**Project name**

## goal *The main goal of close out is to formally end a project phase and/or the project itself. Other goals of close out include:*

## *The gathering of lessons learned and the analysis and sharing of those lessons for the benefit of future projects*

## *To celebrate and recognize the accomplishments and work of the project team*

## *Releasing staff back to their regular work or other projects*

## *Making sure all relevant project documentation is classified and filed for audit or future projects purposes, and*

## *Ensuring that contractual and financial obligations are complete (or transferred for fulfillment).*

## Tips *Make the gathering of lessons learned an ongoing process throughout all stages of the project. The upside of this is that your team will learn as the project progresses and it will ease the process at the end of the phase or project.*

## who to engage in close out? *Think beyond just your core project team when gathering feedback for the lessons learned. This may include any people or groups who contributed to the success of your project without formally being/ have been considered “part of the team”, however have valuable insights for your project and future projects.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Close out CHECKLIST USE THIS LIST TO HELP YOU PREPARE FOR THE PROJECT CLOSE OUT | | | | | |
| **Project Name:** | | **Project Code:** | | | |
| **Completed By:** | | **Date:** Click here to enter a date. | | | |
| Item | Description | Y | N | N/A | Comments |
|  | Has the final status report been submitted? |  | X |  |  |
|  | Are contracts/SOWs completed and invoices paid? |  |  |  |  |
|  | Is the Lessons Learned Report complete? |  |  |  |  |
|  | Have you communicated/presented your lessons learned to your team, division and/or other interested areas? |  |  |  |  |
|  | Has all project documentation been transferred from collaboration tools (e.g. SharePoint and individual Outlook mailboxes) to the office recordkeeping system? |  |  |  |  |
|  | At the end of the project, has the project SharePoint site been deleted? |  |  |  |  |
|  | Has the project been closed out in the project management Tool |  |  |  |  |
|  | Has the project team been released from the project? |  |  |  |  |
|  | Has the supervisor of each FTE been given a letter or email, detailing their employee’s accomplishments on the project? |  |  |  |  |
|  | Have recommendations from PIA/STRA been accepted? |  |  |  |  |
|  | Has a transition to operation plan been completed? |  |  |  |  |