

## Project Closeout Checklist <sup>1</sup>

Post Implementation Review (PIR)	
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"/>

<sup>1</sup> 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"/>

<b>Project Archive</b>	
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"/>

<b>Maintenance &amp; Operations</b>	
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"/>

<b>Celebrate</b>	
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"/>

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