End stage report

Recording a review of the stage performance

[Ref filename & version]

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# Project manager’s report

# Review of business case

# Review of project objectives

# Review of management stage objectives

# Review of team performance

# Review of products

# Lessons

# Issues and risks

# Forecast

# Guidance on how to complete

***(Note: following completion of the End stage report the pages beyond this point can be deleted)***

## Purpose

An end stage report is used to give a summary of progress to date, the overall project situation, and sufficient information to ask for a project board decision on what to do next with the project.

The project board uses the information in the end stage report in tandem with the next stage plan to decide what action to take with the project; for example, authorize the next stage, amend the project scope or stop the project.

## Composition

An end stage report includes the following:

* **Project manager’s report** Summarizes the management stage performance
* **Review of the business case** Summarizes the validity of the project’s business case, including:
	+ benefits achieved to date
	+ residual benefits expected (remaining management stages and post-project)
	+ expected net benefits
	+ deviations from approved business case
	+ aggregated risk exposure
* **Review of project objectives** Review of how the project has performed to date against its planned targets and tolerances for time, cost, quality, scope, benefits and risk. Evaluates the effectiveness of the project’s approaches and controls
* **Review of management stage objectives** Review of how the specific management stage performed against its planned targets and tolerances for time, cost, quality, scope, benefits and risk
* **Review of team performance** In particular, provides recognition for good performance
* **Review of products** , including:
	+ **Quality records** Listing the quality activities planned and completed in the management stage
	+ **Approval records** Listing the products planned for completion in the management stage and their requisite approvals
	+ **Off-specifications** Listing any missing products or products that do not meet the original requirements, and confirmation of any concessions granted
	+ **Phased handover** (if applicable) Confirmation by the customer that operations and maintenance functions are ready to receive the release
	+ **Summary of follow-on action recommendations** (if applicable) Request for project board advice for who should receive each recommended action. The recommended actions are related to unfinished work, ongoing issues and risks, and any other activities needed to take the products handed over to the next phase of their life
* **Lessons**  (if appropriate) A review of what went well, what went badly, and any recommendations for corporate, programme management or customer consideration. Sourced from the lessons log (see section A.14) or any lessons reports that may exist
* **Issues and risks** Summary of the current set of issues and risks affecting the project
* **Forecast** The project manager’s forecast for the project and next management stage against planned targets and tolerances for time, cost, quality, scope, benefits and risk.

Where the end stage report is being produced at the end of the initiation stage, not all the above content may be appropriate or necessary.

## Derivation

An end stage report is derived from the following:

* current management stage plan and actuals
* project plan
* benefits management approach
* risk register, quality register and issue register
* exception report (if applicable)
* lessons log
* completed/slipped work packages
* updated business case.

## Format and presentation

An end stage report can take a number of formats, including:

* a presentation to the project board (physical meeting or conference call)
* a document or email issued to the project board
* an entry in a project management tool.

## Quality criteria

The following quality criteria apply to an end stage report:

* The report clearly shows management stage performance against the plan.
* Any abnormal situations are described, together with their impact.
* Any appointed project assurance roles agree with the report.