

Information Transfer: The Project Close-Out

A project close-out is initiated by the general contractor following guidelines set-up by the architect. This process ensures that all necessary information about the building and its components, including how the project was built, are transferred to the owner or the owner's representative.

The close-out process includes the following transfer of information:

- Operational and Maintenance Manuals - Includes all functioning building components and specifications and selections of all finish materials.
- As-Built Drawings - A record of all concealed work for future reference.
- Permit Cards - Documents that are fully signed off by building inspection officials.
- Warranties and Guarantees - Documents standard one-year warranties and special guarantee periods.
- Final Walk-Through - A walk-through of the facility noting conditions and items for the punch list, as well as answering questions from the owner.
- Punch List - A list of items prepared by the project manager that are to be completed.
- Technology Certification - Special training on technical equipment.
- Contract Close-Out - Notice of completion and final payment.
- One-Year Walk-Through - A follow-up process in which the owner and contractor review the building relative to general and special warranties.

This is not an exclusive list, but merely an indication as to the scope that the project close-out procedure entails. The close-out process gathers all of the important information about the project, from the HVAC system to the type of carpet used in the facility. For example, the operational and maintenance manuals will detail exactly how the carpet should be cared for, and if there is a problem, what steps should be taken to correct it.

Following are three ideas to consider when you are involved in a project close-out.

First, make sure you include the right people in the close-out process. For example, during the building walk-through that includes the HVAC system, the building engineer or the person responsible for that equipment must be present.

Second, consider use a building project as a catalyst to organize your own internal information. More and more companies are moving toward the use of software that is a facility-based information system. In other words, all necessary information can be accessed through software in order to manage the facility and its components.

Third, since many of the certification procedures can be complicated and include a lot of technical detail, work with the contractor to video tape these segments, so you have an exact record of the instructions regarding specific equipment. These recordings will also be very valuable when training new employees.

It is part of the contractor's contractual responsibility to initiate the close-out process; to gather all the pertinent information, and to schedule the various meetings. This transfer of information requires diligent attention to details, and which ultimately will help the operation of the building.

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