

# End-of-Phase Checklist

**Project Name:**

Item Description	Completion Date	Comments	Reason for NOT Completing
<b>Origination</b>			
<b>Develop Project Proposal:</b>			
Formulate business need/problem and anticipated benefits to all parties			
Review project's fit with organization's mission			
Identify project objectives			
Research potential approaches and solutions			
Identify and recommend one (or more) chosen solution(s)			
Review solution's fit with organization's strategic plan			
Estimate costs of all resources and materials required for the project, both initial and recurring			
Identify potential project risks			
Identify organizational impacts of the project			
Identify any legislative, regulatory or policy dependencies or implications of the project			
Perform project cost/benefit analysis			
Identify project funding strategies			
Complete Business Case and Proposed Solution forms			
<b>Evaluate Project Proposals:</b>			
Submit Project Proposal to the Selection process			
Schedule and conduct proposal presentation			
Identify and/or utilize proposal screening criteria			
Identify and/or utilize proposal rating criteria and methods			
<b>Select Projects:</b>			
Identify and/or utilize proposal prioritization criteria			
Evaluate projects' requirements vs. organizational capacity			
Recommend projects for selection			
Choose projects for initiation			
Notify Project Sponsor of unfavorable screening outcome			
Document decision process and outcome for each proposal			
Complete Proposal Decision Notice			

Item Description	Completion Date	Comments	Reason for NOT Completing
forms			
Get signatures from Project Selection Committee members			
Notify Project Sponsor(s)			
<b>IT Priorities:</b>			
Enter project into IT Priorities			
Score project to classify as silo project or PMO project			
<b>Initiation</b>			
<b>Prepare for the Project:</b>			
Identify and assign the Project Manager			
Identify Project Sponsor			
Identify Project Team Members			
Identify Customer Representatives			
Review historical information			
Document how issues were resolved and decisions made			
Review Project Charter template			
Work with Project Sponsor and Project Team to gain consensus on project expectations			
Write the Project Charter document			
Schedule time and location of kickoff meeting			
Invite appropriate attendees			
Prepare meeting presentation and agenda			
Designate meeting scribe			
Prepare materials for distribution at meeting			
Conduct kickoff meeting			
Distribute notes to all attendees			
Establish the project repository			
Update the repository with all project correspondence			
<b>Define CSSQ:</b>			
Write the Project Scope Statement			
Create preliminary list of roles and skills required			
Complete the Project Schedule Worksheet			
Create High-Level Schedule			
Identify agency's existing quality standards, if any			
Identify and document quality standards for each deliverable			
Develop staff and materials acquisition plans			
Estimate costs of all resources			
Calculate the preliminary project budget estimate			

Item Description	Completion Date	Comments	Reason for NOT Completing
<b>Perform Risk Identification:</b>			
Solicit input on risk identification from Project Team, Project Sponsor, and Customer Representatives			
Analyze scope, charter, historical information			
List all risks identified			
<b>Develop Initial Project Plan:</b>			
Identify Internal and External Stakeholders			
Outline Stakeholders' roles and responsibilities			
Understand Stakeholder communication requirements			
Write Communication Plan			
Compile all documentation and deliverables from Project Initiation			
Produce Initial Project Plan			
<b>Confirm Approval to Proceed to Next Phase:</b>			
Review and refine the Initial Business Case			
Review all other deliverables from Project Initiation			
Obtain buy-in from other managers			
Organize deliverables into package			
Prepare formal approval form			
Present approval package to Project Sponsor for signature			
Resolve any issues			
Update package as needed to resubmit to Project Sponsor			
<b>Get Approval Signature</b>			
<b>Project Planning</b>			
<b>Conduct Planning Phase Kick-Off:</b>			
Ensure team members have whatever is required to perform their tasks			
Meet with each team member to convey roles and responsibilities			
Mentor or assign Team Leader to mentor new team members			
Distribute copies of all project materials and deliverables to all team members			
Hold orientation sessions			
Review previous deliverables and components of Initial Project Plan			
Schedule time and location of kick-off meeting			
Prepare materials for distribution at meeting			
Invite appropriate attendees			

Item Description	Completion Date	Comments	Reason for NOT Completing
Prepare meeting presentation and agenda			
Designate meeting scribe			
Conduct kick-off meeting			
Distribute meeting notes to all attendees			
Update the project repository with all project correspondence			
<b>Refine CSSQ:</b>			
Refine the Project Scope statement, breaking deliverables into smaller pieces of work			
Clearly define each deliverable			
Write description of scope change management			
Estimate effort and cost for each task and enter into schedule			
Define dependencies among tasks			
Review quality standards and revise as necessary			
Initiate/address procurement			
Recalculate budget			
<b>Perform Risk Assessment:</b>			
Review identified risks with Project Team and Project Sponsor			
Create Risk Management Worksheet			
Assess each risk (low/med/high)			
Estimate timing of impact on project			
Determine mitigation actions			
Incorporate actions in Project Schedule and Project Plan			
<b>Refine Project Plan:</b>			
Compile detailed descriptions of all work products and deliverables			
Define and document change control process			
Define and document acceptance management process			
Define and document issue management and escalation process			
Refine Communications Plan			
Define and document Organizational Change Management Plan			
Capture baseline Project Schedule (effort and cost)			
Evaluate team member skills and identify training needs			
Establish Training Plan			
Define and document Implementation and Transition Plan			
Add above items to Project Plan			
<b>Confirm Approval to Proceed to Next Phase:</b>			

Item Description	Completion Date	Comments	Reason for NOT Completing
Review Business Case and refine, if necessary			
Review all deliverables from Project Planning			
Organize deliverables into package			
Prepare formal approval form			
Present acceptance package to Project Sponsor for signature			
Resolve any issues			
Update package as needed to resubmit to Project Sponsor for signature			
<b>Gain Approval to Proceed</b>			
<b>Execution and Control</b>			
<b>Conduct Execution and Control Kick-off</b>			
Ensure team members have whatever is required to perform their task			
Meet with each team member to convey roles and responsibilities			
Distribute copies of all project materials and deliverables to all team members			
Hold orientation sessions for new members			
Review previous deliverables and components of Project Plan			
Schedule time and location of kick-off meeting			
Prepare materials for distribution at meeting			
Invite appropriate attendees			
Prepare meeting presentation and agenda			
Designate meeting scribe			
Conduct kick-off meeting			
Distribute meeting notes to all attendees			
Update the project repository			
<b>Manage CSSQ:</b>			
Update and analyze the Project Schedule as needed			
Conduct peer review of deliverables, if appropriate			
Implement quality checklists			
Conduct project audits			
Manage the budget by monitoring financial performance regularly			
Update project repository			
<b>Monitor and Control Risk:</b>			
Review identified risks with Project Team and Project Sponsor			

Item Description	Completion Date	Comments	Reason for NOT Completing
Re-evaluate each risk			
Update Risk Management Worksheet regularly			
Execute contingency plans or modify them, if necessary			
Create new contingency plans to accommodate new risks			
Update project repository			
<b>Manage Project Execution:</b>			
Execute change control process when necessary			
Gain acceptance and approval of all deliverables			
Identify and resolve issues, escalating them if necessary			
Provide timely communications according to Communications Plan			
Prepare Project Status Report regularly			
Conduct status meeting with Project Sponsor regularly			
Ensure status meetings are being held with Project Team regularly			
Conduct training for support personnel			
Conduct training for Consumers			
Communicate rollout information			
Conduct training for Project Team members and update Training Plan			
Allocate and assign work to Project Team members			
Conduct team building activities			
Reward team members			
Manage Project Team member changes			
Manage changes to Customer's organization			
Acquire necessary physical space and equipment to support the product			
Transition product to Performing Organization			
Update the project repository			
<b>Gain Project Acceptance:</b>			
Prepare final Status Report			
Prepare formal Project Acceptance Form			
Conduct final Status Meeting with Project Sponsor and present Project Acceptance Form			
Resolve any issues			
Gain final project acceptance signature from Project Sponsor			

Item Description	Completion Date	Comments	Reason for NOT Completing
<b>Close Out</b>			
<b>Solicit Feedback:</b>			
Prepare surveys			
Distribute or review surveys with appropriate participants			
Gather survey results			
Review and analyze survey results			
Summarize feedback for presentation at Project Assessment Meeting			
<b>Conduct Project Assessment:</b>			
Schedule Project Assessment Meeting			
Select and invite appropriate meeting participants			
Review and distribute survey summary results			
Gather notes and meeting results for inclusion in Post-Implementation Report			
Use survey feedback and meeting results to identify lessons learned and best practices			
Document each lesson learned			
Document best practices			
Develop action plans to implement lessons learned and best practices			
<b>Prepare Post-Implementation Report:</b>			
Gather summarized survey feedback, notes from Project Assessment Meeting, lessons learned and best practices			
Present or distribute report to Performing Organization Management			
Send copy of report to OFT			
<b>Update Skills Inventory and Provide Performance Feedback:</b>			
Establish skills inventory system, if one does not exist			
Update skills or add skills to inventory system for each Project Team member			
Write performance feedback on each Project Team member			
Discuss performance feedback with each Team member			
Forward feedback to team member's immediate supervisor			
<b>Archive Project Information:</b>			
Gather all project information			
Archive information in project			

Item Description	Completion Date	Comments	Reason for NOT Completing
repository			
Locate hardcopy repository in designated documentation area			
CELEBRATE! Your project is complete!			