**Procedures for Using Project Closure Checklist**

When preparing a procurement project folder for closing, a technology consultant should use the *Project Closure Checklist* attached below to ensure that all project documents applicable to the specific type of procurement performed, are included in the project folder.

**The project folder, whether in manila or accordion folder, should be organized by:**

1. Ordering all project documents from front to back according to the order indicated on the Project Closure Checklist

2. Including at the front of the project folder a *Project Closure Checklist* (**printed on canary yellow paper**)

When multiple procurements are done for one project or when a procurement results in no award and is re-issued under the same project number, a separate *Project Closure Checklist* (**printed on canary yellow paper**) should be included for each procurement. Multiple procurements should be ordered chronologically in the project folder with the most current procurement in the front of the project folder and the oldest procurement at the end of the project folder.

When your project is organized in an accordian folder, include the documents listed in the "REQUEST" section of the *Project Closure Checklist* in the original manila folder.

3. Inserting a **Terra Green separator page** for each major category listed on the Project Closure Checklist: Request, Outcome, Process, Deliverables, Background & Work Papers, and Correspondence (An electronic copy of the separator pages is included below.)

4. Discarding all interim drafts of deliverable, process, approval, and outcome documents and only maintaining the final version with Craig Orgeron's signature or the completed form.

5. Verify that project-related emails have been saved in SharePoint.

6. Once the project file is in order, the Technology Consultant should initial and date both the *Project Closure Checklist* and the outside of the project folder and route to the QA/Team Leader for a quality assurance (QA) review. The project should remain in the “In Progress” status in ProjTrak.

NOTE: Board Meeting Mailout packets and Board Meeting minutes do not need to be included in the project folder. Only the original write-up should be included.

NOTE: All LOC responses should be included in the project folder. For RFPs, only winning proposals should be kept with the project folder. Losing RFP responses should be stored in large brown envelopes with the following information on the outside of the envelope, then passed to Jeanette.

1) RFP #

2) Date of opening

3) Vendor’s name

4) Marked as Losing

5) TCs name or initials

When an RFP response is too large for one envelope, separate the response into two envelopes. Then put 1 of 2 or 2 of 2 on the outside of envelope. If the responses are small, more than one vendor can be added to the same envelope. Just write names of all vendors on outside of envelope.

ANY E-RATE ELIGIBLE LOSING PROPOSALS SHOULD BE KEPT WITH THE PROCUREMENT PROJECT FILE. E-RATE PROCUREMENT FILES SHOULD BE FLAGGED AS CONSULTING PROJECTS SO THEY ARE KEPT FOREVER. THIS IS DUE TO THE REGULATIONS OF FCC and USAC (UNIVERSAL SERVICE ADMINISTRATIVE COMPANY).