

Programme and Budget Assessment

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Here are the things we consider when reviewing Programme and Budget submissions.

Programme

- Will the proposed programme deliver to the Investment Feature Outcomes we've agreed for your organisation?
- For Tōtara organisations, will it also fulfil the requirement of contributing to sector capability and development?
- Does the proposed programme seem viable? For us, viability means having the skills, people, track record and money to deliver the programme sustainably.

Budget

Part of the programme viability question includes checking on the financial health of your organisation. The things we'll consider here are:

- Does the organisation have enough financial resources to support its operations?
- Is the organisation projecting a surplus or a deficit? Obviously, we'd prefer to see a positive result projected for the year, but we know that planned deficits are sometimes the reality of doing business.
- if a deficit is planned, we'll consider whether:
 - the result is normal for the organisation (e.g. due to its normal operating cycles),
 - the organisation has the resources to support a shortfall,
 - the organisation's governing body has approved this result.
- How do these projections compare with previous years' results? Is anything significant changing?

Success Factors

We'll also consider what success factors could be in play. What conditions need to be met to enable successful delivery of the programme and achievement of budget targets? Are there any barriers? What can we do to help?