Process Number:	BP.00.008.02	**Effective Date:**	01-July-2011
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Business Practice for Project Close

PURPOSE:
Provide for a uniform process for closing of T&I projects at CSU Channel Islands.

BACKGROUND:
The lifecycle of T&I projects is as follows:

1. Intake
2. Planning
3. Execution & Monitoring
4. Close

BUSINESS PRACTICE:

Accountability:
The VP for Technology & Innovation and T&I managers

Applicability:
All T&I employees

Definitions:
Please refer to BP-00-005, Business Practice on Project Intake for definitions.

Text:

Phase 4 – Project Close
A project that has either successfully or unsuccessfully been executed enters Phase 4 when either—

(1) All prior project phases have been successfully completed—a successful project, or

(2) The goals of the project have not been attained, and the client, or T&I governance, request that the project be discontinued after Phase 1 of the project has been completed—an unsuccessful project.

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The closing phase is required for all projects, regardless of class, that have completed Phase 1 (Project Intake) successfully. Project requests that have not completed Phase 1 successfully do not require project closure. Please refer to BP-00-005 Business Practice on Project Intake for more information about project intake.

Project Closure tasks

Closure of both successful and unsuccessful projects consists of:

(1) Collection of relevant project data into a project archive
(2) Communication with all project stakeholders and teams about the project closure
(3) Assessment of the projects successes, failures, costs, and lessons learned
(4) Turnover and assignment of operations support tasks to the appropriate University personnel

After the Project Lead completes the Project Closure tasks above, T&I governance shall give final approval to close the project.

Project data archive

To complete the project data archive, the Project Lead shall:

1) assemble a collection of documents for the project archive that is appropriate to both the project class and the last successfully completed project phase; and
2) submit the project archive in electronic format to the PMO prior to the closure of the project

For each chartered project, the project data archive shall consist of the following minimum collection of documents:

1) Project Charter
2) Project Closure form (or Project Cancellation form if the project has been cancelled)

The project data archive may also include the following documents:

1) Project Scope Statement
2) Project Schedule
3) Other Planning Package documents
4) Issue Log
5) Change Requests
6) Acceptance Testing Procedure/Checklist
7) Meeting minutes
8) Copies of all status reports
9) Copies of all written communication & marketing materials
10) Other client acceptance documents
11) Budget report
12) Task Summary (hours worked on project tasks by employee)

Project Close meeting

The Supervising Manager or Project Lead shall schedule and lead a Project Close meeting with the client. Project close meetings are required for all Class 3 and larger projects. For Class 1 + Class 2 projects, the Project Close meeting is optional but recommended.

Approval for Project Closure

The client must approve closure of any project. The date of their approval should be designated on the Project Closure Form.

T&I governance shall approve the closure of all projects, according to the project class:

1) Class 1 & 2 projects require only the Supervising Manager's approval to close.
2) Class 3 and larger projects require the VP for Technology & Innovation's approval to close.

Although verbal confirmation for project closure is acceptable, it is recommended that all acceptances for project closure from the client and T&I governance be provided in writing, via one of the following methods:

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