**Department of Financial Services**

***DIS Project Management Office – Project Closure Summary***

Document Instructions

In this document there are instructions explaining how to create a Project Closure Summary document. Remove all the instructions (red text) before issuing the document as the instructions are not meant for the reader.

Replace red text inside of angled brackets (e.g. <Project Name>) with the indicated text and remove the angled brackets.

This document may contain some suggested boilerplate language; it is assumed the project team will make appropriate additions and changes for its specific needs.

Select the Font as Arial and set the font the size as 11 when entering text.

Do not remove any headings, but do indicate that a heading is not applicable to your project by placing “N/A” in the content area.

Under “File” on the menu bar go to Properties; in the Summary Folder enter the document title and author (person or group).

Insert a glossary at the end of the document if technical or project management vernacular is used that is not considered common knowledge by non-specialists inside and outside of the Department.

Delete This Instruction Page Before Submitting the Document for Review or Approval.

Project Closure Summary File Information

File Location: <file location of document in Project Control Book>

Last Updated:

Project Artifact Repository

Project artifacts can be found in the following location(s):*Specify the location where project documents will be archived for future reference material.*

Table of Contents

[1. Purpose of Document 5](#_Toc320025377)

[2. Project Background/Preconditions 6](#_Toc320025378)

[3. Project Scope/Objectives 7](#_Toc320025379)

[4. Budget/Spending Plan 8](#_Toc320025380)

[5. Risk/Issue Impact 9](#_Toc320025381)

[6. Lessons Learned 10](#_Toc320025382)

[7. Signature and Acceptance Page 11](#_Toc320025383)

# Purpose of Document

The <Project Name> Project Closure Summary identifies the:

* Project Background and Preconditions
* Project Scope and Objectives
* Budget/Spending Plan
* Benefits/Performance Indicators
* Risk/Issue Impact
* Lessons Learned
* Formalized Approval, Acceptance and Signature

The purpose of the Project Closure Summary is to describe the achieved project results compared to the expected results which were stated in the <Project Name> Project Management Plan/Scope Statement. This final report is designed to promote knowledge sharing by describing the experiences gained during the project.

# Project Background/Preconditions

Project Background

Summarize the background of the project.

Project Preconditions

*Cover any special conditions or limitations of the project (e.g., legislative mandate, unsupported system, the development had to be done in the existing production environment, or that the project results only applied to a given unit’s business needs).*

# Project Scope/Objectives

Scope/Objectives Met

List and comment on objectives met during the project.

| Scope/Objectives Met | Comment |
| --- | --- |
|  |  |
|  |  |
|  |  |

Scope/Objective Not Met

List and explain why scope/objectives were not met during the project.

| Scope/Objectives Not Met | Explanation |
| --- | --- |
|  |  |
|  |  |
|  |  |

# Budget/Spending Plan

List the funding source, who received the funds and the budget and actual costs.

|  |  |  |  |
| --- | --- | --- | --- |
| Funding Source | Who received funds?  How were funds spent? | Budgeted | Actual Spent |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

*Explain any variance(s).*

# Risk/Issue Impact

*List the identified risks/issues that actually impacted the project and describe the response taken by the project team to address the impact.*

|  |  |  |
| --- | --- | --- |
| Risk/Issue | Impact | Response |
|  |  |  |
|  |  |  |
|  |  |  |

# Lessons Learned

List any lessons learned during the life of the project.

|  |  |
| --- | --- |
| Lesson Learned | Involved Parties |
|  |  |
|  |  |
|  |  |

# Signature and Acceptance Page

I have reviewed this Project Closure Summary and agree that the content of the document is accurate.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

<Name>, <Title> Date

*Project Sponsor*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

<Name> Date  
*Project Manager*