Project Review & Closure Report

(*Small Projects*)

Template and Guide

Version 2.1 April 2008

This guide is intended to be read in conjunction with the following template for the development of a Project Review & Closure Report for small projects. As such the Guide should be removed from the front of the final document.

Additional templates for the review of a project phase (**PM 037 Project Phase Review Report**), the review of a large complex project (**PM 036 Project Review & Evaluation Report**) and the closure of a large complex project (**PM 035 Project Closure Report)** have also been developed. These are available at [www.egovernment.tas.gov.au](http://www.egovernment.tas.gov.au).

|  |  |
| --- | --- |
| *[C:\Users\grant.evans\Desktop\creativeccommonsby.png](http://creativecommons.org/licenses/by/4.0/)* | License URL: <https://creativecommons.org/licenses/by/4.0/legalcode> Please give attribution to: © State of Tasmania ([Department of Premier and Cabinet](http://www.dpac.tas.gov.au)) 2017 |

What is a Project Review and Closure Report?

The *Project Review and Closure Report* is the final document produced for the project and is used by senior management to assess the success of the project, inform future projects, ‘tidy up’ any loose ends and formally close the project. For a more complex project it would be more common to separate the review and closure reports, especially where there are some doubts as to progress of the project.

Why would you develop a Project Review and Closure Report?

A Project Review and Closure Report is developed to:

* Review the outputs and success of the project;
* Outline outstanding issues and recommendations; and
* Detail activities undertaken to close the project; and
* Inform future projects.

The document enables those who approved the resources to analyse how well the project met the objectives by assessing the economics and impact of the project and comparing these against what was originally planned.

Where an Agency, Division or Business Unit has a number of projects, the *Project Review and Closure Report* can be used as a tool to measure success and inform other future projects.

When would you develop a Project Review and Closure Report?

The *Project Review and Closure Report* is usually started towards the end of the project and completed when all the project outputs have been delivered to the Business Owner or when it has been decided to close the project for some other reason. This may be the result of changed priorities within the Agency, Division or Business Unit, a loss of funding or a deadline date reached e.g. Y2K.

Which is the appropriate review template?

There are four (4) different templates that have been developed, each one designed for a different purpose, as detailed in the table overleaf.

How to determine the lessons learned from the Project?

There are a number of mechanisms that can be used to determine the lessons learned from a project. The following list is not fully comprehensive, but provides a few suggestions, a combination of which may best suit your individual needs:

* examination of project records and documentation;
* questionnaire or survey of a representative stakeholder sample;
* face to face interviews – either one-on-one or groups; and/or
* facilitated feedback sessions with a large group of stakeholders.

It is important that stakeholder perceptions of the project are captured. Although different stakeholder groups will have different perceptions of the project, for future projects it is important to learn from their perspective what worked well or could be improved.

What you need before you start:

* Agreement to proceed with the development of the *Project Review and Closure Report* from the Project Sponsor.
* A copy of the project documentation, for example the *Project Business Plan*, *Project Status Reports*, *Project Risk Register*.
* Knowledge and understanding of Project Closure, as outlined in the *Tasmanian Government* *Project Management Guidelines*.

Also advisable:

Any of the following documents -

* *Project Proposal* or *Business Case*.
* Corporate/Business Plan for the Department/Business Unit.
* Departmental Project Management Guidelines.

What you will have when you are finished:

A completed *Project Review and Closure Report* that is ready for approval by the Project Sponsor to enable an informed decision to be taken to close the project. This type of report is extremely useful as a tool for continuous improvement when a project is repeated at another time, for example annual events such as organising a Conference or the development of an Agency’s Annual Report.

Integration Process

This document is a one-off report. It will not be updated and/or revised. Relevant sections of the *Project Phase Review Reports* or the *Project Review and Evaluation Report* may be integrated into this document.

How to use this template:

The template contains sections which are either optional or can be developed at a number of levels of detail depending upon individual need. The resulting document is intended to be brief.

All documents developed based on this template should include an appropriate acknowledgement.

A number of **different text styles** have been used within the template, as follows:

* Text in blue italics is intended to provide a guide as to the kind of information that can be included in a section and to what types of projects it might be applicable. It should be deleted from the final document .
* Text in normal font is intended as examples.
* Text enclosed in <angle brackets> is intended to be replaced by whatever it is describing.
* This document has been formatted for duplex printing. If you intend to print single sided, you may need to delete some page breaks.

Where to Get Additional Help

Project Management tools and resources that can assist you through each step in your project are available at [www.egovernment.tas.gov.au](http://www.egovernment.tas.gov.au)

Checklist

**Have you remembered to remove**:

* The versioning statement from the front cover of your document?
* This guide and checklist from the front of your document?
* All blue italic instructional text and <prescriptive text enclosed in angle brackets> within the template?

| **No.** | **Title** | **Best suits** | **Purpose** |
| --- | --- | --- | --- |
| PM 036 | *Project Review & Evaluation Report* | Large or complex projects | A useful tool to assist a Project Sponsor and/or Steering Committee to:   * determine if the appropriate project management framework has been selected and appropriately applied enabling any deficiencies to be remedied * provide validation of a decision to ‘stop’ the project * make an informed decision about closing the project and capturing the lessons learnt |
| **PM 936** | ***Project Review & Closure Report*** | **Small projects**  **Large or complex projects** | **Excellent tool for capturing lessons from small projects and formally closing the project.**  **If a detailed review is not being undertaken this is an ideal way to capture the lessons learnt from the project and formally close the project.** |
| PM 037 | *Project Phase Review Report* | Large or complex projects (phases) | A useful tool to assist the Project Sponsor and/or Steering Committee to:   * determine if the appropriate project management framework has been selected and appropriately applied enabling any deficiencies to be remedied * provide validation of a decision to proceed to the next phase of the project * provide validation of a decision to ‘stop’ the project |
| PM 035 | *Project Closure Report* | Large or complex projects | A tool to assist a Project Sponsor and/or Steering Committee to ‘tidy up’ any loose ends and formally close the project.  It may follow on from a *Project Phase Review Report* or a *Project Review & Evaluation Report*. |

|  |
| --- |
| <Project Title>  Project Review and Closure Report |
| Version: <n.n>, Date: <dd/mm/yyyy>  Copy: Uncontrolled |
| The version number starts at one and increases by one for each release. It shows the release number and a revision letter if in draft. The original draft is 0.A and subsequent drafts are 0.B, 0.C etc. The first accepted and issued document is 1.0. Subsequent changes in draft form are 1.0A, 1.0B etc.. The accepted and issued second version is 1.1 or 2.0, depending on the magnitude of the change.  Refer to the **Project Management Fact Sheet: Document Control**, for more information at [www.egovernment.tas.gov.au](http://www.egovernment.tas.gov.au) |

Document Acceptance and Release Notice

This document is Version <n.n> of the <Project Title> Project Review and Closure Report.

The Project Review and Closure Report is a managed document. For identification of amendments each page contains a release number and a page number. Changes will only be issued as a complete replacement document. Recipients should remove superseded versions from circulation. This document is authorised for release once all signatures have been obtained.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| PREPARED: |  | Date: |  | / |  | / |  |
| (for acceptance) | <Name, Title>  <Project Title> Project Manager |  |  | | | | |
|  |  |  |  | | | | |
| ACCEPTED: |  | Date: |  | / |  | / |  |
| (for release) | <Name, Title>  <Project Title> Project Sponsor |  |  | | | | |

Document Development History

Build Status:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Author | Reason | Sections |
| <n.n>  List the most recent amendment first | <dd-mm -yyyy> | <name> | Initial Release | All |

Distribution:

|  |  |  |  |
| --- | --- | --- | --- |
| Copy No | Version | Issue Date | Issued To |
| 1 | <n.n> | <dd-mm-yyyy> | <name, title, organisation> |
| 2 |  |  |  |
|  |  |  |  |
| Electronic | <n.n> | <dd-mm-yyyy> | Shared drive |

Table of Contents

[1 Executive Summary 13](#_Toc188424917)

[1.1 Background 13](#_Toc188424918)

[1.2 Reason for Closing the Project 13](#_Toc188424919)

[1.3 Highlights and Innovations 13](#_Toc188424920)

[1.4 Summary of Recommendations 13](#_Toc188424921)

[2 Project Performance 14](#_Toc188424922)

[2.1 Performance against Objectives 14](#_Toc188424923)

[2.2 Performance against Outcomes 14](#_Toc188424924)

[2.3 Performance against Outputs 14](#_Toc188424925)

[2.4 Performance against Schedule 14](#_Toc188424926)

[2.5 Performance against Budget 14](#_Toc188424927)

[2.6 Recommendations 14](#_Toc188424928)

[3 Lessons Learnt 15](#_Toc188424929)

[3.1 What Worked Well? 15](#_Toc188424930)

[3.2 What could be improved? 15](#_Toc188424931)

[3.3 Recommendations 15](#_Toc188424932)

[4 Closure Activities 16](#_Toc188424933)

[4.1 Recommendations 16](#_Toc188424934)

[5 Appendices 16](#_Toc188424935)

# Executive Summary

## Background

Briefly describe the background to the Project.

## Reason for Closing the Project

State the reason why this project is being closed. This usually is because the outputs have been delivered, the closing date has been reached and/or the budget has been expended. A project may be closed for other reasons, for example a change in policy or agency priorities, a loss of funding or a deadline date reached.

## Highlights and Innovations

Describe the highlights of the project and any innovations used or developed by the project.

## Summary of Recommendations

List the recommendations that appear in this Report. One of the recommendations should be for the Project Sponsor to agree that the project can be deemed closed. For ease of reference, each recommendation should be uniquely numbered and a reference provided to the relevant section within this Report.

# Project Performance

Summarise the actual performance of the project against the planned performance. All projects vary to some extent from the original plan, these variations should be identified and the reasons for the variance described.

## Performance against Objectives

Describe the actual performance of the project in relation to the achievement of the planned project objectives.

## Performance against Outcomes

Describe the actual performance of the project in relation to the achievement of targeted outcomes. Were all planned targeted outcomes achieved, to what degree? Some outcomes may not be achieved at this point in time. In this case details should be given as to when the outcomes are anticipated to be achieved and who is responsible for their ongoing measurement and reporting of progress towards their achievement.

## Performance against Outputs

Describe the actual performance of the project in relation to the delivery of the outputs. Were all planned outputs delivered, to what degree? Were they all accepted? Did the quality of the outputs meet expectations?

## Performance against Schedule

Describe the actual performance of the project against the project schedule.

## Performance against Budget

Describe the actual performance of the project against the project budget.

## Recommendations

List the recommendations that arise from this section of the Report.

# Lessons Learnt

You may wish to briefly describe the methodology used to collect the lessons learnt, if it was not described in Section 2.

## What Worked Well?

Describe the project management and quality management processes that were perceived to be appropriate and/or effective for the project, as reflected by the stakeholders and the project records/documentation.

## What could be improved?

Describe the project management and quality management processes that were perceived to be inappropriate and/or ineffective for the project, as reflected by the stakeholders and the project records/documentation.

## Recommendations

List the recommendations that arise from this section of the Report.

# Closure Activities

This section should cover the various activities required to close the project. Where relevant, the sub-sections should include:

* Project Staff: - Describe what steps are being taken to manage the movement of project staff from the project to other roles, including the timing of their move and the capture of their project knowledge.
* Issues Management – Identify any outstanding issues and who will continue to progress the issues.
* Risk Management – Identify any risks that will transfer to an operational area and who will; take on responsibility for monitoring them.
* Financial Management – Outline the final financial position and what will happen to any excess funds.
* Asset Management - Describe any assets which were required by the project, and who will manage them upon completion of the project.
* Records Management – Identify what arrangements have been put in place for the storage, security and backup of hard copy and soft (electronic) copy records and project documents.
* Post Project Responsibilities - List any matters that are outstanding, what actions are required to address them and who is responsible. This should include such things like outcomes yet to be achieved, outputs not yet delivered, maintenance of the outputs or other operational matters such as meeting future training requirements that are outstanding or have not been formally agreed prior to this stage.

Where appropriate, if the project is to be repeated at another time, for example annual events such as organising a Conference or the development of an Agency’s Annual Report identify how the report will be utilised as a tool for continuous improvement.

## Recommendations

List any recommendations that arise from this section of the Report. It would be expected that one of the recommendations would be for the Project Sponsor to agree that the project can be deemed closed as it has fulfilled all of the requirements as documented in the relevant Project Business Plan or Brief, or where this is not the case, the Project Sponsor is satisfied that all outstanding items have been satisfactorily addressed.

# Appendices

This section is optional. Where necessary, appendices can be attached to provide any relevant supporting information, such as:

* A list of the stakeholders who participated in the review
* Any information to promote improvement of future projects of a similar nature, as all necessary information is contained within a single document.