



~~~~~ **PROJECT NOTE** ~~~~~

EDIT THE DOCUMENT FOOTER TO INCLUDE THE PROJECT NAME AND NUMBER.

ALL DIVISION 00 AND DIVISION 01 SECTIONS ARE TO BE REVIEWED BY THE DESIGN MANAGER/CONSTRUCTION MANAGER FOR THE PROJECT. AOR/EOR TO COORDINATE ACCORDINGLY.

NOTE 1: AOR, PM AND DM REVIEW AND UPDATE APPLICABLE COLUMN - NO LATER THAN 100% CD. THIS UPDATED CHECKLIST IS A NEW REQUIREMENT FOR PROJECT OTB ISSUANCE. PM IS RESPONSIBLE FOR THIS CHECKLIST UPDATE PRIOR TO OTB.

NOTE 2: CONTRACTOR TO USE SUBMITTAL MODULE IN E-BUILDER TO SUBMIT FOR REVIEW AND APPROVAL BY AOR ALL APPLICABLE ITEMS INCLUDED WITHIN THIS CHECKLIST. CONTRACTOR IS RESPONSIBLE FOR THIS ACTION. AOR IS RESPONSIBLE FOR REVIEW OF SUBMITTED ITEMS.

NOTE 3: CONTRACTOR, AOR, PM AND DM REVIEW CLOSEOUT DOCUMENTS IN ACCORDANCE WITH THIS CHECKLIST. ONCE COMPLETE AND AGREED UPON BY THESE PARTIES, THE AOR INITIATES THE FA IN E-BUILDER WITH THIS SIGNED CHECKLIST ATTACHED. PM IS RESPONSIBLE FOR CONFIRMATION BEFORE FA IS ROUTED IN E-BUILDER.

NOTE 4: CPS PMO CLOSEOUT MANAGER WILL REVIEW CLOSEOUT DOCUMENTS IN E-BUILDER AND MAKE REVIEW COMMENTS AS NECESSARY. ANY REJECTIONS WILL REQUIRE CONTRACTOR TO PROVIDE CORRECTED DOCUMENTS TO AOR AND PM FOR REVIEW. AOR WILL RE-INITIATE THE FA AFTER REVIEW BY PM.

NOTE 5: TO AVOID DELAYS TO CLOSEOUT, IT IS CRITICAL THAT ALL PARTIES PERFORM THEIR RESPECTIVE RESPONSIBLE ACTIONS.

~~~~ **END OF PROJECT NOTE** ~~~~

**SECTION 01 77 00.01
CLOSEOUT MEETING CHECKLIST**

FACILITY/PROJECT: _____

ARCHITECT/ENGINEER OF RECORD: _____

BOARD'S REPRESENTATIVE: _____

GENERAL CONTRACTOR: _____

Address: _____

Contact Name: _____

Phone Number: _____

Email Address: _____

| I. PRELIMINARY ACCEPTANCE REQUIREMENTS: | | |
|---|--|------------------------|
| Spec. Section | Subject | Discussion / Completed |
| | The Preliminary Acceptance DATE on this project is:_____ | |
| 01 77 00 | Certificate of Occupancy
GC must obtain C of O to be issue PA.
On some projects, a C of O may not be required. GC must provide written documentation from Department of Buildings that a C of O is not required. | |
| | Completion of all Work as indicated in the Contract Documents except for minor corrections (punch list)
Contractor shall prepare their punch list to be submitted to the AOR. | |
| | Final Cleaning
GC must complete final cleaning in order to receive PA. | |
| | Final Meter Readings | |
| | Changeover of Locks | |
| | Final Test & Balance Report
GC to submit as a submittal via Owner Provided Contract Management Software System. | |
| | Completion of Training Sessions <ul style="list-style-type: none"> • School/FM to identify who should be included at training sessions. • GC will coordinate and provide a schedule of training sessions. • GC to include sign-in sheets in closeout documents. • Training sessions must be videotaped. Video to be included in closeout documents. | |
| | Attic Stock <ul style="list-style-type: none"> • GC to leave attic stock with Building Engineer at location designated by BE. • GC to refer to product specifications for type and quantities. • GC to provide BE sign-off and include this sign-off in the close-out documents. | |
| | Removal of Temp Facilities
Contractor must remove all temp facilities except minor tools/materials for the completion of punch list. Review location to store these items with the Building Engineer. | |
| | Written Request for PA and Punch List
If the Contractor has completed the above, they should submit a written request to the AOR, confirming all requirements of Paragraph 3.01 of 01 77 00 have been met. | |

| II. PUNCH LIST | | |
|----------------|---|------------------------|
| Spec. Section | Subject | Discussion / Completed |
| 01 77 00 | Punch List Walk <ul style="list-style-type: none"> • PM will schedule a punch list walk. GC, AOR, PM, DM, Principal, BE, and FM shall attend. • If work is incomplete beyond minor corrections, then the work will not be accepted for Preliminary Acceptance. | |
| | Issuance of Punch List <ul style="list-style-type: none"> • AOR will prepare the punch list in Owner Provided Contract Management Software System. | |

| | | |
|----------------------|--|--|
| | <ul style="list-style-type: none"> Each item is to be entered individually with a photo. BE/FM shall email any punch list items to PM who will forward to AOR for inclusion on the official punch list. AOR will issue the PA certificate and punch list within 5 days of the punch list walk. The PA certificate will be circulated via Owner Provided Contract Management Software System for DM, PM, and FM approval. School will be able to use spaces after issuance of punch list to avoid disputes between wear & tear and punch list work. | |
| 01 32 16
01 77 00 | Completion of Punch List Work <ul style="list-style-type: none"> Contractor has 60 days to complete the punch list. Contractor shall identify that each punch list item is complete and closed via Owner Provided Contract Management Software System. AOR must confirm and close each punch list item via Owner Provided Contract Management Software System. Contractor shall provide weekly updates to AOR of punch list completed items to review. Contractor shall re-clean as necessary for execution of punch list work. | |

III. CLOSEOUT DOCUMENTS:

Note: Contractor to use submittal module in Contract Management Software System to submit for review and approval by AOR all applicable items included within this checklist. Contractor is responsible for this action. AOR is responsible for review of submitted items.

Note: CPS PMO Closeout Manager will review closeout documents in Contract Management Software System and make review comments as necessary. Any rejections will require Contractor to provide corrected documents to AOR and PM for review. AOR will re-initiate the FA after review by PM.

| Spec. Section | Subject | Discussion / Completed |
|---------------|---|------------------------|
| 01 78 00 | Format <ul style="list-style-type: none"> 1 hard copy of as-built drawings 1 hard copy of warranties, OM manuals, etc. in binders with dividers 2 flash drives – not CD as many computers do not have CD ROM drive | |
| | Closeout Documents Checklist <ul style="list-style-type: none"> Submit the signed Closeout Documents Checklist with the closeout documents All required Closeout Documents shall be submitted via the submittal module within the Owner Provided Contract Management Software System | |
| 01 78 00 | Record Prints (Red-lines) <ul style="list-style-type: none"> GC is required to maintain a set of drawings on site that is red-lined with changes due to Bulletins, RFI's, and actual field installation. The original, marked-up, red-lines are to be submitted to the AOR for review of the as-built drawings. The original, marked-up, red-lines are to be submitted with the closeout documents. | |
| 01 78 00 | As-Builts: <ul style="list-style-type: none"> Must be done in AutoCAD. AOR to provide most recent drawing set (Issue for Construction) in AutoCAD to GC. Includes the Contract Drawings and Shop Drawings. | |

| | | |
|----------|--|--|
| | <ul style="list-style-type: none"> At minimum, the same number of sheets that are on the Issue for Construction drawings should be in the as-built set. GC to update title block with "As-Built Prepared MM/DD/YY by ABC Contractor". Each sheet is to have the same title block. GC to submit draft AutoCAD for review by the AOR. Submit through Owner Provided Contract Management Software System as a submittal. The AOR should review/approve prior to the DM's review. | |
| 01 78 00 | As-Built Specs
Include revisions from bid addenda and change orders. | |
| 01 78 00 | As-Built Product Data
See Closeout Documents Checklist. Include electronic and hard copies of all product data. | |
| 01 78 00 | Executed Warranties
Submit sample warranties for review by AOR prior to submittal of final warranties. | |
| 01 78 00 | Operation and Maintenance Manuals
GC to submit electronic copies within 5 days of PA for review by AOR. | |
| 01 78 00 | Submittal of Close-Out Documents
After completion of the page-turn, the GC shall submit electronic and hard copies of all close-out documents to Building Engineer

GC must obtain a signed transmittal from CPS for record keeping. | |

| IV. FINAL CLEANING | | |
|--------------------|---|------------------------|
| Spec. Section | Subject | Discussion / Completed |
| 01 77 00 | Final Cleaning by Contractor:
GC shall be responsible for final cleaning of the following areas: <ul style="list-style-type: none"> ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ | |
| | Turnover Schedule:
GC shall provide a schedule of turnover of areas to be reviewed/approved with School's Operations Manager. | |

| V. FINAL ACCEPTANCE REQUIREMENTS: | | |
|-----------------------------------|--|------------------------|
| Spec. Section | Subject | Discussion / Completed |
| 01 77 00 | The Final Acceptance DATE on this project is: _____ | |
| | Completion of All Punch List Items, Contract Work, and Change Orders:
Close each punch list item via Owner Provided Contract Management Software System confirming each item is complete. | |
| | Resolution of All Notices of Non-Compliance (NNC) or Non Compliance Notices (NCN).
Confirm all NNC/NCN's have been closed. | |
| | Approval of Closeout Documents
All closeout documents have been submitted and accepted by Closeout Manager. | |
| | Written Request for FA
If the Contractor has completed the above, they should submit a written request to the AOR, confirming all requirements of Paragraph 1.4.A of 01 77 00 have been met. | |
| | Final Walk <ul style="list-style-type: none"> • PM will schedule a final walk. GC, AOR, PM, DM, Principal, BE, and FM shall attend. • AOR will issue the FA certificate upon conclusion of the walk, which will be circulated via Owner Provided Contract Management Software System for DM, PM, and FM approval. | |
| | Final Payment Requests
Upon issuance of the FA certificate, the GC, AOR, and MEC shall submit their final invoice. | |

| VI. WARRANTY WORK | | |
|-------------------|---|------------------------|
| Spec. Section | Subject | Discussion / Completed |
| | Service Calls <ul style="list-style-type: none"> Reference the project directory in the OM manuals. Contact PM for any non-responsive vendors. | |
| | 11 Month Warranty Walk <ul style="list-style-type: none"> PM will schedule a warranty walk 11 months from Preliminary Acceptance, to be attended by the PM, AOR, GC, Principal, BE, and FM. | |

CLOSEOUT ACKNOWLEDGEMENT:

CPS Facility Manager **Date**

General Contractor **Date**

CPS Project Manager **Date**

Architect/Engineer of Record **Date**