

- Benner Pike Shops
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Analysis #1 – Close out Planning and Communication

Overview

The general contractor for the Benner Pike Shops replaced their current superintendent of the project to a different one. The issue for the replacement is that the new superintendent is not as familiar as the previous one, and it could take some time for the new superintendent to adapt to the project. Plus, final closing out could be really stressful resulting in possible delay in the project. Another issue that could delay the project is lack of communication among the project team. The project was actually delayed one and a half weeks because the GC did not communicate with the tenants of the shops well enough. This analysis will focus more on research.

This analysis focuses on research of close out planning. First, close out literature was investigated in order to study the closing out of the Benner Pike Shops project. Based on the literature review of close out planning, the general contractor of the project was interviewed with several questions. The same concept concerning were sent out in survey format via electronic mail to number of PACE members. The analysis concludes the research with the comparison of different close out planning and some suggestion for the planning of the Benner Pike Shops project.

Well created planning of a project done in preconstruction phase holds the power to either shorten the schedule or delay it. Certainly, the Benner Pike Shops project could have prevented one and a half weeks delay if their close out planning had been finely oriented. Since the project is a mall, one day delay is crucial for them. On the other hand, if the project was shortened in duration and the mall had opened early, the general contract might end up with incentives.

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Close out literature

Closing out a project would seem that all that needed to close out would be to inspect it, accept it for the owner, and see that the contractor receives the final payment. But, there are more items in that such as, the guarantees, operating instructions for equipment, keying schedule, record drawings, bonds, liens that may have been filed, and etc.

Generally, there may be at least two inspections required to close out the project. The first will establish those areas still requiring correction or other remedial work, and the final inspection will be a check off to assure that all work is considerably complete and that all corrections have been made.

During close out phase of the project, the contractor is in charge of cleaning up the site prior to the final check up. The final cleanup is of significantly greater proportions than previous cleanup work done during the project, as all of the various items of demobilization technically are included under the cleanup category. This includes removal of temporary utilities, haul roads, temporary fences, field offices, detours, stockpiles, surplus materials, scrap, replacement of landscaping where it had been temporarily removed, street cleaning, and the obtaining of releases from the various city, county, or other governmental authorities having jurisdiction.

Probably the biggest portion of the close out planning would be the punch list or check list. There is no period during construction that is concerned with more time-consuming delays and the resulting frustration than the period involving the corrective work prior to final acceptance. It is the contractor and its subcontractors who must assume the greatest responsibility for the existence of work that must be corrected. It is also the contractor's responsibility to create a punch list and make sure there is no error in it.

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To prepare for close out, following process can be performed:

1. Perform close out inspections as outlined under the punch list.
2. Begin a partial reduction of field office inspection staff.
3. Complete final reduction of the field office inspection staff to the minimum number of persons necessary to complete the close out administrative activities.
4. Prepare for final inspection. All items indicated as requiring correction on the preliminary punch list should be re-inspected, and all tests that were originally unsatisfactory should be conducted again.
5. Check for all changes and variations from the original contract drawings have been marked.
6. Prepare a Certificate of Completion or Substantial Completion once all items in punch list have been accomplished to the satisfaction of the inspecting team.
7. Receive the contractor's request for its final progress payment.
8. Check all work quantities and the value of the work completed from the punch list.
9. Submit contractor's payment request to the owner through the design or construction management firm with recommendation to pay.
10. Obtain signatures of the architect/engineer, the contractor, and the owner on the Certificate of Completion or Certificate of Substantial Completion.
11. Notify the owner, through the architect/engineer, that the project is ready for occupancy.
12. Request to the owner for final payment and retainage to be released.

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Questionnaire given to industry members

Total of how many superintendents and project managers were put into the Benner Pike Shops Project?

Were you supposed to leave the job at the closeout phase and hand the project to the third superintendent? Was it planned during preconstruction planning?

How often did your company hold meetings while the project is in progress?

Who else was in the meeting except members from general contractor (architect, subcontractor, client, etc)?

Were there any meetings with shop tenants during the construction?

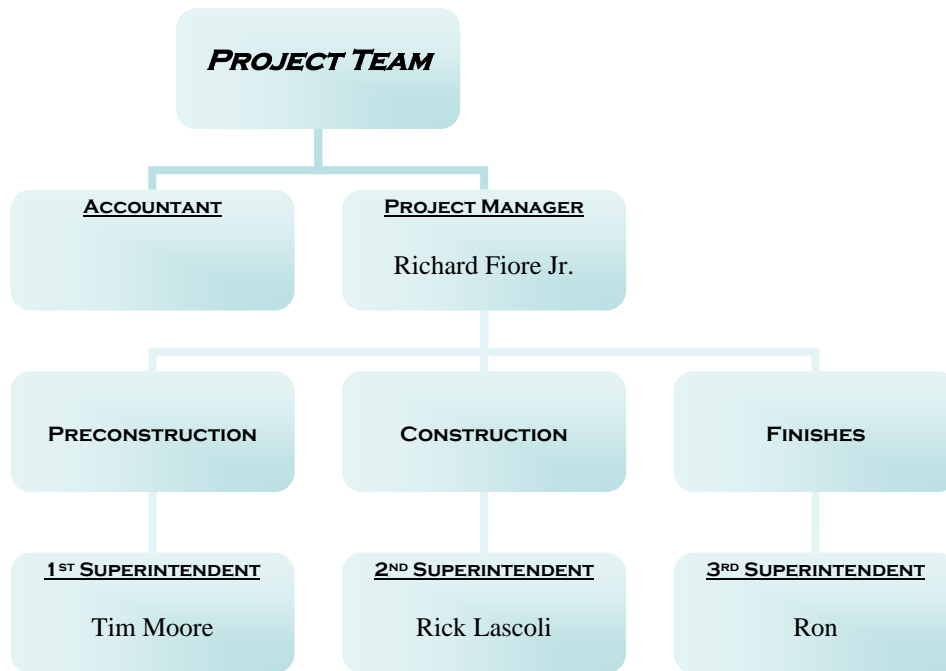
Why do you think that your company had planned the closeout planning like that?

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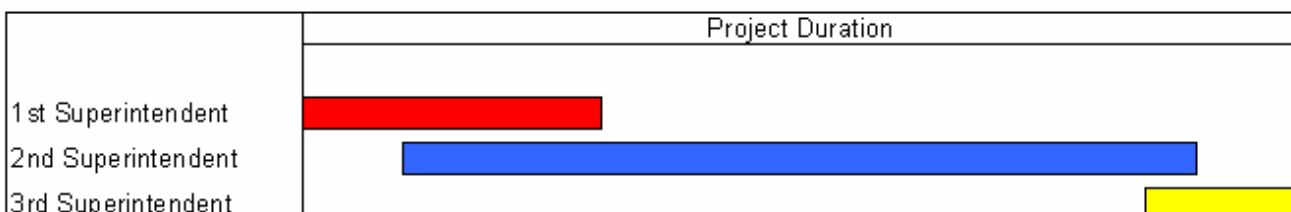


Problem identification

The Benner Pike Shops project was wrongly executed from the beginning. Its staffing plan shows how the entire project is divided into three major sections: preconstruction, construction, and finishes. Each section was covered by different superintendents.



During the preconstruction phase, the superintendent probably had set up plans how the construction should go according to the schedule. Obviously, closeout planning was part of preconstruction. If the first superintendent had stayed on the project until the completion, there could be less risk completing the project. However, he had only stayed until the middle of the project, which the second superintendent was in charge of the project for about 90% of the time.



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It is not good for the second superintendent to be not present during preconstruction period, but it is not going to affect the project hugely since he joined the project at the early stage. Even though there was a project manager in charge of the entire project, it is not efficient to coordinate staffs as shown above. The project manager is only conducting the project from the overview. It is the superintendents who need to appear at the construction site and check if the structure is building properly.

This also affects the communication and the meetings within the job. The project is about a year long and meetings with subcontractors were held weekly. Because the second superintendent was replaced by the third one, the meetings had to be reorganized. In another word, the subcontractors had to be familiar with the new superintendent which is going to take some time. Since the third superintendent was not quite used to the project, it was necessary for him to review the project from the beginning and how the construction went before he came. There could be some communication struggles between the superintendent and subcontractors, because one was at the site the whole time and the other was not. It would not make the project to fail at the last stage, but it certainly is not the best way to coordinate the staffing plan that way.

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Conclusion

As said in the closeout literature, it is important how a company sets up the closeout planning during preconstruction. Mr. Conner from Saddleback Development Corporation replied,

“I think close-out is extremely important and I don't like it when personnel changes at this critical time. Contractors should start to ‘pride themselves’ and market themselves as close-out specialist (meaning they really care about it, have systems for it and do it better than anyone else). They may get more jobs out of it. Owners and Architects, who have gone through poor close-outs don't want to go through it again. The relationships can go bad in a hurry.”

Every participant of the questionnaire said that they had the same supervisor through out the project including closeout phases. Most of them were cautious about closeout, because last impression is sometimes the most important. After all, one has to satisfy their owner when the project is completed. Once the client is satisfied, there is a better chance for him/her to contact again for another project. This is why companies pay good attention when it comes to closeout of a project.

In order to assure satisfaction of tenant and client requirements, constant communication is necessary at all levels. By communicating well, construction sequences can be nicely coordinated with each trade in the right order. This would shorten project schedule which will eventually cause decrease in cost.