

# Project Closeout Toolkit Sheet

## Section 1: Construction Closeout Checklist

Task	Description	Responsible Party	Status	Notes
Final Inspection	Schedule and complete final walkthrough with OPM, Architect, and Authorities Having Jurisdiction	Owner's Rep / Architect		
Punch List Completion	Confirm all punch list items are addressed, signed off by Architect/Engineer	GC / Clerk of the Works		
Substantial Completion Certification	Obtain official Substantial Completion letter	Architect		
Certificate of Occupancy	Submit documents and pass final inspections	Contractor / Owner		
Commissioning Completion	Finalize systems testing and functional performance reviews	Commissioning Agent		
As-Built Drawings	Submit complete, marked-up record drawings	Architect / GC		

Operation & Maintenance Manuals	Deliver all required O&M manuals, equipment data, and warranties	GC / Subcontractors		
Training for Staff	Conduct training sessions for building systems and equipment	GC / Vendors		
Final Site Clean-Up	Ensure site is clean, safe, and ready for turnover	GC		

## Section 2: Financial Closeout Checklist

Task	Description	Responsible Party	Status	Notes
Final Payment Request	Verify and approve all contractor invoices including retainage	Owner / OPM / Architect		
Change Order Reconciliation	Confirm all change orders are fully executed and accounted for	Owner / Architect / OPM		
Contingency Balances	Return unused contingency amounts or document final use	Owner / Finance Dept		
Grant Closeout	Submit all required reports and documentation for grant-funded projects	Owner / Finance / Grant Manager		
Lien Releases	Collect final lien waivers from GC and all subcontractors	GC / Legal / Owner		
Final Budget Report	Reconcile actual costs to original budget and document variance	Owner / Finance		

Audit-Ready  
Package

Compile  
contracts,  
payments,  
approvals, and  
closeout docs  
into archive

Owner /  
Finance

## Section 3: Project Documentation Archive

Document	Description	File Location	Archived (Y/N)	Notes
Project Contract(s)	Final signed agreements			
Change Orders	All approved and executed COs			
Invoices & Payments	Complete record of payments including retainage			
O&M Manuals	Per system/vendor			
Warranties	Equipment and material warranties			
Certificates	Certificate of Occupancy, Substantial Completion, etc.			
Meeting Minutes	Final construction meeting records			
Lessons Learned Summary	Post-project team debrief findings			

# Section 4: Lessons Learned

Category	Successes	Challenges	Recommendations
Procurement			
Communication			
Construction Oversight			
Budget Management			
Schedule Management			
Community Engagement			