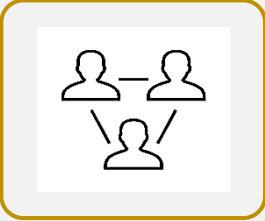# Best Practices for Project Close-Out

USE PARTNERING TO GUIDE CLOSE-OUT PROCESS

- Set up the final partnering session (or two) to focus on a successful and timely close-out
  - Include Executive team members, Engineers and Design team to check in on the quality of the as-builts for the final Punchlist
  - Establish deadlines for Substantial Completion, Final Completion and Final Payment
- Elevate all challenging Change Orders for resolution
  - Use the Issue Resolution Ladder (IRL) to elevate issues related to the merit of scope
  - Set up regular (weekly/bi-weekly) Change Order meetings outside of the weekly progress meetings to focus on resolving issues and negotiate them as you go
  - Set up Executive check-ins to monitor close-out and resolve issues

TREAT CLOSE-OUT AS THE FINAL PHASE OF THE PROJECT

- Set up a "Close-Out" meeting at least 3 - 6 months prior to Substantial Completion
- Start the project with the end in mind – work with your Contractor to receive key monthly requirements (as-builts, certified payroll, schedule updates, etc.)
- Coordinate with the City HRC organizations (CMD, OLSE, OEWD) to ensure paperwork and submittals are provided and reconciled in advance of Substantial Completion request
- Set up a regular Close-Out focused meeting and jointly track the needed deliverables to ensure Substantial Completion, Final Completion and Final Payment are all achieved within the anticipated time frame
- Include Close-Out to the actual Project Schedule roughly 1/3 of the way in (start planning the close-out, i.e. testing/balancing of systems and Commissioning)

DEVELOP ONE, UNIFIED PUNCHLIST

- Consolidate the Owner's Punchlist into a single document
- Take the comments from the Owner's team, Contractor's team, Architect, Engineer and End-User/Operations staff and mutually track the items
- Develop a joint archive and track it as a team
- Develop a Rolling Punchlist to ensure items are resolved while subcontractors are available

DISCUSS AND ALIGN EXPECTATIONS FOR CLOSE-OUT STAFFING

- Identify close-out "owners" from the City and Contractor who are familiar with the project to oversee close-out
  - Continuity is critical – onboarding unfamiliar staff frequently extends close-out
- Establish dates for key deliverables to the City (As-builts, O&M Manuals, Training, HRC Paperwork, etc.)
- Include contingency budgeting for potential ad-services at the end of the project

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