Project Closure Report

(*Large Projects*)

Template and Guide

Version 1.1, April 2008

This Template and Guide is for the development of a Project Closure Report for a large project. The Guide is intended to be read in conjunction with the Template and should be removed from the front of the final document.

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

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**What is a Project Closure Report?**

The *Project Closure Report* is the final document produced for the project and is used by senior management to ‘tidy up’ any loose ends and formally close the project. This template should be used for more complex projects and developed after the project has been reviewed. In less complex projects the review and closure processes have been combined into a *Project Review and Closure Report*. [[1]](#footnote-1)

For a complex project, the *Project Closure Report* would normally follow on from a *Project Review and Evaluation Report*. The *Project Closure Report* only concentrates on the activities required to assist the Steering Committee or senior management to make an informed decision about formally declaring the project closed.

**Why would you develop a Project Closure Report?**

A *Project Closure Report* is developed to:

* Detail activities undertaken to close the project; and
* Outline outstanding issues, risks, operational matters and recommendations.
* The document lists the closure activities and any outstanding matters and recommends how they should be addressed.

**When would you develop a Project Closure Report?**

The *Project Closure Report* is usually developed once the project is completed and all the project outputs have been delivered to the Business Owner(s) or it has been decided to close the project for some other reason. This may be the result of a recommendation from a review of the project where the findings are negative or may be the result of changed priorities within the Agency, Division or Business Unit.

A *Project Review and Evaluation Report* or a *Project Phase Review* should have been completed prior to the development of a *Project Closure 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.

What you need before you start:

* Agreement to proceed with the development of the *Project Closure Report* from the Project Sponsor and Steering Committee.
* A copy of the *Project Review and Evaluation Report,* *Project Phase Review Report* for the project. As the *Project Closure Report* will not capture the lessons learnt from the project, an independent evaluation of the project should have been completed by this stage.
* A copy of the project documentation, for example the *Project Business Plan,* *Project Status Reports*, *Project Risk Register*, *Project Issues 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 Closure Report* that is ready for acceptance by the Project Sponsor and Project Steering Committee recommending that the project be closed and providing recommendations for dealing with any outstanding issues, risks or operational matters.

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.

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** |
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| 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*.** |

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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> Date: <dd-mm-yyyy> of the Project Name Project Closure Report.

The Project 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.

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

Document Development History

Build Status:

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

Amendments in this Release:

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| Section Title | Section Number | Amendment Summary |
|  |  | eg. This is the first release of this document. |

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Table of Contents

[1 Executive Summary 11](#_Toc196017109)

[1.1 Background 11](#_Toc196017110)

[1.2 Reason for Closing the Project 11](#_Toc196017111)

[1.3 Summary of Recommendations 11](#_Toc196017112)

[2 Closure Activities 12](#_Toc196017113)

[2.1 Project Staff 12](#_Toc196017114)

[2.2 Issues Management 12](#_Toc196017115)

[2.3 Risk Management 12](#_Toc196017116)

[2.4 Financial Management 12](#_Toc196017117)

[2.5 Asset Management 12](#_Toc196017118)

[2.6 Records Management 12](#_Toc196017119)

[2.7 Post Project Responsibilities 13](#_Toc196017120)

[2.8 Recommendations 13](#_Toc196017121)

[3 Appendices 13](#_Toc196017122)

# 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 may be because the outputs have been delivered, the outcomes have been achieved, the closing date has been reached and/or the budget has been expended. In some cases a project may be closed for other reasons, for example a change in policy or agency priorities or funding has been fully expended.

## Summary of Recommendations

List the recommendations that appear in this Report. One of the recommendations should be for the Project Steering Committee to agree that the project can be deemed closed. The project has fulfilled all of the requirements as documented in the relevant Project Business Plan, or the Steering Committee is satisfied that all outstanding items have been satisfactorily addressed or there is some other reason to close the project (e.g. no more resources).

For ease of reference, each recommendation should be uniquely numbered and a reference provided to the relevant section within this Report.

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# Closure Activities

The following sub-sections cover the various activities required to close the project.

## 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, the capture of their project knowledge and handover of that knowledge to the Business Owners.

## Issues Management

Identify any outstanding issues and who will continue to progress the issues.

## Risk Management

Identify any risks which will transfer to an operational area and who has responsibility for monitoring them.

## Financial Management

Identify any outstanding financial issues, such as excess funds, and how they will be handled.

## Asset Management

Describe any assets which were acquired for the project, and who will take ownership of 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 copy (electronic) records and project documents. Identify who is responsible for these activities.

## Post Project Responsibilities

List any matters that are outstanding, what actions are required to address them and who is responsible. This should include things that are outstanding or have not been formally agreed prior to this stage such as outcomes yet to be achieved, outputs not yet delivered, maintenance of the outputs or other operational matters such as meeting future training requirements.

## Recommendations

List any recommendations that arise from this section of the Report. This includes such things as the transfer of responsibility for the outcomes to the Business Owner, how outstanding outputs and issues should be addressed, any recommendations for the continued operation by the Business Owner.

# Appendices

Appendices can be attached to provide any relevant supporting information, such as:

* a copy of the signed declaration of acceptance by the relevant Business Owner(s) for each of the outputs (deliverables)
* a copy of any project reviews undertaken e.g. Project Review and Evaluation Report or Post Implementation Review

1. For a definition of Project Management terms, refer to the *Tasmanian Government Project Management Guidelines:* *Appendix 1* [↑](#footnote-ref-1)