



MASSEY UNIVERSITY

Project Post Completion Review Template

Version 1.0

Project Post Completion Review

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1. Purpose

[This template is a multi-purpose document, applicable to construction, ITS and other projects. As specified in the Massey University Post Completion Review Policy, all major projects in excess of \$0.15m (construction, ITS and other projects) are required to have a post completion review]

[This template should be used as a basis to review a project the end of a stage or phase, or to review a project post implementation to evaluate project outcomes after implementation/completion. The template is intended to provide guidance and support consistency across independent external, independent internal and peer reviews as prescribed in the Post Completion Review Policy.]

The purpose of a post completion review is to evaluate how successfully the project objectives have been met and how effective the project management practices were in keeping the project on track.

The purpose of this document is assist the project manager with the formal review of a project, and or significant phase(s) or stage(s) of a project, ensuring that the following areas are addressed:

- There is an objective evaluation of how successfully the planned business objectives and outcomes and were met.
- The expected benefits as defined in the business case and the associated benefits realisation plan are being or have been addressed and/or realised.
- There is an objective evaluation of how effective governance, project management and reporting practices were.
- Any outstanding post project activity is identified, agreed and assigned to an owner.
- Lessons learnt and previously unidentified shortfalls are formally recorded and shared across relevant stakeholders.
- Elements of lessons learnt are then available to assist in planning, managing and meeting the objectives of future phases or projects.
- Recommendations associated to process improvement or future phases or projects are captured and acted upon.

Please refer to the Massey University Post Completion Review Policy for additional information.

2. How to do it well

Conducting a timely and thorough post completion review will help identify lessons learnt which will assist in planning, managing, and meeting the objectives of future projects. In order to assisting in the completion of the review:

- Get input from the entire project team and other major stakeholders.
- Conduct the review after the project's deliverables have been "in service" for an adequate period of time to evaluate the product or service's successful integration into the business.
- Review the business case, project charter and other key project deliverables and evaluate how closely the project results match the original goals, objectives, deliverables planned requirements, schedule, and budget.
- Conduct a customer survey as required to gather/solicit stakeholder inputs as required.
- Evaluate the effectiveness of the project management practices and other processes as well as the success of the project deliverables.
- Provide only the level of detail necessary to show meaningful analysis of events and conclusions.
- Focus on the "unknowns" which may have increased implementation risks and which offer useful "hindsight" value.
- Attach appropriate documentation which may be useful information to support the review.
- Use an objective third party to conduct the review where mandated and/or appropriate. Where an independent external review is commissioned, it is acknowledge that the structure and format of the post completion review report may differ¹ from this document.

¹ All relevant areas specified in this document, as a minimum, must be considered by the independent external review.

3. Project Overview

[The Project Manager² should provide a brief summary of the project, its objectives and its success in meeting those objectives. Segregate significant phase(s) of the project and ensure these align with the business outcomes by phase in section 5.]

4. Post Project Review Meeting(s)

[Illustrative purposes only. The Post Completion Review may require a series of meetings/workshops, surveys and documentation reviews. The activities undertaken, including the final review session should be briefly summarised in this section.]

Meeting Date and time	dd/mm/yyyy at hh:mm
Purpose:	
Venue:	
Invitees:	<i>[List all invitees]</i>
Attendees:	<i>[List all attendees]</i>
Apologies:	<i>[List all parties who were not able to attend]</i>

² Please refer to the Massey University Post Completion Review Policy for additional information in relation to who should undertake the Post Completion Review.

5. Project Objectives and Metrics

[Review the key project metrics and identify any deviation from the baseline plans including KPI's and metrics related to research contracts (where applicable). Where KPI tolerances have been agreed, these should be included in the assessment]

Metric	Planned value	Actual	Reason for variation
Time	<i>Define the planned completion date(s).</i>	<i>Define the actual project completion date.</i>	<i>Provide a reason for any variation.</i>
Cost	<i>Record the allocated budget and any approved changes.</i>	<i>Confirm the actual cost of the project.</i>	<i>Provide a reason for any variation.</i>
Quality	<i>Record the expected quality criteria (from the PID and/or quality management plan).</i>	<i>Provide a view on the level of quality achieved .</i>	<i>Provide a reason for any variation.</i>
Risks	<i>How many risks were identified in the project.</i>	<i>Record the number of risks that eventuated into issues.</i>	<i>Provide feedback on the risk mitigation strategies that failed to prevent risk occurring.</i>
Other	<i>Additional metrics to the specific to the type of project being reviewed.</i>		

6. Project Delivery

[Review the key aspects of project delivery in relation management and governance and identify key learnings.]

Review Items	Met/Unmet	Comments/learnings
<i>The business case was a fit for purpose document that enables a <u>S.M.A.R.T</u> and informed investment decision.</i>		
<i>Project governance was in place and effective with regular steering group (or equivalent group) meetings.</i>		
<i>The project was effectively structured, managed and resourced to deliver according to its objectives.</i>		
<i>The planned delivery approach to define, design, and build was fit-for-purpose.</i>		
<i>The project adhered to the Massey University project management framework (for example with approved project plans, risk and issue management, status reporting).</i>		
<i>Project communication to project team sponsor, steering group, and internal and external project stakeholders was effective.</i>		

Review Items	Met/Unmet	Comments/learnings
<i>Project change control was in place, and variations to scope, budget, timing or quality have been documented and approved by the project steering group (or equivalent).</i>		
<i>Change management practices are followed including stakeholder engagement, business process reviews, training provided.</i>		
<i>Other</i>		

7. Project Deliverables Review

[Provide a brief summary of the deliverables in scope for the project, and how successful the project was in delivering these. Segregate significant phase(s) of the project. For example, initial scoping and design and costing phases may have clear outcomes in relation to architectural and quantity surveyor costing and independent external review of the designs and costings.]

Phases	Deliverables	Met/Unmet?	Supplier/advisor performance	Comments/learnings
<i>[Detail significant project phase(s)]</i>	<i>[For every project phase, list the key deliverables of the project such as the:</i> <ul style="list-style-type: none"> <i>• Strategic assessment</i> <i>• Business case(s)</i> <i>• Project initiation document / project plan</i> <i>• Project costs/budget(s), noting the multiple estimation processes associated with construction projects.</i> <i>• Communication and media plans</i> <i>• Change management plans</i> <i>• Risk management strategy / plan</i> <i>• Data conversion strategy / plan</i> <i>• Quality management plan</i> <i>• Etc.]</i> 	<i>[State if delivered or not. Where they were not fully met, detail why and whether there was any impact on the benefits]</i>	<i>[Where applicable, comment on the performance of the professional services provider in relation to the deliverable(s). Where performance was viewed as suboptimal, detail why and whether there was any impact on the project (costs, benefits, risk etc.)]</i>	

8. Facility or Building assessment (where applicable)

[Remove this section as required i.e. non facility or building reviews. Building reviews are typically undertaken twelve months after the 'in use' date. This is to allow the building to operate through at least one annual business and seasonal cycle.] This section may not be required if the PCR is being undertaken at the completion of a project phase in advance of building completion

Review Items	Project Requirements Met/Unmet <i>[Some review items are subjective in nature. The assessment of these items should reference back to, and use as key inputs:</i> <ul style="list-style-type: none"> • <i>The original business case and requirements</i> • <i>Agreed architectural design documentation</i> • <i>Input and opinions of key stakeholders]</i> 	Comments/learnings
Overall impression of the 'facility'		
Signage, Lighting, Access		
Layout and Functionality		
Furniture, Fittings & Equipment		
Building Services		
Energy efficiency over the first 12 months (kWH/M2)		
Space Utilisation - Agreed/planned and costed metrics. <i>[For example:</i> <ul style="list-style-type: none"> • <i>Office M2 per FTE</i> • <i>Teaching space per EFTS</i> • <i>Office occupancy levels per spaces available</i> • <i>Teaching frequency and occupancy space per TEFMA standard.</i> 		
Compliance with Health and Safety requirements <i>[This may require an independent assessment]</i>		
An assessment of comparable industry related construction and facility metrics (where appropriate) in order to determine possible value for money outcomes.		
Other		

9. Financial Review

[The purpose of this section is to review the project budget vs. actual costs incurred, inclusive of approved variations – highlighting use of contingency (where applicable).]

Phase	Budgeted cost	Actual cost	Comments/learnings
<p><i>[Detail the phases of the project as detailed in the business case/PID/project plan, for example planning, design, implementation/build. In the case of a construction project, this should also extend to the first year of operation.]</i></p>	<p><i>[Detail the agreed budget for the phase for each of the major cost categories e.g. the main contract, major costs outside of the main contract (e.g. internal Massey costs) and any related contingency.</i></p> <p><i>The basis used for budget estimation should be reviewed and assessed in terms of accuracy for each phase of the project, e.g. business case(s) and implementation.</i></p> <p><i>In the case of construction contracts, the analysis should also include a comparative analysis of costs across the respective construction costing/estimation phases.</i></p>	<p><i>[Detail the actual cost for this phase]</i></p>	<p><i>[Provide commentary in relation to any 'material' differences between budget and actual, identifying related approved change requests.]</i></p>

10. Procurement assessment

Professional and other services *[Use/delete as required based on project type]*

Review Items	Met/Unmet	Comments/learnings
<p><i>Assess the effectiveness and outcome of the contract negotiation and execution processes for professional and or other services. Consider:</i></p> <ul style="list-style-type: none"> <i>• Ease of negotiation and agreement of terms.</i> <i>• How effective the contract was in assisting with the management of the relationship and project delivery.</i> <i>• Where applicable, how effective the contract was in assisting with the resolution of any issues or disputes.</i> <i>• The effectiveness of SLA's and KIP's agreed.</i> 		
<p><i>Complete a review of supplier performance in relation to areas such as:</i></p> <ul style="list-style-type: none"> <i>• Scope and variation management.</i> <i>• Budget and budget management.</i> <i>• Quality management and delivery.</i> 		
<p><i>Other</i></p>		

Construction contracts *[Use/delete as required based on project type]*

Review Items	Met/Unmet	Comments/learnings
Assess the effectiveness of the plan. Did the procurement plan identify the appropriate market conditions and capabilities?		
Assess the procurement methodology/approach. Did it result in an acceptable procurement outcome, e.g: <ul style="list-style-type: none"> • Suitable/appropriate questions/queries from vendors. • Quality and timely and fit for purpose tender response(s). • Ultimately, an acceptable preferred vendor. 		
Assess the effectiveness and outcome of the contract negotiation and execution processed for construction services. Consider: <ul style="list-style-type: none"> • Ease of negotiation and agreement of terms. • How effective the contract was in assisting with the management of the relationship and project delivery. • Where applicable, how effective the contract was in assisting with the resolution of any issues or disputes. • The effectiveness of SLA's and KIP's agreed. 		
Complete a review of supplier performance in relation to areas such as: <ul style="list-style-type: none"> • Health and safety management. • Subcontractor management. • Scope and variation management. • Budget and budget management. • Quality management and delivery. 		
Assess the outcome of the procurement/contracting model i.e. did the contracting model deliver the desired outcome in the most cost effective manner for the University?		
<i>Other.</i>		

11. Benefit realisation plan

[This sections details the steps (plan) that will be followed to ensure that the benefits identified in the business case are fully realised by the end of the project or significant project phase.]

Benefit	Benefit measurement	Benefit evidence	Benefit owner	Realisation
<i>[Copy the benefit(s) description from the business case or benefits realisation plan]</i>	<i>[Describe how realisation of the benefits will be measured. How will we know when the benefit has been achieved to the desired level?]</i>	<i>[What evidence is there that the benefit has been achieved?]</i>	<i>[Name who owns the benefit.]</i>	<i>[Provide the date that the benefit was or is expected to be realised. Where realisation was/is delayed/deferred, this should be explained.]</i>

12. Further development needs and follow up

[This section details any actions that remain outstanding at the end of the project or significant project phase. This should record any items that are being carried over into subsequent phases or handed over from the project.]

12.1 Ongoing risks

[Review the project risk registers and identify if any of the risks remain active]

Risk	Owner
<i>[Remaining/residual project risk(s) being 'handed over']</i>	<i>[Record who is taking ownership of the risk and the associated treatment plan/steps]</i>

12.2 Documentation

[Record any documentation that has been agreed to be completed after the project has closed]

Risk	Owner
<i>[Document the risk]</i>	<i>[Record who is taking ownership of the activity and the anticipated completion date.]</i>

12.3 Key project artefacts

[Provide a list of all key project artefacts in order to ensure that the University has access to all relevant documentation and IP]

Document/artefact/process	Location
<i>[Identify the relevant document/ artefact /process. For example:</i> <ul style="list-style-type: none"> • <i>Business case(s)</i> • <i>Plans and schedules</i> • <i>Risk, issue, action and decision registers</i> • <i>Contracts</i> • <i>Variations]</i> 	<i>[Record the location of the final version of the respective artefact. Ensure that these are made available to the SPMO]</i>

12.4 Transition to BAU

[Provide detail of any transition management or handover activities that need to be progressed following the commissioning of the project. For example, in relation to a facility, the receipt of any and all service delivery manuals e.g. HVAC]

Transition task	Owner
<i>[Document the task]</i>	<i>[Record who is taking ownership of the task and the anticipated completion date.]</i>

13. Lessons Learnt

13.1 What worked well

[Provide a list of any aspects of the project that went better than expected or work well. These should be items to highlight to other projects that could be used to make overall project delivery more effective.]

Description	Recommendation
<i>[Record/explain the item/area that work well.]</i>	<i>[Record the recommendation/lesson learnt for future phases/projects that the University should take note of.]</i>

13.2 What didn't work as expected

[Provide a list of any aspects of the project that didn't go as well as expected. Often these are issues that occurred during project delivery but should not be limited to that. These could be issues for future projects hence should be called out here.]

Description	Recommendation
<i>[Record/explain the item/area that did not work well.]</i>	<i>[Record the recommendation/lesson learnt for future phases/projects that the University should take note of.]</i>

13.3 Team performance

[Review and identify what worked well and areas for improvement in relation to teaming and the overall performance of the project team (internal and external staff). Provide a list of any aspects of the project that did and didn't go as well as expected. Often these are issues that occurred during project delivery but should not be limited to that. These should be issues for future projects.]

Description	Recommendation
<i>[Record/explain the item/area of team performance that did/did not work well.]</i>	<i>[Record the recommendation/lesson learnt for future phases/projects that the University should take note of.]</i>

14. Recommendations

[Provide any recommendations that have been identified for the future enhancement or modification of the project management method.]

Description	Recommendation

15. Related Procedures and Documents:

Business Case Policy and Procedure

Project Post Completion Review Policy