

Post- Assignment Review Template

This is required for projects in excess of £10,000 and is advised for all other assignments.

What is this document for?

In order to ensure that the Welsh Government buys consultancy services as effectively as possible, it is necessary to take every opportunity to further refine and improve our processes. This template provides a minimum set of considerations for gathering “lessons learned” from every consultancy purchase we make. This template is an important part of the due diligence and should be completed in light of the original justification / Business Case. Completion should involve senior staff from the project team. The template has two parts. The first relates to the project as a whole, including, but not limited to those tasks performed by the consultants. The second part relates only to the consultants’ performance.

The aim of the review is to ensure VFM is achieved from consultancy engagements, and where appropriate successful skills and knowledge transfer. Completion and submission of this template enables routine collection of performance information, and the ability for NPS to implement Strategic Supplier Relationship Management, thus further increasing supplier performance and driving further value from Welsh Government consultancy expenditure.

How will it be used?

Business areas should use this document, alongside the original Business Case (or other type of justification) to inform their understanding of the reasons they buy consultancy and the factors that contribute to project success, project failure or any variation in predicted spend, timelines or resources. Business Cases and Post-Project Reviews will also be used to support reviews of the types of external resource purchased, to seek alternatives (like recruiting those types of skills that we buy regularly) and to review and continue to improve the Welsh Government’s use of consultants.

Who should be involved in the review?

The number of people involved in the review will depend on the scale of the project but should involve at least the people listed in the table below. For small projects, one individual may fulfil several of the roles listed.

Individual	Description	Minimum Role During the Review
Senior Responsible Owner	The most senior individual in the Directorate who had ultimate responsibility for the project	To sign-off the completed review
Project Manager	The staff member that was responsible for monitoring the consultants activity	Present throughout the review
Impacted Staff	Any staff member whose work or position is affected by the project itself and/or by its recommendations	Input to questions regarding communication, lessons learned and what would be done differently next time.
External Stakeholders	Any external individual or organisation that is affected by the project itself and/or by its recommendations	To provide input to questions regarding communication and lessons learned



Post-Project Review Template - Part One – General Project Review

Post-Project Review Template - Part One – General Project Review			
Project Name		Directorate	
Name of Project Manager		Name of Senior Responsible Owner	
Cost Centre Number		Purchase Order Number	
Project Cost agreed with the supplier at initial Engagement (as documented in approved business case)		Total expenditure paid to supplier by end of engagement, including expenses (detail separately a forecast of any expenditure yet to be paid).	
Estimated project completion date at initial engagement		Actual project completion date	
Please state any Expected Efficiency Savings delivered or secured by the project (£)		Expected Return on Investment – ROI (Efficiency saving divided by actual cost)	
Actual project duration			
Please state the reasons for any delay in project completion			
Please state the original objectives (refer to Business Case)			
Were the original objectives met? (if “No”, please detail in comments)	Yes <input type="checkbox"/> No <input type="checkbox"/>	Comments:-	



Were any additional benefits delivered?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Please describe the additional benefits		
Might other business areas benefit from the outputs of this work? (Please detail the top two business areas in the Comments field)	<input type="checkbox"/> Yes <input type="checkbox"/> No	Comments:-
Did the engagement recommend what was already suspected or planned? (If "Yes", please use the Comments field to state why the work was still necessary)	<input type="checkbox"/> Yes <input type="checkbox"/> No	Comments:-
Will the project recommendations be implemented? (If "No", please explain why not in the Comments field)		Comments:-
What were the key critical success factors that enabled this project to be a success, or the lack of which resulted in project failure?		
What are the key lessons you would take on board if repeating this exercise?		



Post-Project Review Template - Part Two – Consultant Performance Review									
How effective was communication?	Between Staff & Consultants	<input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor <input type="checkbox"/> N/A	Between Consultants and internal Stakeholders	<input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor <input type="checkbox"/> N/A	Between Consultants External Stakeholders	<input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor <input type="checkbox"/> N/A			
Were any changes to specification, project timescales and/or total cost authorised through an agreed change protocol. (If “Yes”, please explain key rationale)	<input type="checkbox"/> Yes <input type="checkbox"/> No		Comments:-						
Will internal staff now be able to carry out this work in the future? (If “No”, please explain why the necessary skills were not transferred to “in-house” staff).	<input type="checkbox"/> Yes <input type="checkbox"/> No		Comments:-						
Did the consultants deliver against their original brief as set-out in the Statement of Requirements? (If “No” please explain what was not delivered and why)	<input type="checkbox"/> Yes <input type="checkbox"/> No		Comments:-						
Overall, please rate the services purchased. (If less than “Good”, please explain in the comments field)	<input type="checkbox"/> Very Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor		Comments:-						

Project Team Sign-Offs

Senior Staff involved in the project should indicate their endorsement of this review document by placing their signatures in the spaces provided below

Name of Senior Responsible Owner		Signature of Senior Responsible Owner	
Project Manager		Signature of Project Manager	
Additional Signatories			