**EXTERNAL ASSESSMENT INFORMATION CHECKLIST**

**Please send copies of ‘Key Information Requested’ in this form to your External Assessor at least 6 weeks before your agreed external assessment**

**assessment date.**

To confirm you have forwarded the ‘Key Information Requested’ to your External Assessor, please cc email or fax a copy of your completed form to the Service Excellence Team.

Before visiting your organisation to complete an External Assessment your External Assessor will want to know more about your organisation and the services you provide. This should improve the usefulness and quality of the External Assessment review and resultant report findings and recommendations.

***Disclaimer: The uptake of a quality program by a funded organisation covers key management systems such as governance, risk management, complaints mechanisms, consumer involvement well. However it does not replace the need for a performance management process associated with the administration of a service agreement***

Please discuss any queries you may have in providing the information requested in this form with your External Assessor and/or the Service Excellence Team.

| **KEY INFORMATION REQUESTED *Please record if ‘not available’ or ‘not applicable’*** | | |
| --- | --- | --- |
|  | External Assessment Booking Form and email/letter of DCSI approval to proceed with assessment |  |
|  | Organisational Charts and Diagrams (showing the staff structure of your organisation) |  |
|  | Strategic Plan (usually 3 – 5 year plan) |  |
|  | Business Plan (current year operational plan) |  |
|  | Annual Report (if applicable) |  |
|  | List only of Consultancy or Audit Reports (internal or external) undertaken in last 12 months (if applicable). A brief summary of Actions Completed to date against Key Recommendations made would be useful. |  |
|  | List only of ethical, Privacy or Confidentiality policies or standards |  |
|  | Index only of Policy/Procedure Manual/s |  |
|  | Copy of your Organisation’s Risk Management Policy – Approved by Executive/Board |  |
|  | Small sample of Promotional materials – pamphlets, newsletters outlining services, client access, consumer rights etc |  |
|  | List of Key Web-based information link details (if any) |  |
|  | If your organisation operates on more than one site – provide details of;   * Number of sites * Address of each site * Purpose of each site * Number of clients services from each site * Number of employee’s at each site ( approx full-time, part-time, casuals, volunteers); and * Preferred site/s to be samples/reason. |  |
|  | Specific Management requests –  Specific concerns or key areas of focus that your organisation may want to highlight up front to your External Assessor. These should be discussed prior to the review and will assist the External Assessor during the planning and review stage of your External Assessment. |  |
|  | Copy of completed workbook |  |

***Please note:*** *Information provided to us is kept confidential. Written permission is required from you before it can be released to third-parties (excepting publicly released reports and information ie Published Annual Reports, public website information, SE Level Achievement etc).*