|  |
| --- |
| **Post Sourcing Review Template** |

|  |
| --- |
| **Public Authority User Guide**  *Public authority instructions:*  *This template provides an example for public authorities when undertaking a Post Sourcing Review for complex and strategic procurements, in accordance with the Sourcing Policy (‘Policy’).*  *As set out in the Policy, within 60 days of purchase recommendation approval, public authorities will undertake a documented Post Sourcing Review for all complex and strategic procurements to inform and improve future procurement processes and strengthen procurement capability.*  *The public authority will consider the extent to which the intended outcome was met and will identify and record the procurement strategies that helped to achieve the outcome and what could help to achieve a better outcome in the future.*  *This template is provided as a guide only and can be customised by public authorities. All guidance notes are provided in green italics and should be deleted.*  *(Delete these user instructions and any green text).* |

**Post Sourcing Review**

**To: Delegate -** *name*

**Re: Post Sourcing Review –** *procurement name*

**Date:** *date of this report (note report should be completed within 60 days of purchase recommendation approval)*

|  |  |
| --- | --- |
| **CONTRACT OVERVIEW** | |
| **Public Authority / Business Unit** | *Business unit of the public authority that ran the procurement process and/or contract implementation* |
| **Procurement title / contract name** | *As per the approved Purchase Recommendation / executed contract* |
| **Date Purchase Recommendation approved** | *As per the Purchase Recommendation* |
| Is this Post Sourcing Review being submitted within 60 days of Purchase Recommendation approval, in accordance with the Sourcing Policy? | Y  ☐ N |
| **Supplier(s) entity name** | *As per the executed contract* |
| **File / Reference number** | *Public authority’s internal file / reference number* |
| **Procurement Complexity** | *e.g. Complex or Strategic* |
| **Contract Complexity** | *e.g. Complex or Strategic* |

|  |  |  |
| --- | --- | --- |
| **PROCUREMENT PROCESS OUTCOMES** | | |
| **Process requirement/stage** | **Lessons Learnt**  *Note: Lessons can either be learnt from problems/issues that arose or something that was done well* | **Comments/Outcome/Actions to be taken**  *This section outlines the issue(s) for each process requirement/stage, and details of how it was dealt with, including any actions yet to be taken.*  *This section also outlines the positive learning(s) from each process requirement/stage.* |
| **Achievement of Procurement Objective**  *Are there any known issues arising in the procurement process or contract implementation that may impact the achievement of the procurement objective?* | Y  ☐ N |  |
| **Defining the Need**  *Was the need optimally identified, and specification suitable to deliver the required sourcing outcome?* | Y  ☐ N |  |
| **Stakeholder and Industry** **Engagement**  *Was the level of stakeholder and/or industry engagement suitable, resulting in meaningful contribution to desired outcomes?* | Y  ☐ N |  |
| **Capability**  *Were resources available and capable to support the procurement process, did any issues arise that may be linked to capability (these may be strengths or weaknesses, such as resolution of complex problems)* | Y  ☐ N |  |
| **Estimated value and whole-of-life cost**  *Was the estimation, and methodology/assumptions supporting the estimation sound, given the resulting contract value and outcomes? Were there any unforeseen budget implications arising through the process?* | Y  ☐ N |  |
| **Supply Market Analysis**  *Were there any unexpected supply market findings/learnings not anticipated in the planning stage?*  *Were bids received from expected suppliers revealed in market analysis? Was there sufficient competition in the process?*  *Were any unforeseen risks/complexities found in supply chains as a result of the procurement process?* | Y  ☐ N |  |
| **Market Approach**  *Did any issues arise due to the implemented sourcing strategy?* | Y  ☐ N |  |
| **Evaluation**  *Were there any impacts/learnings arising from:*   * *Composition of the evaluation team* * *Structure, weightings of evaluation criteria* * *Methodology and conduct of the process* * *Negotiations* | Y  ☐ N |  |
| **Risk**  *Were process/contract risks adequately identified and managed?*  *Did any probity issues arise?*  *Have any additional risks arisen in contract implementation (not considered in the procurement process or at purchase recommendation stage)?* | Y  ☐ N |  |
| **Contract Implementation/ Transition**  *Did any unforeseen issues in contract implementation arise?*  *Were any significant amendments to contract term, terms and conditions, type of contract, performance measures, liability required from those contemplated in the Purchase Recommendation?*  *Was transition into the contract appropriately planned and managed?* | Y  ☐ N |  |
| **Procurement Timeframes**  *Was the procurement and contract implementation undertaken in a reasonable timeframe suitable to the complexity of the requirement? Were there impacts that could’ve been better mitigated/avoided where timeframes were extended?* | Y  ☐ N |  |
| **Stakeholder feedback**  *What was the end-user experience (customer satisfaction?)*  *Were any complaints received on the process outcomes?*  *Has there been any public interest in process or outcomes?* | Y  ☐ N |  |
| **Supplier Debriefs**  *Were there any learnings from, or improvements to be made, supplier debriefs held with unsuccessful or successful suppliers?*  *Did suppliers provide feedback that can inform process improvements?* | Y  ☐ N |  |
| **Departures**  *Were there any departures (that may be noted in the departures register, purchase recommendation, or occurring post purchase recommendation as result of contract implementation) that should be considered for process learnings and improvement?* | Y  ☐ N |  |

|  |
| --- |
| **SIGN OFF** |

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Position: Contract Manager

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Position: Contract Owner

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Position: Chief Executive (or authorised person) if applicable