The purpose of this document is to define the process for closing out a project during the planning stage, including any conditions that will be required for a smooth transfer. Outcomes should be formally handed over to the sponsor who should confirm their delivery so that there is no dispute about whether outcomes have been completed. A closure list is likely to have sections to include tasks from most of the activity sections in this template, but each project will have different features to consider.

Note: Instructions for what to include in each section appear in gold italics. Samples for each section appear in regular black text.

Project CLoseout & Handover plan:

Project Name

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# **Purpose**

This document outlines the agreement between the project team and production support relating to the acceptance by production support to take over responsibility for the new application from the project team. It outlines the work outstanding and current status of the implementation. It may be accompanied by an SLA (Service Level Agreement) if the organisation uses SLAs to define service levels.

# **Criteria**

This section should define any project-specific crtieria that must be complete before project closeout and handover can be achieved.

The following criteria must be met before the application can be transferred to Production Support.

* Application fully implemented and in use by all users
* Existing application decommissioned
* No more than 2 High priority issues outstanding
* No more than 10 Medium priority issues outstanding
* Outstanding support calls below 30
* No unplanned system outages for 5 days
* Additional short term resources to assist support in place
* All items on the Handover List are complete and available

# **Handover Agreement Process**

This section should provide a detailed process for how the project handover will occur after closeout. A step-by-step process or flowchart is useful to ensure clarity.

The following process will occur to facilitate the transfer:

1. Plan agreed between the project team, production support, and operations.
2. Date set for handover.
3. All criteria met by the handover date.
4. Production Support and operations sign off their acceptance of the application.
5. Handover occurs.

# **Closeout Checklist**

This section provides the list of planned activities that will occur within the project team before closeout and handover can be achieved. It is useful to group activities by project management topic (as done here) or by project phase.

The following activities need to occur to enable formal project closeout and handover.

## Integration Management

* Verify project has meet original intent and scope.
* Verify changes to project scope were documented appropriately.
* Determine whether change control process was followed and flexible enough to allow for needed change.
* Document process changes as lessons learned.

## Scope Management

* Verify that project requirements have been adequately met.
* Ensure accuracy of requirements traceability documentation.
* Update project plan to incorporate approved and implemented changes to scope.

## Time Management

* Document actual performance against final approved baseline for project schedule.
* Update crtieria used for estimates if needed, to improve future project estimates.
* Document baseline changes.
* Document lessons learned.

## Cost Management

* Document actual budget against final approved cost baseline.
* Update criteria used for budget estimates if needed, to improve future project estimates.
* Compile final budget report justify differences between planned and actual budgets.
* Document lessons learned.
* Document relevant financial information for support team after handover.

## Quality Management

* Document quality control results.
* Update project documents to reflect changes made as part of the quality control and assurance processes.
* Inform stakeholders as needed of quality assurance results.
* Update lessons learned.

## Human Resources Management

* Inform project resources of formal closure and next assignments.
* Determine extent of continuing support to be provided by project team after handover, and create support request processes if needed.
* Discuss performance with project team members, noting exceptional performance or opportunities for improvement.
* Document lessons learned.

## Communication Management

* Prepare final project performance report(s) for key stakeholders.
* Determine schedule for full transition to operations.
* Turnover project documentation to operations team after handover.

## Risk Management

* Verify all risks and issues are closed, with appropriate documentation.
* Communicate final results of all risks and issues to appropriate owners and stakeholders.
* Update project documentation and organizational documentation.
* Update lessons learned.

## Procurement Management

* Verify all procurement documents reflect the final disposition of their contracts.
* Notify any relevant legal entities of project closure.
* Create documents as needed for transition to operations.

# **Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Signature** | **Date** |
| Executive Sponsor |  |  |  |
| Project Sponsor |  |  |  |
| Project Manager |  |  |  |
| Operational Leader |  |  |  |

# **Document History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Comments** |
| 1.0 |  |  |  |
| 2.0 |  |  |  |
| 3.0 |  |  |  |
| Final Draft |  |  |  |