

# 9

## Review

### Some basics

Even if a project has been completed successfully, it is still possible to gain some additional useful knowledge. Good consultants will be prepared to assist in this process, and some also provide evaluation forms to clients (or conduct interviews) in order to gain feedback for their own staff.

Busy managers are unlikely to be able to afford the time to engage in an extensive review process. However, even a *brief* review can:

- provide an opportunity to discuss with the consultant his or her view on how the results can best be used—an external perspective from someone who, by the end of the project, has a good grasp of the subject matter, can be invaluable;
- provide a learning experience for all staff;
- improve your own contract management skills; and,
- identify further value to be gained (for example, in making available to the public or the minister for media purposes any useful data collected).

The review should focus on major issues, not the nitty-gritty:

- Could project objectives have been better defined?
- Was there enough (or too much) management of the consultant?
- How could the consultant have performed better?

- Have enough skills been transferred to your staff?
- Which risks were not identified properly before the project started?
- How useful are the results compared to the original objectives?
- How could the client have performed better?

## Australian Government requirements

There are no specific guidelines or requirements for reviewing a consultancy. Nevertheless, accountability and good practice also imply that an evaluation should be carried out and documented as a matter of course.

Officials are required by CPR clause 7.2 to maintain ‘a level of documentation commensurate with the scale, scope and risk of the procurement’, and CPR clause 7.24 requires disclosure of non-compliance with the CPRs. CPR clause 4.14 further provides that ‘when a contract does not specify an end date it must allow for periodic review and subsequent termination of the contract by the relevant entity, if the relevant entity determines that it does not continue to represent value for money’.

## Tips and traps

- A review should cover more than just the management and output from the consultancy itself. To be useful, it should also include the process of initiating the consultancy (including the justification) and the subsequent use of outputs for policy formulation, organisational change, or other purpose. In essence, the review should **test whether the initial objectives have been satisfied** and identify lessons learned. It should not be used as an excuse to lay blame for problems encountered on the way.
- Additional value can be extracted from a consultancy if the consultant provides a general debriefing on the project. Consultants often pick up **additional information** that is of use to the client but is not included in a report because it is not directly relevant in purely contractual terms. Similarly, consultants can brief clients on

any avenues investigated that were ‘dead ends’: such information may not appear in a report, but helps provide a more complete picture of the issues investigated.

- Where consultants are hired regularly, a file containing ‘**lessons learned**’ is often useful, particularly if it includes basic details such as the nature of the project and the entity involved. New staff, or those with less experience in letting contracts can skim the file to gain an impression of pitfalls to avoid, and useful practices to emulate.
- To a certain extent, successful use of consultants requires practical experience. It is therefore a good idea to invite **all of your staff**, not just those who were involved directly, to sit in on reviews. The knowledge gained will be at least as valuable as anything that can be gleaned from publications, and will contribute to improve use of consultants in the future.
- Reviews can also be carried out **before the finalisation of a project**. In large projects, it may even pay to seek external review of request documentation before its release, particularly where subject matter expertise is important.
- It may not be realistic to expect busy public service managers to carry out a review of every project. However, Commonwealth entities seeking to improve their general level of performance in letting consultancies could select a number of projects each year for use as **case studies** in a ‘no-blame’ atmosphere to allow all staff to learn from them. It would be important, however, to ensure that the entity’s own performance (for example, turnaround time for selecting a consultant) were assessed, as well as the performance of the consultant. An alternative is to link performance assessment directly to the outcomes of a consultancy project.
- Where **useful data or information** has been collected and there is a likelihood that it may be of use to researchers or policymakers elsewhere, it is worth weighing the costs and benefits of making it accessible. Dissemination to academics and state or local governments, reference to its availability in your entity’s annual report, or posting on a website, can help make it more generally available. From a national perspective, resources will be saved in future if data or information collection does not need to be duplicated.

**Table 8. Evaluation: Risks and mitigation**

Type of risk	Likely consequence	Mitigation strategy
Consultant resents contract review	<ul style="list-style-type: none"> <li>• Inadequate evaluation</li> <li>• Damage to relationship between client and consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Foster collaborative relationship with consultant throughout project</li> <li>• Hold regular reviews as part of contract management process, rather than one at the end</li> <li>• Make clear from outset (including in request documentation) that final review is to occur</li> <li>• Include review clause in contract</li> </ul>
Failure to identify problems and address them	<ul style="list-style-type: none"> <li>• Missed opportunity to improve future procurement activity</li> </ul>	<ul style="list-style-type: none"> <li>• Develop systematic evaluation methods and techniques</li> <li>• Use clear, relevant evaluation criteria</li> </ul>

This text is taken from *Managing Consultants: A practical guide for busy public sector managers*, by Leo Dobes, published 2016 by ANU Press, The Australian National University, Canberra, Australia.