[Project Name]

Project#:

Author:	[Name]
Creation Date:	[Date – applicable format]
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Approval

Project Sponsor:

<u>Name</u>	<u>Signature</u>	<u>Date</u>
[please print]		

<u>Title</u>

Purpose of the Project Evaluation Report

The document summarizes the results of the project evaluation held as part of the project closing process. A project evaluation compares what the project actually achieved to the original commitments set out in the project charter and project plan which were developed in the initiating and planning processes. It also identifies lessons learned and potential enhancements for future projects.

The focus of project evaluation is the project management process and continuous improvement of the management process provides the rationale for undertaking a project evaluation. The project evaluation takes place at the end of the project. This is generally too soon to answer the question of whether the project results actually solved the problem or addressed the opportunity the project was chartered to solve or address. The matter of the effectiveness of the project result is addressed, rather, in a post implementation review. Such a review normally takes place 6 to 12 months after the end of the project, once its result has been in operation for a sufficient period of time that its effectiveness can be judged.

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Project Evaluation Report

1.0   Project Evaluation Process

(A comparison between the project charter and the project plan casts light on how the project management process operated through the planning phase. While this is a matter of interest, it does not examine questions of how well the plan was executed or how well execution was monitored and, more important, controlled. This approach limits the applicability of any lessons learned to the planning process. It is thus recommended that the charter, rather than the plan, be used as the baseline for the project evaluation. That said there may be benefits to comparing the charter to the plan and then the plan and the final result. Whichever approach is taken to the evaluation, the approach should be discussed in this section and the rationale for adopting that approach should also be discussed.)

(This section should also identify the dimensions of the project that were subject to evaluation [just scope, just scope, time, and budget, just HR or procurement, just integration, all 9 management domains] and the rationale for not examining whichever domains were not examined. The members of the review team and their project roles should also be identified as well as the process by which the evaluation was undertaken [facilitated or not, individual interviews or group process, etc.])

2.0   Evaluation Findings

(Each section of the charter or plan, as appropriate to the focus of this review, should be examined and the project results should be compared to the commitments made in the relevant initiation or planning document. The following tabular format may be helpful. Use one subsection of this section for each charter or plan section, as follows:)

2.1   Project Rationale (and Benefits)

Charter (Plan) Commitment	Project Outcome	Material Difference? (Y/N)
•	•	
•	•	
•	•	
•	•	

2.2   Major Deliverables

Charter (Plan) Commitment	Project Outcome	Material Difference? (Y/N)
•	•	
•	•	
•	•	
•	•	

2.3 Functions and Features

Charter (Plan) Commitment	Project Outcome	Material Difference? (Y/N)
•	•	
•	•	
•	•	
•	•	

2.4 Scope (plan only)
2.4 Quality (plan only)
2.4 Timelines and Milestones (plan only), etc.

3.0 Evaluation Conclusions

(Each material difference identified in the preceding section should then be analyzed for its significance and the lesson that should be drawn for the project management process in general should also be identified. This information can be summarized in the attached table. Use one subsection of this section for each charter or plan section, as in the previous section, as follows:)

3.1 Project Rationale (and Benefits)

Material Difference	Significance	PM Lesson
•	•	•
•	•	•
•	•	•
•	•	•

(For particularly significant lessons, a longer narrative can be attached to this report as an appendix.)

3.2 Major Deliverables

Material Difference	Significance	PM Lesson
•	•	•
•	•	•
•	•	•
•	•	•

(For particularly significant lessons, a longer narrative can be attached to this report as an appendix.)

3.3   Functions and Features

Material Difference	Significance	PM Lesson
•	•	•
•	•	•
•	•	•
•	•	•

(For particularly significant lessons, a longer narrative can be attached to this report as an appendix.)

3.4   Scope (plan only)
3.4   Quality (plan only)
3.4   Timelines and Milestones (plan only), etc.

4.0   Other Evaluation Findings and Conclusions

4.1 Outstanding Issues

(Use this section to identify any issues [materialized risk events] which remained unresolved at the end of the project. Such issues may indicate the need for a future project or for a new version of the result of this project.)

4.2 Lessons Learned

(Use this section to identify what the project team learned from the experience it gained on this project. This information can be organized under the headings below. "Went well" is understood as indicating either that results were as expected or that they exceeded expectations, providing "happy surprises". "Challenging" is understood as an area that presented difficulties but which difficulties were overcome – here the lessons learned will have to do with how those difficulties were surmounted. "Done differently" identifies areas where an entirely different approach would have proven much more productive – here the lessons learned will have to do with what that other approach would have been and how we might have identified that other approach. All projects encounter difficulties, just as risk characterizes all projects. That difficulties were encountered does not reflect poorly on the project management process, the project manager, or the project team. However, the failure to recognize and analyze difficulties does reflect poorly on the project manager and project team; honesty here is essential if we are to learn from experience and improve performance over time.)

4.2.1 What went well

4.2.2 What was challenging

4.2.3 What would be done differently

4.3 Project Successes

(Use this section to identify things that went particularly well on this project. The project team can give itself a particular "pat on the back" here.)

4.4 Recommendations for Other Project Management Improvements

(Use this section to identify any other process improvements that the project team has identified that did not fit easily in another section of the evaluation.)

Appendices