Project Closure Report
[Project Title]

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# Contents

[Contents 2](#_Toc122014450)

[Closure 3](#_Toc122014451)

[Document Purpose 3](#_Toc122014452)

[Project Manager’s Report 4](#_Toc122014453)

[Project Performance Against Benefit 5](#_Toc122014454)

[Lessons Learned 5](#_Toc122014455)

[Communication & Reporting 7](#_Toc122014456)

[Summary of Follow-On Actions 7](#_Toc122014457)

[Appendix 1 – Document Locations 8](#_Toc122014458)

[Document Control 8](#_Toc122014459)

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Closure

# Document Purpose

*NB: All text in italics is instructional & must be removed or replaced with non-italicised content. Refresh Table of Contents once all italicised text is removed.*

*The Project Closure Report is the key document required in the Closure Stage.*

*It enables the project manager to confirm the project objectives have been delivered and accepted, that ongoing monitoring and support of expected outcomes has been planned, that benefits have been assessed and lessons learned captured for the future. It also passes on details of unfinished work, ongoing risks or potential modifications required from the group charged with follow-up of benefits realisation.*

*The Project Closure Report is used to inform your Executive Sponsor or Project Board’s decision to close the project.*

*This Project Closure Report is scalable and designed to be used for all projects. Adapt the template to suit your project closure needs, putting N/A or deleting fields if not required.*

*If there is a premature closure of the project, a Project Closure report will be written to handover the project at its current stage. An evaluation of the project will provide a rationale for the decision to close the project.*

# Project Manager’s Report

## Summary

*Provide a summary of the project aims, objectives and outcomes*

*Enter the project’s basic information in the table below.*

|  |  |
| --- | --- |
| Project Name |  |
| Project Manager Name |  |
| Reasons for Project Closure |  |
| Project Description |  |

## Performance Summary

*Describe the project’s initial agreed and achieved project outcomes (from the original objectives) & the project’s changes including changes to the baseline start and end date, in the tables below.*

|  |  |  |  |
| --- | --- | --- | --- |
| Start & End Dates | Baseline | Actual | Variance (Days) |
| Project Start Date | *Eg. 01/11/2020* | *Eg 11/11/2020* | *10* |
| Project End Date | *Eg. 27/02/2022* | *Eg. 07/07/2022* | *129* |

## Budget Costs

*Summarise the costs of the project against the original budget and the variance (if applicable).*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Expenditure | Original Budget  | Any revised Budget  | Final Actual Budget | Variance |
| *Record the cost items for the project e.g. FTE, Goods & Services* |  |  |  | *The amount difference between the Revised Budget and the Actual Budget* |
|  |  |  |  |  |
| TOTAL |  |  |  |  |

# Project Performance Against Benefit

*Describe the quantitative and qualitative benefits achieved to date for Health and Financial Benefits. If applicable to your project use the tables provided. If the project has an Evaluation Plan, please consider which information is required in this part of the report, there is no need to duplicate information here which is included in the Evaluation Report.*

## Health Benefits

*(If applicable) Describe any health benefits realised from this project. This will include all qualitative (non-tangible) benefits*

## Financial Benefits

*(If applicable) Describe any financial benefits realised from this project.*

## Other Benefits

*(If applicable) Describe any other benefits realised from this project. This will include all qualitative (non-tangible) benefits such as patient experience, for example.*

### Future project benefits and sustainability

*Describe the benefits expected to be achieved after the closure of the project.*

*Example 1 “A review will be completed six months’ post implementation by the …. Committee to assess performance against the model of care in its entirety as well as the performance against KPIs. It is expected at this point that each health service will be achieving the KPIs articulated within the project.”*

*Example 2. “Projected financial benefits will be reviewed monthly to ensure realisation and any significant variance from planned performance will be addressed through mitigating strategies.”*

*Also reflect on how sustainability has been considered through the project, and what elements of the project and/or its outcomes are sustainable beyond closure of the project e.g. workforce capacity, infrastructure, partnership strength, adoption by the organisation involved). What actions, if any, are required to improve or embed sustainability (ensure these are documented in Follow-On Actions, section 6).*

# Lessons Learned

*The lessons identified will be used to help future projects avoid similar issues and challenges. For project closure, schedule a final ‘lessons learned’ identification session with your Executive Sponsor, and other project stakeholders at your discretion. If you used a ‘Lessons learned’ register (see Project Lifecycle template) during the project, update this with the learnings from this session. Theme and summarise the key lessons learned, plus any recommended actions at project closure in the table below, and attach the lessons learned register (if relevant) as an appendix to this document. A potential idea is to hold a debrief session with key stakeholders to understand what worked well and areas for improvement.*

| **Theme** | **Recommendations** | **Recommendation Action Status** |
| --- | --- | --- |
| **Project Discovery and Design** |
| *Reflect on the project discovery and design stages, how the project was developed, activities undertaken to refine project idea, engagement activities etc.* | *R1 –* *R2 -*  | *R1S – Completed/in progress/not progressed (dependent on RxS)* |
| **Planning** |
| *Reflect on project planning and activities undertaken (budgets, milestone development, stakeholder mapping) as part of this process.*  |  |  |
| **Communication and Evaluation (Data)**  |
| *Reflect on project communication, was information appropriately disseminated and communicated.**Also reflect on evaluation of the project.* |  |  |
| **Governance and Partnerships** |
| *Reflect on the effectiveness of the project’s governance and partnership arrangements, including satisfaction of the members (if measured).*  | *Consider whether any actions are required to support these partnerships following closure of this project e.g. formal acknowledgement of partner contribution, sharing of project outcomes etc (ensure these are documented in Follow-On Actions, section 6).* |  |
| **Best Practice** |
| *Briefly describe any innovative approaches or techniques used to improve the quality, productivity, or development cycle times for the project. Reflect on how the project outcomes relate to the existing evidence and/or best practice related to the project (from the Project Plan). Consider whether the project has added to the existing evidence base and whether publication (e.g. public report, peer reviewed journal article) of the project approach or outcomes is warranted.* |  |  |

#

# Communication & Reporting

*How should these project lessons/outcomes be communicated and/or reported to:*

* *The organisation e.g. staff email, presentation*
* *Project Governance groups/Project Board e.g. hold project completion debrief, share Project Closure report*
* *Project Partners e.g. Project Summary report, hold project completion celebration*
* *Other stakeholders (refer to your project’s stakeholder mapping and analysis plan), including project target audience e.g. newsletter article*
* *The public e.g. social media post, media release*

# Summary of Follow-On Actions

## Outstanding Actions

*If applicable, describe any outstanding actions for the project initiatives, and what the plan is to manage any outstanding actions, including, what actions are required, who is responsible, what are the deliverables and when are they due.*

## Ongoing Risks

*If applicable, describe any ongoing risks identified. Please provide details of the plans or actions that are required to address those risks, including who is responsible and when the plans/actions are due*.

## Evaluation

*If relevant, describe if a future evaluation is needed. If there is a plan, who will be responsible for it, when will it be undertaken (e.g. 12 months post implementation?), how will it be funded?*

# Appendix 1 – Document Locations

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | File Description | File Name | Archive/Path Location | Storing Media (Hardcopy/ Softcopy) |
| *1* | *Lessons Learned* |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |

# Document Control

## Document information

|  |  |
| --- | --- |
| Document Name | [Document name] |
| Project Name | [Project name] |
| Document Author | [Document author] |
| Document Version | [Version] |
| Document Status | [Status – “Draft”, “Final”] |
| File Name | [File name] |

## Document history

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Additions/Modifications | Prepared / Revised by |
|  |  |  |  |
|  |  |  |  |

## Project Closure Approval

*Approval for closure of your project – The Project Board, Executive Sponsor, as well as internal governance*

|  |  |  |  |
| --- | --- | --- | --- |
| **Position/Committee** | **Name** | **Signature** | **Date** |
|  |  |  |  |
|  |  |  |  |