Post Implementation Review Report

Template

Version 4.4 ● APRIL 1, 2021

Using this Template

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 the requesting office name.
3. Replace [bracketed text] in the tool header area at the top of page i (Contents page) with the same project and office name as on the cover page.
4. Do not remove or modify content in the footer area.
5. Each section contains abbreviated instructions, shown in *blue italics*, and a content area. The content area is marked with a placeholder symbol (Þ) or with a table.
6. Each section contains the following categorization:

* **Rule Chapter 60GG-1 Required** – The section/field must be completed in compliance with Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.).
* **Rule Chapter 60GG-1 Recommended** – The section/field is not required; however, under Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.), it adds value and therefore should be considered as part of the project documentation.
* **FDOT Required** – The section/field must be completed in support of Innotas, the Department’s Portfolio Management Tool used for reporting and tracking projects.
* **FDOT Recommended** – The section/field is not required; however, the information provided adds value and provides consistent project documentation throughout Department projects.

1. The various sections and fields found in the template and tool must not be removed or rearranged. Where relevant, use N/A to indicate that the section/field is not applicable to this project.

Note: The *italicized blue instructions* within the template may be removed.

1. Update the table of contents by right-clicking and selecting “Update Field,” then “Update page numbers only.”
2. If this template does not fit the needs of the project, specifically document in the Project Management Plan (PMP) that deviation from this template is necessary. Any altered, added or removed sections to the template must be approved by the signatories listed on the PMP template. Note: Any modifications to the approved template must still meet the minimum requirements of Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.).
3. The signatories listed on the signature page of this document must be obtained to meet the minimum FDOT requirements for approval. As appropriate for the project, additional stakeholder signatures may be requested to establish ownership and accountability.

Template Revision History

| **Version** | **Date** | **Name** | **Description** |
| --- | --- | --- | --- |
| 3.0 | 04/28/2017 | Melissa Elrod | Original Creation |
| 4.0 | 01/01/2019 | Melissa Elrod | Formatting Revisions |
| 4.1 | 11/22/2019 | Dreunna Holland | Updated 74-1 to 60GG-1 |
| 4.2 | 08/19/2020 | Schelley Cassidy | Updated from .doc to .docx |
| 4.3 | 03/04/2021 | Courtney Lewis-Kroodsma | Updated FAC to FC & Functional Application Coordinator to Functional Coordinator |
| 4.4 | 4/1/2021 | Courtney Lewis-Kroodsma | Removed “(internal projects only)” from OIT Section Manager signature page |

Project Delivery Methodology (PDM)

POST IMPLEMENTATION REVIEW REPORT

[Functional Office(s) Name]

[PROJECT NAME]

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

Approval of the Post Implementation Review Report indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees the content of this document is accurate and clearly describes the post-implementation review of the project.

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| --- | --- | --- |
| **Project Sponsor** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **<Business> Functional Coordinator (FC)** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **OIT Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **Project Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **Contract Manager (external projects only)** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **OIT Section Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

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# Section 1 Purpose of Document

## The Post Implementation Review (PIR) Report results from monitoring the performance of the system/application during normal operations against original user requirements and any newly implemented requirements or changes.

## 1.1 PIR Report Summary

## FDOT Recommended for R&C Categories 3-4

*Provide a high-level summary of the report.*

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# Section 2 Project Overview

## 2.1 Project Description

**FDOT Recommended for R&C Categories 3-4**

*Provide a brief summary of the project.*

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## 2.2 Project Background

**FDOT Recommended for R&C Categories 3-4**

*Briefly introduce the business process the system supports and how it fits within the larger context of agency services. Identify interfaces for both internal and external business processes.*

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## 2.3 Customers / Users

**FDOT Recommended for R&C Categories 3-4**

*Identify customers and users and specify the business process the system supports and how it fits within the context of the customers/users’ processes, services, or functions.*

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## 2.4 Scope

**FDOT Recommended for R&C Categories 3-4**

*Summarize the impact of any changes to the initial project scope on business outcomes, including approved and non-approved changes.*

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## 2.5 Cost (Budget)

**FDOT Recommended for R&C Categories 3-4**

*Identify the initial estimated and final project costs. Summarize the impact of any changes to the initial project cost on business outcomes, including approved and non-approved changes.*

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## 2.6 Schedule

**FDOT Recommended for R&C Categories 3-4**

*Identify the initial planned project start and finish dates. Identify the final project start and finish dates. Summarize the impact of any changes to the initial scheduled baseline on business outcomes, including approved and non-approved changes.*

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# Section 3 Customer / User Assessment

## 3.1 Customer / User Assessment

**FDOT Recommended for R&C Categories 3-4**

*Briefly describe the process (e.g., surveys, user group meetings, customer focus groups, etc.) used to assess customer or user satisfaction. Summarize the results of surveys or other user or customer inputs. Is the existing system providing customers the needed functionality and performance? Based on your user or customer inputs, is actual performance consistent with user or customer expectations, or do the current performance goals reflect current user or customer functional or performance requirements? Has the project result(s) exceeded expectations? Discuss how your system addresses the following operational indicators: efficiency, effectiveness, maintainability, productivity, security, availability, reliability, energy usage.*

*One method for obtaining customer feedback is known as the RATER model, because it prescribes measuring satisfaction in five dimensions:*

***Reliability:*** *The ability to perform the promised service dependably and accurately.*

***Assurance:*** *The knowledge, competence, and courtesy of employees and their ability to convey trust and confidence.*

***Tangibles:*** *Physical facilities, equipment, and appearances that impress the customer.*

***Empathy:*** *The level of caring, individualized attention, access, communication, and understanding that the customer perceives.*

***Responsiveness:*** *The willingness displayed to help clients and provide prompt service.*

*Questions pertaining to the application are based on each of the five dimensions with each question assigned ratings from 1 (not satisfied) to 5 (very satisfied). An assessment can then be done to determine the level of customer/user satisfaction for each of the five dimensions.*

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## 3.2 Business Goals and Objectives

**Rule Chapter 60GG-1 Required for R&C Categories 3-4**

*Document whether the products or services delivered by the project meet the Agency’s business objectives.*

*FDOT Recommendation: Based on actual performance measurement results, describe the project’s impact on the agency’s ability to meet the business goals and objectives described in the Business Case or Charter. If the stated business goals and objectives were not met, include factors that inhibited performance in the project impact description.*

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## 3.3 Project Results and Benefits

**Rule Chapter 60GG-1 Required for R&C Categories 3-4**

*Provide the expected results and benefits as documented in the Initiation and Planning phases.*

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# Section 4 Cost Benefit / ROI Analysis

## 4.1 Customer / User Assessment

**Rule Chapter 60GG-1 Required for R&C Categories 3-4**

*Validate the cost benefit analysis. The analysis should be performed six months to one year after the product or service has been implemented.*

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## 4.2 Return on Investment Analysis

**Rule Chapter 60GG-1 Required for R&C Categories 3-4**

*Validate the projected return on investment analysis. The analysis should be performed six months to one year after the product or service has been implemented.*

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# Section 5 Quantitative and Qualitative Value

*For each of the value factors identified below, describe the project’s impact on the agency. If a value factor is not applicable to the project, state “N/A.” If applicable, include a brief statement of the business impact or reasons that inhibited achieving the expected benefit.*

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## 5.1 Statutory Fulfillment

**FDOT Recommended for R&C Categories 3-4**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Value Factor** | **Realized** | | | **Impact to Business Outcome** |
| **Yes** | **No** | **N/A** |
| 1 | The project is implemented to satisfy a direct mandate or regulation (state, federal, national, international). |  |  |  |  |
| 2 | The project is implemented to satisfy a derived mandate or regulation (state, federal, national, international). |  |  |  |  |
| 3 | Implementing the project improves the turnaround time for responses to mandates or regulatory requirements. |  |  |  |  |
| 4 | The project results in agency compliance to mandates or regulatory requirements. |  |  |  |  |
| 5 | The project results in agency avoidance of enforcement actions (e.g., penalties) based on mandates or regulatory requirements. |  |  |  |  |
| 6 | Implementing the project achieves the desired intent or expectation outcomes of the mandates or regulatory requirements. |  |  |  |  |
| 7 | Implementing the project imposes stricter requirements, or different or additional requirements, than those required by the mandates or statutes. |  |  |  |  |
| 8 | Other |  |  |  |  |

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## 5.2 Strategic Alignment

**FDOT Recommended for R&C Categories 3-4**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Value Factor** | **Realized** | | | **Impact to Business Outcome** |
| **Yes** | **No** | **N/A** |
| 1 | The project aligns with Governor / Legislative strategic goals or priorities. |  |  |  |  |
| 2 | The project is aligned with, and delivers business outcomes, that support agency and statewide goals. |  |  |  |  |
| 3 | The project satisfies a strategic agency or state mission critical need, regardless if required by a mandate or regulation. |  |  |  |  |
| 4 | The project is aligned with the overall mission of the agency and state. |  |  |  |  |
| 5 | The project results in the ability of the agency or state to better share resources with other agencies or states as part of a long-term strategic alignment effort. |  |  |  |  |
| 6 | The project strategically consolidates and streamlines business practices and administrative processes. |  |  |  |  |
| 7 | Other |  |  |  |  |

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## 5.3 Technology Impact

**FDOT Recommended for R&C Categories 3-4**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Value Factor** | **Realized** | | | **Impact to Business Outcome** |
| **Yes** | **No** | **N/A** |
| 1 | The project results in systems which support the defined architecture / standards for the agency. |  |  |  |  |
| 2 | The project results in systems which reduce or eliminate redundant systems. |  |  |  |  |
| 3 | The project results in systems which enable reuse of code / components available from other state or federal agencies. |  |  |  |  |
| 4 | The project results in systems which improve consistency between systems within the agency through standardization. |  |  |  |  |
| 5 | The project results in systems which leverage the technical capability of commercial-off-the-shelf (COTS) software packages. |  |  |  |  |
| 6 | The project results in systems which provide the ability to evolve as new technologies emerge. |  |  |  |  |
| 7 | Other |  |  |  |  |

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## 5.4 Financial Analysis

**FDOT Recommended for R&C Categories 3-4**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Value Factor** | **Realized** | | | **Impact to Business Outcome** |
| **Yes** | **No** | **N/A** |
| **Cumulative Savings** | |  |  |  |  |
| 1 | Reduced IT and non-IT FTE costs including fringe benefits. |  |  | Q |  |
| 2 | Reduced IT and non-IT contractors / consultants. |  |  |  |  |
| 3 | Reduced outsourced labor costs. |  |  |  |  |
| 4 | Improved workflow / business processes. |  |  |  |  |
| 5 | Reduced error rate. |  |  |  |  |
| 6 | Reduced hardware maintenance / upgrade expense. |  |  |  |  |
| 7 | Reduced software maintenance / upgrade expense. |  |  |  |  |
| 8 | Reduced facilities rental / maintenance expense. |  |  |  |  |
| 9 | Reduced equipment rental / supplies and materials expense. |  |  |  |  |
| 10 | Other. |  |  |  |  |
| **Cost Avoidance** | |  |  |  |  |
| 11 | Avoid penalties. |  |  |  |  |
| 12 | Avoid loss of funding. |  |  |  |  |
| 13 | Improved enforcement actions. |  |  |  |  |
| 14 | Asset protection. |  |  |  |  |
| 15 | Other. |  |  |  |  |
| **Constituent Project Benefits** | |  |  |  |  |
| 16 | Reduced constituent transaction costs. |  |  |  |  |
| 17 | Reduced service delivery cycle time. |  |  |  |  |
| 18 | Increased service availability / accessibility. |  |  |  |  |
| 19 | Expansion of services. |  |  |  |  |
| 20 | Reduced (paper) reporting requirements. |  |  |  |  |
| 21 | Improved accountability / compliance. |  |  |  |  |
| 22 | Greater consistency in constituent / state transactions. |  |  |  |  |
| 23 | Other. |  |  |  |  |

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# Section 6 Business Lessons Learned

**FDOT Recommended for R&C Categories 3-4**

*Include lessons learned related to how well the project resolved business problems and needs. Describe lessons learned in terms of a problem (issue). Identify recommended improvements to correct similar problems in the future, including such things as plans for improved communication and follow-up about the project.*

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# Section 7 Recommendation

**FDOT Recommended for R&C Categories 3-4**

*Justify if the existing system should continue in operation as is, be enhanced, or terminated. If the system is to be enhanced or terminated, summarize the actions to be taken this fiscal year.*

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# Section 8 Project Glossary

*Define all terms and acronyms required to interpret the Project Charter properly.*

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# Section 9 Document Revision History

*Identify document changes.*

| **Version** | **Date** | **Name** | **Description** |
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# Section 10 Appendices

*Include any relevant appendices.*

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