Port of EVERETT

Engineering & Planning
Construction Project Closeout Checklist

Project No.: _____   Project Name: _____

CIP No.: _____   Project Manager: _____

1. Items Required to Issue Substantial Completion

Complete	N/A	Task	Responsible Pty
☐	☐	**Contractor requests substantial completion**	Contractor
☐	☐	Obtain Certificate of Temporary or Final Occupancy or Final Inspection Reports	PM
☐	☐	Obtain Draft Commissioning Report	PM
☐	☐	Ensure all submittals are received per spec (unless otherwise noted)	PM
☐	☐	Ensure all utilities are operational	PM
☐	☐	Ensure all 3rd party inspections are complete	PM
☐	☐	Finalize Punchlist	PM
☐	☐	**Issue Certificate of Substantial Completion**	**PM**

2. Items Required to Issue Physical Completion

Complete	N/A	Task	Responsible Pty
☐	☐	Ensure Physical Work on Punchlist is Completed	PM
☐	☐	Receive Red Line As Built from Contractor	PM
☐	☐	Receive Operations & Maintenance Manual(s)	PM
☐	☐	Obtain and Inspect Warranties	PM
☐	☐	Obtain Final Commissioning Report	PM
☐	☐	Complete Training	PM or End User
☐	☐	Receive Spare Parts	PM or End User
☐	☐	**Issue Certificate of Physical Completion**	**PM**

3. Items Required to Issue Final Acceptance

Complete	N/A	Task	Responsible Pty
☐	☐	Verify City Permits Inspection Requirements are met	PM
☐	☐	Closeout project permits with City	PM
☐	☐	Ensure Physical Work on Punchlist is Completed	PM
☐	☐	Execute Final Closeout Change Order	PM/AA
☐	☐	Receive and Process Contractor's Final Pay Application	PM
☐	☐	Complete New Location Insurance Form (New Buildings/Infrastructure)	PM
☐	☐	Receive Affidavits of Wages Paid for General and all Subs	CA
☐	☐	Receive Lien Waivers & Legal Actions	CA
☐	☐	Collect Owner Provided Items (Keys, FOBS, Badges, Equipment)	PM
☐	☐	Complete Contractor's Performance Evaluation	PM

Complete	N/A	Task	Responsible Pty
☐	☐	Receive Grant Documents (Buy American, Certified Payroll, etc)	CA
☐	☐	**Obtain Commission Acceptance (over $350,000)**	**PM**
☐	☐	**Issue Notice of Final Acceptance**	**PM**

4. Items Needed to Closeout Project

Complete	N/A	Task	Responsible Pty
☐	☐	Issue Notice of Completion of Public Works (L&I, DOR, ES)	CA
☐	☐	Update the Apprenticeship Utilization Log	CA
☐	☐	Update the Supplier Diversity Spreadsheet	CA
☐	☐	Notify Finance (Bob) if Programmatic Permit was used	PM
☐	☐	Complete lessons learned document	PM/CA/Other
☐	☐	Hold grant closeout meeting with Grant Administrator, Asset Manager, Contract Administrator, and other attendees as needed.	PM
☐	☐	Hold a handoff meeting with the end user to review O&M, responsibilities, identify operational requirements, etc.	PM
☐	☐	Send O&M Manuals, Preventatitve Maintenance Requirements and Warranties to end user	PM/AA
☐	☐	Provide Finance Asset List (Assets over $5,000) – Include make, model, serial number and location w/ plans, maps or photos	PM
☐	☐	Provide As-Built Drawings to Consultant to develop Record Drawings	PM
☐	☐	Ensure Record Drawings Properly Filed: ▪ PDF Copies on SharePoint (Project Folder & Archive Folder) ▪ AutoCAD Copies on K-Drive ▪ Hard Copies in Flat Files	PM AA CM
☐	☐	Verify Permit Requirements, such as Photos, Notice of Completion, and Certificate of Completion, are sent to the Agencies	PM/Planning
☐	☐	If Applicable, Provide as Built Information on Dredging Projects to NOAA	PM
☐	☐	Purge Hard Copy Files of Duplicate and Superfluous Records	AA
☐	☐	Hardback Hard Copy Files	AA
☐	☐	Consolidate Copies of Warranty Information in Warranty Binder / Folder	PM
☐	☐	Schedule Warranty Walk Through / Add to Warranty Dates To Outlook	PM
☐	☐	**Release Retainage**	**CA**
☐	☐	**Archive all Pertinent Electronic & Physical Files / Delete Superfluous Files**	**AA / PM**

Key: PM-Project Manager / CA-Contracts Administraor / CM-Construction Manager / AA-Administrative Assistant