



## **POLICY: 9 PLANNING, MONITORING & REVIEW**

PURPOSE: TO ENSURE THAT PROCESSES CONTRIBUTE TO THE ACHIEVEMENT OF THE TRUST'S PURPOSES

*MEASURE/S OF ACHIEVEMENT: EVALUATIONS*

*These policies must be read in conjunction with the Trust Deed.*

### **PLANNING**

Regular, systematic, organisational planning will be reflected in strategic and annual plans and budgets.

- a) written strategic plans will include goals in relation to Ngati Tamaoho Trust purposes as defined in the Trust Deed
- b) written annual plans will provide objectives with more detail as to how strategic goals will be achieved
- c) preparation of strategic and annual plans will be informed by
  - o characteristics, needs and intended outcomes for the Trust's service users
  - o outcomes of reviews of relevant previous plan/s and services
  - o input from key stakeholders
- d) plans will include a process for collecting information to inform evaluation and review

### **MONITORING**

Procedures will be in place to monitor progress on all significant governance and operational plans (longer than six months) and key indicators in each relevant section of the quality management system (QMS).

Progress in relation to annual plans will be reported at the AGM.

### **REVIEW including EVALUATION**

Strategic plans and policies will each be reviewed by the Board at least once every three years. Services and QMS sections will be reviewed at least once every three years by Te Kaiwhakahaere.

Feedback on services will be encouraged from any key stakeholders, at any time. Evaluation by service users is solicited on a regular basis; it will include feedback on quality of delivery as well as on effectiveness in meeting the users' own objectives.

### **COMPLAINTS/CONFLICT RESOLUTION**

The best strategy for minimising the number and scale of complaints and other conflict is to try to minimise the factors that contribute to them such as poor communication, unclear procedures, disagreement about fundamental values, and inadequate response to early warning signals. When a complaint/conflict arises, the main objective is to achieve resolution to the satisfaction of all parties directly concerned.

Any stakeholders may make complaints/identify conflicts that need to be solved. They shall be given serious consideration including prompt investigation which complies with the relevant procedures. Due process must be observed; the rights of all parties involved in a complaint or conflict must be ensured (e.g., to privacy, to confidentiality, to be heard, to respect). At least one option for appeal must be available in relation to the first decision about a complaint or conflict.

All key stakeholders (service users, staff, regular referral agencies, major funders) should be made aware of the complaints/conflict resolution policies and procedures.

**Approved:**  
**Trust Chairperson:**  
**(On behalf of the Ngāti Tamaoho Trust)**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_