

LOGO

Evaluation   
Closure Report  
[Insert Evaluation Name]

**Version X.X Date DD-MM-YYYY**

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| **EMBEDDING EVALUATION INTO EVERYDAY PRACTICE ACROSS THE COMMONWEALTH: TEMPLATES TO SUPPORT BETTER PRACTICE EVALUATION**  The [Commonwealth Evaluation Toolkit](https://evaluation.gov.au/toolkit/commonwealth-evaluation-toolkit) is designed to support people to determine fit for purpose approaches to evaluate, measure, assess and report on the performance of Commonwealth programs and activities.  There are many evaluation templates, tools and resources used across the Commonwealth, and in other jurisdictions, that may assist at different stages of an evaluation. While the set of templates available here are in line with better practice, the application and use of any one tool, template or example for the evaluation of a specific program or activity is ultimately at the discretion of the manager responsible for the successful delivery of results.  The templates can be used to document how you plan to conduct an evaluation, or to strengthen routine performance measurement approaches, and are organised around the three stages typically involved in an evaluative activity:   * Planning and budgeting (steps 1, 2 & 3) * Measuring and assessing (steps 4, 5 & 6) * Reporting and being accountable (steps 7 & 8)   While the "[How to evaluate](https://evaluation.gov.au/toolkit/how-evaluate)" schematic is presented as a series of sequential steps, in practice, evaluation and performance management needs to be approached in a holistic way and considered early in the policy cycle. Evaluation findings and other performance information should support continuous improvement, accountability and decision-making.  The [tools and additional resources](https://evaluation.gov.au/toolkit/templates-tools-and-resources) available in the Toolkit provide further guidance and examples on specific tasks.  [ REMEMBER TO DELETE THESE REFERENCE NOTES BEFORE FINALISING YOUR DOCUMENT ] |

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| **TEMPLATE 11: Evaluation closure report**  **Template Overview:** An Evaluation Closure Report provides a summary of how an evaluation proceeded against the Evaluation Plan. It helps share lessons learned that can be applied to other evaluations. |
| **Complete set of templates available in the Commonwealth Evaluation Toolkit:** These [templates](https://evaluation.gov.au/toolkit/templates-tools-and-resources) can be used to help document how you plan to evaluate, measure, assess and report on the effectiveness, efficiency and/or appropriateness of government programs and activities. Use of these templates is NOT mandatory.   * **Planning and budgeting**    + Template 1 | Theory of change (outcome mapping)   + Template 2 | Program logic   + Template 3 | Evaluation framework (program)   + Template 4 | Evaluation terms of reference   + Template 5 | Evaluation plan   + Template 6 | Identifying stakeholders and their roles in an evaluation * **Measuring and assessing**    + Template 7 | Data evaluation matrix   + Template 8 | Data sharing agreement  (Sourced from ONDC: Data sharing agreement ONDC (datacommissioner.gov.au)) * **Reporting and being accountable**   + Template 9 | Evaluation report   + Template 10 | Evaluation action plan   + Template 11 | Evaluation closure report   *[Could insert any suggested handling instructions in relation to inclusion/omission of Commonwealth logo – for further discussion.]*  [ REMEMBER TO DELETE THESE REFERENCE NOTES BEFORE FINALISING YOUR DOCUMENT ] |

**TEMPLATE 11**

This template is provided as guidance only – the use of this template is not mandatory. The appropriate application and use of any one tool, template or example for the evaluation of a specific program or activity is ultimately at the discretion of the manager responsible for the successful delivery of results. The level of documentation and governance required for a particular evaluation should be commensurate with the size of the complexity of the evaluation.

Key stakeholders of the evaluation should be involved in developing the closure report.

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1. Purpose

<The Evaluation Closure Report provides a summary of how the evaluation proceeded against the Evaluation Plan. It also allows the:

* review of the evaluation outputs (eg report) and success, or otherwise, of the evaluation;
* documenting and sharing of any lessons that can be usefully applied to other evaluations; and
* documenting and sharing of any outstanding issues and any ongoing risks to the program/activity and/or evaluation activities.>

1. Evaluation Plan review
   1. Update on background and strategic alignment

<Refer to the endorsed Evaluation Plan for this section and reflect on whether the background and purpose was appropriate>

* 1. Aims and objectives

<Briefly describe the aims and objectives of the evaluation, and provide an overview as to whether these were achieved.>

* 1. Evaluation change requests

<List any change requests that were approved during the course of this evaluation (eg change in timeframe, change in stakeholders, change in data collection etc).>

* 1. Deviations from the approved Evaluation Plan

<Insert here any deviations from the Evaluation Plan that did not go through a Change Control Process. Include here any discussion on any decisions that refined/changed the scope and/or methodological approach of the evaluation that were not subjected to a change control process>

* 1. Products/outcomes achieved/delivered

<List the products/outcomes that the evaluation has achieved/delivered (including, for example, any policy decisions that have been taken as a result of the evaluation if known)>

1. Resource review

<Include here a reflection on the evaluation team stand up process, the team size and capability. Any observations of the support provided by the executive in your entity, the evaluation team in your entity (if applicable), the Commonwealth Evaluation Centre of Excellence (particularly the Commonwealth Evaluation Toolkit) etc in relation to resourcing the evaluation team can be included here.

The following table provides a breakdown of the total costs of the evaluation.

Table 1: Evaluation Budget (all costs are inc GST)

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| --- | --- | --- | --- |
| **Cost Description** | **Original Approved** | **Final Approved Budget** | **Variance** |
| Resources |  |  |  |
| * Individual resourcing elements (e.g. staff costs, research, focus group etc) |  |  |  |
| Budget |  |  |  |
| Total resources |  |  |  |

1. Lessons learned

<List each of the lessons learned as a separate line item in these tables, this includes lessons from the evaluation and from the processes in establishing and managing the evaluation including resources.>

Table 2: Lessons Learned from the evaluation

|  |  |  |
| --- | --- | --- |
| **Lesson Description/Explanation** | **Recommended Action** | **Lesson Owner** |
|  |  |  |
|  |  |  |

Table 2: Lessons Learned from the process of establishing and managing the evaluation

|  |  |  |
| --- | --- | --- |
| **Lesson Description/Explanation** | **Recommended Action** | **Lesson Owner** |
|  |  |  |
|  |  |  |

<Ensure that lessons learned from evaluations, where appropriate, are integrated into an entity’s lessons learned registry (if applicable) to assist future evaluations of: like programs/activities; and the processes involved in establishing and managing the evaluation.

As part of the lessons learned process, evaluation teams should consider the following:

* What worked well and why;
* What could be improved and why; and
* What alternative action or changes to processes, tools or templates should be undertaken.

Where the evaluation utilised consultants, capture lessons on areas for improvement or success in engaging a particular consultant. You may wish to consider the specific staff they had on the task, and what their strengths and/or weaknesses were.

Following closure, please provide a copy of the lessons learned to the evaluation area of your entity (if applicable) and to the Commonwealth Evaluation Centre of Excellence ([pgpa@finance.gov.au](mailto:pgpa@finance.gov.au)). Where appropriate, it is good practice for the agreed actions or proposed changes to be considered for inclusion in an entity’s evaluation framework and/or the Commonwealth Evaluation Toolkit.

The purpose of lessons learned is to bring together relevant stakeholders and to identify any lessons learned, and insights gained during an evaluation. Documenting this information could then be used by other evaluation managers to usefully apply on future evaluations, and for the current evaluation team to apply to future evaluation planning/activities.

The process of capturing lessons learned is often overlooked and forgotten in evaluation activities. Lessons learned registers are useful as they advise evaluation sponsors, managers, and governance bodies, what went right, what went wrong and why. The information is a valuable tool in driving actions of improvement for future evaluations and, subsequently, the performance measurement of an entity’s programs and activities.

1. Summary of follow-on actions
   1. Outstanding deliverables

<Describe here if there were any deliverables or products that are left outstanding and why. Provide a handling strategy for ensuring how they will be produced, if still required, and which area is responsible for this (i.e. now that the evaluation is complete). If there are none, write Nil.>

* 1. Suggested follow up actions

<Describe any suggest follow up actions beyond the evaluation, or Nil if not applicable>

* 1. Outstanding risks/issues

<Outline any outstanding risks or issues associated with the evaluation that will need to be managed beyond the closure of the evaluation>

# Document control

## Document details

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| **Document Name** |  |
| **File Name** |  |
| **File Location** |  |

## Version history

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| --- | --- | --- | --- |
| **Version** | **Date** | **Author/Editor** | **Changes** |
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## Document approval(s)

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| --- | --- | --- | --- |
| **Name** | **Date Approved** | **Date of Issue** | **Version** |
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## Sponsor Acceptance

Approved by the Evaluation Sponsor:

<Evaluation Sponsor Name>

<Evaluation Sponsor Title>

Date: