|  |
| --- |
|  |
| Project Closure Report |
| [Insert Project Name] |

|  |
| --- |
|  |

***Purpose of Project Closure Report***

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

***Project Closure Report Participants and Approvers***

*Input into the project closure report may come from many different sources including project documentation, and feedback from stakeholders and those who participated on the project according to the defined project roles in the project charter. Project documentation that should be referenced includes but is not limited to the project charter (scope, objectives and success criteria), project management plan, risks, issues, approved changes to the project, 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 project performance evaluation.* ***PMO resources are available to facilitate lessons learned and the closure process.***

*The author is the* [*Project Manager*](https://pilots.uwaterloo.ca/ist-project-management-office/methodology/roles/project-manager)*. The approver of the project closure report is the* [*Sponsor*](https://pilots.uwaterloo.ca/ist-project-management-office/methodology/roles/project-sponsor)*. An approved closure represents final sign off on the project, the final deliverable, and agreement on project 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 project information by reading documentation (such as charter, risks, issues, lessons learned, contracts and statements of work, stakeholder register, deliverable documentation, approved changes).*
2. *Contact* [*PMO*](https://uwaterloo.ca/ist-project-management-office/about/contact-us) *to conduct satisfaction survey. Collect and document lessons learned.*
3. *Assess success of project based on the success criteria outlined in the charter and project management plan. Perform required measurements for success criteria.*
4. *Create the project closure report based on information from steps 1-4. 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.*
6. *Obtain appropriate approval for project closure to indicate agreement by the Sponsor.*
7. *Upload closure report to the* [*Project Artifacts Library*](https://uwaterloo.ca/ist-project-management-office/project-artifact-library)*.*
8. *Share lessons learned with other Project Managers.*

***Next Steps***

*Once the project closure has been approved, the project is closed. Lessons learned should be shared with others.* [*Schedule*](https://uwaterloo.ca/ist-project-managmeent-office/about/contact-us) *a closure meeting with PMG Management**.*

# Executive Summary

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

[Insert Executive Summary]

# Stakeholder Feedback

## Process

*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

*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]

# Project Performance Outcome

*This section should document the outcome of the project by comparing the outcome to the success criteria stated in the charter (or the approved changed success criteria documented in the Project Management Plan) and explain any variances.* [*Success*](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/project-success) *is based upon whether the project 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 project, the PMO is available for guidance.*

*In the chart below, record the success criteria (from project management plan), expected results (from project 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 project management plan. The rating should be a collaborative agreement between the Project Manager and Sponsor, at minimum, and may also include feedback from project governance, the project team, and other stakeholders from the closure survey and other discussions.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Category | Performance | | | | |
| Success of Product/ Service  *Did the product/ service deliver what was asked for, relevant to constraints such as scope (requirements, functionality, et cetera), and quality?* | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation** | **Action(s) to address variances (if applicable)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  | |
| **Overall Success of Product/Service (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 Expectations  Comments (if applicable): | | | | | |
| Success of Outcome  *Did the product/ service delivered provide benefit to people using it, and/or to the business?* | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation** | **Action(s) to address variances (if applicable)** | |
|  |  |  |  |  |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
| **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 Expectations  Comments (if applicable): | | | | | |
| Success of Process  *Did the process followed to deliver the product/ service work well? (management of resources, budget, schedule, project team, change, communication, transition to operations, procurement, et cetera)* | **Criteria** | **Expected Result(s)** | **Actual Result(s)** | **Variance & Explanation** | **Action(s) to address Variances (if applicable)** | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
| **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 Expectations  Comments (if applicable): | | | | | |

# Closure Checklist

*This section includes a checklist of things that should be done during project closure, and includes any notes that may need to be carried through transition to operations. Mark these items as complete/not complete with an ‘x’ (or N/A if not relevant for the project) and add any relevant comments before the sponsor approves this closure report*

|  | Yes | No | N/A | Comments |
| --- | --- | --- | --- | --- |
| Are all deliverables completed and transitioned to operations? |  |  |  |  |
| 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 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 project team, 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 project team members been released from the project or re-allocated? |  |  |  |  |
| Are there future recommended projects or initiatives related to this one? If yes, please include details in Comments, including references to additional documentation. |  |  |  |  |
| Are there outstanding project 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? |  |  |  |  |
| Is the service management plan complete? |  |  |  |  |

# Approvals

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

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

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

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

Project Manager Authorization: [print Project Manager name here]

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

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

# Revision History

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