Transition & Closure Plan

*<Insert State Route, Project Name>*

*<Insert Project MP limits>*

Project Manager: *<Insert name here>*

*<Date>*

Optimal success for this project – realization of the project purpose - requires delivery of a quality product resulting in satisfied customers and conducting a deliberate closure – including an effective “hand-off” to a subsequent phase and team (i.e. transition or handoff from Design to Construction).

The following elements describe the <transition or closure> of <identify project or phase>:

* 1. Transition Points

Identify the major activities and milestones of the project that will require a formal transition process. Consider the following criteria:

* *Delivery and acceptance of major elements of the work*
* *Transfer of responsibility for all or a major portion of the project*
* *Major turnover of project staff, resources or location of performance*

Include those activities as discrete work elements in the project schedule. Establish project specific acceptance requirements and procedures to ensure completion of each activity, phase, or the project and financial closeout.

Identify the steps and requirements to demobilize staff and resources.

* *Identify and describe transition points in the project and how staff will transition to their next assignment.*
* *Identify activities, steps and requirements for demobilizing, returning or terminating facilities, equipment and services as they are acquired.*
* *Establish roles, responsibilities, budgets and schedules for the activities involved in demobilizing facilities, equipment and services associated with each transition event.*
  1. Review and Document Lessons Learned.
* *Establish specific project team activities and responsibilities for identifying, compiling, documenting, and reporting lessons learned throughout the life of the project.*
* *Lessons learned should be a standing agenda item at project status meetings.*
* *As each transition point or final closure is reached, compile, report, and document lessons learned.*
  1. Archive

Review current archiving policies with Region/Organization Management and determine the specific archiving requirements and Electronic Content Management (ECM) processes.

* *Develop specific record keeping instructions for document management during the course of the project. Include instructions for maintaining hardcopy and electronic files, sequestering original documents, dates and project information on documents, copying documents, and the maintenance of document logs.*
  1. Evaluate, Reward and Recognize team members.

Review WSDOT rewards and recognition requirements and policies.

* *Identify “target” performance metrics in key areas that are critical to project success. The metrics should be strong indicators of performance beyond expectations and should be “stretch” targets that are achievable but require significant “extra” effort to accomplish.*
* *Based on these target performance metrics, identify appropriate project rewards and recognition for exemplary performance.*