

CLOSING A PROJECT

This tool kit has been designed to help you successfully and effectively close down your project.

Closing a project is as much a part of the project lifecycle as initiation and when managed well it can identify and yield important results.

This toolkit will help you to think about why you are ending the project, and what to consider when conducting an end of project review, completing your end of project report, and guidance for carrying out a post-implementation review.

In this toolkit

Why do projects close?	p2
The process of closing a project	p2
To workshop or not?	P3
End of project report	p4-5
Lessons learned	p6
Post implementation review	p7
Archiving project documents	p8

The End of Project Report (EPR) template includes:

- ◆ Project summary
- ◆ Key deliverables against quality
- ◆ Performance against time and cost
- ◆ Staff resources
- ◆ Benefits realisation
- ◆ Problems encountered
- ◆ Outstanding snags
- ◆ Post Implementation Review

CLOSING A PROJECT

Why do projects close?



There are two main reasons for closing a project. The first, and most common, is that all project work has been completed and the project executive had confirmed that all project objectives have been met.

The second reason for closing a project is when the decision has been made to halt a project. There are a variety of reasons for this; the project no longer meets the business need, the perceived benefits are no longer seen as valid, changes in compliance, regulatory changes, defunct technology, withdrawal of funding, a change in operational strategy or the loss of key person(s) driving the original project.

The Process of Closing a Project

Once the main activity of the project is complete the developments in services and systems to the University become the focus as what was “the project” now becomes part of normal activity (Business As Usual).

- ◆ Formal closure of the project signals that a period of work has ended.

A meeting is required to identify that all key deliverables have been met and that the project can be defined as “complete”. If the project is closing early what criteria/ objectives have been met? This is a formal control point and is usually attended by the key stakeholders.

The questions to be asked are....



“Did the project deliver its intended end product within the time and budgetary constraints set?”

“Does the project need to be handed over to operational teams? Are roles, responsibilities, support and governance defined?”

Starting up a project

Initiating a project

Implementing a project

Closing a project

Post project

2

CLOSING A PROJECT

To workshop or not?



Having a workshop at the end of a project is a great way of capturing information about the success of the project and sharing learning between members of the team. It can be helpful to have someone facilitating the session on your behalf.

They can help by asking questions, challenging answers and, later on present the responses in a meaningful format that can be shared. Attendees should be as honest as possible about their experience of the project so that a realistic document can be created.

Some questions to be asked at the meeting;

- ◆ Have benefits been realised and how have they been measured?
- ◆ When and how will the benefits not yet realised be reviewed and who will own this?
- ◆ How will these benefits be measured?
- ◆ Are there any outstanding snags?
- ◆ Have any lessons learned been identified? If you did this project again what would you do differently? What worked particularly well?
- ◆ What risks were associated with the project and how were they mitigated?

Staff in the Project Office may be available to facilitate an end of review workshop for your project.

Celebrate success!

You may not have the budget to celebrate the end of your project with coffee and cake or a team lunch. If you work closely with the team, you could recognise their achievements at the end of project workshop or in a team meeting, share the news on the intranet or in newsletters, or just congratulate individuals separately and let them know that you appreciate their effort.



CLOSING A PROJECT

End of Project Report

An End of Project Report is required for the Project Board and Authority Group to formally sign-off in order to approve closure of the project.

Go back to the start

Look at the Project Initiation Document and any subsequent change requests to review whether the objectives that were set out have been met. If not, you will need to explain why the project is closing.

Confirm whether the deliverable met the acceptance criteria – have you achieved what was agreed at the outset?



Don't forget to check against Change Request Forms where change in scope is recorded! Why was the change agreed?

Review project benefits



Without benefits the project isn't worth doing so you now need to check the status of the benefits;

- ◆ Benefits realised to date – some may have been at stages of the project, or when closure was being undertaken
- ◆ Identify the benefits that will be realised post project, these are sometimes called “residual benefits”. Work out the timescale for their realisation and who the owner is.
- ◆ Expected net benefits
- ◆ Unexpected benefits
- ◆ Dis-benefits (outcomes that are perceived as negative by one or more stakeholders).

CLOSING A PROJECT

Other areas to cover on the EPRF

- ◆ Identify any outstanding snags and timescales and responsibility for completion.
- ◆ Outline any problems encountered by the project and how they were managed.
- ◆ Discover what lessons can be learnt from a project, this means identifying both good and bad experiences of managing projects.
- ◆ To share information and knowledge with other Project Managers to benefit future projects undertaken and to increase awareness of what happened previously.

Occasionally there is a requirement to audit projects, especially those of a high financial value and it is useful at this point to check that all project documentation is in order should this be required, essentially a “paper trail”.

If you are unsure please contact the Project Office: projects@contacts.bham.ac.uk

CLOSING A PROJECT

Lessons Learned

Projects are a valuable training ground. They can provide an opportunity to review processes methodologies and to develop new skills. They also provide an environment in which to learn what worked and what didn't.

"In NASA, we never punish error. We only punish the concealment of error."

Al Siepert

Identifying and sharing lessons is an essential element of the project. The aim is to reduce the risk of making the same mistakes again and sharing hints and tips learnt should the same or similar project need to be undertaken, e.g. when another upgrade of a similar computing system is required.

The Risk and Issue Registers will be vital in gathering the lessons learned, as well as the experiences of the key stakeholders who need to have their input.

Lessons learned influence good practice



The Lessons Learned is the "review" stage, but in order to make reviewing the project a useful process it is important to use what you have learnt to improve the success of future projects, to do this;

- ◆ Look for trends
- ◆ Assign actions to implement necessary changes
- ◆ Review lessons learned at the start of each stage of a project, or new project.

Keep the Lessons Learned with the other project documentation so that it can be accessed when another project manager needs to undertake similar work in the future.



CLOSING A PROJECT

Post Implementation Review



A Post Implementation Review (PIR) is a review of the project which takes place after the project has been running as business as usual for a an agreed length of time. The review enables the project executive, or business owner to review whether any outstanding benefits have been realised one the project is bedded-in to business as usual.

Many projects can include benefits that will be realised after the project has been completed. E.g. A project implementing new software that reduces the number of calls to the service desk won't realise the benefit until after it has been rolled out and bedded-in.

This means that although the objective has been achieved the benefits may take longer to be realised.

If the project benefits have not been realised by the time the project is closed, a post implementation review is required and timescales and ownerships for ensuring that benefits are realised must be assigned.

The PIR will consider the outstanding project benefits. When reviewing the benefits, consider;

- ◆ The new conditions that now apply to a particular process or activity
- ◆ Staff training requirements that may now need to be put into place
- ◆ Further support that may be required and introduced



CLOSING A PROJECT

Archiving Project Documents



Once the project has closed, the project manager should ensure that all project documents are archived.

Maintaining a library of past project documentation serves as a source of reference for project managers. Previous project documentation can be used for estimating future projects.

The following project documentation should be is archived:

- ◆ Project Initiation Document (PID)
- ◆ Stakeholder Analysis and Communications Plan
- ◆ Change Requests (and revisions to PID's)
- ◆ End of Project Report
- ◆ Post Implementation Review
- ◆ Project Plan
- ◆ Relevant meeting notes
- ◆ Tender and contracting documentation
- ◆ Technical documents
- ◆ Post Implementation Review

These documents should be archived in the Project Library which is managed by the Project Office, please send all final versions of project documents to projects@contacts.bham.ac.uk

For more information and advice contact the Project Office: projects@contacts.bham.ac.uk

