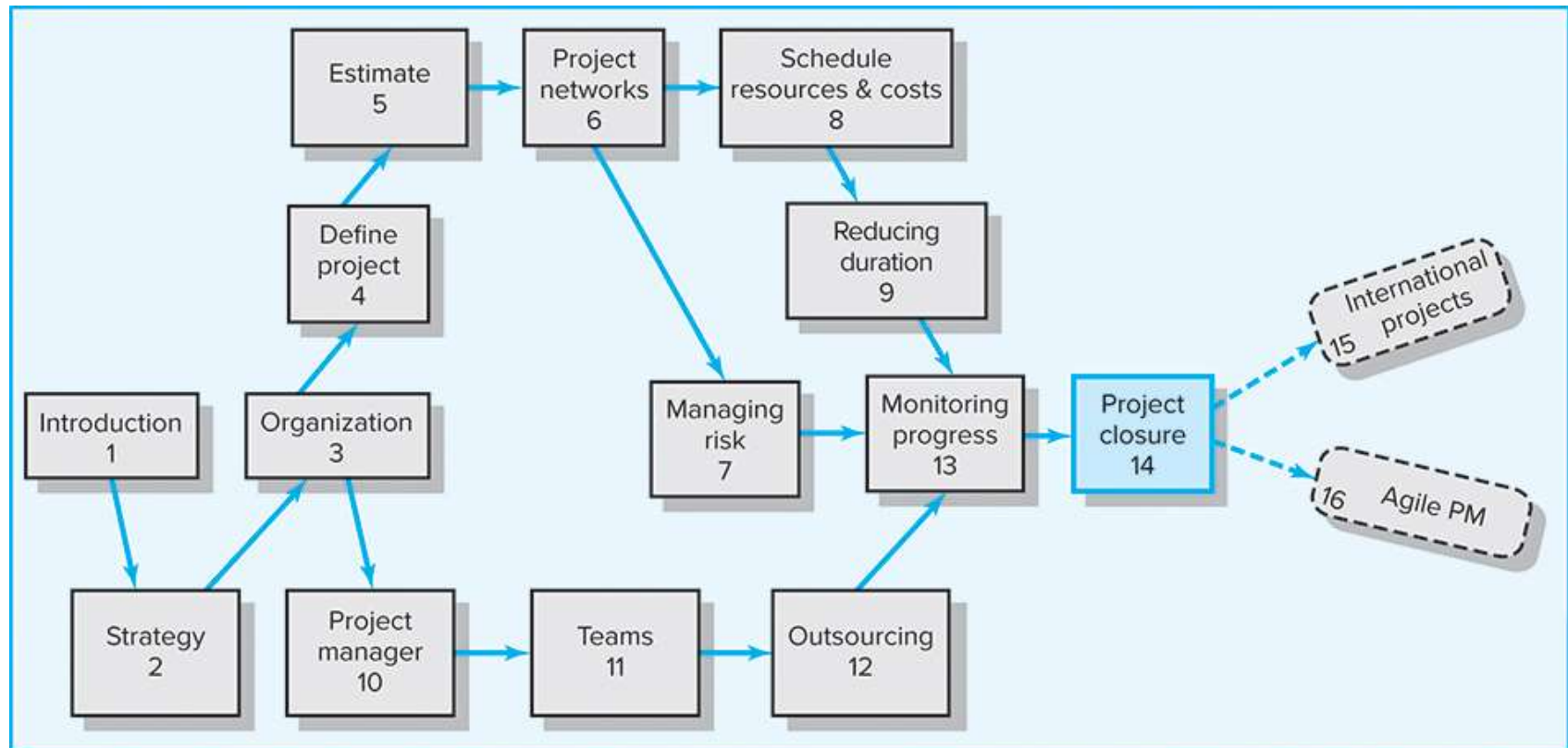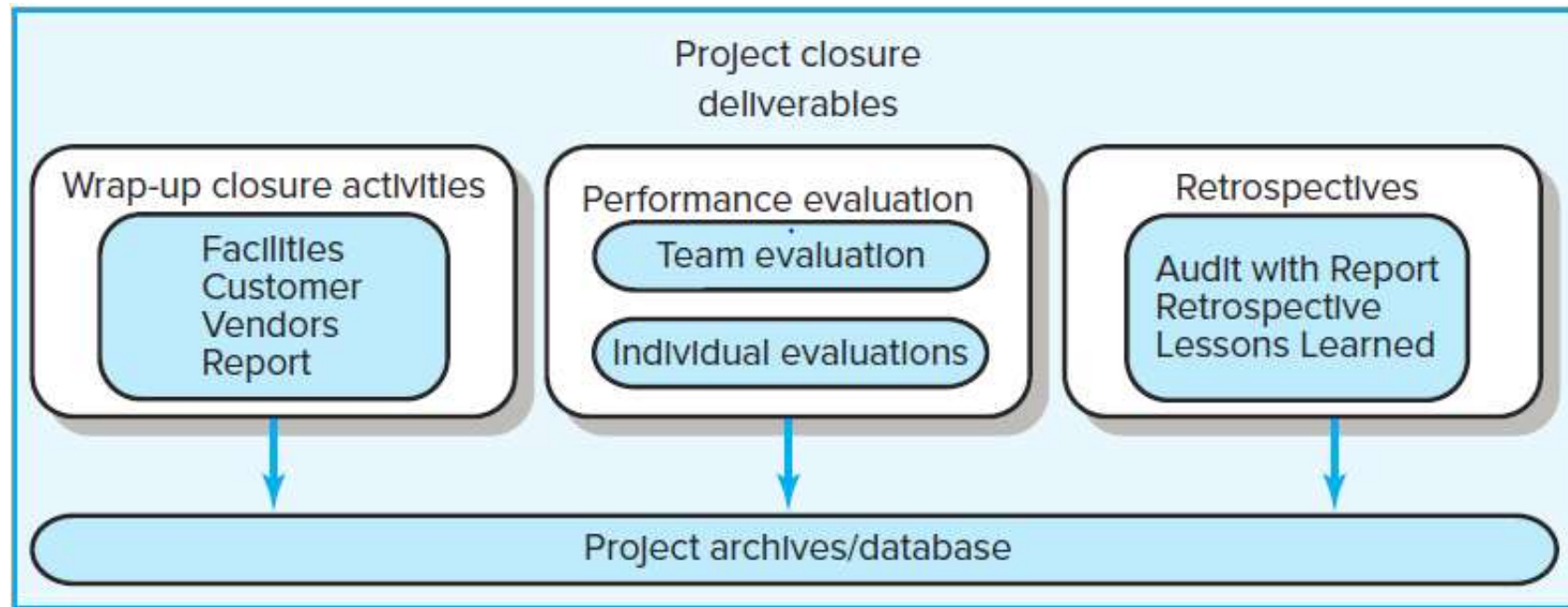# Chapter Fourteen

Project Closure

Where We Are Now

Project Closure and Review Deliverables

Project closure deliverables

Wrap-up closure activities
- Facilities
- Customer
- Vendors
- Report

Performance evaluation
- Team evaluation
- Individual evaluations

Retrospectives
- Audit with Report
- Retrospective
- Lessons Learned

Project archives/database

FIGURE 14.1

Project Closure

- **Types of Project Closure**
  - Normal
  - Premature
  - Perpetual
  - Failed Project
  - Changed Priority

- **Close-out Plan: Questions to be Asked**
  - What tasks are required to close the project?
  - Who will be responsible for these tasks?
  - When will closure begin and end?
  - How will the project be delivered?

Project Audits

- Examine project success and review why the project was selected.
- Include a reassessment of the project's role in the organization's priorities.
- Include a check on the organizational culture and external factors.
- When to perform the project audits:
  - In-process project audits
    - Concentrate on project progress and performance.
    - Perform early in projects to allow corrective changes.
  - Post-project audits
    - Emphasize on improving the management of future projects.
    - Include more detail and depth than in-process project audits.

Guidelines for Conducting a Project Audit

1. The philosophy must be that the project audit is not a witch hunt.

2. Comments about individuals or groups participating in the project should be minimized.

3. Audit activities should be sensitive to human emotions and reactions.

4. Accuracy of data should be verifiable.

5. Senior management should announce support for the project audit.

6. The objective of project audits is not to prosecute but to learn and conserve valuable organization resources where mistakes have been made.

7. The audit should be completed as quickly as is reasonable.

The Project Audit Process

1. **Initiating and Staffing**
   - Depends primarily on organization and project size
   - The outcome must represent an independent, outside view of the project.

2. **Data Collection and Analysis**
   - Gather information and data to answer questions from:
     - Organization view
     - Project team view

3. **Reporting**
   - The report attempts to capture needed changes and lessons learned from a current or finished project.

A Common Outline for Project Audit Reports

- ## Classification
  - Project type
  - Size
  - Number of staff
  - Technical level
  - Strategic or support

- ## Analysis
  - Project mission and objectives
  - Procedures and systems used
  - Organization resources used
  - Outcomes achieved

- ## Recommendations
  - Technical improvements
  - Corrective actions

- ## Lessons Learned
  - Reminders
  - Retrospectives

- ## Appendix
  - Backup data
  - Critical information

Project Retrospectives

- ## Retrospectives
  - Denote specific efforts at identifying lessons learned on projects.

- ## An Independent Facilitator
  - Guides the project team through the analysis project activities.
  - Uses several questionnaires focusing on project operations and on how the organization's culture impacted project success and failures.
  - Visits one-on-one with project participants to dive deeper into cause-effect impacts.
  - Leads a team retrospective session.
  - Works with the team to develop a system that prioritize information for different recipients.

Pre-Implementation Conditions: Team

1. Do standards for measuring performance exist? (You can't manage what you can't measure.) Are the goals clear for the team and individuals? Challenging? Attainable? Lead to positive consequences?

2. Are individual and team responsibilities and performance standards known by all team members?

3. Are team rewards adequate? Do they send a clear signal that senior management believes that the synergy of teams is important?

4. Is a clear career path for successful project managers in place?

5. Is the team empowered to manage short-term difficulties?

6. Is there a relatively high level of trust emanating from the organization culture?

7. Are there criteria beyond time, cost, and specifications?

Sample Team Evaluation and Feedback Survey

	Disagree				Agree
Using the scale below, assess each statement.					
1. The team shared a sense of common purpose, and each member was willing to work toward achieving project objectives.	1	2	3	4	5
2. Respect was shown for other points of view. Differences of opinion were encouraged and freely expressed.	1	2	3	4	5
3. All interaction among team members occurred in a comfortable, supportive atmosphere.	1	2	3	4	5

TABLE 14.4

Project Performance Evaluation: Individual

- Performance Assessment Responsibilities:
  - Functional organization or functional matrix: the individual's area manager.
    - The area manager may solicit the project manager's opinion of the individual's performance on a specific project.
  - Balanced matrix: the project manager and the area manager jointly evaluate an individual's performance.
  - Project matrix and project organizations: the project manager is responsible for appraising individual performance.

Conducting Performance Reviews

- Begin by asking the individual to evaluate his or her own performance.

- Avoid drawing comparisons with other team members; rather, assess the individual in terms of established standards and expectations.

- Focus criticism on specific examples of behavior rather than on the individual personally.

- Be consistent and fair in treatment of all team members.

- Treat the review as one point in an ongoing process.

Individual Performance Assessment

- **Multiple rater appraisal (360-degree feedback)**
  - The objective is to identify areas for individual improvement.
  - Involves soliciting feedback concerning team members' performance from all of the people that their work affects.
    - Project managers, area managers, peers, subordinates, and customers