Project Closeout Report

Template

Version 1.2 ● August 28, 2012

Using This Template

The companion tool, **Project Closeout Report Instructions**, provides detailed direction for completing this template. This and other Framework tools are available on the Framework Web site.

To create a deliverable from this template:

1. Delete the template title page (previous page) and this page.
2. Replace [bracketed text] on the cover page (next page) with your project and agency information.
3. Replace [bracketed text] in the tool header at the top of page 1 with the same project information as on the cover page.

Note: Please do not remove or modify content in the footer area.

1. Complete the entire template. Each section contains abbreviated instructions, shown in italics, and tables for entering content. Relevant text from other project deliverables may be pasted into content areas.

Note: Feel free to remove the italicized instructions.

**Template Revision History**

| **Version** | **Date** | **Name** | **Description** |
| --- | --- | --- | --- |
| 1.0 | 2/5/2012 | David Davis | Original Creation |
| 1.1 | 4/27/2012 | David Davis | revised language in section 1;Removed questions from section 2; |
| 1.2 | 7/24/2012 | David Davis | Updates to instructions and content for Final Product Checklist, Project Artifact checklist, Post Implementation plan, and Open Issues |
| 1.2 | 8/21/2012 | David Davis | Updated implementation plans instructions. |
| 1.2 | 8/28/2012 | David Davis | Removed Portfolio Manager and Project Sponsor signature from this report. |

PROJECT DELIVERY METHODOLOGY

PROJECT CLOSEOUT REPORT

[Functional Office(s) Name]

[PROJECT NAME]

|  |  |
| --- | --- |
| VERSION: [VERSION NUMBER] | REVISION DATE: [DATE] |

*Approval of the Project Closeout Report indicates an understanding and formal agreement that the project is ready to be closed. By signing this deliverable, each individual agrees all administrative, financial, and logistical aspects of the project should be concluded, executed, and documented as described herein.*

|  |  |  |  |
| --- | --- | --- | --- |
| Approver Name | Title | Signature | Date |
|  | <Project> Functional Coordinator |  |  |
|  | BSSO Program Manager |  |  |
|  | Project Manager |  |  |

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Section 1 Final Product and/or Service Acceptance Checklist

*Project Functional Coordinator should respond to each question below. For each “no” response, include an issue in Open Issues section.*

| Item | Question | Response |
| --- | --- | --- |
| 1.1 | Did you approve the implementation of the product or service deployed which indicates acceptance that the product and/or service was ready to be deployed? | Yes  No |
| 1.2 | Do you agree the product and/or service has sufficiently met the stated business goals and objectives? | Yes  No |
| 1.3 | Do you fully understand and agree to accept all operational requirements, operational risks, and other limitations and/or constraints imposed as a result of ongoing operations of the product and/or service? | Yes  No  N/A |
| 1.4 | Do you agree the project should be closed? | Yes  No |

*BSSO Program Manager should respond to each question below. For each “no” response, include an issue in Open Issues section.*

| Item | Question | Response |
| --- | --- | --- |
| 1.1 | Did you approve the implementation of the product or service deployed which indicates acceptance that the product and/or service was ready to be deployed? | Yes  No |
| 1.2 | Do you agree the product and/or service has sufficiently met the stated business goals and objectives? | Yes  No |
| 1.3 | Do you fully understand and agree to accept all operational requirements, operational risks, and other limitations and/or constraints imposed as a result of ongoing operations of the product and/or service? | Yes  No  N/A |
| 1.4 | Do you agree the project should be closed? | Yes  No |

Section 2 Project Artifacts Checklist

*Project Manager respond to each question. For each “no” response, include an issue in Open Issues section.*

| Item | Question | | Response |
| --- | --- | --- | --- |
| 2.1 | Have project documentation and other items (e.g., Project Plan, code, financial records, status reports, memos) been prepared, collected, audited, archived, and/or disposed? | | Yes  No |
| 2.2 | Were audits (e.g., project closeout audit, contract audit) completed and results documented for future reference? | | Yes  No  N/A |
| 2.3 | Are storage locations for all items not maintained under configuration management known (i.e., that are not identified in a Configuration Items Register)? Identify the storage location for these items: | | |
|  | Name | Storage Location | Method |
|  |  |  | Electronic  Manual |
|  |  |  | Electronic  Manual |
| 2.4 | Verify final project management data for project | | |
|  | Name | | Details Attached? |
|  | Scope (Current scope) | | Yes  No |
|  | Cost (Budget/Actual) | | Yes  No |
|  | Schedule (Planned/Actual) | | Yes  No |

Section 3 Resources

*List resources specified in the Project Plan and used by the project. Identify plans for the resource (e.g., transfer, reassignment, contract termination) and the date the plan will become effective (e.g., turnover date, release date).*

| Resource | Resource Disposition | Effective Date |
| --- | --- | --- |
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Section 4 Project Lessons Learned

*Identify lessons learned specifically for the project. State the lessons learned in terms of a problem (issue). Describe the problem and include any project documentation references (e.g., Project Plan, Issues Log) that provide additional details. Identify recommended improvements to correct a similar problem in the future.*

| Problem Statement | Problem Description | References | Recommended Changes |
| --- | --- | --- | --- |
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Section 5 Post-Implementation Plans

*Identify all post-implementation activities after project closeout. Make sure to include any handoff or maintenance activity in this section.*

| Action | Planned Date | Assigned To | Frequency |
| --- | --- | --- | --- |
| Post-Implementation Review (actual review)\*\* |  |  |  |
| Development Team Application Support (planned) |  |  |  |
| Name “Advisor” from Development Team, include length of time advisor will be available to maintenance team. |  |  |  |

*\*\*Refer to the* [Quality Management Chapter 6](http://fdotsharepoint.dot.state.fl.us/fa/OIS/BSSO/PDM/PDM%20Document/Old_PDM_Versions/Project_Delivery_Methodology.docx#Chapter6) *of the PDM for information about the Post-Implementation project*

*Review.*Section 6 Open Issues

*Describe any open issues and plans for resolution within the context of project closeout. Include an open issue for any “no” responses in the Final Product and/or Service Acceptance Checklist and the Project Artifacts Checklist sections. Make sure to identify who is assigned to the issue and when the issue is planned to be resolved. Include a link to the issue if applicable.*

| Issue | Issue Assigned to/Planned Resolution | Planned Resolution Date |
| --- | --- | --- |
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