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**Document Purpose:**

This checklist details the basic phases of a project management process one need to work through and what actions and responsibilities one must fulfill to ensure the project is successful. The phases of project management are:

1. Pre-Project
2. Initiation
3. Planning
4. Execution
5. Monitor and Control
6. Transfer
7. Close-Out

This checklist is a quality tool used to enforce conformance to the process and assists a project manager by verifying whether everything required for a successful project has been considered and/or planned. It is useful as a tool to remind, prompt, trigger various activities and deliverables.

The Checklist below is meant to be fairly comprehensive and can be pared down to suit your needs and the scale of the project. It can be customized for any project: add, or delete items as deemed necessary and required by the project.

For further information, refer to the Project Management Manual and Investment Planning Manual.

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| --- | --- | --- | --- | --- |
| **Project Detail** | | | | |
| Project Name: | Enter Project Name in full | | | |
| City Project Manager: The City Project Manager is the City of Winnipeg employee having delegated authority to deliver the project. | Enter Project Manager name | | Enter Title | Enter Department |
| Business Case Reference: Enter the file location of BC | | Enter Business Case Reference | | |
| City File #: Enter the City File Number assigned by the department for this project. | | Enter City File number | | |

| **0. Pre-Project Phase (Investment Planning)**  Focused on defining the need and getting the project prioritized and budget approved. Once the Business Case and Basis of Estimate has been approved, it officially becomes a project. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Business Case |  |
|  | Basis of Estimate |  |
|  | Initial requirements specification |  |
|  | IT / HR / Finance / Legal engagement (as required) |  |
|  | Land acquisition and zoning requirements |  |
|  | Environmental considerations |  |
|  | Funding model (other level of government or third party) |  |
|  | Project Delivery Approach & methodology |  |
|  | Business Case |  |
|  | Lessons learned |  |
|  |  |  |

| **1. Initiation Phase**  Focused on defining the project and any sub-phase it may need, and gaining authorization for the project to commence, Within this phase the scope is beginning to be refined, as well as any needed budget requirements.  This process develops a Project Charter, which is a document noting the formal start of the project and provides high level details and assists in setting expectations with the Project Sponsor, Business Owner, Stakeholders and the project team.,  It includes identification of a Project Manager, Project Sponsor and any key impacted stakeholders, project member roles and responsibilities are outlined, documenting the objective the project will achieve and how its success will be measured, the initial assessment of risks faced, length of project and its major milestones.  In this Phase, how the project will be completed is not as important as what the project is about and who will be involved. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Product or service requirements |  |
|  | Funds approved (Budget and/or Administration Report) |  |
|  | Project Sponsor |  |
|  | Project Manager |  |
|  | Project Team |  |
|  | Initial Stakeholders identification |  |
|  | Project Charter |  |
|  | Key Stakeholders Project Kick-off meeting/event |  |
|  | Project committees |  |
|  | Lessons learned |  |
|  |  |  |

| **2. Planning Phase**  Focused on compiling and agreeing on the detailed scope of the project and its sub-phases.  These processes produce the Project Delivery Plan, which integrates all the baselines and management plans required for the project. The project delivery plan is a working document and as such will evolve as your project develops. This means that one will issue several versions of this plan during the project’ life-cycle.  In this Phase, how the project will be completed is what’s important. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Product or service requirements |  |
|  | Scope (requirements specifications) |  |
|  | Land issues |  |
|  | Environmental issues |  |
|  | Health, Safety and Security |  |
|  | Stakeholders Assessment & Communication Plan |  |
|  | Public Engagement |  |
|  | Risk and Opportunities |  |
|  | Commissioning strategy |  |
|  | Project Delivery Plan (and subsidiary plans) |  |
|  | Project Execution Plan |  |
|  | Business Case updated |  |
|  | Plan procurement |  |
|  | Pre-award Meeting |  |
|  | Lessons learned |  |
|  |  |  |

| **3. Execution Phase**  Focused on executing the project.  These processes are where one implements the pre-defined plan and ensures that the planned deliverables are achieved at each sub-phase and for the whole project.  In this Phase, one is ‘working the plan’. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Project Team Charter |  |
|  | Stakeholder Communications |  |
|  | Meetings/Inspections |  |
|  | Procurement |  |
|  | Substantial Performance Certificate |  |
|  | Lessons learned |  |
|  |  |  |

| **4. Monitor and Control Phase**  Focused on tracking and reviewing the projects progress. Includes the identification, approval and management of any required changes.  These processes are about managing the process and ensuring the appropriate stakeholders are involved and the projects aims are achieved.  In this Phase, one is ‘monitoring and controlling the plan’. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Stakeholder Communications |  |
|  | Change Management |  |
|  | Risk Management |  |
|  | Resource management |  |
|  | Performance reports |  |
|  | Consultant/Contractor performance |  |
|  | Lessons learned |  |
|  |  |  |

| **5. Transfer Phase**  Focused on ensuring that all project activities have been transferred successfully to the Business Owner to be operationalized by having a formal sign off and acceptance by the business owner or end user of each project phase.  The Project Manager coordinates with the Business Owner in planning and preparing the service or product to transfer, commission, and start-up of new work. Operating budgets are established and staff are trained to operate and maintain the product or service.  In this Phase, the project deliverables are transferred to the end user. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Operating & Maintenance (O&M) Manual |  |
|  | Operation procedures (people) |  |
|  | As-Built drawings |  |
|  | As-Built schedule |  |
|  | Health & Safety manuals |  |
|  | Training |  |
|  | Training materials |  |
|  | Warranties |  |
|  | Commissioning |  |
|  | Tangible Capital Asset |  |
|  | Benefit review |  |
|  | Final Inspection Report |  |
|  | Total Performance Certificate |  |
|  | Acceptance Process |  |
|  | Lessons learned |  |
|  |  |  |

| **6. Close-Out Phase**  Focused on ensuring that all project activities have been completed and that the Project’s expectations, needs and requirements have been met.  “Key” deliverables of this Phase are the completion of the Project Close-out Report including the Lessons Learned. Project Team’s should use these 2 deliverables to identify what worked well during the execution of the project and what could have gone better. This feedback can be used on future projects to help similar projects run more smoothly. | | |
| --- | --- | --- |
| 🗹  **Completed** | **Key Activity or Project Deliverable** | **Comments / Notes** |
|  | Purchase Orders |  |
|  | Benefits |  |
|  | Project documentation |  |
|  | Final Construction Report |  |
|  | Financial accounts |  |
|  | Record System |  |
|  | Project Close-Out Report |  |
|  | Contract Closure |  |
|  | Consultant Evaluation |  |
|  | Claims |  |
|  | Lessons learned |  |
|  | Celebrate project success |  |
|  |  |  |

**Comments**

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