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| **Post Contract Review Report (Contract Closure Report) Template** |

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| **Public Authority User Guide**  Public Authority instructions  The Contract Management Policy requires public authorities to prepare a post-contract review report (also known as a contract closure report) for the Chief Executive (or authorised person) for all routine, complex or strategic contracts.  The depth and detail of the review can be determined by the public authority, and may depend on the contract length and complexity as well as whether the public authority is likely to procure similar goods or services in the future.  The Contract Closure Guideline recommends conducting a post-contract review to enable the public authority and the supplier to:   * assess effectiveness of deliverables * assess the extent to which expected performance outcomes were achieved * assess whether the contract or purchase achieved value for money * consider whether any unexpected benefits were achieved * review issues/risks identified during the contract, and how they can be avoided or mitigated in future * provide feedback * and review contract management effectiveness.   The review process also enables public authorities to:   * assess whether each party’s contractual obligations and project deliverables were achieved * evaluate their contract management practices * consider ways to improve contract outcomes.   User specific instructions  *This template is provided as a guide only and can be customised by public authorities for individual contract closures.*  *(delete these user instructions and any green text).* |

**Contract Closure Report**

**To: Delegate -** *name*

**Re: Contract Closure Report -** *contract name*

**Date:** *date of this report*

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| **CONTRACT OVERVIEW** | |
| **Public Authority / Business Unit** | *Business unit of the public authority that is responsible for managing the contract* |
| **Procurement title / contract name** | *As per the approved Purchase Recommendation / executed contract* |
| **Supplier entity name** | *As per the executed contract* |
| **File / Reference number** | *Public authority’s internal file / reference number* |
| **Contract Complexity** | *e.g. Transactional, Routine, Complex, Strategic* |
| **Contract Management Plan** | *Was a contract management plan prepared?* |
| **Risk Management Plan** | *Was a risk management plan prepared?* |
| **Contract Register** | *Was the contract recorded in the public authority’s contract register?* |
| **Contract start date** | *As per the executed contract* |
| **Summary of extensions and variations during the contract period (both planned and unplanned)** | *Summarise # (both planned and unplanned) of all approved variation(s) to scope/quantity, pricing schedule, and/or timelines to date.* |
| **Contract expiry date** | *As per the executed contract and if applicable, any extensions* |
| **Contract Management Meetings** | *e.g. Detail of meetings:**dates, attendees, overview of agenda items and actions during the contract period (could be provided as a separate attachment)* |

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| **ALLOCATED RESOURCES** | |
| **Contract Owner** | *Name and position title* |
| **Contract Owner** | *Name and position title* |
| **Staff allocation (FTE)** | *Number of FTEs that managed the contract* |
| **Staff Turnover (Contract Owner and Contract Manager)** | *Detail any staff changes during the contract period* |

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| **CONTRACT EXPENDITURE** (GST inclusive) | |
| **Base contract value** | *As recorded in the Purchase Recommendation / Report* |
| **Value of any planned contract extensions** | *As recorded in the Purchase Recommendation / Report* |
| **Total contract value** | *As recorded in the Purchase Recommendation / Report* |
| **Actual contract expenditure** | *Value (% & $) of approved value vs actual expenditure*  *Value (% & $) of savings achieved or increase* |
| **Budget** | *Did the contract meet or exceed the estimated/contracted budget?* |
| **Savings** | *Were any direct financial savings achieved?* |
| **Additional Value** | *Savings may be non-financial (i.e. do not affect cash flow) but contribute other value e.g. other economic and/or social benefits* |
| **CONTRACT OUTCOMES** | |
| **Contract outcomes** | *Have the anticipated outcomes been achieved? e.g. list relevant outcomes achieved and their effectiveness, success or otherwise*  *Overall # & % outcomes achieved within contract period*  *Were any unexpected benefits achieved?* |
| **Achievement/Completion of targets, KPIs, deliverables, milestones etc** | *Commentary against each (e.g. were they achieved, and were they achieved on time and within budget)* |
| **Quality** | *e.g. did the goods/service meet/exceed contract outcomes/service expectations?*  *Was there sign-off and acceptance of products/ goods?* |
| **SA IPP outcomes** | *e.g. were SA IPP outcomes achieved?* *What were they?*  *Detail any variations to the IPP and if OIA was notified* |
| **Other - please specify** | *e.g. green procurement outcomes, social and economic procurement outcomes* |
| **Value for money** | *e.g. overall, did the contract achieve value for money and achieve the public authority’s requirements?*  *What savings or improvements were achieved?* |

| **SUPPLIER PERFORMANCE** | |
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| **Compliance** | *e.g. were all insurances, employee/contractor screening checks, accreditations etc maintained and up-to-date?* |
| **Reports** | *e.g. were all supplier reports satisfactory and submitted on time? Were risk and issues registers maintained?* |
| **Management of contract by supplier** | *e.g. detail supplier key staff or management personnel turn-over, disputes/complaints, maintenance of records and data, impact of using subcontractors (if applicable), frequency and quality of supplier communication, receptive to feedback.* |
| **Performance issues that required remedy during the contract period** | *e.g. detail the issues and the remedy/s and how this was managed.* *Do any remain unresolved? If yes, what is the planned course of action?* |
| **Supplier liabilities** | *Does the supplier have any outstanding liabilities?*  *e.g. relating to work carried out that may require contract administration until the supplier’s liability ends* |
| **Contract renewal / handover** | *e.g. is the service or product still needed? Would you use supplier again? If not, why not?*  *Were client records handed over to the new supplier?* |
| **Supplier’s overall performance,** | *e.g. detail any problems with product delivery, service standards, budget, product quality, reporting etc.* |
| **Risk Management** | *Detail how risks relating to the goods/services or the supplier were managed.*  *Detail if any risk reviews were conducted and outcome*  *# & % of risks controlled/ treated during the contract period compared to risks originally identified*  *e.g. was the contract terminated early? If so why? How was this managed? What was the outcome?* |

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| **NEXT STEPS / FUTURE RECOMMENDATIONS** | |
| **Learnings at contract end** | *e.g. describe learnings and opportunities to improve contract management practices and contract outcomes* |
| **Public, client or customer response** | *e.g. what was the end-user experience (i.e. customer satisfaction)?*  *Were there any complaints? How were these managed.*  *Has there been any public, media or client concern about contract end? How was this / will this be managed?* |
| **Formal evaluations** | *e.g. was a contract evaluation undertaken? Yes/No.*  *Was the evaluation conducted internally or through an independent evaluator? What was the outcome?* |
| **Continuous improvement** | *e.g. identify opportunities for continuous improvement*  *Would you manage this contract differently in the future?* |
| **Issues and recommendations for future procurements** | *e.g. are there any recommendations or other relevant issues to consider for future procurement processes?* |

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| **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