Sourcing closure report

Template

(Insert procurement activity and reference number)

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| --- |
| **When to use this template**  This template can be used to document the outcomes and learnings from a procurement sourcing process. It can also assist in any contract management handover.  **Please delete this text box and remove any user notes before use.**  Use of this template is optional – remember to check your agency’s policies and procedures to check whether your agency has a standard template available that you are required to use.  **For more information on the *Buy Queensland* approach to procurement please visit** [www.qld.gov.au/buyqueensland](http://www.qld.gov.au/buyqueensland).  Get involved! This document is part of the Procurement Resource Centre. We would love to hear what you think, so please email your feedback to [betterprocurement@hpw.qld.gov.au](mailto:betterprocurement@hpw.qld.gov.au).  **Disclaimer**  This document is intended as a guide only for the internal use and benefit of government agencies. It may not be relied on by any other party. It should be read in conjunction with the Queensland Procurement Policy, your agency’s procurement policies and procedures, and any other relevant documents.  The Department of Housing and Public Works disclaims all liability that may arise from the use of this document. This document should not be used as a substitute for obtaining appropriate probity and legal advice as may be required. In preparing this document, reasonable efforts have been made to use accurate and current information. It should be noted that information may have changed since the publication of this document. Where errors or inaccuracies are brought to attention a reasonable effort will be made to correct them. |

# Aim of report

The aim of the sourcing closure report is to:

* review the procurement activity outcome against what was planned and how well did it performed against its objectives
* review any risks and issues to ensure that these are now closed or no longer relevant
* highlight any outstanding risks, issues or other work that still needs to be completed or addressed
* collate learnings that can be incorporated into the planning for any future procurement activity of the same or similar goods/services.

# Procurement details

|  |  |
| --- | --- |
| **Procurement activity** | (Insert procurement activity name and reference number) |
| **Key officers involved in the process** | (Insert names and titles of the key officers involved) |
| **Start date** | (Insert the date the activity commenced, normally the date planning commenced) |
| **End date** | (Insert the date the activity was finalised, normally the contract signing date) |

# Review of objectives

[User note: this section of the report should detail the original objectives.]

(Insert objectives from original documentation.)

(Insert brief commentary on whether the objectives were achieved and if not, why not.)

# Procurement outcomes

|  |  |
| --- | --- |
| Original scope | (Insert details of the scope used to go to market) |
| **Estimated budget at commencement** | (Insert estimated budget at the time of originally going to the market) |
| **Were any additional elements included in the final contract? Is so, provide details** | (Insert details about any additional (originally out of scope items) that were included in the final contract; e.g. extended warranty, innovative offers) |
| **Final contract price** | (Insert the final contract price) |

# Adherence to schedule

[User note: this section should review the indicative timetable for the procurement and how well the forecast timeframes were met. Where timeframes were not met then a reason for the change should be noted.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Stage** | **Planned date** | **Date delivered** | **Reason for change** |
| **(Insert stage in the procurement process)** | (Insert originally planned delivery date) | (Insert the date delivered) | (Insert the reason for any change) |
| **(Insert stage in the procurement process)** | (Insert originally planned delivery date) | (Insert the date delivered) | (Insert the reason for any change) |
| **(Insert stage in the procurement process)** | (Insert originally planned delivery date) | (Insert the date delivered) | (Insert the reason for any change) |

# Issues, risks, and changes

[User note: this section should summarise the total number of risks and issues from during the process, including a breakdown of those closed and still open.]

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Total logged** | **Total closed** | **Total still open** |
| **Issues** | (Insert number) | (Insert number) | (Insert number) |
| **Risks** | (Insert number) | (Insert number) | (Insert number) |

## Outstanding risks and issues

[User note: every open risk or issue should be described, including detail on what actions or other future work is required to close them and who owns these items going forward.]

|  |  |  |
| --- | --- | --- |
| **Risk/issue** | **Future action required** | **Owner of risk/issue** |
| (Insert details) | (Insert details) | (Insert details) |
| (Insert details) | (Insert details) | (Insert details) |
| (Insert details) | (Insert details) | (Insert details) |

# Residual, outstanding and other follow-on activities

The below table summarises any residual, outstanding or other follow-on activities that require action following the procurement activity.

|  |  |  |
| --- | --- | --- |
| Identified future activity | Action required | Responsibility |
| (Insert details) | (Insert details) | (Insert name and title of the responsible officer) |
| (Insert details) | (Insert details) | (Insert name and title of the responsible officer) |
| (Insert details) | (Insert details) | (Insert name and title of the responsible officer) |

# Lessons learnt

[User note: this section should list key lessons learned throughout the procurement activity. The user notes in the table below provide examples for information only.]

|  |  |
| --- | --- |
| **Description** | **Recommendation** |
| [User note: Project management:   * did the project run to schedule? If not, why not and what could be done to improve this next time? | (Insert details) |
| Stakeholder engagement and communication:   * were all stakeholders identified at the start of the project? * are there any opportunities to improve the communication with stakeholders in terms of format or frequency? | (Insert details) |
| Scope definition and outcomes negotiated:   * did the original scope provide the necessary outcome for the agency? * were any new or innovative items/practices discovered as part of the project? | (Insert details) |
| Supply market knowledge:   * did you learn any new supply market information? | (Insert details) |
| Negotiation outcomes and process:   * did the negotiation run as planned? * if you had to do this again, would you approach this differently?] | (Insert details) |

# 

# Conclusion

[User note: this section summarises the process – things that went well, things that went badly and relevant considerations for the future.]

|  |  |
| --- | --- |
| **Successes** | (Insert details) |
| **Areas for improvement** | (Insert details) |
| **Relevant future considerations** | (Insert details) |