<Date>

**Version <X.x>**

**NOTES TO THE AUTHOR/TEMPLATE INSTRUCTIONS**

This template includes instructions and boilerplate text for this document. The author should note that:

* Each section provides instructions or describes the intent, assumptions, and context for content included in that section. Instructional text appears in *blue italicized text* throughout this template.
* Replace instructional text in each section with project specific information.
* Use or modify boilerplate examples of wording and formats for text and tables as appropriate.
* Search and replace all text enclosed in angle brackets - < > - with project specific information (e.g., <Project Name> or <Project Acronym>.

Follow these steps when using this template:

1. All documents must be compliant with Section 508 requirements. Refer to [FNS 504-508 Compliance Reference Library](https://fncspro.usda.net/offices/oit/Documents/Forms/AllItems.aspx?RootFolder=%2Foffices%2Foit%2FDocuments%2F504%2D508%20Compliance%20%2D%20Accessibility&View=%7BB47848DF%2D6059%2D4D43%2DAB0C%2D8ECEDC92AD4C%7D) or [Section508.gov](https://section508.gov/) for more information.
2. Modify any boilerplate text, as appropriate, for your specific project.
3. Use Styles for new sections such as Heading 1, Heading 2 and Std Para.
4. Place Table captions and descriptions *above* the table and centered. All tables must have an associated tag providing appropriate alternative text for Section 508 compliance.
5. Place Figure captions and descriptions *below* the figure and centered. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.
6. Update the Table of Contents and any List of Tables or List of Figures by right-clicking it and selecting Update field / Update entire table.
7. Delete this “Notes to the Author/Template Instructions” page and all instructional text to the author before finalizing the draft of the document.

**SDLC TEMPLATE REVISION HISTORY**

| VERSION | DATE | CHANGE DESCRIPTION |
| --- | --- | --- |
| 1.0 | 03/19/2013 | Created the document. |
| 1.1 | 09/09/2013 | Re-formatted the document. |
| 1.2 | 03/23/2017 | Re-formatted the document. |
| 2.0 | 11/02/2020 | Updated to reflect new FNS Agile SDLC processes and comply with Section 508 standards. |

**SDLC TEMPLATE CONTACT INFORMATION**

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Complete the below table to track the version history of this document.

**DOCUMENT REVISION HISTORY**

| **VERSION** | **DATE** | **AUTHOR** | **CHANGE DESCRIPTION** |
| --- | --- | --- | --- |
| x.x |  |  |  |
| x.x |  |  |  |
| x.x |  |  |  |

*List the relevant area of responsibility, contact person and email address for this document.*

**CONTACT INFORMATION**

| **RESPONSIBILILTY** | **CONTACT PERSON** | **EMAIL ADDRESS** |
| --- | --- | --- |
| Area of Responsibility |  |  |
| Area of Responsibility |  |  |
| Area of Responsibility |  |  |
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| Area of Responsibility |  |  |

**APPROVAL**

**OFFICE OF INFORMATION TECHNOLOGY**

| This document approved by: |  |
| --- | --- |
|  | **Joseph Shaw**Date  Director, Portfolio Management Division,  Office of Information Technology |

|  | **Kevin Russ**Date  IT Governance Manager, Portfolio Management Division,  Office of Information Technology |
| --- | --- |

*Modify the title and organization name as needed.*

|  | **<Name>**Date  OIT Program Manager, Program Management Branch,  Office of Information Technology |
| --- | --- |

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*List the acronym reference and definition or description for each acronym contained in this document.*

**ACRONYM LIST**

| **REFERENCE** | **DEFINITION** |
| --- | --- |
| PPA | Project Process Agreement |
| OIT | Office of Information Technology |
| OIT PM | Office of Information Technology Project Manager |
| SDLC | System Development Lifecycle |

# overview

*Describe the purpose of this document. Describe closing activities, any outstanding action items and issues.*

Project Closeout activities begin after the final release of the Product to transition the system to Sustainment. If the system transitions to a separate sustainment team, the Product team supports the final release for at least 60 days to mitigate and address any discovered software defects. Artifacts for this activity are included in the Project Process Agreement (PPA). The exiting Office Information Technology Project Manager (OIT PM) coordinates project closeout activities with the sustainment team (if applicable). In conjunction with the Product transition, the exiting Project Manager follows the [Project Transition Guide and Plan](https://fncspro.usda.net/collaboration/pmb/Project%20References%20%20Guidelines/Forms/AllItems.aspx?RootFolder=%2Fcollaboration%2Fpmb%2FProject%20References%20%20Guidelines%2FOIT%20Policies%20and%20Procedures%2FPMD%20Policies%20and%20Procedures&FolderCTID=0x01200034AE19FD3EC6CF4E82254C137A3EE2C3&View=%7BC665044B%2D9C03%2D4CA9%2D9FD9%2DBE345044FA61%7D) to transition Project Manager responsibilities, as applicable.

The purpose of this Project Closeout Report is to formally close a project and authorize the handoff from project to sustainment. It includes final information about schedule, financial, resources, final acceptance, open issues, lessons learned, and a list of deliverables.

# Project information

*Enter information about the project in Table 1 below. For Roles, enter any additional key personnel involved with this project. In section 2.1 provide project description and in section 2.2 describe project accomplishments.*

Table – Project Information

| **Project Name** |  |
| --- | --- |
| <Project Name> |  |
| **Roles** |  |
| **Product / Business Owner** | **Organization** |
| Add info | Add info |
| **OIT Project Manager** | **Organization** |
| Add info | Add info |
| **System Development Lead** | **Organization** |
| Add info | Add info |
| **Title** | **Organization** |
| Add info | Add info |

## Project Description

*Insert a project description, leveraging the project charter or business case documents.*

## Project Accomplishments

*Insert project accomplishments, leveraging the project charter or business case documents, insert intended goal and objectives. If project was on track, discuss these items and what the project was able to accomplish. If any of these items changed, states why and how.*

# schedule and financial information

Summarize schedule and financial information. Highlight the significance of approved changes to the schedule and financial baselines, their impact on the project, and how they were managed. Identify and discuss specific issues that challenged the project/project team.

Compare budgeted amount to actuals and explains variances. Explain any schedule variances. Explain if variances resulted in risks being realized.

Enter project planned and actual dates in Table 2.

Table – Schedule Information

| **Start Date** | **Finish Date** |
| --- | --- |
| **Planned Start Date** | **Planned Finish Date** |
| Add info | Add info |
| **Actual Start Date** | **Actual Finish Date** |
| Add info | Add info |

*Enter project budget in Table 3.*

Table – Project Budget

| **Project Budget** |  |  |
| --- | --- | --- |
| **What was the original project budget? (in thousands)** | **What amounts were obligated (in thousands) and on what date(s)?** |  |
| **Original Budgeted Amount** | **Obligated Amount** | **Date** |
| Amount info | Amount info | Date |
| Amount info | Amount info | Date |

*Check appropriate box. For each “No” response, add it as an issue in Section 6 Open Issues being sure to reference the question number.*

Table – Financial Information

| **Question #** | **Question** | **Answer** |
| --- | --- | --- |
| FI-01 | List Funding Sources | Examples of funding sources: Program, OIT, Development, O&M, etc. |
| FI-02 | Resources Used | Govt. Staff Contractor Other  If Other, explain: |
| FI-03 | Have all Contracts/Task Orders been closed? | Yes No Not Applicable  If No, list task order and description in the Open Issues section of this document. |
| FI-04 | Have all unused funds been deobligated? | Yes No  If No, state why in the Open Issues section of this document. |
| FI-05 | Has the Operations & Maintenance handoff been completed? | Yes No  If No, state why in the Open Issues section of this document. |

# resource information

*Check appropriate box. For each “No” response, add it as an issue in Section 6 Open Issues being sure to reference the question number.*

Table – Resource Information

| **Question #** | **Question** | **Answer** |
| --- | --- | --- |
| RE-01 | Have all resources (including, but not limited to, staff, contractors, hardware, software, tools) been appropriately released? | Yes No |
| RE-02 | Have all applicable SDLC artifacts been completed/finalized and uploaded to the appropriate tool/archive? | Yes No |
| RE-03 | Have all products and documentation been turned over to the appropriate group or organization? | Yes No |

# final product or service acceptance information

*Check the appropriate box. For each “No” response, add it as an issue in Section 6 Open Issues being sure to reference the question number.*

Table – Product or Service Acceptance

| **Question #** | **Question** | **Answer** |
| --- | --- | --- |
| AC-01 | Was this product or service successfully deployed and are users successfully able to use the product or service? | Yes No |
| AC-02 | Have all actions items and tasks been completed? | Yes No |

# Open issues

*Describe any open issues and plans for resolution. Add an issue for any “No” responses in Tables 4, 5, and 6; reference the question number. All other open issues, apply OP-01, OP-02…number sequence per the example.*

Table – Open Issues

| **Issue #** | **Issue Description** | **Assigned To** | **Proposed Resolution** |
| --- | --- | --- | --- |
| RE-01 | Deliver Final Code | Acme Corp | Will deliver in two weeks |
| RE-02 | Training Materials | Acme Corp | Will deliver in two weeks |
| OP-01 | Other Open Issue 1 | OIT PM |  |
| OP-02 | Other Open Issue 1 | OIT COR |  |

# lessons learned report

*Enter lessons learned in the table below. If your project is using the Lessons Learned template, copy and paste the contents from the log to this section, or provide link to the log. See sample Lessons Learned Log below.*

The <Project Name> Lessons Learned Log is located at <insert link – changing name to be Lessons Learned Log and not actual URL information>.

Table – Lessons Learned Log

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **LESSONS LEARNED LOG** | | | |  |  |
| **Project Name:** | |  |  |  |  |
| **Organization:** | |  |  |  |  |
| **OIT Project Manager:** | | |  |  |  |
| **ID** | **Date Identified** | **Entered By** | **Category** | **Lesson Learned / Best Practice** | **Recommendation** |
| 1 | 9/21/2020 | John Doe | Scope | Stakeholders continuously tried adding to the backlog throughout the project. | The PM must have an approval process from the Product Owner for any proposed scope changes. |
| 2 | 10/15/2020 | Mary Smith | Resources | There was no plan for providing awards and recognition to team members. | The PM should institute and communicate an awards/recognition program for every project. |
| 3 | date | Name | Category | Lesson Learned / Best Practice | Recommendation |
| 4 | date | Name | Category | Lesson Learned / Best Practice | Recommendation |

# Deliverables

*List deliverables in Table 9. If your project maintains a list of deliverables, copy and paste the contents from the document to this section, or provide link to the document.*

<Insert Lessons Learned Log link or object, if applicable >

Table – Deliverables

| **Name** | **Date Delivered** | **Location** |
| --- | --- | --- |
| Agile Project Management Plan | date | Sent by email |
| MS Project-Agile Schedule | date | In PartnerWeb team site |