

Contract Closeout Checklist

Purpose: Use this checklist to document the completion and closeout of a contract after the contract term has ended or all required goods, services, deliverables, and obligations have been completed. *Requirements may vary based on the contract, scope, vendor(s), and applicable terms.*

Expiration does not always mean the contract is complete. Before closing a contract, confirm that all contractual obligations have been fulfilled or appropriately transitioned, documented, or resolved.

Contract Information

Field	Information
Contract Number	
Contract Title	
Original Contract Term	
Contract Expiration Date	
Contract Closeout Date	

Closeout Type:

- ☐ Contract reached expiration
- ☐ Contract completed early
- ☐ Contract terminated
- ☐ Contract replaced/rebid
- ☐ Other: _____

1. Confirm Contract Completion

- ☐ Confirm the contract term has ended or all required work has been completed.
- ☐ Confirm all required goods, services, deliverables, milestones, and other contractual obligations have been completed.
- ☐ Confirm all applicable projects, work orders, purchase orders, or other activities under the contract have been completed or otherwise resolved.
- ☐ Identify any incomplete or outstanding obligations.
- ☐ Document the disposition of any outstanding obligations.

- ☐ Confirm there are no remaining obligations requiring continued contract administration. Examples of ongoing obligations may include:
 - Outstanding deliverables, reports, or acceptance documentation
 - Open invoices, credits, refunds, or unresolved payment issues
 - Pending warranty, maintenance, support, or service obligations
 - Open claims, disputes, complaints, or corrective actions
 - Required data return, data retention, transition assistance, or destruction requirements
 - Unresolved vendor performance issues or monitoring activities
 - Equipment, materials, property, or other State assets requiring return or disposition
 - Other contract-specific obligations that continue beyond the contract end date

2. Final Vendor Performance Review

- ☐ Review overall vendor performance during the contract term.
- ☐ Confirm required performance measures were met.
- ☐ Document significant performance successes, deficiencies, complaints, or corrective actions.
- ☐ Confirm all performance issues have been resolved or appropriately documented.
- ☐ Complete final vendor performance documentation, if applicable.
- ☐ Document information that may be useful when evaluating the vendor for future procurements.

Overall Vendor Performance:

- ☐ Satisfactory
- ☐ Needs Improvement
- ☐ Unsatisfactory
- ☐ Other: _____

Performance Notes: _____

3. Final Deliverables & Reporting

- ☐ Confirm all required reports have been received.
- ☐ Confirm all required deliverables have been received and accepted.
- ☐ Confirm final inspections, acceptance documentation, or other required approvals have been completed.
- ☐ Confirm outstanding deficiencies have been resolved.
- ☐ Retain final reports, deliverables, acceptance documentation, and related records in the contract file.
- ☐ Confirm any required data, records, or other information has been transferred to the agency.
- ☐ Certificate of Destruction; if applicable

4. Contract Modifications & Changes

- ☐ Confirm all amendments and extensions have been fully executed and documented.
- ☐ Confirm all applicable project change orders have been completed and documented.
- ☐ Review the Contract Modification Log for completeness.
- ☐ Confirm the contract file contains all executed modifications.
- ☐ Confirm applicable award updates or notices were posted.
- ☐ Confirm the final contract term and value are accurately reflected in agency records.
- ☐ For multi-vendor contracts, confirm each vendor's contract status and outstanding obligations have been addressed.

5. Vendor Compliance & Property

- ☐ Confirm all required vendor documentation has been received and retained.
- ☐ Confirm return of State property, equipment, materials, keys, access credentials, or other agency-owned property, if applicable.
- ☐ Confirm disposition of agency data, records, confidential information, or other materials, if applicable.
- ☐ Confirm any required licenses, certifications, bonds, insurance, or other documentation have been addressed through the end of the contract term.
- ☐ Confirm vendor access to agency systems, facilities, or resources has been terminated or appropriately transitioned, when applicable.

6. Records & Contract File

- ☐ Confirm the contract file is complete.
- ☐ Confirm the file includes the fully executed contract and applicable incorporated documents.
- ☐ Confirm amendments, extensions, and change orders are included.
- ☐ Confirm required vendor documentation is included.
- ☐ Confirm performance reviews, reports, deliverables, and significant correspondence are included.
- ☐ Confirm final invoices, payment documentation, and financial records are included as required.
- ☐ Confirm applicable award notices and posting documentation are included.
- ☐ Organize and retain records in accordance with applicable records retention requirements.
- ☐ Update the contract management system or tracking tool to reflect the contract's closed status.

7. Lessons Learned & Future Procurement

- ☐ Document significant contract management issues or successes.
- ☐ Identify scope, pricing, performance, reporting, or other requirements that should be considered in a future solicitation.
- ☐ Document vendor performance information that may be relevant to future procurement activities.
- ☐ Identify opportunities to improve contract administration.
- ☐ Share applicable lessons learned with the procurement team or agency stakeholders.

Lessons Learned / Recommendations: _____

8. Final Closeout

- ☐ All contractual obligations have been completed or appropriately resolved.
- ☐ All required deliverables and reports have been received.
- ☐ All invoices and payments have been addressed.
- ☐ Vendor performance has been documented.
- ☐ Outstanding issues, claims, or disputes have been resolved or documented.
- ☐ Required contract records have been retained.
- ☐ Contract tracking systems have been updated.
- ☐ Applicable staff have been notified of contract closeout.
- ☐ Contract has been formally closed.

Final Contract Status

- ☐ Completed
- ☐ Expired
- ☐ Terminated
- ☐ Replaced by New Contract
- ☐ Other: _____

Closeout Notes: _____

Certification

I have reviewed the contract and confirm that, to the best of my knowledge, all required closeout activities have been completed or appropriately documented.

Contract Manager: _____

Date: _____

Supervisor/Reviewer, if applicable: _____

Date: _____