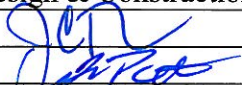





Standard Operating Procedure (SOP)
Project Closeout - Administrative

SOP No.	DC-7100	Revision :	3
Department:	Design & Construction	Date:	6/23/2015
Dept. Head Approval:		Date:	11/8/2016
Director Approval:		Date:	11/8/16

Purpose

To establish guidelines for project managers closing out a project, ensuring that all electronic systems are closed properly, all project documentation is archived, and all appropriate departments are notified of the project being closed.

Responsibility

1. The following people are responsible for following this SOP:
 - 1.A. Project Managers
 - 1.B. Document Control Supervisor
 - 1.C. Associate/Assistant Directors
 - 1.C.1. Maintenance
 - 1.C.2. Roads & Grounds
 - 1.C.3. EH&S
 - 1.C.4. Operations
 - 1.C.5. Public Safety
 - 1.D. Maintenance Supervisors
 - 1.E. Operations Managers
 - 1.F. Financial Analyst
 - 1.G. PM Administrative Support

Definitions

1. MAP: stands for Mountaineer Administrative Processes. West Virginia University's financial system.
2. TMA: Facilities Management's computer maintenance management system/work order system.
3. Web PAL: WVU Design and Construction's Capital Project Tracking Program.
4. P6: WVU's Design & Construction Gantt chart for project scheduling

Procedure

PROJECT CLOSE OUT CHECK OFF SHEET

Note: All steps must be checked off to close out project. Completed forms will be placed in the project folder and saved under project documents in the N: drive file for review and audit

	Done	N/A
1. PM Notifies facilities information coordinator of forecasted substantial completion as early as possible		
2. PM completes the project information from (Exhibit A)		
a. Copy submitted to Facilities information coordinator		
b. Copy kept in project file on N: drive construction doc>		
3. Once substantial completion date reached, enter date in TMA under "user defined" tab in field "substantial completion"		
4. PM ensures all deliverables have been received		
5. All new equipment has been recorded on WVU equipment data sheets by the contractor.		
a. Sent to document control for data entry		
6. Complete room finish schedule		
a. Sent to document control and facilities information coordinator		
b. Copy kept in project file on N: drive construction doc>		
7. PM Issues Project Hand-Off Notification (exhibit B)		
a. Copy kept in project file on N: drive construction doc>		
8. PM checks that project is closed in TMA in accordance with SOP DC-7150.		
9. Once all WO's closed submit (project close out memo) exhibit C to resource management		
10. PM gathers PO documentation from operation coordinator and includes in project file on N: drive		
11. Project over \$10,000.00 Pm completes customer survey sheet (exhibit D) including contacts for future problems and forwards to customer		
12. PM completes lessons learned, contractor, and A/E evaluations located on the N: drive		
13. PM sends project files to the archives and electronic file on N: drive to archives folder		
14. One hard copy of O&Ms, as-builts, warranties to director of Maintenance.		
15. Process complete copy saved to N: drive folder and placed hard copy in file		

Exhibit A: FISNET Project Information Form

Fill in the blanks with appropriate information. Use N/A to indicate that no information applies or is available

Project Information:

Project Number	_____	
Title of Project	_____	
Project Start Date	_____	
Project Substantial Complete Date	_____	
Project Manager	_____	Phone: _____
Total Cost of Project	_____	_____
Estimated Building Replacement Value	_____	_____
Estimated Replacement Value – Contents	_____	

Building/Room Information:

Building Number and Name	_____	
Address	_____	
Street	_____	
City/State	_____	_____
Zip Code	_____	
Architect	_____	
General Contractor	_____	
Building GSF	_____	
Foundation Type	_____	
Exterior Wall Type	_____	
Roof Type	_____	
HVAC	_____	
Sprinkled (yes/no)	_____	
Life Safety Information (type of alarms)	_____	
* Room Finish Schedule Provided (yes/no)	_____	
Provided Electronic Floor Plans (yes/no)	_____	




*Room schedule should have the following included for each room: Room Number, Net Square Footage, Room type, Department occupying space, Wall Finishes, Floor Finishes, Ceiling Finishes, Ceiling Height, Lighting Type, Sprinkled (y/n), ADA Accessible (y/n), fixed seating (y/n), and Special Technology (y/n).

Exhibit B: Project Hand-Off Notification



West Virginia University
Facilities Management

Notification of Building Hand-off

TO: FM Director of Maintenance
FM Director of Operations
Director of Public Safety
FM Asst. Director of Roads and Grounds 
Director of EHS

FROM: 

CC: FM Assistant Vice President
Director of Design & Construction
Associate Director Construction Services
Associate Director In-House Construction

DATE:

PROJECT: 

BUILDING: 

The subject project is substantially complete and is ready to be transferred from the Construction Phase to the Operation and Maintenance (O&M) phase. The units below will be responsible for routine building operation and maintenance on the specified dates.

Transfer Date (Operations/Custodial):

Transfer Date (Maintenance):

Transfer Date (Roads and Grounds):

Transfer Date (Fire Control):

Comments/Exceptions:

Attachments:

- Punch list
- Project Closeout Checklist

Exhibit C: Project Closeout Memo

TO:

FROM:



SUBJECT:

DATE:

The attached project and/or work order number _____ is complete.

Please Verify charges and **sign and date this cover letter and all attached work order(s)** if cost meets your approval.

If you have any questions or concerns, please contact me at 304-293-6262 at your earliest convenience.

Thank you.

Approval to close project/work order:

Signature/ Date

Exhibit D: Customer Summary Sheet

West Virginia University
Facilities Management

Project Number _____

Project Name _____

Project Manager _____

Date _____

Description of Project

Start Date _____

Project Completion Date _____

Budget:

Start of Constr _____

Approved Increases _____

Total Project Budget _____

Change Orders:

Total Submitted _____

Total Approved _____

Final Project Cost _____

Gross Construction Cost (per/sq.ft) _____

Please contact Facilities Management Help Desk (304-293-HELP) for service or warranty issues. The project manager will remain involved through the warranty period. The warranty for this project expires one year after the project completion date listed above, unless otherwise noted.