Using this pack

Structure a focused service review using existing records and stakeholder perspectives.

This pack helps a charity or community organisation carry out a manageable first review. It includes a PDF guide, editable browser worksheets and CSV recording templates. Use the steps below to adapt the materials to your programme and context.

Files and how to use them

Open Worksheets.html in a browser. Edit the wording and write into the spaces. Use Print or Save as PDF to retain your work. Download your answers as a local JSON file if useful. Nothing is submitted to HumanScope.

Open the CSV files in Excel, Google Sheets or another spreadsheet app. Save a working copy. Blank rows are intentional: add one row per record. Keep dates and response categories consistent.

Read the questionnaire or discussion prompts before collecting information. Pilot the wording with two or three appropriate people and note adaptations.

Review the included licence and release notes. Analysis, meetings, bespoke survey hosting and interpretation support are separately scoped services.

Important distinction

Agree the review questions and exclusions before inviting stakeholders. Examine records, participant feedback and delivery perspectives separately before comparing them. Keep disagreement visible. This pack supports a focused service review and is not a clinical assessment, safeguarding investigation, audit opinion or accredited evaluation standard.

Te Whare Tapa Whā

Holistic reflection for the service you are reviewing.

Acknowledging the Māori health model developed by Tā Mason Durie. We use original service-specific prompts to support discussion across the four dimensions; these prompts are not a validated measure or an endorsed Māori evaluation instrument.

Taha tinana Physical wellbeing	Taha hinengaro Thoughts and feelings
Taha whānau Whānau and relationships	Taha wairua Spiritual wellbeing, identity and meaning

Whenua and place context

Invite discussion of the land, places and environments that support connection and wellbeing where this is relevant and welcomed. Record this context separately; it is not a fifth numerical scale.

Use the dimensions together. Do not rank them, combine answers into a score, or interpret one dimension without the participant’s broader context. Agree the use and meaning with local Māori partners and participants before collection.