|  |  |
| --- | --- |
| Project Number and Name | |
| **Closeout Led by** | [should be PM, but could be someone else if PM is not available] |
| **Reason for Project Closure** | Contract canceled and new contract initiated to accommodate changed scope  Successfully completed all tasks and deliverables  Client terminated contract prior to completion because: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ATG terminated contract prior to completion because: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Other reason: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **PM Closeout Checklist** | Client has signed-off on all deliverables  Final invoice and progress report submitted  Project milestones documented  Project reference saved as Contact and linked as reference in Contacts tab of Vision Project Module  Project description updated, including employee roles and role description, and sent to Marketing for future use  Add applicable Project Codes to Background tab of Vision Project Module  Lessons learned and verify risk issues documented at Project Closeout Meeting  Thank You letter(s) sent and saved to folder. Include recipient(s) and address(es)  Project Closeout Meeting held; attendees documented in Meeting Minutes and saved in Project Folder  Files and folders have been cleaned-up, organized, and ready for IT to archive  Project Manager closeout complete [Project Manager Sign-off] [insert initials and date] |
| **QA/QC Closeout** | PM closeout procedures completed  Closeout meeting with PM, project team, division manager/other senior managers  Client Quality Review Meeting, after final deliverables have been accepted  Project QA/QC closeout complete [QA/QC Manager Sign-off] [insert initials and date]  Post closeout Client quality check back meetings completed |
| **IT Closeout** | Documents and data are ready to be archived **(selecting this option will be taken as confirmation by IT to archive project folder)**  *\*\*Note: Upon archiving folder, all files will be available as read only\*\** |
| **Accounting and Budget Closeout**  ***(To be completed by Accounting)*** | Final invoice submitted  All invoices paid  Average age of receivables & Issues related to collection:  QA/QC: [Describe any issues related to staying on budget]  Final project overview saved in closeout folder  Project made Dormant, i.e. completely closed.  Accounting Closeout complete [Accounting Staff Sign-off] [insert initials and date] |
| **EXAMPLES AND ADDITIONAL GUIDANCE TO REQUIRED ITEMS** | |
| **Project Reference** | [Link individual who could provide feedback on our work to the Project on the Contacts tab of the Vision Project Module. If contact not found in Vision, may be necessary to first enter them as a Contact, then indicate their Role as Reference. Be sure to include someone who would be a good reference to use with future clients and also request a Letter of Recommendation from that individual, if appropriate.] |
| **Project Description** | [Initial project description should be updated to past tense i.e. ATG performed..etc., and to add project components not previously included] |
| **Project Codes (Keywords)** | [Verify and insert any additional applicable key words that reflect project components on the Background tab of the Vision project Module. This is only needed if not all applicable codes were captured at project setup. i.e. Software – SYNCHRO] |
| **Employee Roles and Role Descriptions** | [The Team tab of the Vision Project Module lists all ATG staff who worked on the project. Indicate the Role and insert a short description of each individual’s role in the project description]  **Employee:** Jane Doe  **Role:** Project Manager  **Role Description:** Jane led the staff in the successful completion of all tasks on time and under budget. Jane also xxxxxxx. |
| **Closeout Meeting Components** | Identify issues and resolutions: Verify risk, issues, and change registers. If risk, issues, and change registers were not used – verify a summary of significant project issues and resolutions, as well as changes made during the project.  Identify lessons learned and actions to be taken in the future – should include a review of QC logs and registers.  Celebrate and discuss areas of success |
| **Client Quality Review Meeting, prior to Project QA/QC Closeout completion** | What did ATG provide in the way of added value to the project?  What did we do well?  What do you wish we had done differently?  Will you be a reference? |

**Project Codes and Descriptions (Keywords for Marketing)**

|  |  |
| --- | --- |
| DESCRIPTION | CODE |
| Data - Delphi Process | **008** |
| Data - Geocode | **203** |
| Data - Plan Design | **201** |
| Data - VideoGPS | **204** |
| Design - Bicycle Facility | **101** |
| Design - Context Based | **122** |
| Design - Drainage | **121** |
| Design - Intersection | **117** |
| Design - ITS | **317** |
| Design - Parking and Circulation | **120** |
| Design - Pedestrian Facility | **115** |
| Design - Roadway | **119** |
| Design - Schematic Development | **123** |
| Design - Signal | **116** |
| Design - Signing & Striping | **118** |
| Design - Traffic Control Plan | **114** |
| Development - Comprehensive Plan Transportation Element | **014** |
| Development - Master Transportation Plan | **016** |
| Development - Transportation Improvement Plan | **015** |
| Development - Transportation Plan | **013** |
| Engineering - Bidding Services | **148** |
| Engineering - Construction Administration | **149** |
| Engineering - Expert Witness | **150** |
| Engineering - Permitting | **147** |
| Engineering - Plans, Specifications & Estimates - PS&E | **146** |
| Engineering - Review | **151** |
| Guidelines - Bicycle | **024** |
| Guidelines - Pedestrian | **023** |
| Guidelines - Street | **025** |
| Modeling - Interface Development | **028** |
| Modeling - TDM Application | **005** |
| Modeling - TDM Development | **003** |
| Modeling - TDM Refinement | **004** |
| Modeling - TDM Update | **029** |
| Modeling - Traffic Forecasting | **006** |
| Modeling - Traffic Simulation | **106** |
| On-Call - Data Collection | **214** |
| On-Call - Engineering | **129** |
| On-Call - Planning | **027** |
| Software - ArcGIS | **312** |
| Software - AutoCAD | **306** |
| Software - CORSIM | **300** |
| Software - CUBE | **309** |
| Software - InDesign | **313** |
| Software - Maptitude | **311** |
| Software - Microstation | **307** |
| Software - MS Access | **316** |
| Software - MS Project | **315** |
| Software - SIDRA | **305** |
| Software - SQL | **314** |
| Software - SYNCHRO | **303** |
| Software - TransCAD | **308** |
| Software - TransModeler | **310** |
| Software - VISSIM | **301** |
| Software - VISSUM | **302** |
| Software - VISTRO | **304** |
| Study/Analysis - Access Management | **019** |
| Study/Analysis - Accident | **111** |
| Study/Analysis - ADA Compliance | **112** |
| Study/Analysis - Alternative Analysis | **010** |
| Study/Analysis - Bicycle | **031** |
| Study/Analysis - Corridor Analysis: Engineering | **104** |
| Study/Analysis - Corridor Analysis: Planning | **001** |
| Study/Analysis - Cost/Benefit | **011** |
| Study/Analysis - Drainage | **113** |
| Study/Analysis - Feasibility Study: Engineering | **105** |
| Study/Analysis - Feasibility Study: Planning | **002** |
| Study/Analysis - Freight | **030** |
| Study/Analysis - Hazardous Cargo | **124** |
| Study/Analysis - Interchange Access Justification | **110** |
| Study/Analysis - Intersection | **108** |
| Study/Analysis - Land Use | **026** |
| Study/Analysis - Major Investment Study | **017** |
| Study/Analysis - Mobility | **018** |
| Study/Analysis - Parking and Circulation | **102** |
| Study/Analysis - Passenger | **033** |
| Study/Analysis - Pedestrian | **103** |
| Study/Analysis - Rail | **034** |
| Study/Analysis - SAFETEA-LU Compliance | **009** |
| Study/Analysis - School | **022** |
| Study/Analysis - Socioeconomic Analysis | **007** |
| Study/Analysis - Toll Feasibility/Traffic and Revenue | **012** |
| Study/Analysis - Traffic Calming | **020** |
| Study/Analysis - Traffic Impact | **107** |
| Study/Analysis - Traffic Impact Level 0 - Driveway | **1071** |
| Study/Analysis - Traffic Impact Level 1 - Basic | **1072** |
| Study/Analysis - Traffic Impact Level 2 - Intermediate | **1073** |
| Study/Analysis - Traffic Impact Level 3 - Complex | **1074** |
| Study/Analysis - Traffic Signal | **152** |
| Study/Analysis - Transit | **032** |
| Study/Analysis - Travel Time | **210** |
| Study/Analysis - Warrant Study | **109** |
| Survey - Commercial Vehicle | **205** |
| Survey - Instrument Design | **202** |
| Survey - Intercept Interview | **206** |
| Survey - Post Card | **208** |
| Survey - Telephone | **209** |
| Survey - Video License Plate | **207** |
| Traffic Counts - Automatic | **213** |
| Traffic Counts - Manual | **212** |
| Traffic Counts - Turning Movements | **211** |