Guidance for Forming a Project Close-out Team

A. Responsibility for forming the project close-out team

The country representative (CR) is responsible for ensuring each project has a project close-out team established in sufficient time to plan and execute a timely and accountable close-out. The head of operations (HoOps) and head of programming (HoP), working with the project manager (PM) or chief of party (CoP), typically identify the members of the close-out team and the CR confirms supervisors' support for their participation. See Standard 16, key action 1 for additional guidance, including on forming close-out teams for multi-country or global projects.

B. Composition of the project close-out team

CRS project close-out teams represent the various departments and units whose engagement is crucial for a comprehensive and well-coordinated project programmatic, administrative, and financial close-out, and timely award closure where applicable. At minimum, a CRS project close-out team should include the following:

Department/position[1]	Typical close-out responsibilities	Periods of greatest involvement
Programming	NOTE: All members of the close-out team participate in developing the close-out plan	
• Project lead (PM/CoP)	Overall team leadership; manage development and implementation of the close-out plan	Throughout the close-out process
• MEAL staff	Final evaluation (FE) reporting, learning; data exit strategy	FE planning and implementation; final technical reporting
Finance staff (finance manager, grant manager, other)	Support financial planning and analysis throughout close-out; prepare information needed for asset disposition and HR close-out; prepare final financial reports and payments	Monthly budget comparison reviews; final quarter (final sub-recipient liquidations); final post-project end date reporting
Human resources staff (HR manager or officer)	Support PM/CoP with planning and budgeting for project staffing close-out, communicating to staff, and staff exit/transition processes	Early in process to develop and communicate staffing close-out plans; as staff depart the project
Supply chain management (incl. procurement)	Support with asset disposition; final procurement of goods and services; final distribution of goods to end-users; final reports	(Depends on donor requirements) 3-6 months before project end date for disposition activities; final month; post-project reporting
Other operations		
• HoOps or Ops manager	Coordination of operations support, including for logistics for close-out activities; compliance with donor and government regulations	Throughout the close-out process, but more intense in last 3-6 months and immediately after project end
• ICT staff	Finalization and implementation of project data exit strategy (data protection, archiving project information, updating systems); proper disposition of project ICT equipment	Final months of project, especially after all project MEAL data has been collected

[1]**Programming** close-out team members may also include partnership staff and programming technical advisors. **Supply chain management** close-out team members may include logistics, fleet management, inventory management, and facilities management staff, or the admin. Manager if he/she covers procurement functions. **Other operations** close-out team members may also include the admin. manager, especially for projects with significant close-out events and logistics.

The following table illustrates how the composition of the project close-out team might vary depending on the nature and complexity of the project.

Table: Variations in project close-out team composition by project type – ILLUSTRATIVE, adapt as needed

	Single-country 1550-funded project or small institutional donor-funded project[2]	Single country, medium-sized institutional donor-funded project	Single country, complex project (e.g. FFP, FFE, FFPr, Global Fund)	Multi-country project (*=Team members in each participating country)
Programming[3]	- PM - HoP	- CoP or Project Director - PM(s) - MEAL manager - HoP as needed	- CoP or Project Director - DCoP - MEAL manager - Key leads for sectors/activities *(titles differ by project structure)* - HoP as part of **Close-out Core Group** (see section C below)	- CoP or Project Director *PMs (each country) *HoP (each country) *MEAL manager (each country)
Finance	Finance manager	Finance manager	- Finance manager - Grant manager or grant accountant(s), if part of team	*Finance manager (each country) - Grant manager or grant accountant(s), if part of team
Human resources	HR officer, if needed	HR manager or officer	HR manager	*HR manager or officer (for national staff – each country) - Project Ops manager (if part of grant team, for international staff)
Supply chain management	Supply chain/procurement manager or admin manager	- Supply chain or procurement manager - Admin manager	- Supply chain or procurement manager - Logistics manager - Fleet manager	*Supply chain/procurement manager or admin manager (each country)
ICT	ICT officer	ICT manager or officer	ICT manager	*ICT manager or officer (each country)
Cross-cutting Ops	HoOps/Ops manager	HoOps/Ops manager	HoOps as part of **Close-out Core Group** (see below)	*HoOps/Ops manager (each country) - Any central **project** Ops manager/DCoP
Other		Head of Office (if applicable)	- Head(s) of Office (if applicable) **Close-out Core Group** (see below)	

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[2] This refers to a standalone 1550 project, not a 1550 project that is cost share under an award. Cost share projects should be closed out by the same team closing out the related award. Small institutional donor funded projects refers to projects of low complexity, for example a $50,000 - $100,000 project funded by a small family foundation with no close-out requirements beyond a final narrative and financial report.

[3] Note that all staff who are direct-charged to the project (e.g. (senior) project officers, field officers, etc.) are considered members of the project close-out team responsible for programming close-out. However, they may not participate in wider meetings of the cross-discipline project team. They would instead meet regularly with the close-out team lead (the PM/CoP, etc.) to update on the status of close-out activities for which they are responsible.

C. Complex and multi-country project close-out: additional leadership and coordination

For single-country complex projects[4] and multi-country projects, in addition to the close-out team, form a higher-level **Close-out Core Group,** with the mandate to provide overall guidance and high-level oversight to the close-out process, make major decisions, and lead management of sensitive issues.

- The Close-out Core Group is not involved in day-to-day project close-out activities, but meets at the beginning of the close-out process, and then at a set frequency or as needed throughout close-out.
- In a **complex, single-country project**, the Close-out Core Group would typically consist of the CR, HoP, HR Manager, CoP, and HoOps.
- In a **multi-country project**, the Core Group would consist of the CoP/Project Director, the CR for each participating country, and regional staff, such as DRDs and key RTAs (note that regional staff participation in the Core Group is particularly important for multi-region projects).
- For centrally-funded awards, the Close-out Core Group may also include IDEA staff.

D. Leadership of the close-out team and day-to-day close-out process

The PM or CoP/project director provides leadership for the close-out process and oversees the coordination of the close-out team's activities. The PM or CoP/project director works in close coordination with the HoOps and HoP to ensure follow up by other members of the close-out team, particularly those members of the team who are not part of direct-charged project staff.

For global grants/multi-country projects with multiple levels of the project close-out team, the in-country PM should coordinate the day-to-day of country program-level close-out. The CoP/project director coordinates the global close-out team's day-to-day activities.

> Good practice is for the PM or CoP/project director to convene regular check-in meetings of the project close-out team, typically:
> - **Monthly** following development of the project close-out plan until 4-6 months before the project end date (for multi-year projects)
> - **Every two weeks** starting 3-5 months before the project end date (for projects $\leq$12 months, start with meetings every two weeks)
> - **Weekly** in the final month before the project end date and following the project end date/award expiry through the completion of all close-out activities

For multi-country projects, each country-level close-out team should organize check-ins per the schedule above. The global CoP/project director may also plan regular check-ins with individual country program teams, or with the group of country program close-out team leads.

For close-out of projects of 12 months or less, and for projects where the operating environment is especially dynamic, adjust the above – when in doubt, plan for more frequent meetings to check in on progress and problem-solve.

See Standard 16, key action 3 for additional guidance on coordinating and monitoring implementation of the close-out plan.

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[4] E.g. multi-year FFP awards, FFE, FFPr, Global Fund PR awards, larger foundation-funded projects.