# Commercialisation Partner Network and Preseed Accelerator Fund Reporting template

Use this template for annual reporting for contract holders receiving funding from either the Commercialisation Partner Network (CPN) or the PreSeed Accelerator Fund (PSAF).

This template covers:

* How to enter and submit your report
* The required report content
* How we assess your report.

**Your annual report details your work programme’s progress between 1 July 2022 and 30 June 2023.**

### Report completion and submission requirements

* Use this template to complete your report in MS Word and respond to all sections in the report as fully as you can.
* When ready, copy your completed report content into our Investment Management System (IMS) and submit it to us.
* **IMS will be open for you to enter your annual report content and submit it on Monday 3 July 2023.**
* **The closing date for annual reports to be submitted is 12 noon, Tuesday 15 August 2023.**

Once you have uploaded your report into IMS, you submit it to your Host Superuser for a quality assurance check. When this is complete, they will then finalise and submit your report to us for assessment. Your Host Superuser must be authorised by your organisation to declare on your behalf that:

* The submission is a true and correct record of the status of the Key Performance Indicators for the reporting period; and
* The submission accurately reflects the state of the whole investment and includes all relevant information.

### Contact details

General queries: [annualreporting@mbie.govt.nz](mailto:annualreporting@mbie.govt.nz)

IMS queries: [imssupport@mbie.govt.nz](mailto:imssupport@mbie.govt.nz)

## Report Template *for the period 1 July 2022 to 30 June 2023*

### Section 1: Progress Reporting

|  |
| --- |
| 1.1 **Reporting dates**  Enter the start and end date of the reporting period into the appropriate input box. For 2022-2023 Annual Reporting this period is 01/07/2022 to 30/06/2023. |
| 1.2 **Key Performance Indicators**  The status of each of your Key Performance Indicators. Select one of the following:   * Achieved * Not Achieved * On Track * On Track with Issues   If you have selected **'Not Achieved'** or **'On Track with Issues'** you are required to provide a reason and any remedial action that you plan to take in the text box provided. For everything else type N/A in comments.  If a KPI is ongoing and required to be reported on each year, then you must select either ‘**On Track’** or ‘**On Track with Issues’**. Only select the status ‘**Achieved’** or **‘Not Achieved’** in the final year of the KPI. |
| 1.3 **Additional information** (**this is an opportunity to provide further information)**  List any achievements/highlights.  Enter your answer here...  List any opportunities.  Enter your answer here...  Are there any future challenges to delivery?  Enter your answer here...  Is there any further information you wish to provide?  Enter your answer here... |

## How we assess your report and performance

MBIE reviews your report and uses the following criteria to assign your contract an assessment rating in the form of a Red, Amber, Green or Gold (RAGG) status that best reflects your reported progress. Contract holders are notified in December of their RAGG status.

If your contract is assigned Amber status, remedial action is required. In this event, MBIE will discuss with you what that may involve. After an agreed period, MBIE will follow-up on your progress.

If your contract is assigned Red status, remedial action is also required and your contract payments may be suspended. In this event, MBIE will discuss with you what that may involve. After an agreed period, MBIE will follow-up on your progress. Once all remedial actions have been actioned, any payments withheld will be released.

Incomplete remedial action(s) may result in a contract termination. In this event, unspent funds will need to be returned to us.

### Gold

Your contract is performing above expectation, that is:

* it is on track to deliver the Work Programme deliverables; and
* the broader results and benefits to end users are above expectations and/or at a level of quality well above expectation or well ahead of time.

### Green

Your contract is performing satisfactorily, that is:

* it is on track to deliver the Work Programme deliverables; and
* the broader results and benefits are in line with expectations; and
* it has delivered or will deliver on time and at the expected level of quality.

### Amber

There are issues with the contract, that is:

* more information is required to make an assessment; and/or
* a variation to the contract (in addition to any contract variation requests received prior to the Annual Reporting portal opening) is required with the objective of getting the project back on track; and/or
* contract conditions (if any) are not satisfied; and/or
* some action is required to get the contract back on track, for example, some issues may have been identified which means that the Work Programme deliverables and broader results and benefits:
* have not been delivered on time AND MBIE has not received an acceptable contract variation request that fully resolves the issues; and/or
* are highly unlikely to be delivered by the time the contract matures, or they will be at a level of quality below expectation.

### Red

There are serious issues with the contract that require action by the organisation and/or intervention by MBIE, that is:

* the Work Programme deliverables and broader results and benefits will be severely under-delivered in terms of quality and timeliness, or there is a risk that the contract may fail completely; and/or
* immediate action/intervention is required to preserve the value of MBIE’s investment.