



StewartBrown
Integrity + Quality + Clarity

Aged Care Financial Performance Survey

Participant Kit

Thank you for agreeing to participate in the StewartBrown Aged Care Financial Performance Survey.

To assist in fulfilling your responsibilities as a participant in the *StewartBrown Aged Care Financial Performance Survey* (Survey), we have prepared this Participant Kit.

The kit contains the following resources:

- Data-related information
- Contact details
- Survey timetable
- Line-item definitions and pro-forma data entry forms

Validity of Participant Data

The integrity of the Survey and its results relies upon the integrity of the data provided by participants in the Survey as well as the data cleansing procedures undertaken by StewartBrown.

It is imperative that all participants take great care to ensure data is provided in the format required and that income and expense allocations are in line with the line-item definitions provided in this kit.

If participants are not sure about a particular line-item definition or where a particular item of income and expense should be allocated, they should contact StewartBrown for clarification.

It is also important for participants to inform us if there is a change in circumstances surrounding the operations of a facility. This would include things such as additional places being added, beds being shut down for refurbishment or co-located facilities being amalgamated.

Any of these circumstances or others like it that significantly affect the results of the operations should be communicated to us when you send the data. This will assist us to understand the data and why these changes are occurring. In certain circumstances we may decide to exclude the data from the Survey for a period, though you will still receive a report on the facility with comparisons to Survey data.

Data Collection

It is important to the survey process that feedback is given to participants in a timely fashion. Our aim is to provide a one-month turnaround for the data. That is, we will process the data and report on it within a month of the deadline for submission. Delays will occur, however, if the submission of data is delayed. If it appears likely that the deadline for data submission cannot be met, please contact us so we can make necessary arrangements for the timely delivery of the information.

Training and Assistance

We would be pleased to provide assistance to the staff completing the data collection forms to make this task as seamless as possible. This may involve a site visit or telephone conference to review the line-item definitions and how your current chart of accounts should be mapped to the data collection forms. Please contact us if you wish to receive this assistance.

Continuous Improvement

StewartBrown is committed to the continuous improvement of this Survey service. To this end we would be pleased to receive any suggestions for improvements to the process and the reports provided. We would also be pleased to receive suggestions for special survey topics.

Privacy and Confidentiality

We are committed to ensuring that all information provided to us by participants is kept totally private. Participants also have a role in ensuring that the information received by them in the form of a report is also kept confidential. To this end we have reproduced the privacy and confidentiality provisions contained in the terms and conditions of participating in the Survey.

Privacy Policy

StewartBrown will be collecting financial data from organisations with the purpose of providing benchmarks and other summary reports for participants and industry bodies. We will not be collecting personal information, but rather corporate data and as such we are not bound by the National Privacy Principles or the Privacy Act 1998. We will however still be abiding by these National Privacy Principles with respect to the data and other information collected, as we are committed to ensuring the highest level of privacy over the information collected. In accordance with these principles:

- (a) No report received by a participant will identify other participants by name. In general, all comparative information will be in aggregate format, that is, it will be an average of a number of other participating organisations
- (b) Any information provided to third parties such as industry groups will only be in aggregate format and can only be used for the purpose of policy development or lobbying Government agencies
- (c) Only data and other information necessary to produce the survey will be collected from participants
- (d) All information collected will be stored in a secure manner
- (e) Where information is shared between participating organisations as a result of contact being facilitated by StewartBrown, such sharing will be done on the understanding that the terms and conditions relating to Privacy and confidentiality are adhered to by the parties involved

Confidentiality of Information

StewartBrown and all participants will abide by the following with respect to confidentiality of information collected or produced as part of the survey:

- (a) For training and marketing purposes, StewartBrown has the right to publish data resulting from the Survey as examples of the benchmarking process, however such examples will not identify any of the participating organisations
- (b) All data and material provided by participants shall be kept confidential by StewartBrown at all times
- (c) Any material provided to third parties such as industry groups under contract to any such group will not identify any individual participant
- (d) Any report or material provided to participants as part of the survey process will be kept confidential by the participant

- (e) Where StewartBrown facilitates contact between participants to discuss the Survey results, such discussions and any information shared between participants will be kept confidential by the participants.

Copyright Issues

Unauthorised copying of any material or report produced by StewartBrown as part of the Survey process is not permitted. Copying and distribution of such material will only be permitted after receiving the express written permission of StewartBrown.

The materials and reports deemed to be included in the survey process include, but are not limited to:

- Registration Kit
- Participant Kit
- Training material
- Promotional material
- Line-item definitions
- Quarterly or special reports
- Data collection forms

Participants can copy the quarterly or special reports for internal distribution to management and Directors as long as the recipients are made aware of the privacy, confidentiality and copyright provisions of these terms and conditions and they agree to abide by them.

Survey Timetable

Quarter	Deadline for data submission	Due date for individual benchmark report distribution	Due date for analysis report distribution
September	31 October	15 December	20 December
December	31 January	28 February	20 March
March	30 April	31 May	20 June
June	12 August	30 September	20 October

Please note, there are a number of reasons for the extended timeframe for the full-year June Survey results:

- We try and ensure the data used for the full-year survey is based on audited accounts if it is available. This helps to ensure a higher level of data integrity
- Due to year-end pressures on finance departments, experience has told us that the submission of data is delayed as a result
- We aim to include as many facilities as possible in the full-year survey. During the year fewer facilities participate in each Survey as we cut off data collection at an earlier date. A number of participants send in data after the cut-off date, however this data is not included in the database. For the June Survey we endeavor to facilitate the inclusion of these late submitters.

We understand this extension of time is a compromise between ensuring maximum participation, data integrity and timely reporting, however, we feel the correct balance has been reached. Any feedback on this would be appreciated.

It is critical that deadlines be adhered to by all participants to allow for the timely entering of data and distribution of reports. If any organisation finds that they cannot meet these deadlines, please let us know as soon as possible.

Once again, we thank participants for their support in this process. Please contact us if you have any questions about the process or anything that might be contained in this kit.

Contact Details

The following is a comprehensive list of relevant contact details for participants.

Postal Address:

Attention: Vicky Stimson or Steven Toner
StewartBrown
PO Box 5515
CHATSWOOD NSW 2067

Street Address:

Attention: Vicky Stimson or Steven Toner
StewartBrown
Level 2, Tower 1
495 Victoria Avenue
CHATSWOOD NSW 2067

Telephone: (02) 9412 3033

Project Contacts:

Grant Corderoy	Project Partner	email – grant.corderoy@stewartbrown.com.au
Robert Krebs	Project Manager	email – robert.krebs@stewartbrown.com.au
Vicky Stimson	Administration	email – vicky.stimson@stewartbrown.com.au
Steven Toner	Administration	email – steven.toner@stewartbrown.com.au

Further information regarding this service and other services provided by our firm can also be found on our website at www.stewartbrown.com.au.