



NSW Specialist Homelessness Services: *Quality Standards Implementation Resource Kit*

<b>Topic:</b>	Module 5a) External Assessment: Planning and Undertaking an External Assessment (Site Visit)
<b>Document type:</b>	Checklist

*This checklist has been developed to help organisations in choosing an External Assessor. It is not prescriptive but suggested as a starting point that organisations can change or adapt. It is recommended you use this before starting the selection. The list of approved ASES assessors is [here](#). Full web address:*

*<https://dhs.sa.gov.au/services/community-services/australian-service-excellence-standards/contact-ases-external-assessors2>.*

PRELIMINARY STEPS		
1	Develop specifications of important characteristics you would like in an External Assessor by following the handout: <i>Tips for Selecting an External Assessor</i> . You can use these as your selection criteria.	<input type="checkbox"/>
2	Set up a selection procedure. You may wish to appoint a selection panel.	<input type="checkbox"/>
INITIAL RESEARCH		
3	Review the External Assessors' websites for overall impressions and value fit.	<input type="checkbox"/>
4	Identify which providers you will call and develop a list of questions you will ask based on steps 1 and 2 above.	<input type="checkbox"/>
5	Prepare information you will provide to the External Assessors about your organisation (see handout: <i>Tips for Selecting an External Assessor</i> ).	<input type="checkbox"/>
CONTACT AND REQUESTS FOR QUOTES		
6	Call the External Assessor organisations in your initial selection and speak to them about their assessment process based on your criteria.	<input type="checkbox"/>
7	Review the outcomes of the discussion and decide which organisations to approach for a quote.	<input type="checkbox"/>
8	Seek at least three quotes and provide the information requested by the Assessors.	<input type="checkbox"/>
QUOTE ASSESSMENT, SELECTION & APPROVAL		
9	Review the quotes, assess them against your criteria and ensure that there are no <a href="#">conflicts of interest between</a> your organisation and the External Assessor organisation, or between your organisation and the individual Assessor allocated to your organisation.	<input type="checkbox"/>
10	Make sure that the quote does not ask for the whole payment up front – a part payment up front to secure the quote or part of a payment plan is acceptable	<input type="checkbox"/>
11	If there is at least one quote that meets the criteria set out in point 9 above, and you are satisfied with the quote overall, proceed to the next step. If there is not, try and negotiate a closer alignment with your criteria with the provider/s. If that is not successful, don't proceed. Seek quotes from other External Assessor organisations.	<input type="checkbox"/>
12	Referee checks – You can speak with two organisations who have previously worked with the External Assessor.	<input type="checkbox"/>
13	Request a copy of the standard service agreement and review it to ensure you are confident that both parties can meet its terms and conditions. If you are not sure or something concerns you, speak with the provider and if needed, request amendments.	<input type="checkbox"/>
14	Make a final recommendation and seek approval in line with your organisation's delegations instrument with the quote, rationale for selection and service agreement attached.	<input type="checkbox"/>



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SERVICE AGREEMENT CHECK & EXECUTION		
15	Make a final check of the service agreement, ensuring that you can meet all the requirements and that the dates of the site visit are suitable. If you need to, seek clarification or external advice before signing.	<input type="checkbox"/>
16	Sign a service agreement in line with your organisation's contract management procedures as soon as possible to protect the rights of both parties.	<input type="checkbox"/>
17	Advise staff and all stakeholders of the date of the site visit and diarise all key dates from the service agreement. Note the date of final deferral or cancellation before any penalties apply.	<input type="checkbox"/>

