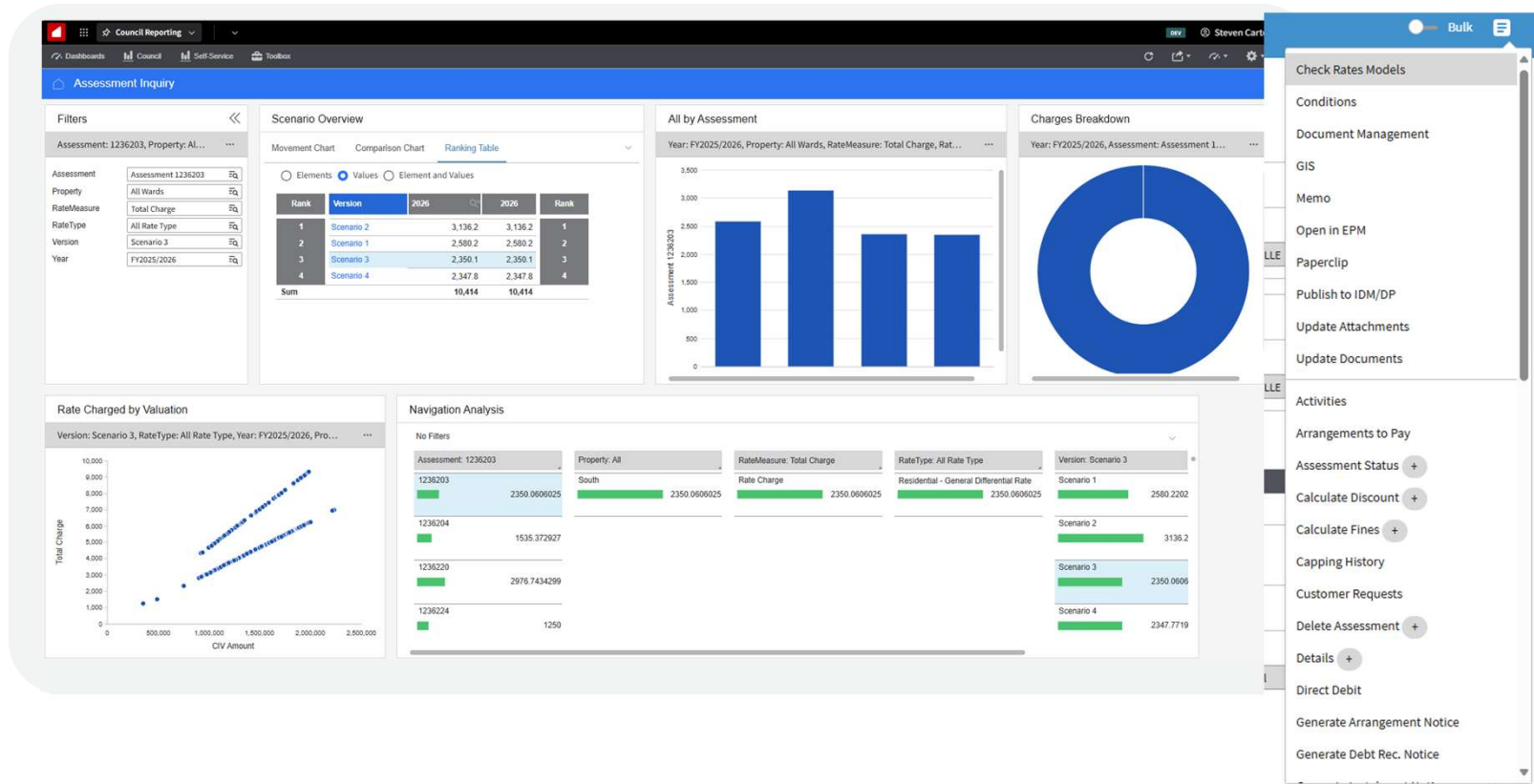
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Rate in the Dollar	0.01424815	0.01341848		0.00%
Total Rates	2,388,682	2,547,731	159,049	6.24%

Commercial Office - General Differential Rate + All Wards			
0	0	0	5.71%
1,313	1,392	80	5.75%
4.00%	4.00%		0.00%
0.00284963	0.00335462		0.00%
25,053	26,697	1,644	6.16%

- Expand and collapse rates and wards
- Compare side by side
- Scroll right for further analysis and comparisons

Rates Modelling

Comparison Reporting – Compare scenarios / Apply Filters



- Compare Scenarios
- Rank Scenarios
- Apply filters
- Compare Assessment – launched from Pathway

IPSUF 2025

Demonstration



Rates Modelling

Rates Modelling Wizard – Adopt a scenario (WIP)

The screenshot displays the 'Rates Modelling Import Control' form within the Infor application. On the left is a dark sidebar with a search bar and a list of navigation items: My Account, Bookmarks, Homepage, My Roles, Accounts Receivable..., Animal Registration, Applications, Auditing, Batch Processing, Bookings Management, Customer Service, Debtors, Electoral Roll, General Ledger Interf..., Infringements, Inspections, Licensing, and Memos. The main content area has a blue header with the title 'Rates Modelling Import Control' and buttons for 'Submit' and 'Clear'. The form is divided into several sections: 'Processing Options' with fields for 'Rates Prediction Test Set' and 'Rate Type Import Format', both marked as required; a 'File' field also marked as required; a 'Job Type' dropdown menu currently set to 'Report Only'; a 'Submission' section with a 'Description' field marked as required; a 'Run Type' dropdown menu set to 'Immediate'; and a 'Print Options' section with a 'Printer' dropdown set to '(none)' and three checkboxes: 'Print Header Page' (unchecked), 'Add to My Reports' (checked), and 'E-mail Report' (unchecked).



Pathway Local Government

Rates Modelling Q & A

Steve Carter

Date: August 2025

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