Clayton DeSimone

Project Management

Assignment 19

4/9/2024

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**Project Closure**

**Template**

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Document Approvals

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# Template Guide

***What is a Project Closure Report?***

*A Project Closure Report is a document which formalizes the closure of the project. It provides confirmation that the criteria for customer acceptance have been met and requests sign-off from the Project Sponsor to close the project.*

*A Project Closure Report includes:*

* *A formal list of completion criteria*
* *Confirmation that each completion criterion has been met*
* *A list of outstanding business activities, risks and issues*
* *A set of closure actions (to hand over project deliverables / documentation, terminate suppliers, release resources and undertake closure communication)*
* *A request for project closure approval.* ©

***When to use a Project Closure Report***

*A Project Closure Report is undertaken at the start of the Project Closure phase (i.e. after the end of the Project Execution phase). The document is usually prepared by the Project Manager and presented to the Project Sponsor for sign-off. Following sign-off, a suite of closure activities is undertaken to formally close the project. After these activities have been completed, a Post Implementation Review is undertaken to measure the success of the project and identify lessons learnt for future projects.* ©

***How to use this template***

*This document provides a guide on the topics usually included in a Project Closure Report. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.*

# 

# Project Completion

This section identifies the criteria required to complete the project and any outstanding items which still need to be undertaken even though the project may be ready for completion.

## Completion Criteria

List the criteria which must be met to confirm that the project is completed. For each criteria listed, assess whether or not it has been achieved to the satisfaction of the customer.

|  |  |  |
| --- | --- | --- |
| **Category** | **Criteria** | **Achieved** |
| Objectives | * The project ‘vision’ has been achieved (as defined in the Terms of Reference) * All project objectives have been achieved (as defined in the Terms of Reference) | *Y* |
| Benefits | * The full benefits have been realized (as defined in the Business Case) | *Y* |
| Deliverables | * All deliverables have been completed (as defined in the Terms of Reference) * All deliverables have been accepted by the customer (as per the Acceptance Plan) | *Y* |
|  |  |  |
|  |  |  |

## Outstanding Items

List any outstanding items which still need to be undertaken even though the project has satisfied the above completion criteria. For each item, list the actions required to be undertaken and the Owner responsible for undertaking the action.

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | | **Action©** | **Owner** |
| Activities | | Final monitoring and optimization of software product. | Daniel Ray, Monitoring Lead |
| Risks | | *na* | *Name* |
| Issues | | *na* | *Name* |
|  |  | |  |

# 

# Project Closure

This section outlines the next steps required to perform the closure of the project. This includes the handover of deliverables and documentation to the customer, the termination of supplier contracts, the release of project resource back to the business (or the marketplace) and the communication to all stakeholders that the project is now formally closed.

## Deliverables

Identify a hand-over plan for the release of all project deliverables to the customer. An example follows:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Deliverable** | **Current** | | **New©** | | **Hand-over Plan** | | |
| Type | Owner | Location | Owner | Location | Activities | Date | Owner |
| Financial General Ledger, Accounts Payable and Accounts Receivable system modules | NSE | NSE Headquarters | NSE | NSE Headquarters | * Handover system maintenance * Handover operational support * Handover system documentation | *Date* | Sally Smith |
| Software product | NSE Development Team | Development environment | Client’s production environment | Client’s production environment | * Final testing and debugging report |  | Mary Bradshaw |
| Install software on client’s servers | NSE Development Team | NSE Development servers | Client Production servers | Client Production servers | * Training and support documentation |  | Client IT manager |
|  |  |  |  |  |  |  |  |

## Documentation

Identify a hand-over plan for the release of all project documentation to the customer. An example follows:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Documentation** | **Current** | | **New©** | | **Hand-over Plan** | | |
| Type | Owner | Location | Owner | Location | Activities | Date | Owner |
| Project Initiation:   * Business Case * Feasibility Study * Terms of Reference | Jim Jones | NSE Headquarters | Customer | Customer address | Give documentation to customer | *Date* | *Name* |
| Project Planning   * Project Plan * Resource Plan * Financial Plan * Quality Plan * Acceptance Plan | Alice White | NSE Headquarters | Customer | Customer address | Give documentation to customer | *Date* | *Name* |
| Project Execution   * Change Process * Change Form * Change Register * Risk Process * Risk Form * Risk Register | Clayton DeSimone | NSE Headquarters | Customer | Customer address | Give documentation to customer | *Date* | *Name* |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

## Suppliers

Identify a hand-over plan for the termination of project supplier contracts. An example follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier Name** | **Contract Reference** | **Termination Activity©** | **Release Date** | **Activity Owner** |
| Analytics Today | 85 | * Notify supplier of termination * Release supplier resources * Return supplier assets * Pay supplier invoices | 3/31/2026 | James Arnold |
|  |  |  |  |  |
|  |  |  |  |  |

## Resources

Identify a hand-over plan for the release of all project resources (including staff and equipment). An example follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Resource  Name** | **Current**  **Designation** | **Release Activity** | **Release Date** | **Activity Owner** |
| Jim Jones | Process Manager | * Notify staff member of release * Release staff member * Return staff assets * Pay final staff salary | 3/31/2026 | Clayton DeSimone |
| Alice White | Software support | * Release for work on other projects | 3/31/2026 | Clayton DeSimone |
|  |  |  |  |  |
|  |  |  |  |  |

## Communication

Identify a plan to communicate the project closure to all stakeholders and interested parties. An example follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Target Audience** | **Intended**  **Message** | **Method  Used©** | **Dispatch Date** | **Dispatch Owner** |
| Project Sponsor | * Project has been successfully completed and is now closed * Benefits realized due to success of the project * Lessons learned from project | * Email and formal letter for each recipient * Special Board presentation on benefits realized * Undertake ‘Post Implementation Review’ and email to key stakeholders | 3/31/2026 | Clayton DeSimone |
|  |  |  |  |  |
|  |  |  |  |  |

# Approval

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Role: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Date: \_\_\_ / \_\_\_ / \_\_\_

By signing this document, I grant approval to formally close this project and complete the hand-over activities as described above.

# 

# Appendix

## Supporting Documentation

Attach any documentation you believe is relevant to the Project Closure Report. Examples include:

* Project documentation generated to date (e.g. Business Case, Feasibility Study, Terms of Reference, Project Plan, Resource Plan, Financial Plan, Quality Plan or Acceptance Plan) which relates to the project closure criteria specified
* Other relevant information or correspondence. ©

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