Project Management Manual

Capital Planning and Development

**Lessons Learned Checklist**

**Scope of Work:** Provide a general description of the project, overall costs and schedule – elaborate on the details later in the specific sections. Provide a sentence describing each of the following systems. Provide square foot costs or historical cost data if available.

* Site work:
* Structural System:
* Building Enclosure:
* Plumbing Systems
* HVAC Systems:
* Electrical Systems-Electrica/Data/Access/Security/Lighting
* Accessibility

**Submittals & RFIs:** Lessons learned from the submittal process, long lead time items, RFIs which led to significant changes or costs.

**Quality Control:** What worked well? How was the punch list managed? Were there details that were particularly hard to construct?

**Schedule:** Discuss challenges (delays & their causes), recovery techniques, timesaving processes, long lead-time items, commissioning & owner move in.

**Challenges:** Name top 3 challenges for the project & how they were resolved.

**Successes:** Name top 3 things we did well & explain why they went well.

**Safety:** Short sentence regarding number of injuries in relationship to the number of hours worked.

**Project Team:** How did the Architect, General Contractor or specific subcontractors perform? Don’t include subjective comments like “they did a terrific job”. What specifically did they do? Good communications, coordination, oversight of design consultants, etc. Be specific!

**Cost Report:** Compare budget to actual costs. Report on:

* Building square footage costs
* System costs if available
1. Mechanical
2. Electrical
3. Accessibility
* Soft cost percentage
* Over/under budget – disposition of funds
* Change order Review—Grading—Owner requested, design oversight(specify), Unforeseen conditions, city requirement

**Summary:** Use this section for closing remarks – big picture perspective!