Project Wrap-up Checklist

Whether your project is ending, or you intend to continue the work in some fashion, here are some practical steps for wrapping up your grant.

PARTNERS
- Reach out to your primary project partners or community groups and let them know the grant period is ending. Talk to them about their ongoing commitment to the project, if appropriate.
- Hand off any tangible deliverables to project partners, stakeholders, or community groups. Think about digital files, survey results, how-to documents, or other materials that you intended to share out or return.

PEOPLE
- If applicable, check in with your organization's HR department to review any specific offboarding processes for grant-funded staff, such as an exit interview.
- Reassign staff or volunteers if they are continuing to work for your organization.
- If staff or volunteers are moving on to other work, offer to help with references or a resume/cover letter review as appropriate.
- If possible and appropriate, identify a staff person to shepherd or oversee the project after the official grant period end date.

FINANCIAL
- Finalize outstanding contracts and agreements with consultants and any other vendors or contractors.
- Process and pay all invoices and close out any project-related contracts or accounts.
- Identify any recurring or anticipated future costs, such as software licenses or equipment replacement, and include those in your organization's annual budget.

GRANT MANAGEMENT
- Make note of any final reporting requirements and due dates.
- Compile information needed for any final reports.
- Request final reimbursement from IMLS. You have up to 90 days after the official grant period end date to do so.
- If needed, request a no-cost extension from IMLS no later than 10 days before the official grant period end date.

DOCUMENTATION AND DIGITAL PRESERVATION
- Locate and assemble key project documentation. For example:
  - Project plans
  - Workflows and training materials
  - Meeting materials (agendas, minutes, slide decks)

- o   Reports and publicity materials
- o   Budgets, receipts, and contracts
- o   Policies and partnership agreements/MoUs
- o   Permission forms or donor agreements
● Organize and archive this documentation as historical data for future reference. Consider who within your organization will need access to your project documentation and make sure they know where to find it in either paper or electronic format. Be sure to include:
  - o   Logins/passwords for cloud storage, software tools, etc.
  - o   Locations of external hard drives or other hardware or software necessary to sustain or preserve the project
● Safely store your project documentation and products/digital files including images, audio, video, data or other content created. Follow the "3-2-1 Rule" which suggests saving three copies of your digital files on two different storage mechanisms with at least one copy stored offsite. Refer to the digital product form you submitted with your original grant application.

EVALUATION AND REFLECTION
● Arrange a project debrief with your team shortly after your project ends. Invite project staff, volunteers, leaders, or other key stakeholders. Discuss the successes, challenges, and lessons learned, and invite honest feedback about their experiences. Use this information to craft any final reports or future project plans.
● Consider administering an end-of-project survey to gather feedback from key stakeholders, partners, or community groups. Again, use this information to craft any final reports or future project plans.

OUTREACH AND CELEBRATION
● Share your project outputs with all the people and in all the locations that need to know about your excellent work. Be sure to inform your Board, Friends group, colleagues, content contributors, and funding entities.
● Create email/listserv announcements, blog or social media posts, newsletter articles, press releases to local news outlets, or other communication platforms.
● Send thank you notes or other expressions of gratitude to your project team, volunteers, funding entity, or other project participants. Acknowledge their contribution in your outreach and on your project website if appropriate.
● Finally, but perhaps most importantly, celebrate with your project team! Invite folks back for an event celebrating your project completion.