

Project Closeout Checklist ¹

| Post Implementation Review (PIR) | |
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| Has a Lessons Learned exercise been conducted to capture the positive as well as negative lessons from the project? | <input type="checkbox"/> |
| Has Lessons Learned input been received in the key project areas? | <input type="checkbox"/> |
| Has input been documented as received in the Lessons Learned exercise and provided to the project manager? | <input type="checkbox"/> |
| Have the users of the final deliverables been surveyed to validate their satisfaction? | <input type="checkbox"/> |
| Was feedback solicited from a diverse audience? | <input type="checkbox"/> |
| Has a plan been implemented to measure the achievement of the project objectives and proposed benefits? | <input type="checkbox"/> |
| Did the delivered scope include all the original business, technical and operational requirements, plus approved change orders? | <input type="checkbox"/> |
| Were the project costs reviewed to check for success in meeting cost targets? | <input type="checkbox"/> |
| Were project schedules reviewed to check for success in meeting delivery schedules? | <input type="checkbox"/> |
| Are the causes of significant variances to scope, schedule, or cost documented in the Lessons Learned and stored in a Lessons Learned electronic library? | <input type="checkbox"/> |
| Is the Post Implementation Review readily available for others to review? | <input type="checkbox"/> |
| Has the Post Implementation Review been submitted to the Project Management Center of Excellence (PMCoE)? | <input type="checkbox"/> |

| Staffing Transfer / Release | |
|---|--------------------------|
| Is the Staffing Transfer / Release approach approved by Human Resources? | <input type="checkbox"/> |
| Are employees informed about options? | <input type="checkbox"/> |
| Have all project staff been released or reassigned? | <input type="checkbox"/> |
| Is information posted about transfers? | <input type="checkbox"/> |
| Has systems and product knowledge been transferred to the maintenance and operations staff? | <input type="checkbox"/> |
| Are all staff employment files updated? | <input type="checkbox"/> |

| Contract Closeout and Financial Closure | |
|--|--------------------------|
| Have vendors and staff been notified of financial closing date? | <input type="checkbox"/> |
| Has each contract been audited to verify acceptance and delivery? | <input type="checkbox"/> |
| Have all acceptance criteria been met prior to final payment to contractors? | <input type="checkbox"/> |
| Has a Final Consultant Contract Payments Reporting Form been completed by the consultant for each contract and submitted to City Contracting Services? (If applicable) | <input type="checkbox"/> |
| Have all contract records been included in the project archives? | <input type="checkbox"/> |
| Have all project invoices and financial obligations been resolved? | <input type="checkbox"/> |

¹ This checklist was adapted from the Washington State DIS Project Framework Checklist available at: <http://www.dis.wa.gov/pmframework/checklist.htm>. Additional sources include the PMCoE Tollgate Review Checklist and the PMBOK 2000.

| | |
|---|--------------------------|
| Have all project assets (hardware, software, applications, tools, and facilities) been transferred or disposed? | <input type="checkbox"/> |
| Have the procedures for retaining the financial records been implemented? | <input type="checkbox"/> |

| Project Archive | |
|--|--------------------------|
| Have the hardcopy documents been stored or archived according to project documentation standards? | <input type="checkbox"/> |
| Are any hardcopy documents that would be useful for future projects available through the Project Library? | <input type="checkbox"/> |
| Does the folder structure used to store electronic documents meet project documentation standards? | <input type="checkbox"/> |
| Does the archive contain an index file describing the documents in the archive? | <input type="checkbox"/> |
| Does the maintenance team have access to all the documents that could help them maintain the project's deliverables? | <input type="checkbox"/> |
| Have the "Lessons Learned" documents been stored in a Lessons Learned electronic library? | <input type="checkbox"/> |

| Maintenance & Operations | |
|---|--------------------------|
| Is the Maintenance & Operations Plan finalized? | <input type="checkbox"/> |
| Have maintenance staff been identified and assigned? | <input type="checkbox"/> |
| Has the Maintenance & Operations Plan been communicated to the project team, maintenance staff and internal and external stakeholders and accepted? | <input type="checkbox"/> |
| Do the maintenance team members understand the processes outlined in the Maintenance & Operations Plan and understand the consequences of not following it? | <input type="checkbox"/> |
| Is system documentation being kept up to date? | <input type="checkbox"/> |
| Are maintenance activities, resource requirements and other maintenance obligations included in your budget? | <input type="checkbox"/> |
| Are maintenance activities and process routinely measured against goals? | <input type="checkbox"/> |
| Is the product or service performing well against the established standards? | <input type="checkbox"/> |
| Do the maintenance team members understand the warranty, support, and Service Level Agreements? | <input type="checkbox"/> |
| Have Disaster Recovery and Business Continuity Plans been documented and tested? | <input type="checkbox"/> |

| Celebrate | |
|---|--------------------------|
| Are you celebrating when you should? | <input type="checkbox"/> |
| Is your planned celebration consistent with City and department professional and ethical standards? | <input type="checkbox"/> |
| Have you invited everyone involved in the project to the celebration? | <input type="checkbox"/> |

| Approval | |
|---|--------------------------|
| Has the project sponsor signed off on the closeout stage? | <input type="checkbox"/> |