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| A black text on a white background  Description automatically generated |
| Program Closure Report |
| [Insert Program Name] |

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**Purpose of Program Closure Report**

The program closure report is the final program management deliverable for a program and is used for senior management to assess the success of the program. The closure report records the final program sign off from the Sponsor, assesses success, and initiates a number of activities: identify and share best practices for future programs, identify and assign items to be addressed (issues, future initiatives, future projects/programs), appropriately close current contracts, provide final program communication to stakeholders, release program resources, and ensure appropriate operational transition. The closure report is part of the PMO’s[closure process](https://uwaterloo.ca/it-portfolio-management/methodologies/program-management/program-closure).

**Program Closure Report Participants and Approvers**

Input into the program closure report may come from many different sources including program documentation, and feedback from stakeholders and those who participated on the program according to the defined program roles in the program charter. Program documentation that should be referenced includes but is not limited to the program and component project charters (scope, objectives and success criteria), program management plan, risks, issues, approved changes to the program and component projects, stakeholder register, contracts and statements of work, and lessons learned. Feedback can be in the form of group meetings, interviews and surveys. An impartial third-party resource may be used to assist with program performance evaluation. PMO resources are available to facilitate lessons learned and the closure process.

The author is the [Program Manager](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/program-manager). The approver of the project closure report is the [Sponsor](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/projectprogram-sponsor). An approved closure represents final sign off on the program, the final deliverables, and agreement on program successes and improvement opportunities. It also represents the sponsor’s agreement that the closure content is accurate and ready to be shared.

**Instructions:**

1. Review program and component project information by reading documentation (such as charters, risks, issues, lessons learned, contracts and statements of work, stakeholder register, deliverable documentation, approved changes).
2. [Contact the PMO](https://uwaterloo.atlassian.net/servicedesk/customer/portal/2221) to conduct satisfaction survey. Collect and document lessons learned.
3. Assess success of program based on the success criteria outlined in the charter and program management plan. Perform required measurements for success criteria.
4. Create the program closure report based on information from steps 1-3. The green italic text contains instructions for filling out the template and can be removed for the final version of the document.
5. Review closure report with applicable stakeholders and sponsor for accuracy and completeness, if required, and obtain appropriate sponsor approval.
6. Scan the signed program closure report and upload to the Knowledge Base
7. Share lessons learned with other Program and Project Managers.

**Next Steps**

Once the program closure has been approved, the program is closed. Lessons learned should be shared with others. [Schedule a closure meeting with PMO](https://uwaterloo.atlassian.net/servicedesk/customer/portal/2221).

# Executive Summary

Instructions: This section should include a brief overview of the program, highlight key program performance ratings and highlights, summarize the key lessons learned, and next steps or remaining actions.

[Insert Executive Summary]

# Stakeholder Feedback

## Process

Instructions: This section should include a description of how feedback was/is being collected for lessons learned, who feedback was collected from (if specific groups were not targeted for feedback they should be mentioned as well with a reason why they were excluded), and the measures against success criteria (including stakeholder satisfaction).

[Insert summary of feedback process]

## Feedback Results

Instructions: Include the results of the stakeholder feedback, including key (1 or 2) themes, key (1-3) things that were done well, key (1-3) opportunities for improvement for the future, and next steps. This information should be summarized from the closure survey, lessons learned report, and success criteria measurements.

[insert feedback results]

# Program Performance Outcome

This section should document the outcome of the program by comparing the outcome to the success criteria stated in the charter (or the approved changed success criteria documented in the Program Management Plan) and explain any variances. [Success](https://uwaterloo.ca/vpaf-project-management-office/methodologies/project-success) is based upon whether the program delivered what was asked for, whether there are benefits to what was delivered, and the process to get there. If success criteria haven’t been defined up front for the program, the PMO is available for guidance.

Instructions: In the chart below, record the success criteria (from program management plan), expected results (from program management plan), actual results, variance & explanation, and a rating indicating how well the success for each category was met/not met. The measurements for determining the actual results will be documented in the charter or program management plan. The rating should be a collaborative agreement between the Program Manager and Sponsor, at minimum, and may also include feedback from program governance, the program team, and other stakeholders from the closure survey and other discussions. This success criteria is at the program level; component projects will have each had their own success criteria, but may have measures that relate towards the success of the overall program.

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| Category | Performance |
| Success of Product/ ServiceDid the products/ services deliver what was asked for through the program components relevant to constraints such as scope and quality? | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation** | **Action(s) to address variances (if applicable)** |
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| **Overall Success of Products/Services (click one checkbox below):** [ ] All Expectations Were Met and/or Exceeded[ ] Not all Expectations Were Met, But Still May Be (explain how, who, and when below)[ ] Some Expectations Will Not Be Met (explain impact below)[ ] Did Not Meet Any ExpectationsComments (if applicable): |
| Success of OutcomeDid the products/ services delivered provide benefit to people using it, and/or to the business and achieve the program vision? | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation**  | **Action(s) to address variances (if applicable)** |
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| **Overall Success of Outcome (click one checkbox below):** [ ] All Expectations Were Met and/or Exceeded[ ] Not all Expectations Were Met, But Still May Be (explain how, who, and when below)[ ] Some Expectations Will Not Be Met (explain impact below)[ ] Did Not Meet Any ExpectationsComments (if applicable): |
| Success of ProcessDid the process followed to deliver the products/ services work well? (oversight of program components, management of resources, budget, schedule, benefits, teams, change, communication, transition to operations, procurement, et cetera) | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation** | **Action(s) to address Variances (if applicable)** |
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| **Overall Success of Process (click one checkbox below):** [ ] All Expectations Were Met and/or Exceeded[ ] Not all Expectations Were Met, But Still May Be (explain how, who, and when below)[ ] Some Expectations Will Not Be Met (explain impact below)[ ] Did Not Meet Any ExpectationsComments (if applicable): |

# Closure Checklist

This section includes a checklist of things that should be done during program closure, and includes any notes that may need to be carried through transition to operations.

Instructions: Mark these items as complete/not complete with an ‘x’ (or N/A if not relevant for the program) and add any relevant comments before the sponsor approves this closure report

|  | Yes | No | N/A | Comments |
| --- | --- | --- | --- | --- |
| Have all program components been closed appropriately? |  |  |  |  |
| Are all deliverables completed and transitioned to operations? |  |  |  |  |
| Have all program benefits been delivered and communicated? If not, provide details in comments of benefits that have not been delivered and required actions. |  |  |  |  |
| Has deliverable documentation been handed over to stakeholders and Operations? |  |  |  |  |
| Have all contracts been closed? |  |  |  |  |
| Have all payments (invoices, et cetera) been made? |  |  |  |  |
| Has adequate knowledge transfer and training been completed? |  |  |  |  |
| Are there recurring maintenance/operational costs for the product(s) to be accounted for? If yes, indicate what and who is responsible in the Comments. |  |  |  |  |
| Are there recommended enhancements or updates still required? If yes, add details in the Comments. |  |  |  |  |
| Have all tasks been completed? If no, add details in the Comments. |  |  |  |  |
| Have any remaining issues been communicated to operations? Add details of any such issues in Comments. |  |  |  |  |
| Have any remaining risks been communicated to operations? Add details of any such risks in Comments. |  |  |  |  |
| Were stakeholders provided with an opportunity to provide feedback about the deliverables and their satisfaction? |  |  |  |  |
| Has the closure been communicated to all stakeholders? |  |  |  |  |
| Has documentation been archived in the appropriate repository? |  |  |  |  |
| Has team member performance been communicated to their functional managers, where requested? |  |  |  |  |
| Has there been appreciation expressed to the teams, including any relevant celebrations? |  |  |  |  |
| Have lessons learned been collected and completed by stakeholders? |  |  |  |  |
| If lessons learned have been collected and completed, have they been archived appropriately in a repository or knowledge base? |  |  |  |  |
| Have team members been released from the program or re-allocated? |  |  |  |  |
| Are there future recommended projects, programs, or initiatives related to this one? If yes, please include details in Comments, including references to additional documentation. |  |  |  |  |
| Are there outstanding program outcome measurements that need to be done in the future and transitioned to operations? If yes, include details of measure, timing and who is responsible in Comments. |  |  |  |  |
| Have you had a closure meeting with the Portfolio Management Group? |  |  |  |  |
| If the deliverable creates a new service, or impacts an existing services, has the [service catalogue](https://uwaterloo.ca/information-systems-technology/services) been updated? |  |  |  |  |

# Approvals

This report formally closes the [insert program name] program, based on the completion of deliverables and assessment of program performance outlined. This approval represents acceptance of the final deliverable based on the information in this report, and releases all resources from this program (financial and FTE). The closure performance ratings will be recorded in the IT portfolio, and relevant information, such as opportunities for improvement, may be shared with other programs and projects.

Sponsor Authorization: [print name of sponsor, title here]

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Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Program Manager Authorization: [print Program Manager name here]

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Revision History

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| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
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