Contractor Close-Out Rubric

The plant's record of what the contractor actually did. Written by a plant technician. Filed in the plant's CMMS. Without it, the institutional memory walks out the gate with them.

Companion to: *Fix the System*, Chapter 12. **Who uses it:** the plant-side technician assigned to oversee the contractor work. **When:** before the contractor leaves the site, at the end of the job, with the contractor present for review. **Time to complete:** 20 to 30 minutes. **Filed where:** the plant's CMMS, attached to the asset record the work was performed on. Not in a contractor folder. Not in a project folder. On the asset itself.

Header

Work order number: ____________ Asset tag: ____________

Contractor company: ______________________________________

Contractor crew lead: ______________________________________

Plant-side technician (author of this close-out): ______________________

Date work started: ____________ Date work completed: ____________

Plant-side contact during the work: ______________________

Section 1 — What was requested

One paragraph. The scope as given to the contractor at mobilization. Copy from the work order if the original scope was clear; rewrite if it wasn't.

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Section 2 — What was actually done

One to two paragraphs. Verified by the plant-side technician. Not reported by the contractor.

Include: any scope added or dropped during the work, any substitutions approved in the field, any sequence changes, the final state of the asset.

If the answer is "exactly what was requested," say so in one sentence. If not, say what changed and why.

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Section 3 — What was found

Any conditions discovered during the work that were not in the original scope.

This is where the plant captures what the contractor saw that was not the job. It is often the most valuable section of the close-out.

Examples of what goes here: corrosion worse than expected, upstream valves leaking, bearings in adjacent equipment showing early wear, gaskets installed against spec, pipe supports loose, documentation on file that did not match the asset as found, hidden damage from a prior repair.

List each finding on its own line. For each, note whether a work order has been opened (or needs to be) to address it.

Finding	Work order opened?	WO #	Priority

Section 4 — What was installed that differs from spec

Any non-OEM parts, any substitutions, any redesigned components, any temporary repairs that are not yet permanent.

Name specifically. Include part numbers, manufacturer, drawing references where applicable. A "miscellaneous substitute" line is not acceptable — it fails a future planner.

Spec'd part / component	What was installed	Part #	Reason for substitution

If temporary: what triggers the permanent replacement, and when? ______________________

Section 5 — What the contractor recommended for follow-up

Any follow-up work the contractor recommended: monitoring, re-inspection, replacement, procedure update, training.

Recommendations translate into plant work orders before the contractor leaves. Not open-ended suggestions. Not a paragraph in a contractor report. Work orders, with owners and due dates, in the plant's language.

Recommendation (plain language)	WO # opened	Owner	Due date

If no follow-up: say so explicitly in one sentence. A blank section is ambiguous.

Section 6 — What we learned that changes the standard

If anything.

The test: does something about this job change what the plant will do next time? A procedure, a standard, a failure code, a PM interval, a training requirement, a spare-parts holding, a vendor evaluation.

If yes, name it. Name the owner. Name the due date.

Lesson	What changes	Where it goes (procedure / training / failure code / PM / standard)	Owner	Due

If nothing changes, one sentence: "Nothing learned beyond routine. Standard procedure held."

A recurring "nothing learned" across multiple jobs on the same asset is a signal the plant is not looking hard enough, not a signal the jobs were uneventful.

Review and sign-off

Contractor review

The contractor reads the completed close-out. Agrees, or contests specific items. Disagreements are noted in a sentence next to the item, not resolved by rewriting the plant's record.

☐ Contractor agrees with close-out as written.

☐ Contractor contests specific items (listed below).

Contested items: ____

Contractor crew lead signature: ______________________ Date: _____________

Plant sign-off

Plant-side technician signature: ________________________ Date: ______________

Plant-side contact (permit holder) signature: ________________________ Date: ______________

File location

- ☐ Attached to CMMS record for asset tag ______________.
- ☐ Arrival checklist attached to this close-out.
- ☐ Work orders from Sections 3, 5, and 6 opened in CMMS before this sheet is filed.
- ☐ Any procedure / standard / training changes from Section 6 submitted to the owning function within 7 days.

Free toolkit downloads and updates: getov.xyz/toolkit/fix-the-system/ch12