



## Recommended Protocol for Job Close Out of Painting and Decorating Projects

### 1. Scope

- 1.1. The purpose of this standard is to establish procedures for the close out of painting and decorating projects.
- 1.2. This standard assigns responsibilities to the various entities involved when the project specifications do not define specific job close out procedures.

### 2. Significance and Use

- 2.1. It is important that the close out of painting and decorating projects be accomplished in an orderly and timely procedure to eliminate misunderstandings and conflicts.
- 2.2. This standard applies when job close out procedures are not detailed in the contract documents.

### 3. Reference Standards and Documents

- 3.1. AIA, The American Institute of Architects Document G704-2000, Certificate of Substantial Completion.
- 3.2. Dictionary of Architecture and Construction, Fourth Edition, 2005.
- 3.3. Merriam-Webster's Collegiate Dictionary, Eleventh Edition, Copyright 2003.
- 3.4. MPI, The Master Painters Glossary – Painting and Decorating Terminology, Version 4.
- 3.5. PDA Standard 9, Definition of Trade Terms.
- 3.6. PDA Standard 18, Recommended Protocol for Documenting Extra Work to a Contract.
- 3.7. If there is a conflict between any of the references and this standard, this standard shall prevail.

### 4. Definitions

- 4.1. **ATTIC STOCK:** Extra materials indicated in the contract documents to be provided to the owner for maintenance after completion of the project. [PDA Standard 9]
- 4.2. **CONTRACTING ENTITY:** The general contractor, owner of the property, construction manager, developer or other entity legally responsible for the agreement or authorized agent of any of the above. [PDA Standard 9]
- 4.3. **EXTRA:** Performed work or a desired item of construction which is beyond the intent of the drawings and specifications contained in a construction contract; an item of work involving

additional cost. [Dictionary of Architecture and Construction]

- 4.4. **EXTRA MATERIALS:** see attic stock.
- 4.5. **FINAL COMPLETION:** The completion of work and all contract requirements by the contractor. [Dictionary of Architecture and Construction]
- 4.6. **GENERAL CONTRACTOR:** The prime contractor who is responsible for most of the work at the construction site, including that performed by the subcontractors. [Dictionary of Architecture and Construction]
- 4.7. **PAINTING AND DECORATING CONTRACTOR:** An individual or firm whose primary business is providing surface preparation, and wallcovering and coating application service. [MPI]
- 4.8. **PRIME CONTRACTOR:** Any contractor on a project having a contract directly with the owner. [Dictionary of Architecture and Construction]
- 4.9. **PUNCH LIST:** A checklist of all items on a construction project that are unfinished, or incomplete, have not been done at all, require replacement or repair, or require additional work to achieve an acceptable level of workmanship. Such a list is often established as a result of periodic inspections at the job site during construction and may be included in field reports. All items must be corrected by the contractor in a timely fashion so that the finished construction job conforms to the contract documents. [Dictionary of Architecture and Construction]
- 4.10. **PROPERLY PAINTED SURFACE:** A surface uniform in appearance, colour, texture, hiding and sheen. It is also free of foreign material, lumps, skins, runs, sags, holidays, misses, or insufficient coverage. It is also a surface free of drips, spatters, spills or overspray caused by the painting and decorating contractor's workforce. [PDA Standard 1]
- 4.11. **OWNER:** The architect's client and party to the owner architect agreement; one who has the legal right or title to a piece of property. [Dictionary of Architecture and Construction]
- 4.12. **SUBCONTRACTOR:** A person or organization that has a direct contract with a prime contractor to perform a portion of work at the site. [Dictionary of Architecture and Construction]

**4.13. SUBSTANTIAL COMPLETION:** Substantial completion is the stage in the progress of the work when the work or designated portion is sufficiently complete in accordance with the contract documents so that the owner can occupy or utilize the work for its intended use. [AIA]

**4.14. WORK LIST:** A vague term sometimes implying an initial punch list generated to provide an indication of work remaining to be completed.  
[PDA Standard 9]

## 5. Standard Specification

**5.1. Projects where the painting and decorating contractor is a subcontractor:**

**5.1.1. The owner or its designated representative may prepare an initial punch list.**

**5.1.1.1. The initial punch list, if any, shall be prepared prior to substantial completion.**

**5.1.1.2. Unless otherwise agreed, the painting and decorating contractor shall work diligently to complete the items on the initial punch list within a reasonable amount of time and will, upon request, provide documentation that will support completion of the initial punch list**

**5.1.1.3. If the painting and decorating contractor determines that some of the items on the initial punch list are extra to its work, then the painting and decorating contractor shall notify the general contractor or its designated representative that these items constitute extra work and that the painting and decorating contractor is entitled to additional compensation.**

**5.1.1.4. The additional compensation shall be invoiced in accordance with PDA Standard 18.**

**5.1.2. At the time of substantial completion, a final punch list shall be prepared by the owner or its designated representative.**

**5.1.2.1. Unless otherwise agreed, the painting and decorating contractor shall work diligently to complete the items on the final punch list within a reasonable amount of time and will, upon request, provide documentation that will support completion of the final punch list.**

**5.1.2.2. If the painting and decorating contractor determines that some of the items on the final punch list are extra to its work, then the painting and decorating contractor shall notify the general contractor or its designated representative that these items constitute extra work and that the painting**

**and decorating contractor is entitled to additional compensation.**

**5.1.3. Punch lists should address specific items at specific locations rather than general descriptions.**

**5.1.4. If the final punch list is redistributed after its initial distribution, it shall be based solely on the items listed on the final punch list.**

**5.2. Projects where the painting and decorating contractor is a prime contractor:**

**5.2.1. The painting and decorating contractor shall prepare an initial punch list, a comprehensive list of outstanding items to be completed or corrected when the painting and decorating contractor deems the project to have attained substantial completion.**

**5.2.1.1. Unless otherwise agreed, the painting and decorating contractor shall work diligently to complete the items on the initial punch list within a reasonable amount of time and will, upon request, provide documentation that will support completion of the initial punch list.**

**5.2.1.2. If the painting and decorating contractor, upon his inspection, determines areas of completed work require additional corrective work that are extra to its work, then the painting and decorating contractor shall notify the owner or its designated representative that these items constitute extra work and that the painting and decorating contractor is entitled to additional compensation.**

**5.2.1.3. The additional compensation shall be invoiced in accordance with PDA Standard 18.**

**5.2.2. When the painting and decorating contractor deems the project to be complete, a final punch list may be prepared by the owner or its designated representative.**

**5.2.2.1. Unless otherwise agreed, the painting and decorating contractor shall work diligently to complete the items on the final punch list, if any, within a reasonable amount of time and will, upon request, provide documentation that will support completion of the final punch list.**

**5.2.2.2. If the painting and decorating contractor determines that some of the items on the final punch list are extra to its work then the painting and decorating contractor shall notify the owner or its designated representative that these items constitute extra work and that the painting and decorating contractor is entitled to additional compensation.**

**5.2.2.3. The additional compensation shall be invoiced in accordance with PDA Standard 18.**

5.2.3. Punch lists shall address specific items at specific locations rather than general descriptions.

5.2.4. The appearance of painted surfaces shall be judged in accordance with the definition of a properly painted surface.

5.2.5. If the final punch list is redistributed after its initial distribution, it shall be based solely on the items listed on the final punch list.

5.3. The punch list process may be performed for various phases of the project in accordance with the project schedule. The punch lists provided shall be unique to that phase.

5.4. At final acceptance of the work, the painting and decorating contractor shall provide the following:

5.4.1. Attic stock or extra materials as required by the contract documents.

5.4.2. As built drawings, generally a schedule of paint and wallcovering finishes as required by the contract documents.

5.4.3. Maintenance instructions as required by the contract documents.

5.4.4. Warranties as required by the contract documents.

5.4.5. Final releases of lien as required by the contract documents.

## 6. Comments

6.1. This standard establishes a protocol for the close out of painting and decorating projects.

6.2. This standard is intended to establish a consensus document for the painting industry's practices.

## 7. Notes

7.1. PDA does not warrant or assume any legal liability or responsibility for the accuracy, completeness or usefulness of any of the information contained herein.