

Click here to enter the Project Name

Project Close-Out

Version 1.0

Prepared by

Click here to enter the Author’s name

Date: June 22, 2017

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| **Document Approval**  It is recommended that this Project Close-Out Document be accepted to mark the end of this project.  **Review and Approval.**  This section contains the signatures of the Project Sponsor, Business Owner(s), and Project Manager for Project Delivery to sign off on the Project Close-Out Report. | | | |
| **Name** | **Title** | **Signature** | **Date** |
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| **Template Version and Quality Control Information**  This section is used to track design changes to the Project Close Out Report Template by The City of Winnipeg Corporate Asset Management Office. | | | |
| **Document Revision No.** | **Revision(s)** | **Date Released** | **Released By** |
| v1.0 | Released for Use | June 2017 | J. Frizado |
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# You are prompted to update the Table of Contents (TOC) when saving the report, however, you may also update the TOC while working on the document.

# To update the Table of Contents while working on the document:

# a) Click anywhere in the Table of Contents. b) Right-click and select Update Field. c) Select: Update entire table.

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This document contains instructions/details embedded as “hidden text”.

To view or hide the hidden text, click the Show/Hide icon [¶] under the Home ribbon tab.

# **Instructions**

# This document is your template for producing a mandatory Project Close-out Report as a deliverable..

# **Document Purpose**

# The purpose of this document is to mark the completion of the project by:

# assessing the project’s performance,

# identifying the lessons learned, and

# confirming that essential contractual and other project closure activities have been completed.

# This document also transfers assets, deliverables and all ongoing administrative functions to the control and use owner in the organization.

# Included in this transfer is the commitment to measure the benefits/outcomes delivered by the project.

# **Using this Template**

# To create a Project Close-out Report from this template:

# Enter the title on the cover page with the name of your project and the organization information.

# Enter the title in the document header and footer with your project name.

# Save your document with a file name that is in accordance with current branch document naming standards.

# Complete the entire template. Each section contains abbreviated instructions, tables are also provided as a suggested layout for some of the information required.

# Update the Table of Contents by: a) Clicking anywhere in the Table of Contents b) Right-clicking and selecting Update Field c) Selecting Update entire table.

# **Distribute the document in PDF format to ensure no changes are made.**

# 1. General Information

|  |  |
| --- | --- |
| **Description** | |
| **Project Name** | Enter the full Project Name |
| **Project Description** | Enter the Project Description as per Project Registration |
| **City File No.**  The file number that has been assigned by the Department for the project. | Enter the File No, |
| **Project ID**  The City-issued number representing the Capital Funding Source of the Contract. Located on the Capital Budget Sheet. | Enter the Project ID number of the Project. |
| **Project Record Index No. (PRI)**  The City-issued Index number. Refer to *PMM Section 5.8.8 Project Record Index (PRI)*. | Enter the Project Record Index #t. |
| **Bid Opportunity No.**  The number used to identify the Tender of the Contract as issued by the City of Winnipeg Materials Management Division. | Enter the Bid Opportunity #t. |
| **Project Manager** | Enter the name of the Project Manager who finished this Project |
| **Project Sponsor** | Enter the Project Sponsor at time of completion of this Project |
| **Reason for Closure** | Enter “Project finished”, or enter the Termination Clause. |

# 2. Purpose

The purpose of this report is to mark the completion of the Click here to enter the Project name Project by assessing the project’s performance, identifying the lessons learned, and confirming that essential contractual and other project closure activities are completed.

This report also transfers assets, deliverables, and all ongoing administrative functions to the Control and Use Owner in the organization. Included in this transfer is the commitment to measure the benefits/outcomes delivered by the project.

## 2.1 Background

Enter sufficient business and project background information to describe why the project was required and what outcomes it was intended to produce. The information may include the original problem or opportunity resolved.

Click here to enter sufficient business and project background information to describe why the project was required and what outcomes it was intended to produce. The information may include the original problem or opportunity resolved.

# 3. Project Completion Work

## 3.1 Work Completed (as part of project wrap-up)

This section covers some or all of the following aspects. In larger projects, these elements may be expanded into separate sections.

* Contract Closure   
  Current status, estimated final closure date; for on-going support/maintenance contracts, refer to who is responsible, renewal periods, costs, etc.
* Financial Closure   
  Invoice approvals, payments, financial system transactions, transfer of remaining funds
* Asset Transfer  
  Disposition of hardware, software licenses, furniture, etc.
* Administrative Closure   
  Transfer of administrative functions to an in-service support organization; transfer includes handover of project deliverables to a responsibility center
* Human Resources   
  FTEs returned to home units, departures of contracted resources
* Information Management  
  Describe where the documents have been stored or archived, using a table format such as the following table

Click here to enter text.  
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* Human Resources   
  FTEs returned to home units, departures of contracted resources
* Information Management  
  Describe where the documents have been stored or archived, using a table format such as the following table.

| **Information Management** | | |
| --- | --- | --- |
| **Deliverable** | **Medium** | **Location  (Logical or Physical Storage)** |
| For example: Project Management Deliverables. | For example: Electronic | For example:  Shared Drive Path;  SharePoint Site |
| For example: Signed Contracts. | For example: Paper documents | For example: File Cabinet ##, Asset Management Office |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |

## 3.2 Outstanding Issues

In the table below, identify any outstanding deliverables, issues, or actions from the project that remain to be completed. Where appropriate, provide recommendations as to how these may be dealt with. If there are remaining deliverables, list them in table-format along with an estimate of the work-effort required to complete them.

| **No.** | **Outstanding  Deliverables, Issues, or Actions** | **Estimate of  Work-effort** | **Recommendation** |
| --- | --- | --- | --- |
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# 4. Project Performance Assessment

## 4.1 Summary

|  | **Baseline** | **Actual** | **Variance** | **Explanation** |
| --- | --- | --- | --- | --- |
| **Start Date** | Click here to enter a date. | Click here to enter a date. | Click here to enter a number. | Click here to enter text. |
| **Finish Date** | Click here to enter a date. | Click here to enter a date. | Click here to enter a number. | Click here to enter text. |
| **Budget** | e.g.$0.000.000.00 | e.g. $0.000.000.00 | e.g. $0.000.000.00 | Click here to enter text. |

## 4.2 Measurement of Project Success

This section provides a quality assessment of the product or end-result that the project delivered. The assessment is expressed in terms of how well the project has addressed project requirements, specifications, expectations, and intended benefits.

To change the color and text of the Rating Circle:

1. Click the edge of the Rating Circle under the Rating Column
2. Right-mouse click, and click the Shape Fill icon menu-arrow (the paint bucket drop-down arrow)).
3. Select the appropriate colour as per the Colour Key:  
   Green = Good  
   Yellow = Fair  
   Red = Poor
4. Double-click the circle to change the text to correspond with the selected colour.

Rating Key:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Good** |  | **Fair** |  | **Poor** |

|  |  |  |
| --- | --- | --- |
| **Aspects** | **Details** | **Rating** |
| **Business Needs have been met**  List each objective from the Project Charter and evaluate whether the outcome of the project fulfills the objectives or not, one by one. | List each objective from the Project Charter and evaluate whether the outcome of the project fulfills the objectives or not, one by one. |  |
| **Project End Result**  In bullet format, provide a quality assessment in terms of how well the project has addressed project requirements, specifications, expectations, and intended benefits of the product or end result that the project delivered. | Quality assessment in terms of the product or end result the project delivered, in regards to addressing project requirements, specifications, expectations and intended benefits. |  |
| **Project Deliverables**  In bullet format, list key deliverables that were to be produced. Required Deliverables that were not completed are listed above in the Outstanding Issues section. | In bullet format, list key deliverables that were to be produced Required deliverables that were not completed are listed above in the Outstanding Issues section. |  |
| **Quality of the Deliverable**  Summarize the number of issues found during the project and evaluate against the standard issues for the type/size of the project. | Click here to summarize the number of issues found during the project, and evaluate against the standard issues for the type/size of the project. |  |
| **Benefit Realization**  List the benefit provided in the Project Charter (Revenue or Cost Saving) and measure the Actual Benefit Realized compared with what has been stated in the Project Charter. | Click here to list the benefit provided in the Project Charter (Revenue or Cost Saving) and measure the Actual Benefit Realized compared with what has been stated in the Project Charter. |  |

## **4.3 Project Changes**

Insert the Summary Table from the Change Control Log which includes both Change in Work Orders (CWO) and Change in Scope of Services (CSS).

Insert the Change Control Summary Table here.

# 5. Lessons Learned

In the table below, summarize project lessons learned including the cause of issues, reasoning behind the corrective action chosen, and other types. Identify and discuss specific issues that challenged the project/project team.

| **No.** | **Description**  What happened in the project that has been identified which needs to be addressed for improvement, and/or what expected or unexpected positive outcomes occurred. | **Impact**  What were the impacts of the incident?  Who were the parties impacted?  How big were the impacts? | **Recommendation**  What would you recommend to prevent this incident for projects in the future? |
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# 6. Administrative Closure

In the table below, summarize project administrative closure activities such as procedure to transfer the project products or services to production and/or operations.

| **No.** | **Activity** | **Responsible** | **Date Completed** |
| --- | --- | --- | --- |
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# 7. Contract Closure

In the table below, summarize project contract closure activities, such as formally closing all contracts associated with the complete project.

| **No.** | **Vendor and Deliverable** | **Signoff Date** |
| --- | --- | --- |
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# APPENDIX A: Project Checklist

Refer to the Project Checklist.