

# Executive Performance Report

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July 2023

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# Prevention

## The Return on Investment result improved over the month....

- The ROI improved from \$1.81 to \$1.82 over the month after seeing a decline in Q4 of FY23. It remains in the middle of the target range of \$1.72 to \$1.92. The improvement in July is due to the investment in a third cohort of riders in the Motorcycle programme. This programme continues to scale up with over 30,000 riders now trained.

## ...with investments in Q1 expected to maintain the result within target range....

- Several investments are expected to be finalised in Q1, positively impacting the ROI further. These include the ShopCare and Rugby League business cases due in August, and a re-investment in the Netball business case likely in September.
- At the end of Q1, programme design costs from FY22 move into the ROI, shifting it down. This two-year lag allows programmes to have flexibility to innovate in the early days / discovery phase (i.e. design) without having to have an ROI until the programme is ready to have an impact (i.e. delivery).
- At the start of Q2, the number of injuries reduced as a result of injury prevention programmes will be known, providing clarity whether the results at the end of FY24 are in line with expectations.

## .... however, it is only in Q4 when the impacts from revaluations and SCE updates are reflected in results.

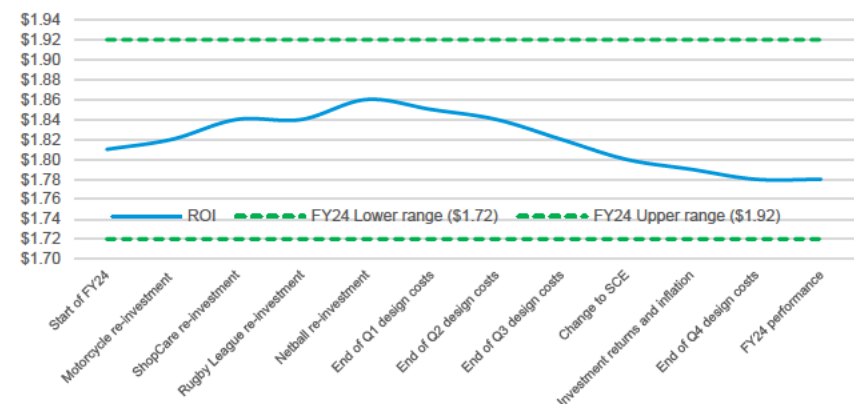
- Two processes take place each year in Q4 when more information is available to assess the impact of the ROI:
  - an update of the Statistical Case Estimate (SCE) which values the reduction in injuries people have had as a result of the prevention interventions
  - the re-valuation process, where future expectations of each programme are assessed to determine whether the impact could be higher or lower based on performance.
- The underspend in Injury Prevention in FY23 impacts on new business cases and programme development in subsequent years. At the time of writing, it is not clear whether other investments will be occurring that impact the ROI, other than those outlined already

## WorkSafe results for FY23 are expected in August.

- The breakdown of the FY23 spend from WorkSafe is expected in August. This allows the FY23 ROI for WorkSafe to be calculated. The WorkSafe ROI is excluded from the FY24 Service Agreement target. We expect the FY23 result to be around \$0.18 to \$0.21 once finalised, an increase on the 0.17 at the end of FY22, but significantly short of breakeven or the current target of \$0.50.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	Injury prevention Return on Investment	\$1.82	Improving	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	\$2.01	Stable	
OM	Return on investment: Road Portfolio	\$3.09	Deteriorating	
OM	Return on investment: Sport Portfolio	\$1.87	Stable	
OM	Return on investment: Falls Portfolio	\$1.08	Stable	
OM	Return on investment: Treatment Safety Portfolio	\$1.33	Stable	
OM	Return on investment: Community Portfolio	\$0.64	Stable	

WATERFALL OF KNOWN FACTORS IMPACTING ON ROI. EST \$1.78 AT END OF JUNE 2024



# Executive Performance Report

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August 2023



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## Performance narrative

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### The Injury Prevention ROI is holding steady

- Overall, the Injury Prevention ROI result remained stable in August and is expected to remain stable.

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# Prevention

## The Return on Investment (ROI) result is stable...

- Re-investments into the Shopcare programme improved the expected ROI for the Workplace portfolio from \$2.01 to \$2.11. The expected ROI of \$1.08 from the re-investment in Rugby League lowered the Sport Portfolio ROI to \$1.77. These changes resulted in no change to the overall Injury Prevention ROI result in August.
- The re-investment in Netball is expected to be confirmed in September, further improving the ROI in Sport. Netball has been a strong performer in the last two years, with fewer people being injured as a result.
- At the end of Q1, programme design costs from 2021/22 move into the ROI, shifting it down. This two-year lag allows programmes to have flexibility to innovate in the early days or discovery phase (i.e. design) without having to have an ROI until the programme is ready to have an impact (i.e. delivery).

## ...and is expected to remain within range...

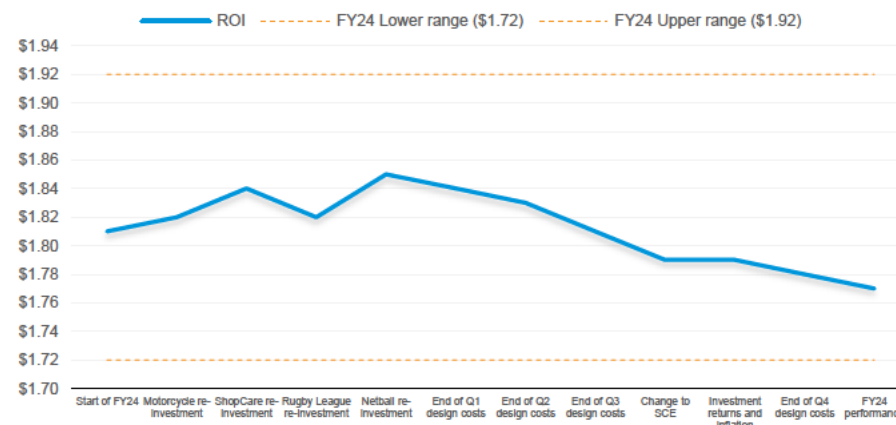
- At the start of Q2, the number of injuries reduced from prevention programmes in Q1 will be known, providing some assurance that results at the end of 2023/24 are on track with expectations.
- A re-investment business case of \$30M for Older Adults Falls Prevention is expected in Q2. The benefits for this are currently being worked through as the additional investment will take the overall investment to over \$100M and will need Board approval. It is likely to lower the overall ROI and may put pressure on the year end result remaining within the target range.

## ... however, it will only be in Q4 when the impact on the ROI is more fully understood.

- The underspend in Injury Prevention in 2022/23 impacts new business cases and programme development in subsequent years. At the time of writing, it is not clear whether other investments will be occurring that impact the ROI, other than those outlined already.
- Two processes take place each year in Q4 when more information is available to assess the impact of the ROI:
  - an update of the Statistical Case Estimate (SCE) which values the reduction in injuries people have had as a result of the prevention interventions
  - the re-valuation process, where future expectations of each programme are assessed to determine whether the impact could be higher or lower based on performance.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.82</b>	Stable	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Improving	
OM	Return on investment: Road Portfolio	<b>\$3.09</b>	Stable	
OM	Return on investment: Sport Portfolio	<b>\$1.77</b>	Deteriorating	
OM	Return on investment: Falls Portfolio	<b>\$1.08</b>	Stable	
OM	Return on investment: Treatment Safety Portfolio	<b>\$1.33</b>	Stable	
OM	Return on investment: Community Portfolio	<b>\$0.64</b>	Stable	

**KNOWN FACTORS IMPACTING ON ROI. EST \$1.77 AT END OF JUNE 2024**



# Executive Performance Report

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September 2023



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# Prevention

The Return on Investment (ROI) result remains within target range.

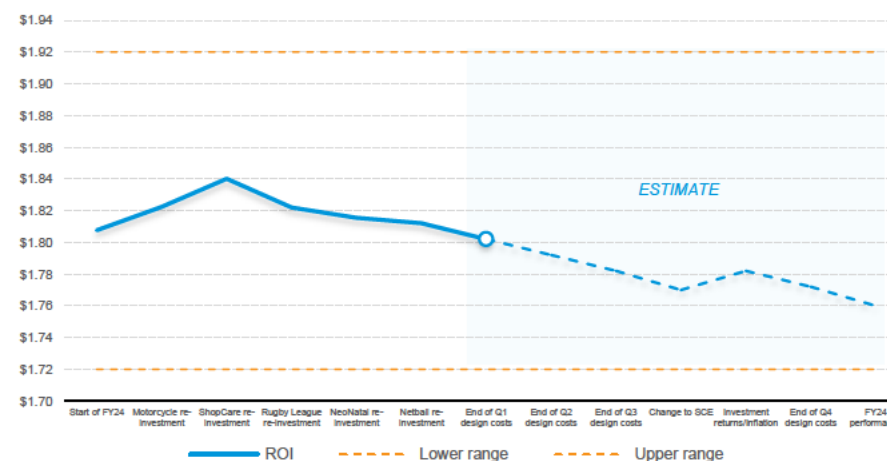
- The overall ROI result saw a small reduction over the quarter but remains within target.
  - ShopCare, Neonatal Encephalopathy, Rugby League, Motorcycles and Netball programmes had re-investments approved in Q1, with the estimated impacts on ROI shown in the chart on the right. Further re-investment in the Older Adult Falls programme is expected in Q2.
  - Programme design costs from Q1 2021/22 moved into the ROI calculation this quarter, reducing the ROI result. This two-year lag allows programmes to have flexibility to innovate in the early days or discovery phase (i.e. design) without having to have an ROI until the programme is ready to have an impact (i.e. delivery).
- The number of injuries reduced from prevention programmes over Q1 will be known during October. This result will indicate whether results for 2023/24 are on track.
- We continue to forecast an underspend in Injury Prevention investments.

Key injury prevention initiatives are progressing.

- Research commissioned by ACC to track the impact of Preventable indicates people are more likely to take prevention focused actions if they feel it would benefit their community. This will feed into a new television (and online) campaign to show impact of injuries beyond family and friends, to include impact on workmates, workplaces and communities.
- ACC and WorkSafe have jointly developed and approved the next Harm Reduction Action Plan 2023-26. The Plan sets the priorities and focus areas for the next three years to further reduce workplace harm.
- We are continuing to deliver on Te Aorerekura Aorerekura and have invested in upskilling community primary prevention through three regionally based service level agreements providing Primary Prevention Practitioners through to June 2025.
- Work continues with whānau, hapū and communities to design approaches for tamariki, rangatahi and whānau to know about mana-enhancing and tapu-enriched relationships to increase prevalence of healthy and consensual relationships. A nationally cohesive approach is being developed that will enable locally led responses and support local mātauranga.
- We have been significantly influencing the performance metrics in Road to Zero and have also been advocating a greater focus on Māori road safety.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.80</b>	Stable	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Stable	
OM	Return on investment: Road Portfolio	<b>\$3.09</b>	Stable	
OM	Return on investment: Sport Portfolio	<b>\$1.75</b>	Deteriorating	
OM	Return on investment: Falls Portfolio	<b>\$1.08</b>	Stable	
OM	Return on investment: Treatment Safety Portfolio	<b>\$1.28</b>	Deteriorating	
OM	Return on investment: Community Portfolio	<b>\$0.58</b>	Deteriorating	

Known factors impacting on ROI. Est \$1.77 at end of June 2024



# Executive Performance Report

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October 2023



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# Prevention

## The Return on Investment (ROI) result remains within target range...

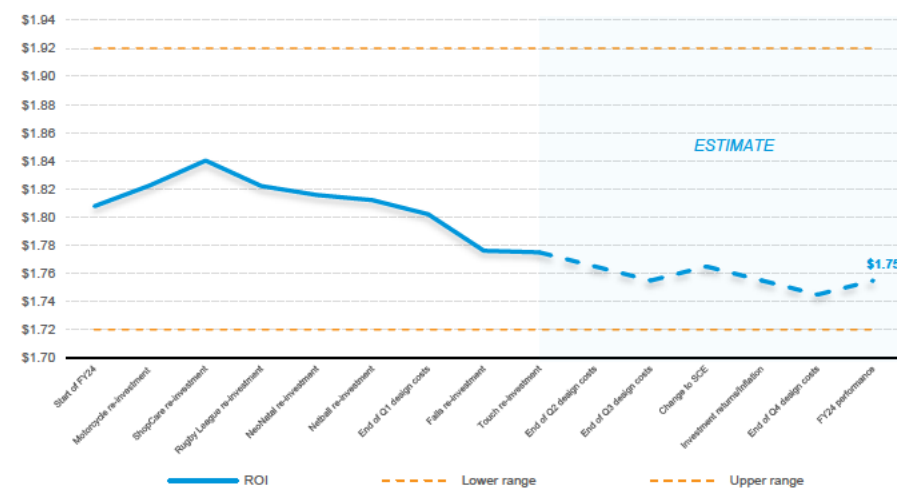
- The Older Adult Falls programme re-investment was approved by the Board in October. This lifts the expected ROI for Falls to \$1.26. Older Adult Falls has had significant investment over the last ten years (circa \$100m). Health sector pressures and major system reform have resulted in challenges in implementation of key components.
- Fracture Liaison Services that meet international accreditation standards are an essential component of falls prevention services. With around 60% of Te Whatu Ora hospitals currently meeting this standard, additional investment over the next two to three years will focus efforts on increasing hospitals achieving full accreditation.
- A small (<\$500k) re-investment in Touch (Rugby) also took place in October 2023.

### ... with analysis providing confidence in the expected trajectory.

- The number of injuries prevented from Injury Prevention programmes in Q1 was assessed during October. This provided early indications of how programmes are expected to perform throughout the year. Our assessment indicates no significant deviation this month from performance in the last two quarters. FarmStrong and Netball programmes continue to perform strongly, offsetting other programmes that are underperforming.
- If current performance continues in line with our modelling, we expect a \$0.01 increase to the ROI result at the end the year, as indicated in the chart to the right.
- The 2022/23 underspend in Injury Prevention impacts new business cases and programme development in subsequent years. There have been no new business cases in 2023/24. Most of the re-investments for 2023/24 have now been completed. Further design costs from prior years will be brought into ROI calculations in Q2 and Q3, lowering the ROI further as outlined in the chart.
- Two processes take place each year in Q4 when more information is available to assess the impact of the ROI:
  - an update of the Statistical Case Estimate (SCE). The SCE values the reduction in injuries through prevention interventions.
  - the re-valuation process. This process assesses the future expectations of each programme to determine whether the impact could be higher or lower based on performance.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.77</b>	Stable	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Stable	
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OM	Return on investment: Treatment Safety Portfolio	<b>\$1.28</b>	Stable	
OM	Return on investment: Community Portfolio	<b>\$0.58</b>	Stable	

KNOWN FACTORS IMPACTING ON ROI. EST \$1.75 AT END OF JUNE 2024



# Executive Performance Report

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November 2023



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## Performance narrative

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### Injury prevention performance remains stable

- Performance of the injury prevention programme is stable, with the service agreement measure for return on investment (ROI) still expected to achieve target. However, with no new business cases expected and re-investments being completed for 2023/24, there are likely to be challenges in meeting Service Agreement targets in future years.

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# Prevention

## Injury prevention return on investment is stable....

- The only funding activity this month was a \$300k re-investment to implement a framework developed by a workplace grants recipient. This additional investment is not expected to change the overall or workplace return on investment result.
- We are not expecting any business cases needing a return on investment to be presented during the remainder of Q2 or Q3.

## ... with the numbers of injuries avoided meeting expectations

- At the end of Q1, injury prevention programmes have contributed to the avoidance of approximately 2,750 claims. Full year expectation is 10,800 claims avoided.

## The expected trajectory for the ROI remains on-track ...

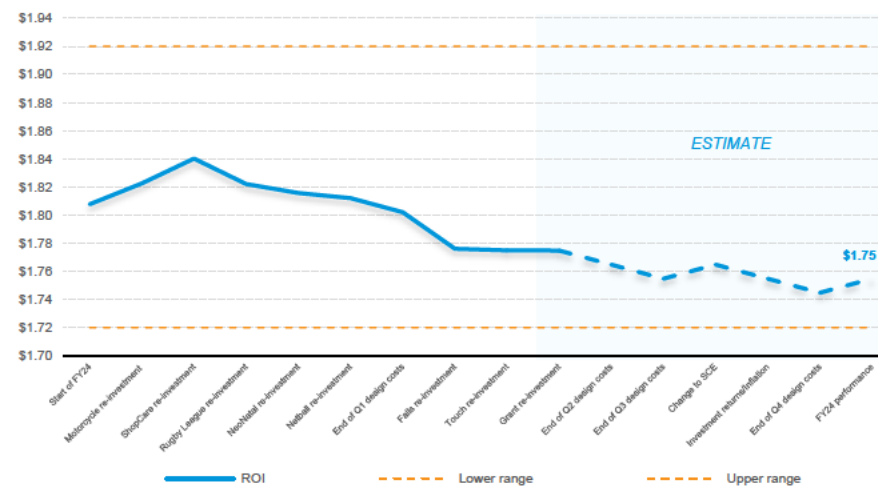
- Performance trends across all portfolios were stable over the month. This indicates year-end performance targets should be met. Expected movements over coming months are highlighted in the chart to the right:
  - Further design costs from previous years will be brought into the ROI calculations in Q2 and Q3. These are expected to lower the ROI result.
  - Updates to the Statistical Case Estimate (SCE). The SCE values the reduction in injuries through injury prevention initiatives. Re-valuation processes occur in the final quarter, expecting some improvements in the ROI result.

## ... however, pressure to achieve out-year targets is building.

- The underspend in Injury Prevention in 2022/23 impacts new business cases and programme development in subsequent years. When considered alongside no new business cases in 2023/24 and re-investments being completed, the achievability of the current ROI target range for 2024/25 (\$1.75 - \$1.95) may be difficult to achieve.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.77</b>	Stable	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Stable	
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OM	Return on investment: Falls Portfolio	<b>\$1.24</b>	Stable	
OM	Return on investment: Treatment Safety Portfolio	<b>\$1.28</b>	Stable	
OM	Return on investment: Community Portfolio	<b>\$0.58</b>	Stable	

KNOWN FACTORS IMPACTING ON ROI. EST \$1.75 AT END OF JUNE 2024



# Executive Performance Report

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December 2023



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# Performance narrative

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## Injury Prevention

- Injury prevention portfolios maintained stable performance with little change in the ROI at the programme level. The overall ROI saw a small, expected decline in December as re-investments and design costs move into the calculation, and is still expected to achieve target. With no new business cases requiring an ROI and re-investments being completed for this performance year, the challenge in meeting future year targets remains.

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# Prevention

## Injury prevention return on investment remains within the target range....

- The Return on Investment (ROI) result declined slightly this quarter. This is a result of reinvestments and programme design costs from 2021/22 moving into the calculation. There is a two-year lag to allow programmes the flexibility to innovate in the early discovery phase (i.e. design). This means programmes are not required to have an ROI until the programme is ready to have an impact (i.e. delivery). The result is within the target range and is still expected to meet the target at year-end.
- YTD data is being analysed to clarify whether the forecast 10,800 injury claims avoided will be achieved during 2023/24.

### ... and is expected to remain on-track ...

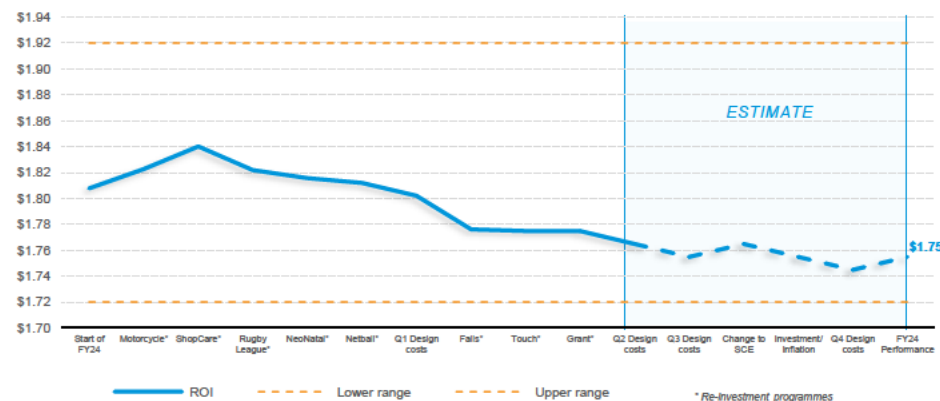
- Performance trends across all portfolios remain stable, indicating year-end performance targets should be met. Expected movements over coming months are highlighted in the chart to the right:
  - Further design costs from previous years will be brought into the ROI calculations in Q3. These are expected to lower the ROI result.
  - The Statistical Case Estimate values the reduction in injuries through injury prevention initiatives. Re-valuation processes occur in Q4 every year. We expect some improvements in the ROI result.

### ... however, pressure to achieve out-year targets is building.

- The underspend in Injury Prevention in 2022/23 will impact new business cases and programme development in subsequent years. This underspend coupled with no new business cases in 2023/24 and re-investments being completed means the current ROI target range for 2024/25 (\$1.75 - \$1.95) may be difficult to achieve.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.76</b>	Deteriorating	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Stable	
OM	Return on investment: Road Portfolio	<b>\$3.08</b>	Stable	
OM	Return on investment: Sport Portfolio	<b>\$1.75</b>	Stable	
OM	Return on investment: Falls Portfolio	<b>\$1.24</b>	Stable	
OM	Return on investment: Treatment Safety Portfolio	<b>\$1.28</b>	Stable	
OM	Return on investment: Community Portfolio	<b>\$0.57</b>	Stable	

KNOWN FACTORS IMPACTING ON ROI. EST \$1.75 AT END OF JUNE 2024



# Executive Performance Report

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January 2024



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# Performance narrative

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## Injury Prevention

- Injury prevention portfolios continued to see stable performance with no changes in the ROI at the programme or aggregated level during January and the target is still expected to be met. The number of claims avoided is ahead of expectations at the end of Q2 and if performance for claims avoided is sustained, we anticipate an improvement in the overall ROI result at year end.

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# Prevention

## Injury prevention initiatives for key programmes are performing well...

- Analysis of avoided injury claims (Q2 6,500, annual target 10,800) reveals stronger than target performance YTD, and an anticipated improvement in Return on Investment (ROI) at year-end if sustained.
- Farmstrong, Netball, and Football programs contributed 62% of the avoided claims in the first two quarters.
- Young Driver and Motorcycles are on target and the Surgical Simulation program is exceeding its target. These programmes have lower impact due to smaller volumes and higher average costs.
- Despite success in these highlighted programs, half of all initiatives may not meet their claims avoidance targets. This performance will affect the annual re-valuation process, influencing adjustments to future claim savings estimates and impacting the overall ROI.

## ... supporting a positive ROI outlook.

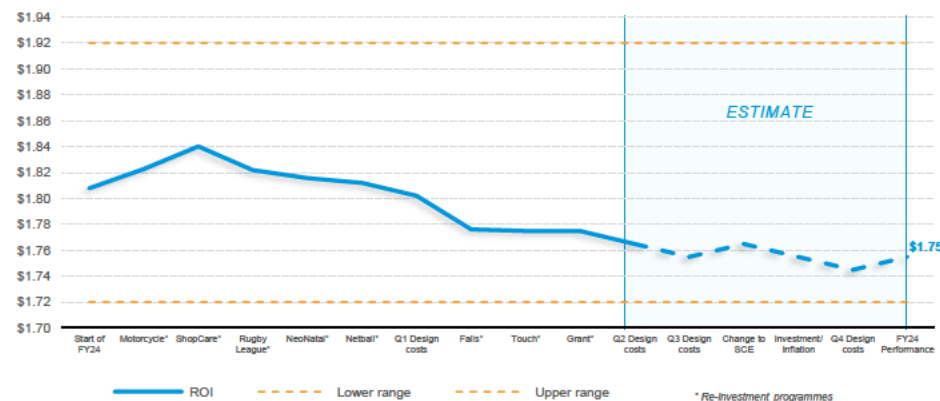
- Performance results across all portfolios did not change from last month. This supports confidence that year-end performance targets should be met. Expected movements over coming months are highlighted in the chart to the right:
  - Further design costs from previous years will be brought into the ROI calculations in Q3. These are expected to lower the ROI result.
  - The Statistical Case Estimate values the reduction in injuries through injury prevention initiatives. Re-valuation processes occur in Q4 every year. We expect some improvements in the ROI result.

## Other progress YTD

- We have given notice to WorkSafe that we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).
- Key business cases to date this year include reinvestment (shown in the ROI graph) in ShopCare and Falls (via ACC Board). A Sexual Violence prevention renewal business case will be developed for Board consideration later this year.
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in Manufacturing and Agriculture, the latter boosting the successful FarmStrong programme. Grant Round 5 is underway with completion by October.
- On the horizon are the secondary injury project underway with Health Partnerships and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.76</b>	Deteriorating	\$1.72 to \$1.92
TYPE	ROI AT PORTFOLIO LEVEL	MONTH ACTUAL	TREND	
OM	Return on investment: Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	Stable	
OM	Return on investment: Road Portfolio	<b>\$3.08</b>	Stable	
OM	Return on investment: Sport Portfolio	<b>\$1.75</b>	Stable	
OM	Return on investment: Falls Portfolio	<b>\$1.24</b>	Stable	
OM	Return on investment: Treatment Safety Portfolio	<b>\$1.28</b>	Stable	
OM	Return on investment: Community Portfolio	<b>\$0.57</b>	Stable	

## Known factors impacting on ROI. Est \$1.75 at end of June 2024



# Executive Performance Report

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February 2024



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## Performance narrative

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### Injury Prevention

- Injury prevention portfolios are stable. The number of claims avoided is ahead of expectations at the end of Q2, if this continues, we anticipate an improvement in the overall ROI result at year-end.

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# Prevention

## Injury prevention initiatives for key programmes are performing well...

- Analysis of avoided injury claims (Q2 result 6,500, annual target 10,800) reveals stronger than target performance YTD. If sustained this should improve the Return on Investment (ROI) at year-end.

### ... supporting a positive outlook for the ROI measure.

- Performance results across all portfolios are stable and unchanged from last month. This provides confidence that year-end performance targets should be met. Expected movements over coming months are highlighted in the chart below:
  - Further design costs from previous years will be brought into the ROI calculations in Q3. These are expected to lower the ROI result.
  - The Statistical Case Estimate provides a valuation of various claim types that is used to estimate the value from the reduction in injuries achieved through injury prevention initiatives. The annual re-valuation processes are underway. This examines whether further benefits from the prevention programme will continue or need adjusting. This process will be complete for year-end. Improvement in the ROI result is expected.

### Focus areas for prevention portfolio

We have given WorkSafe notice we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).

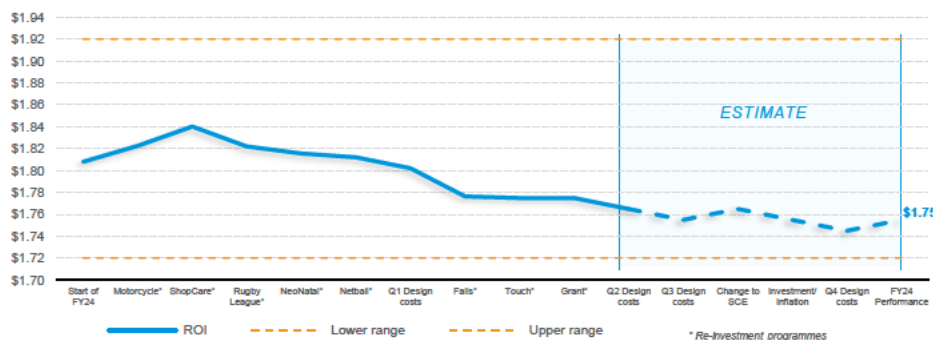
- Key business cases YTD include reinvestment in ShopCare and Falls. These reinvestments can be seen in the chart to the right. A Sexual Violence prevention renewal business case will be developed for Board consideration later this year.
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in manufacturing and agriculture, the latter boosting the successful FarmStrong programme. Injury Prevention Grant round five is underway with completion expected by October 2024.
- Other projects on the horizon include the secondary injury project (with Health Partnerships) and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.76</b>	Deteriorating	\$1.72 to \$1.92

TYPE	PORTFOLIO	ROI	CLAIMS SAVED	YTD TOTAL	TREND
OM	Workplace Portfolio (excluding WorkSafe)	<b>\$2.11</b>	1,786	\$11.5m	Stable
OM	Road Portfolio	<b>\$3.08</b>	559	\$5.3m	Stable
OM	Sport Portfolio	<b>\$1.75</b>	2,497	\$5.4m	Stable
OM	Falls Portfolio	<b>\$1.24</b>	1,093	\$6.2m	Stable
OM	Treatment Safety Portfolio	<b>\$1.28</b>	97	\$1.3m	Stable
OM	Community Portfolio	<b>\$0.57</b>	43	\$4.7m	Stable
OM	Violence Portfolio	-	0	\$9.0m	Stable
OM	WorkSafe	<b>\$0.17</b>	317	\$1.0m	Deteriorating

### Known factors impacting on ROI. Est \$1.75 at end of June 2024



# Executive Performance Report

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March 2024

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# Prevention

## Injury prevention initiatives for key programmes are performing well...

- Analysis of injury claims avoided (Q3 8,659, annual target 10,800) reveals stronger than target performance YTD. If sustained this should improve the Return On Investment (ROI) at year-end.

### ... supporting a positive outlook for the ROI measure.

- Performance results across all portfolios generally remain stable. The only change is the moving the quarterly design costs into the ROI. Confidence that year-end performance targets should be met has not changed. Expected movements over coming months are highlighted in the chart on this page:
  - Further design costs from previous years will be brought into the ROI calculations in Q4. These are expected to lower the ROI result.
  - The Statistical Case Estimate values the reduction in injuries through injury prevention initiatives. The annual re-valuation processes is underway. This examines whether further benefits from the prevention programmes will continue or will need to be adjusted. Completion of this process is on track for Q4. Improvement in the ROI result is expected.
  - A \$10.8m re-investment over six years has been approved into cohorts three and four of the young driver programme (joint venture with Waka Kotahi). This re-investment is expected to have an ROI of \$3.78. Also agreed, was a further one year of funding for Water Safety, with a view to completing Injury Prevention's investment.

### Other progress year to date

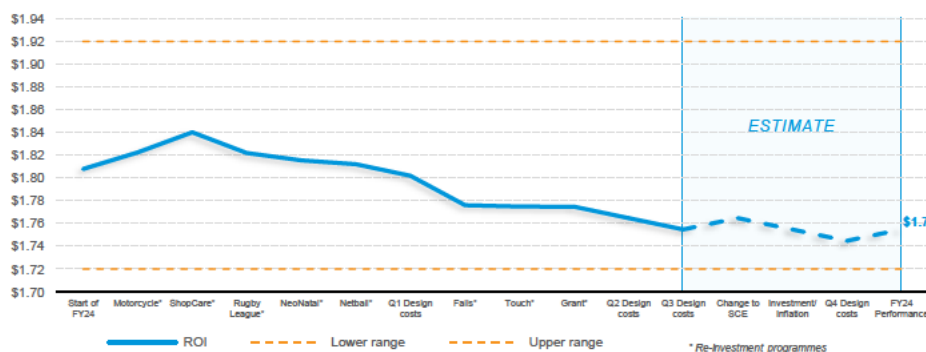
- We have given WorkSafe notice we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).
- Key business cases YTD include re-investment in ShopCare and Falls. These re-investments can be seen in the chart to the right. A Sexual Violence prevention renewal business case will be developed for Board consideration later this year.
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in manufacturing and agriculture, the latter boosting the successful FarmStrong programme. Injury Prevention Grant round five is underway with completion expected by October 2024.
- Other projects on the horizon are the secondary injury project underway with Health Partnerships and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.75:\$1</b>	Stable	\$1.72:\$1 to \$1.92:\$1

TYPE	PORTFOLIO	ROI	CLAIMS SAVED TO Q3	YTD TOTAL	TREND
OM	Workplace Portfolio (excluding WorkSafe)	\$2.11	2,396	\$8.8m	Stable
OM	Road Portfolio	\$3.08	759	\$6.7m	Stable
OM	Sport Portfolio	\$1.75	2,963	\$6.4m	Stable
OM	Falls Portfolio	\$1.24	1,855	\$8.3m	Stable
OM	Treatment Safety Portfolio	\$1.28	134	\$2.8m	Stable
OM	Community Portfolio	\$0.57	55	\$5.1m	Stable
OM	Violence Portfolio	-	0	\$13.8m	Stable
OM	WorkSafe	\$0.17	497	\$7.1m	Deteriorating

Known factors impacting on ROI. Est \$1.75 at end of June 2024



# Executive Performance Report

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April 2024



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## Performance narrative

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### Injury Prevention

- Injury prevention portfolios remain stable and year-end performance is on track. Further improvements in the ROI are expected.

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# Prevention

## Injury prevention initiatives for key programmes are performing well...

- Injury claims avoided (Q3 8,908, annual target 10,873) is stronger than target performance YTD. Four programmes (Falls, Netball, Football and FarmStrong) represent around 75% of injury claims avoided. Young Driver and Motorcycles programmes (both high value programmes) are also tracking higher than expected. If this level of performance is sustained the Return On Investment (ROI) should improve further at year-end.

## ... supporting a positive outlook for the ROI measure.

- Results across all portfolios are generally stable, confidence that we will meet year-end performance targets is unchanged. Expected movements in the ROI over coming months are highlighted in the chart on this page and highlight:
  - Further design costs from previous years being brought into the ROI calculations in Q4. These are expected to lower the ROI result.
  - The Statistical Case Estimate values the reduction in injuries through injury prevention initiatives. The annual re-valuation processes is underway. This examines whether further benefits from the prevention programmes will continue or will need to be adjusted. Completion of this process is on track for Q4. Improvement in the ROI result is expected.

## Other progress year to date.

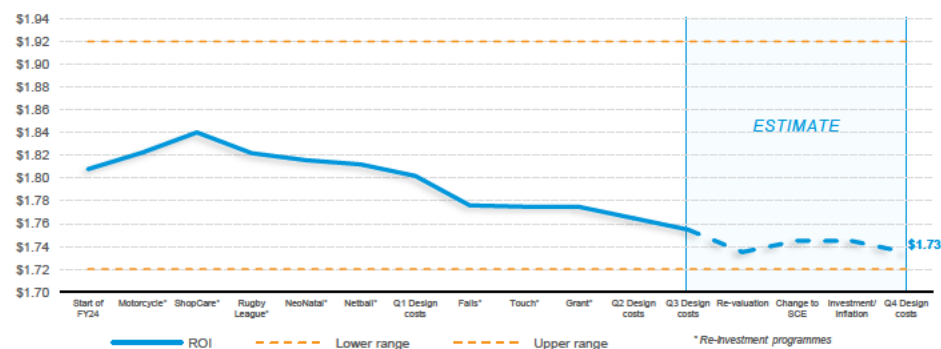
- A \$10.8m re-investment over six years has been approved into cohorts three and four of the young driver programme (a joint venture with NZTA). This re-investment is expected to have an ROI of \$3.78. Also agreed was a further one year of funding for Water Safety, with a view to completing Injury Prevention's investment. This will have an unfavourable impact on the 2024/25 ROI as there are no associated benefits.
- We have given WorkSafe notice we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).
- Key business cases YTD include re-investments into ShopCare and Falls. The impacts from these investments on the ROI can be seen in the chart to the right. A renewal business case for Sexual Violence prevention will be developed for Board consideration later this year.
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in manufacturing and agriculture, the latter boosting the successful FarmStrong programme. Injury Prevention Grant round five is underway with completion expected by October 2024.
- Other projects on the horizon are the secondary injury project underway with Health Partnerships and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.75:\$1</b>	Stable	\$1.72:\$1 to \$1.92:\$1

TYPE	PORTFOLIO	ROI	CLAIMS SAVED TO Q3	YTD TOTAL	TREND
OM	Workplace Portfolio (excluding WorkSafe)	\$2.11	2,396	\$9.4m	Stable
OM	Road Portfolio	\$3.08	759	\$8.5m	Stable
OM	Sport Portfolio	\$1.75	2,963	\$7.0m	Stable
OM	Falls Portfolio	\$1.24	1,855	\$7.9m	Stable
OM	Treatment Safety Portfolio	\$1.28	134	\$2.4m	Stable
OM	Community Portfolio	\$0.57	55	\$8.9m	Stable
OM	Violence Portfolio	-	0	\$14.1m	Stable
OM	WorkSafe	\$0.17	497	\$6.9m	Deteriorating

Known factors impacting on ROI. Est \$1.75 at end of June 2024



# Executive Performance Report

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May 2024



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## Performance narrative

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### Injury Prevention

- Injury prevention portfolios remain stable and year-end performance remains on track.

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# Prevention

## Injury prevention initiatives for key programmes are performing well...

- Injury claims avoided YTD of 8,908 is stronger than target performance YTD (full year target of 10,873). Four programmes (Falls, Netball, Football and FarmStrong) represent around 75% of injury claims avoided. Young Driver and Motorcycles programmes (both high value programmes) are also tracking higher than expected. If this level of performance is sustained the Return On Investment (ROI) should improve further at year-end.

## ... supporting a positive outlook for the ROI measure.

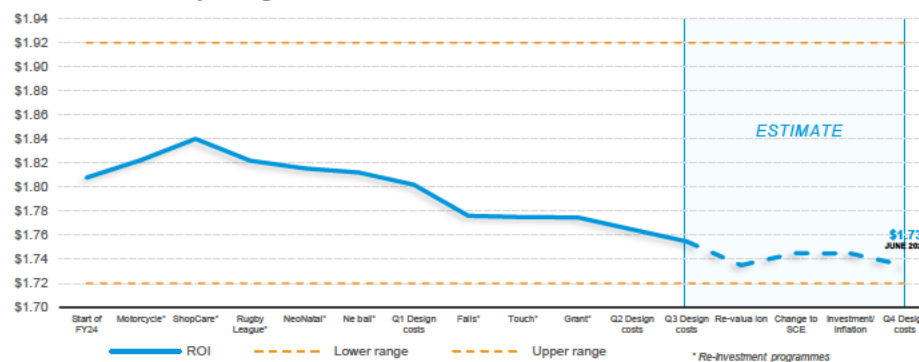
- Results across all portfolios are generally stable, confidence that we will meet year-end performance targets is unchanged. Expected movements in the ROI over coming months are highlighted in the chart on this page and highlight:
  - The annual re-value of future benefits will move the ROI at the end June to \$1.73. This is at the lower end of the target range for this measure .
  - Further design costs from previous years being brought into the ROI calculations in Q4. These are expected to lower the ROI result.
  - The Statistical Case Estimate values the reduction in injuries through injury prevention initiatives. The annual re-valuation processes is underway. This examines whether further benefits from the prevention programmes will continue or will need to be adjusted. Completion of this process is on track for Q4. Improvement in the ROI result is expected.

## Other progress YTD

- A \$10.8m re-investment over six years has been approved into cohorts three and four of the young driver programme (a joint venture with NZTA). This re-investment is expected to have an ROI of \$3.78. Also agreed was a further one year of funding for Water Safety, with a view to completing Injury Prevention's investment. This will have an unfavourable impact on the 2024/25 ROI as there are no associated benefits.
- We have given WorkSafe notice we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).
- Key business cases YTD include re-investments into ShopCare and Falls. The impacts from these investments on the ROI can be seen in the chart to the right. A renewal business case for Sexual Violence prevention will be developed for Board consideration later this year.
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in manufacturing and agriculture, the latter boosting the successful FarmStrong programme. Injury Prevention Grant round five is underway with completion expected by October 2024.
- Other projects on the horizon are the secondary injury project underway with Health Partnerships and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET	
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.75:\$1</b>	Stable	\$1.72:\$1 to \$1.92:\$1	
TYPE	PORTFOLIO	ROI	CLAIMS SAVED TO Q3	YTD TOTAL	TREND
OM	Workplace Portfolio (excluding WorkSafe)	\$2.11	2,396	\$9.7m	Stable
OM	Road Portfolio	\$3.08	759	\$10.6m	Stable
OM	Sport Portfolio	\$1.75	2,963	\$7.0m	Stable
OM	Falls Portfolio	\$1.24	1,855	\$8.2m	Stable
OM	Treatment Safety Portfolio	\$1.28	134	\$2.6m	Stable
OM	Community Portfolio	\$0.57	55	\$6.2m	Stable
OM	Violence Portfolio	-	0	\$14.1m	Stable
OM	WorkSafe	\$0.17	497	\$7.7m	Deteriorating

Known factors impacting on ROI. Est \$1.73 at end of June 2024



# Executive Performance Report

June 2024

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## Performance narrative

### The Return on Investment for Injury Prevention was achieved

More injuries were prevented than had been forecast, primarily from Falls, Netball, Football and FarmStrong programmes. The annual revaluation resulted in a higher than anticipated impact on the ROI, with higher claims costs from worsening rehabilitation performance having a strong, positive impact.

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# Prevention

## Injury prevention initiatives for key programmes performing slightly better than expected in FY24...

- Injury claims prevented were 11,666 vs a target of 10,873, is stronger than target performance. Four programmes (Falls, Netball, Football and FarmStrong) represent around 75% of injury claims avoided. Young Driver and Motorcycles programmes (both high value programmes) also prevention more claims than expected. This lifted the end of year ROI. However, the volume of claims in FY24 is much lower than the 15,000 claims IP have prevented in previous years.

## ... and achieved the ROI at the end of the year due to worsening rehabilitation performance.

- Expected movements in the target ROI over the June months is highlighted in the chart on this page:
  - The Statistical Case Estimate (SCE) values the claims prevented. This has a large impact on the ROI due to higher claim costs from worsening rehabilitation performance. It to favourably improve the ROI by ~13.6 cents, was much greater than anticipated; or changed the ROI from \$1.766 to \$1.902. This placed it in the top of the target range for FY24 of \$1.72 to \$1.92. About 5.6 cents of the ~13 cent increase came from the SCE applied to Falls portfolio; and 4.2 cents came from the SCE applied to the Work portfolio.
  - The 11,666 claims prevented favourably moved the the ROI from 1.9017 to \$1.9312. We expected the claims prevented performance to improve the ROI at the end of June and the SCE moved it higher.
  - Investment returns and converted ROI into the present value of money moved the ROI at the end June from \$1.9312. to \$1.9202.
  - The annual re-value of future claim savings unfavourably moved the ROI at the end June from \$1.9202. to \$1.8578.

## Other progress YTD

- A \$10.8m re-investment over six years was approved into cohorts three and four of the young driver programme (a joint venture with NZTA). This has an ROI of \$3.78 and will take effect in FY25. Also agreed was a further one year of funding for Water Safety, with a view to completing Injury Prevention's investment. This will have an unfavourable impact on the 2024/25 ROI as there are no associated benefits.
- We have given WorkSafe notice we will exit our agreement by March 2025. This process is proceeding in an orderly fashion. Other recent exits include closing two reference groups in treatment safety (Neonatal and Surgical mesh).
- Key business cases include re-investments into Motorcycling, ShopCare, Netball and Falls. The impacts from these investments on the ROI can be seen in the chart to the right..
- Two key areas of work with Māori, Tuarai (East Coast) and Ngā Tini Whetū, could provide a blueprint for engaging further with Māori in a meaningful way.
- The Workplace portfolio is focusing on sector partners in manufacturing and agriculture.
- Other projects on the horizon are the secondary injury project underway with Health Partnerships and the Maternal Birth Injuries scoping process.

TYPE	MEASURE	MONTH ACTUAL	TREND	TARGET
AM	<b>Injury prevention: Return on Investment</b>	<b>\$1.86:\$1</b>	Improving	\$1.72:\$1 to \$1.92:\$1

TYPE	PORTFOLIO	ROI	CLAIMS SAVED TO Q3	YTD TOTAL	TREND
OM	Workplace Portfolio (excluding WorkSafe)	\$2.22	2,615	\$12.1m	Improving
OM	Road Portfolio	\$3.36	1,264	\$11.3m	Improving
OM	Sport Portfolio	\$1.74	4,198	\$8.1m	Deteriorating
OM	Falls Portfolio	\$1.40	2,648	\$10.0m	Improving
OM	Treatment Safety Portfolio	\$1.15	179	\$2.9m	Deteriorating
OM	Community Portfolio	\$0.59	67	\$6.7m	Deteriorating
OM	Violence Portfolio	-	0	\$19.0m	Stable
OM	WorkSafe	\$0.13	695	\$9.1m	Deteriorating

Factors impacting on ROI during FY 2023/24

