Project Checkpoint Checklist

The purpose of this checkpoint procedure is to leave your project or position so it can be successfully inherited and/or restarted by another person. (A *checkpoint* is a point where a project's normal operation is momentarily suspended to determine its status.)

Date _____ **Project** _____ **Name** _____

Organize Physical Files

☐ Make sure all physical files (folders, archives, notebooks, etc.) are organized and labeled

Organize Computer Files

☐ Make a list of filenames with brief descriptions, designating whether active or non-active

☐ Printout all text files, place in notebook, label notebook

Organize Source Materials

☐ Manuals

☐ Cassette interview tapes

☐ Other (specify)

Write Status Report

☐ Develop a written Project Status Report, including brief history, SMEs (Subject Matter Experts), what remains to be done, recommended actions, Do-List

Conduct a Checkout Meeting

Review the following with your manager and replacement (use Checkout Meeting Agenda on the next page, as outline):

☐ Project(s) Status Report(s)

☐ Physical files

☐ Computer files

☐ Source materials

☐ Paperwork

Submitted Date _____ Signed _____

Approved Date _____ Signed _____

CHECKOUT MEETING AGENDA

Conduct a checkout meeting with your manager and replacement. It is best to record the meeting on tape (audio or video), which can then become additional training materials for your replacement.

Physical Files

What are they?

Where are they?

Computer Files

What are they?

Where are they?

Source Materials

What are they?

Where are they?

Status Report(s)

Where located?

Other Comments