

Checklist instructions: All text in italics is instructional and will help you to complete the checklist. It should be removed from your document.

The following outlines the key activities that should be done and questions that should be answered in the Close phase of a project. It should be reviewed before beginning the Close phase and then periodically after that to remind you of what still needs to be done. Many project managers find it useful to have a printed copy of the checklist at their desk for easy reference.

Space is included at the bottom of the list to include any additional activities you may need to do during this phase.

Close Phase Checklist

Activity / Question	Tool/Template	Complete?
Have you reviewed the funder's evaluation requirements, if any?	Evaluation Plan	
Have you reviewed the evaluation needs with your project team and discussed the specific steps that need to be taken to evaluate the project?	Evaluation Plan	
For your internal project evaluation, have you reviewed the Project Overview Statement and noted any areas where the finished product didn't meet the intended scope?	Project Overview Statement	
Have you reviewed the budget and noted where your project was over or under budget?	Budget	
Have you reviewed the feedback from the product or service review (and pilot, if applicable) and listed any quality or design issues that were identified?	Evaluation Plan	
Have you identified other areas where the project went well and where there were challenges?	Evaluation Plan	
Have you completed the evaluation report for the funder?	Evaluation Report	

Activity / Question	Tool/Template	Complete?
Have you had the evaluation report reviewed and approved, if needed, by the Project Sponsor or Steering Committee?	Evaluation Report	
Have you submitted the evaluation report to the funder, as well as any project materials (e.g., final budget) that they require?	Evaluation Report	
For your internal project evaluation, have you reviewed your notes on scope, budget, review feedback and other areas where the project worked well or was challenged with the project team?	Lessons Learned	
Has the project team's input on what went well and what was challenging with the project been noted?	Lessons Learned	
Have you turned your and the project's notes internal evaluation notes into an easy-to-reference guide which can be used for future projects?	Lessons Learned	
Have you gathered all of the relevant project materials into one place (i.e., a CD, computer server or a binder?)		
Have you organized these materials in a way that will be easy to reference for future projects (e.g., by lifecycle phase or project management process)?		