Sample Quality Assurance Calendar

January	April	July	October
Team Management Meetings	**Team Management** Meetings	**Team Management** Meetings	**Team Management** Meetings
Health & Safety Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return
Corporate Risk Register SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review
Business Continuity Plan Review Contact List Complete Test Update Plan	**Business Continuity Plan** Review Contact List Review and Update Plan	**Business Continuity Plan** Review Contact List Complete Test Update Plan	**Business Continuity Plan** Review Contact List Review and Update Plan
Data Security Quarterly Self Assessment Checklist	**Data Security** Quarterly Self Assessment Checklist	**Data Security** Quarterly Self Assessment Checklist	**Data Security** Quarterly Self Assessment Checklist
Safeguarding Forum		**Safeguarding Forum**	**Annual Self Assessment Review**

February	May	August	November
Team Management Meetings	**Team Management** Meetings	**Team Management** Meetings	**Team Management** Meetings
Health & Safety Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return
Corporate Risk Register SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review
Data Security ISMF Forum	**Data Security** ISMF Forum	**Data Security** ISMF Forum	**Data Security** ISMF Forum
Business Continuity Plan Review Contact List	**Business Continuity Plan** Review Contact List	**Business Continuity Plan** Review Contact List	**Business Continuity Plan** Review Contact List
			Safeguarding Forum

March	June	September	December
Team Management Meetings	**Team Management** Meetings	**Team Management** Meetings	**Team Management** Meetings
Health & Safety Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return	**Health & Safety** Monthly Return
Corporate Risk Register SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review	**Corporate Risk Register** SLT Review
Diversity & Equality Forum		**Diversity & Equality Forum**	
Environmental Sustainability Forum		**Environmental Sustainability Forum**	

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Operations Performance and Quality Calendar

Daily	Weekly	Monthly

• Data Security
• Check Quality Dashboard and MI for Minimum Service Level Compliance
• Check Jeopardy Reports for Appointments KPI
• Review outcome pipeline
• Check Submitted, Paid and Rejected outcomes
• Check for customer feedback
• Set daily expectations and targets in regard to calls and activities
	• Complete caseload management checks for
	  o Balanced Advisor Active Caseloads
	  o Referred customers
	  o Inactive customers
	  o Repeat customers
	  o Telephone reviews
	• Weekly Performance and outcome call with Regional Manager / Supply Chain Manager
	• Review, cascade and action Change Alerts
	• Update HR and Cascade records
		• Complete and return Monthly Management Report and Action Plan before your 1-2-1 with Regional Manager
		• Review Outcome pipeline report
		• Prepare initial forecasts for first performance call of the month
		• Complete File Checks
		• Review and submit a Good News Story for the site
		• Carry out and minute Team Meeting
		• Complete and record staff observations
		• Complete full caseload reviews
		• Complete 1-2-1 staff reviews
		• Review and return P&L summary
		• Review and update Business Continuity Plan and Contact List

Monthly	**Quarterly**	**6 Monthly & Annual**
• Review and update Risk and Issue Log • Review and update Safeguarding Log • Complete Petty Cash return to finance • Update all site noticeboards and ensure current documents are displayed • Customer CV review • Attend bi-monthly Business Manager / Partnership meetings	• Complete and upload QMR by second working day of the month • Consider submissions for quarterly Staff Awards • Consider review meetings with local Menu Partners • Prepare customer files ready for archive (customers who have exited the programme) • Complete the Security Self Assessment with your site Security Rep	• Carry out half day planning session with the team (six monthly) • Carry out staff annual review (October) • Consider submissions for annual Staff Awards • Complete Business Continuity Plan test exercise. Guidance will be provided by the Business Continuity Manager prior to the event.
Ad Hoc		
• Respond to Billing Integrity audit investigations; include results in the MMR • Respond to any internal audits by working with the Regional Manager and implement improvement actions	• Raise any formal complaints via the assigned Officer in line with complaints resolution process • Escalate any security incidents in line with Data Security & Incident Reporting Handbook	• Complete requested e-learning • Arrange training for Site Reps (Evac Chair Users, First Aid, Fire Warden, etc.) • Stakeholder Engagement – local site visits

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