



QF262	REPORTING FORMATS and SUMMARY SHEET
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Enhanced Lifestyles [insert position title of senior staff person]

Report to Board

Date:
Report prepared by:

<i>Progress report: Organisational plan</i>			<i>Tick ✓ for required board/committee action</i>		
Item	Issue	Proposed action	For information only	For discussion	For decision

<i>Progress report: Actions from previous meetings</i>			<i>Tick ✓ for required board/committee action</i>		
Item	Agreed action	Progress	For information only	For discussion	For decision

<i>Issues for discussion</i>		
Issue	Background	Recommended action

<i>For Board/committee information</i>		
Issue	Background	Outcomes/Action being taken



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Enhanced Lifestyles Activity and Performance Report to Board from [\[insert title of staff person\]](#)

For period: [insert time period covered]
Report prepared by: [insert name]

<i>Services and activities</i>			
Item	Target/performance indicator (if relevant)	Report on results	Comment

<i>Organisational operation</i>			
Item	Target/performance indicator (if relevant)	Report on results	Comment



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Enhanced Lifestyles Compliance and Incident Report to Board

For period: [insert time period covered]
Report prepared by: [insert name]

<i>Compliance Report</i>			
Item	Compliance required	Date due	Date complied
Risk management plan			
Insurances			
Workplace Health and Safety			
Other legal requirements			
Contracts			
Service agreements			
Reporting			
Standards			
Incorporation			
Other			

<i>Incident Report</i>			
Date of incident	Description of incident	Action taken	Further action proposed



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Enhanced Lifestyles Financial Report to Board

For period: [insert time period covered]
Report prepared by: [insert name]

Item	[Month] Actual	[Month] Budget	Variance \$	Year To Date Actual	Year To Date Budget	Variance \$	Variance %
INCOME							
TOTAL INCOME							
EXPENSES							
TOTAL EXPENSES							
Surplus/ Deficit							

[Note: use either a simple balance of accounts statement OR the more detailed information from the Balance Sheet.]

Balance of accounts (simple)	
Balance at beginning of period	
Surplus/deficit for period	
Balance at end of period	



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<i>Balance of accounts (details from Balance Sheet)</i>		
	[date at beginning of period]	[date at end of period]
<i>Current assets</i>		
Total		
<i>Fixed assets</i>		
Total		
<i>Liabilities</i>		
Total		
<i>Equity</i>		

Summary

The tables below can be used to summarise the items listed in 'What reports the Board will receive' column, organising them by type and frequency of monitoring for easy reference by Board members.

<i>Policy</i>
[insert list of any policy documents that the Board members need to sight or approve]

Items to be checked monthly

<i>Details of check</i>
[insert list of any items that the Board members needs to check on a monthly basis]



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Items to be checked quarterly

<i>Details of check</i>
[insert list of any items that the Board members needs to check on a quarterly basis]

Items to be checked annually

<i>Details of check</i>
[insert list of any items that the Board members needs to check on an annual basis]

Items to be checked at other times and irregularly

<i>Details of check</i>
[insert list of any items that the Board members needs to check and when]