Schedule Three

Community Residential Support Services Reporting Schedule

1. Types of reports

1.1 The Provider must provide the following reports on or before the timeframes specified in the table below:

Type of report	Content of Report	Frequency of report
Performance Report	See template below	Every 6 months unless specified otherwise by the Purchasing Agency
Unaudited financial		Annually - within 8 weeks from the Provider's balance date.
Audited financial	Financial statements and Annual Report prepared in accordance with Generally Accepted Accounting Practice for New Zealand. Include the signed Auditors report.	Annually – within 5 months of the Provider's balance date for their reporting year.

2. Performance Report template

2.1 The Provider must use the following template:

Performance Report

Contract number:

Date competed:

Name of person completing form:

	Measures and Narrative	A) Total number	B) Percentage
1	Total number of Disabled People receiving Services from the Provider under this Panel Agreement on the day of this form being completed	A:	Note: No response needed in shaded areas
2	Total number of new Disabled People who have entered the Service during the reporting period	A:	

3	A) Total number of Personal Plans completed within three months of a new Disabled Person entering the Service during this reporting period B) Percentage of Personal Plans competed within three months compared to the total number of new Disabled People entering the Service during the reporting period	A:	B:
4.	A) Number of Personal Plans reviewed and signed off in the past 12 months B) Percentage of Personal Plans reviewed and signed off in the past 12 months compared to the total of all Disabled People receiving Services under this Panel Agreement	A:	B:
	If the percentage for question 4 is not 100% please provide a narrative describing the reasons for the variance. – (Note boxes will enlarge as you type)		
5.	Percentage of total number of Disabled People with home agreements which have been reviewed and signed off in the past 12 months		B:
	If the percentage for question 5 is *not 100% please provide a narrative describing the reasons for the variance:*		
6.	Percentage of total number of Disabled People receiving Services under this Panel Agreement who are active participants in their community.		B:
	Please comment on the percentage in question 6, giving examples of how they are participating and what the organisation is doing to increase participation		
7	A) Total number of staff employed by the Provider who are in front line roles directly delivering Services to Disabled People B) Percentage of this total who have achieved at least Level 2 qualifications or above	A:	B:
	Please comment on increase or decrease in this percentage since the last reporting period.		
8	Percentage of staff turnover during the reporting period		B:
	Please comment on staff turnover in this reporting period		

9	A) Number of complaints received in this reporting period B) Percentage of these complaints resolved	A:	B:
	Please comment on trends and issues appearing in complaints and any changes your Service has made as a result of resolution of the complaints		
10	A) Total number of Disabled People receiving Services under this Panel Agreement identifying as Māori B) Percentage of Disabled People identifying as Māori who receive Services under this Panel Agreement, who are involved with their whānau, hapu and/or iwi	A:	B:
	Please comment on how your organisation supports a culturally responsive environment:		
11.	Please provide comment about how your organisation is providing the Services in a manner that is aligned with the principles of Enabling Good Lives		

3. Reporting regarding changes to a house / facility

3.1 The Provider must, as soon as practicable after entering into this Panel Agreement, notify the Purchasing Agency of each type of house / facility that is used for the purpose of providing the Services. In particular, the Provider must specify:

(a) the housing configuration (ie, whether the house / facility is a single unit or multiple facility arrangement) in accordance with any guidance specified by the Purchasing Agency; and

(b) the total number of bedrooms in the house / facility in accordance with any guidance specified by the Purchasing Agency.

3.2 The Provider must notify the Purchasing Agency as soon as practicable of any proposed changes to a house / facility that is used to provide the Services (such as selling or exiting a house, undertaking significant renovations) prior to those changes taking place. [BF1]