

PROJECT CLOSEOUT

Efficient closeout ensures Owner's timely occupancy and prompt payment.

Smooth, successful project closeout depends on clear definitions of responsibilities and timely completion of contract requirements.

- As defined in the specifications, the Contractor is responsible for initiating all actions outlined, and for securing required documents and approvals such as
 - record documents
 - warranties
 - operations and maintenance manuals
 - owner training
 - occupancy and other permits
 - release of surety
- The Contractor shall provide written notification to the Owner that the project is substantially complete. The Design Team will develop the Punch List and provide to the Contractor. The Contractor shall provide written notification to the Owner that the Punch List is complete and the Owner executes the final inspection.
- The Contract Documents shall clearly assign the responsibility between Owner and Contractor for the period between substantial completion and final payment for utilities, HVAC, maintenance, insurance, and building security.
- When the project is divided into phases to be completed and occupied at different times, each phase shall be treated separately in the final closeout procedure.
- Latent defects are covered by warranty and not part of retainage. It should be verified that documentation is in the correct file format, and that extra materials, tools, and parts have been delivered to the Owner in proper quantities as identified in the Project Manual prior to release of retainage and final payment.

REFERENCES

AIA A201 General Conditions

Application and Certificate for Payment; AIA G702

Certificate of Substantial Completion; AIA G704

Contractor's Affidavit of Payment of Debts and Claims; AIA G706

Contractor's Affidavit of Release of Liens; AIA G907a

Division 1 – General Requirements

Guideline: Project Record Documents

ConsensusDOCS 200, Owner/Contractor Agreement and General Conditions

Application for Payment ConsensusDOCS 292

Certificate of Substantial Completion ConsensusDOCS 280

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American Institute of Architects, St. Louis Chapter
American Council of Engineering Companies of Missouri
Associated General Contractors of Missouri
Greater St. Louis Chapter, Construction Specifications Institute
St. Louis Chapter of International Facilities Management Association

Certificate of Final Completion ConsensusDOCS 281

Guideline: Punch List

Project Delivery Practice Guide, Construction Specifications Institute

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