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| **Annual Contract Review Template** |

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| **Public Authority User Guide**  Public Authority instructions  The Contract Management Policy requires public authorities to undertake an assessment of their contracts to determine whether:   1. the contract continues to deliver value for money; 2. the delivery timeframes are being met; and 3. overall performance of the supplier including if there is opportunity for improvement and/or innovation.   The Policy requires reviews to be conducted annually, at a minimum, for complex and strategic contracts with a contract term longer than 12 months.  This contract review template can be used by public authorities to assess their contract management practices and determine whether each party’s contractual obligations and project deliverables are being achieved.  The contract review also enables public authorities to assess their contract management practices and consider ways to improve contract outcomes and deliverables.  User specific instructions  *This template is provided as a guide only and can be customised by public authorities for individual contracts.* |

**To: Delegate**

**Re: Annual Contract Review Report – *Contract Name***

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| **CONTRACT OVERVIEW** | |
| **Department/Section** | *Business unit responsible for managing the contract* |
| **Procurement title / contract name** | *As per the approved Purchase Recommendation or executed contract etc* |
| **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 in place** | *Has a contract management plan been prepared, signed and reviewed as required?* |
| **Risk Management Plan in place** | *Has a risk management plan been prepared and reviewed?* |
| **Contract recorded in asset register** | *Has the contract been recorded in the public authority’s record’s management processes/system* |
| **Contract start date** | *As per the executed contract* |
| **Contract expiry date** | *As per the executed contract* |
| **Extension options and due date/s (if applicable)** | *As per the executed contract* |
| **Review period (Year) of this Report** | *e.g. financial year or calendar year period of this report* |
| **Detail of any Contract Management Meetings** | *e.g. dates, attendees, overview of agenda items and actions* |

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| **ALLOCATED RESOURCES** | |
| **Contract Owner / Contract Manager** | *Names and position titles* |
| **Staff allocation (FTE)** | *Number of FTE (or part FTE) allocated to managing the contract* |
| **Changes to contract manager** | *Number of changes to the Contract Manager in this Review Period* |

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| **CONTRACT EXPENDITURE** (GST inclusive) | |
| **Base contract value** | *As per the Purchase Recommendation / Report* |
| **Value of any Contract Extension options** | *As per the Purchase Recommendation / Report* |
| **Total Contract Value** | *As per the Purchase Recommendation / Report* |
| **Contract expenditure to date** | *Value (% & $) of approved contract value vs actual expenditure of the contract*  *Value (% & $) of savings achieved or increase* |
| **Budget** | *Is the contract meeting the estimated budget?* |
| **Current stage of contract** | *% of contract already completed* |

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| **CONTRACT OUTCOMES** | |
| **Contract outcomes, performance measures, targets, KPIs, deliverables, milestones etc** | *List* |
| **Status in achieving/completing outcomes, performance measures, targets, KPIs, deliverables, milestones etc** | *Commentary against each (e.g. were they achieved or are they on track to be achieved, were they achieved on time)*  *Overall # & % achieved (or on track to be achieved)*  *Overall # & % achieved within the required timeframes*  *Commentary against how outcomes for this reporting period compare to previous reporting period(s) (if applicable)* |
| **Quality** | *e.g. did the goods/service meet/exceed contract outcomes/service expectations?* |
| **SA IPP outcomes** | *Were the SA IPP outcomes achieved or are they on track to be achieved?* |
| **Other - please specify** | *e.g. green procurement outcomes, social and economic procurement outcomes* |
| **Were there any existing performance issues that required remedy?** | *If yes, detail how this has progressed* |
| **Unresolved performance issues, problems or contractual matters to be addressed with the supplier** | *Detail if any new performance issues require remedy* |
| **Value for money** | *Overall, is the contract achieving value for money and does the contract continue to accurately reflect the public authority’s requirements* |

| **SUPPLIER PERFORMANCE** | **Comment** |
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| **Compliance with contract** | *e.g. are all insurances, screening checks, accreditations etc maintained and up-to-date?* |
| **Reports** | *e.g. were all reports satisfactory and submitted on time?* |
| **Management of contract by supplier** | *e.g. key staff or management personnel turn-over, handling of disputes, complaints, maintenance of records and data, impact of using subcontractors (if applicable)* |
| **Frequency and quality of supplier communication** | *e.g. was the supplier response to communication* |
| **Other - please specify** |  |
| **Suitability for further work** | *e.g. would you use supplier again?* |
| **Overall Score and Comment** |  |

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| **CONTRACT VARIATIONS / PROPOSED VARIATIONS** | |
| **Summary of approved variations to date** | *Summarise (# and level of variation) all approved variation(s) to scope/quantity, pricing schedule, and/or timelines to date. If this is the first reporting period, complete following sections of the report instead.* |
| **New Approved Variations to scope or quantity in this reporting period** | *Detail # and level of variation(s) to scope or quantity, if applicable and any relevant approvals* |
| **New Approved Variations to pricing schedule and/or approved contract value in this reporting period** | *Detail # and level of variation(s) to pricing schedule and/or approved contract value, if applicable and any relevant approvals (i.e. difference between original contract value and the new contract value after the variation has occurred)*  *# & % savings or increase* |
| **New Approved Variations to timelines in this reporting period** | *Detail # and level of variation(s) to timelines, if applicable and any relevant approvals (i.e. difference between original contract timeline and the new contract timeline after the variation has occurred)*  *# & % of days increase / decrease* |
| **Future Variations** | *Is there a need to enter into a further variation to scope, quantity, pricing schedule, and/or timeline dates?* |
| **Industry Participation Plan** | *Detail any variations to the IPP and if the OIA was notified* |
| **Other minor changes to scope, quantity, pricing schedule, timelines and delivery dates in this reporting period** | *Detail any minor changes that did not require a contract variation* |

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| **RESULT OF EFFORT TO MITIGATE RISKS** | |
| **Existing/emerging risks identified** | *Existing/Emerging risks as identified by the Risk Management Plan* |
| **Outcome of further risk reviews in this reporting period** | *Detail if any risk reviews were conducted and the outcome*  *# & % of risks controlled and/or treated compared to the number of risks that were originally identified (relating to the goods/services procured or the supplier) as needing to be managed under the contract* |
| **How were risks managed?** | *Detail* |
| **Status of risk management** | *e.g. risks managed or resolved and/or risks yet to be managed or resolved* |
| **Was the contract terminated early?** | *If yes, why was it necessary to terminate the contract? How was this managed? What was the outcome?* |

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| **NEXT STEPS** | |
| **Learnings to date** | *e.g. describe learnings and opportunities to improve contract management practices and outcomes* |
| **Formal Evaluations** | *e.g. was a contract evaluation undertaken? Yes/No. Was the evaluation conducted internally or via independent evaluator? What was the outcome?* |
| **Identify continuous improvement opportunities** | *e.g. would you manage this contract differently in the future?* |
| **Post contract review/report** | *e.g. will a post-contract review/report be prepared* |
| **Other relevant issues for future procurements** | *e.g. are there any relevant issues that are important 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