



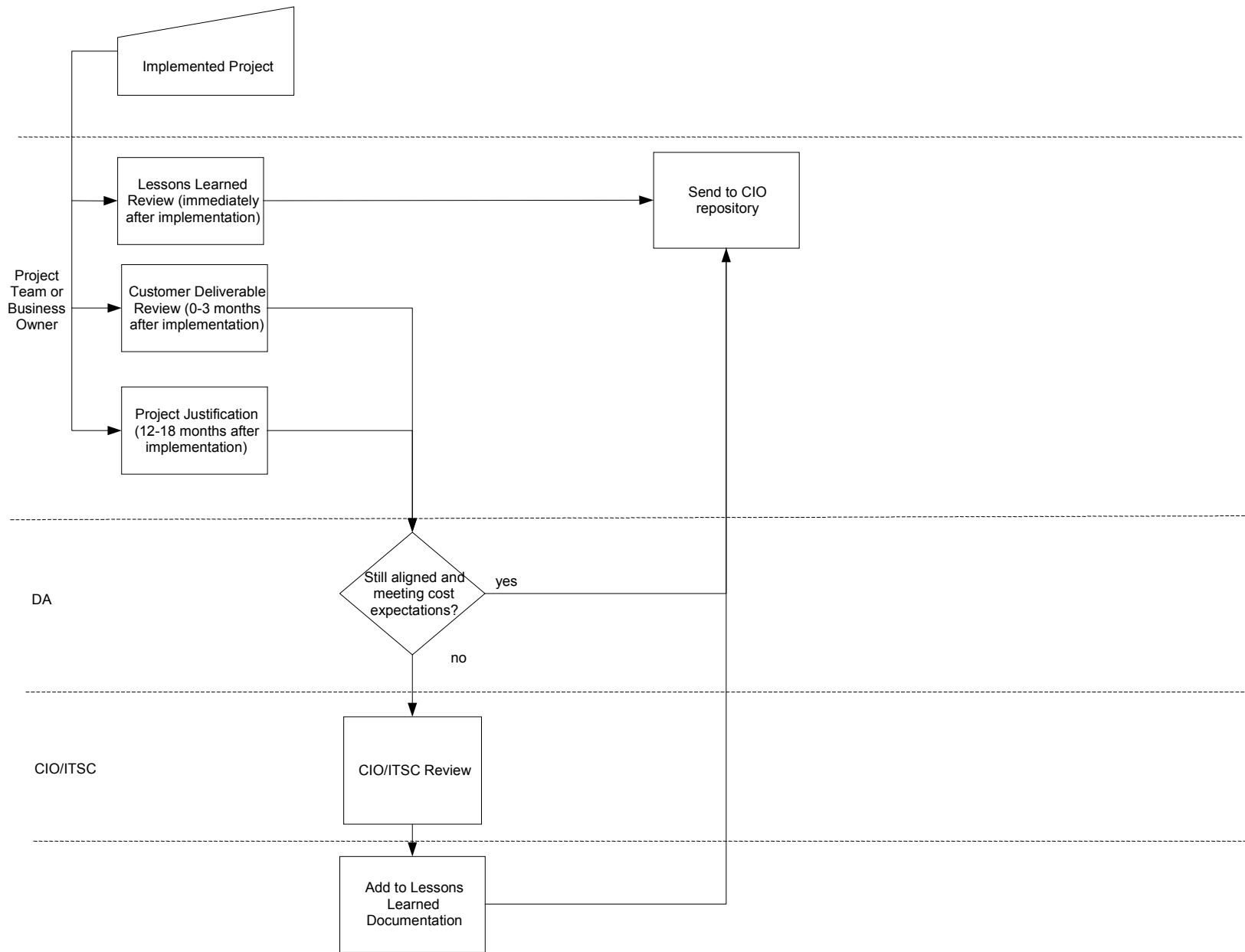
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# IT Investment Process

## Module 9 – Evaluate the Project

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May, 2003





**MODULE 9 – Evaluate the Project**

**Description** This module discusses the various evaluations that an implemented project goes through, including who completes them and when.

**Module Topics** Topic 9.1: Documenting Lessons Learned  
Topic 9.2: Project Outcome Review  
Topic 9.3: Project Justification Review

**Target Skills** Upon completion of this module, you will be able to:

- Document Lessons Learned;
- Complete a Project Outcome Review;
- Complete a Project Justification Review.

**Module Tools**

- Evaluate the Project Responsibility Flow
- Lessons Learned Document
- Project Evaluation Scorecard

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**Topic 9.1**

**Documenting Lessons Learned**

• Once the project is complete and goes into maintenance mode, it is important to capture lessons learned and determine if the system is providing the intended value to DWD. Immediately after implementation, the Project Manager must complete a Lessons Learned document. This document is instrumental in sharing the experience of the project team with others that may be in project development stages. The Lessons Learned document captures practices, tools and methods that are recommended and non-recommended. This document should be provided to the CIO Office for Department-wide sharing.



**Topic 9.2**

**Project Outcome Review**

Measurement of system value is done using the metrics set forth in the Project Charter. Measuring system value is done in several iterations, beginning with the Project Outcome Review. The Business Owner and Project Team (if still available) along with system stakeholders, complete the Project Outcome Review 0-3 months after project implementation. This review captures how the system is achieving the goals described in the Project Charter and describes any additional benefits achieved by the system. If the system is not achieving the goals as stated in the Project Charter, action items to address this should be documented as part of the review. The review is completed using the Project Evaluation Scorecard template. This Review is shared with the Division Administrator and the CIO Office.

**Topic 9.3**

**Project Justification Review**

The next review is completed 12-18 months after project implementation. This review, called the Project Justification Review, revisits the Project Outcome Review to ensure that goals are still being achieved. This review also revisits the Cost Benefit Analysis completed during the Project Justification stage to see if the savings projected for year 1 have been realized. The review is completed using the Project Evaluation Scorecard template. It is completed by the application owner's business unit and is shared with the Division Administrator and the CIO Office.

All reviews are tracked by the CIO Office through the Approved Portfolio Project List. All reviews are documented in the CIO Office's annual report to the ITSC on project status. If evaluated projects are found to not be providing value or not achieving the savings predicted, the ITSC may decide to remove the system from the IT Investment Portfolio or take remedial action.

**END OF MODULE 9.**

**CONTINUE TO MODULE 10.**

## LESSONS LEARNED

### Evaluate the Project Stage Cover Sheet - Lessons Learned

<b>Description</b>	The Lessons Learned document captures process, tools and methods that are recommended and non-recommended for use. There is an explanation of recommendation or reason for not recommending associated with each Process/Tool/Method, as well as contact name and number. This document is instrumental in sharing the experience of the project team with others that may be in that project development stage.
<b>Timeframe</b>	The Lessons Learned document should be completed immediately after project implementation.
<b>Owner</b>	The Project Manager
<b>Reviewer</b>	CIO Office
<b>Inputs</b>	Process/Tools/Methods Used, Ideas for Recommendation or Not Recommending, Contact Name, Contact Number.

## PROJECT EVALUATION SCORECARD

### Evaluate the Project Stage Cover Sheet - Project Evaluation Scorecard

<b>Description</b>	<p>The Project Evaluation Scorecard should be completed as part of the Customer Deliverable Review (done at 0-3 months after system implementation and as part of the Project Justification Review (done 12-18 months after implementation).</p> <p>The Scorecard contains an Operational Evaluation as well as a Cost-Benefit review. The Operational Evaluation takes the goals from the project charter and compares them to the actual outcome using measurement tools and assigning a score.</p> <p>It also documents any additional benefits and the variance between the project goals and the actual outcome.</p> <p>The Cost-Benefit review should be conducted 12-18 months after system implementation. A 5 year and annual estimate from the approved CBA should be filled in. Then, for each year the actuals are compared to the estimates.</p>
<b>Timeframe</b>	<p>The Operational Evaluation should be done as part of the Customer Delivery Review (0-3 months after system implementation) and as part of the Project Justification Review (12-18 months after system implementation).</p> <p>The Cost-Benefit spreadsheet should be completed as part of the Project Justification Review (12-18 months after the implementation) and then the actuals should be filled in over the next 5 years.</p>
<b>Owner</b>	<p>The Project Team and system stakeholders should complete the Operational Evaluation.</p> <p>The Cost-Benefit spreadsheet should be completed by the application's owning business unit</p>
<b>Reviewer</b>	CIO Office and Division Administrator
<b>Inputs</b>	Project Charter, Cost-Benefit Analysis.