

**Checklist: Project Close-out Team Check-in Meetings**

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| **INSTRUCTIONS**  The PM/CoP or other coordinator of the project close-out team adapts this checklist as needed and uses it to guide discussions in regular check-in meetings of the project close-out team. For more information on close-out check-in meetings, see the guidance and resources for CRS [**project management standard 16, key action**](http://compass.crs.org/closeout/standard16/keyaction3) **3: Closely monitor and manage implementation of the close-out plan, including timely communication with the donor.** |

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|  | Review the **status of action items** from the prior check-in meeting |
|  | Identify any planned **activities that are behind schedule[[1]](#footnote-1)** and discuss:  **Who** will do **what** and **when** to get the activity back on track  A realistic **revised completion date**, if needed |
|  | Review the **status of approvals** needed (internal or donor) to advance close-out actions  For pending approvals, identify who needs to follow up, with whom and when |
|  | Discuss any **questions or concerns** related to close-out activities  If the team cannot fully answer a question or address concern, identify who needs to follow up, with whom, to resolve the question or concern |
|  | Review any close-out issues for **follow-up with partners**  Identify the issue, the partner, who will follow up, and when |
|  | Discuss **staffing changes, staff leave, or other staffing-related issues** that may affect completion of activities in the project close-out plan |
|  | Review any **close-out related risks and issues** in the project risk register and issues log; update the management plan and risk and issue status as needed; and identify, discuss, and document any new risks or issues |
|  | Identify any **follow-up** needed with country program **senior management and/or IDEA staff** (as applicable), especially as relates to close-out risks and issues |
|  | Summarize all next steps/follow-up **actions agreed** to and **individuals responsible** |

1. For smaller close-out teams/shorter close-out plans, it may be useful to review the status of all activities in the close-out plan. For complex projects with extensive close-out plans, it is recommended that each member of the close-out team who is responsible for a specific activity updates the status of that activity in the close-out plan before the check-in meeting. The PM/CoP should review the status of all activities before the meeting and help focus check-in discussion on activities that are behind schedule or at risk of falling behind. [↑](#footnote-ref-1)