

Unit 17 – Handover and closure



Unit 17 - Learning Objectives

To gain an understanding of:

- The activities conducted as part of handover and project closure
- The benefits of closing a project efficiently

Handover and closeout overview

Handover and closeout is the fourth and final phase in the project life cycle. During this phase final project deliverables are handed over to the sponsor and users. Closeout is the process of finalising all project matters, carrying out final project reviews, archiving project information and redeploying the project team (APM BoK).

Handover consists of:

- Formal accepted by those responsible for using/ operating the product (a formal transfer of ownership is essential)
- Handing over of all associated product documentation e.g. manuals and certification
- Completion of commercial settlements
- Support such as training and warranties

Closeout consists of:

- Completion of all project documentation and archiving it as agreed
- Closing down the project team and associated infrastructure
- Reviewing project performance (hold post-project review/end project review)
- A final capture, consolidation and dissemination of lessons (lessons learned)
- A final project report to the sponsor
- Final a gate review to accept the final report and confirm the project closure

This phase serves the important function of allowing the project to enter into the operational environment. This decision will be based on the projects deliverables having achieved the agreed acceptance criteria; this will take place prior to the handover. By applying tests and checks to ensure that the deliverables are of an acceptable standard the project manager reduces the chances that the deliverables will be deemed unacceptable by the end user.

Generally a project manager will require the end user to sign a certificate of acceptance, this will confirm that the deliverables have been handed over and are acceptable. This “transfer of ownership” of the deliverables can be vital for contractual purposes.

During closeout the project manager will ensure that surplus project materials are disposed of. The project manager will ensure that contracts and purchase orders are finalised along with finalising project accounts. Project documents will require completion and archiving and the post-project reviews are carried out (which will become part of the projects lessons learned). The project manager will carry out performance appraisals of the team, the team will then be redeployed in a controlled manner.

Although handover and closeout is characterised as the final phase of the project life cycle these activities will go on throughout the project. Within each phase of the project there will be a specific piece of work that will be carried out. To move successfully to the next phase that piece of work will need to have been done to an acceptable standard, allowing the project to pass through the gate into the next phase.

This will require testing to ensure that the phase's deliverables have reached the agreed acceptance criteria and end of phase reports will be required which can then be fed into the end of project reports.

From a project control perspective, a substantial effort is necessary to track and record the testing and hand-over of the works. Meeting schedule requirements and complying with the sequential nature of bringing a process unit on stream in a logical and orderly manner requires the coordination of all resources through detailed planning.

From a cost control viewpoint, the Taking-Over certificate forms part of the documentary evidence supporting full and final settlement of all contract costs.

Benefits of handover and closeout

Efficient completion of this phase of a project is important for many reasons including:

- Ensuring that there is a clear transference of product ownership from the project team to the operational team
- Project costs are closed off
- Lessons are captured for the organisation to learn from and improve future project activities
- To celebrate success among those involved in the project
- To ensure that there is an audit trail of decisions and documentation
- To ensure that all commercial activities are completed and warranties etc. are in place

Learning Objectives

You should now gained an understanding of:

- The activities conducted as part of handover and project closure
- The benefits of closing a project efficiently