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TECHNICAL HANDBOOK FOR  
ENVIRONMENTAL HEALTH AND ENGINEERING  
VOLUME III - HEALTH CARE FACILITIES DESIGN AND CONSTRUCTION  
**PART 24 - CONSTRUCTION GUIDELINES**

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**CHAPTER 24-8 PROJECT FINAL REPORT**

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**24-8.1 INTRODUCTION**

This technical handbook chapter provides detailed guidelines for preparing the project final report, which is required for all completed Indian Health Service (IHS) health care facilities and quarters projects. This report compiles all pertinent data on completed projects, ranging from the facility's budget and location, to details of what went right and/or wrong during the design and construction process.

**24-8.2 PURPOSE**

The project final report provides a source of many recommendations reflected in the design development and construction of all IHS health care facilities and quarters, including maintenance and improvement projects. This report contains materials that will encourage IHS staff to become actively involved with the health care design, so that future facilities directly reflect the needs of the American Indians and Alaska Natives who use them. Also, it contains data to assist IHS in providing closure to IHS projects justifying cost, need, action taken, etc., to interested parties including the Congress and Tribal Organizations. This report should be used by management to determine changes needed in the planning, designing, and constructing process.

**24-8.3 GUIDELINES**

The project final report will be prepared for all IHS health care facilities and quarters projects, including projects funded by the tribal contractor with medicare and medicaid, health services carryover funds, and other IHS funds.

The preparer is to follow the format in Appendix A, provide the information indicated in the chapter guideline briefly and concisely, and use existing documents as attachments, where possible.

**24-8.4 RESPONSIBILITIES**

The IHS Headquarters (HQE) Office of Environmental Health and Engineering (OEHE), Division of Facilities Planning and Construction (DFPC) should include the completion of the project final report as a monitoring/review item.

The program responsibilities are as follows:

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- A. IHS Facilities Projects - The Area Facilities Engineer in each area should prepare the project final report on all projects to include new construction, renovation, and maintenance and improvements, immediately after the financial closure or contract and closeout documents are final.
  
- B. Tribal Facilities Projects (638 and self-governance) - A tribal contractor's staff should prepare the project final report upon project completion and prior to contract closure.

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**APPENDIX A - PROTOTYPE PROJECT FINAL REPORT**

## FINAL REPORT

[PROJECT NAME]

[PROJECT NUMBER]

[Name of the Hospital or Health Center]

[Location], [State]

[Month] [Year]

[NAME OF AREA]  
INDIAN HEALTH SERVICE  
DEPARTMENT OF HEALTH AND HUMAN SERVICE

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**FINAL REPORT**

[Project Name], [Project Number]  
[Name of the Hospital or Health Center]  
[Location], [State]  
[Month] [Year]

PREPARED BY:

\_\_\_\_\_  
[Name]  
Area Staff Engineer  
Area Office  
Indian Health Service

\_\_\_\_\_  
Date

CONCUR:

\_\_\_\_\_  
[Name]  
Director, Division of Facilities Management  
Area Office  
Indian Health Service

\_\_\_\_\_  
Date

RECOMMEND APPROVAL:

\_\_\_\_\_  
[Name]  
Area Associate Director,  
Office of Environmental Health and Engineering  
Area Office  
Indian Health Service

\_\_\_\_\_  
Date

APPROVE\*:

\_\_\_\_\_  
[Name]  
Area Director  
Area Office  
Indian Health Service

\_\_\_\_\_  
Date

NOTE: For new construction/IHS facilities projects only.  
For tribal contractor, use a modified signature sheet.  
\* - approving official title may be different than shown but  
functioning in a similar capacity.

**FINAL REPORT**  
[Project Name], [Project Number]  
[Name of the Hospital or Health Center]  
[Location], [State]  
[Month] [Year]

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**LIST OF EXHIBITS**

1. DRAWINGS/MAPS/PLANS [*Maps, site plans and as-built plans (reduced size) as appropriate to indicate the new facility/upgrade.*]
2. PHOTOGRAPHS [*50 mm x 100 mm pictures generally showing the project.*]
3. SCHEDULE OF VALUES [*Quantities, costs, etc., of real property.*]
4. BUDGET SHEETS
5. SIGNIFICANT CORRESPONDENCE [*Funding Approvals, Contracts, Awards, Notices to Proceed, Minutes of Meetings of Significance, Final Inspections, Punch List Certification, etc.*][optional]
6. PROJECT DEVELOPMENT DOCUMENT [*Program Justification Document/Program of Requirements, Project Summary Document, or other project development documents.*]
7. REPORTS [*Site Selection and Evaluation Phases I & II, Environmental Assessment, Feasibility Study, Value Engineering, Energy Conservation, Post Occupancy Evaluation, etc.*]

**FINAL REPORT**

[Project Name], [Project Number]  
[Name of the Hospital or Health Center]  
[Location], [State]  
[Month] [Year]

- I. INTRODUCTION** [*Unless dates are necessary to make the body of this report flow, they need only to be listed in Table I.*]

The [facility name] required [renovation, expansion, a new addition (etc.)] to provide a more modern, safe, and adequate facility to deliver efficient and cost-effective health care services. Construction of the space is authorized by [(cite legislation) and governed by the (policy/guidance) set forth in (cite regulations, Indian Health Manual Chapters, and/or other policy or guidance)]. The construction [added \_\_\_\_\_ gross square meters to the existing facility and/or renovated \_\_\_\_\_ net square meter in the existing facility]. Funds for the construction were [state the source of funding (federal, tribal funds, Medicare/Medicaid (M/M), Maintenance and Improvement (M/I), etc.)]. The chronology of all significant events in the history of the planning, design and construction of this project are noted in Table I. [The list given in Table I is not an all inclusive list, but gives an idea of the items that should be included.] The project development document [PJD/POR, Project Summary, or other project development documents] attached in Exhibit 6 to this report described the existing facility, justified the need to [expand and/or renovate the facility], and recommended the construction necessary to provide the proposed addition/expansion and/or renovation.

**Table I - Chronology Of Events**

<u>EVENT</u>	<u>DATE</u>
Site Evaluation/Phase I	
Start of Design*	
Completion of Design*	
Award of Construction Contract*	
Notice To Proceed	
Final Inspection	
Completion Of Construction*	
Punch List Certification	
Warranty Inspection	
Financial Close-Out	
Post Occupancy Evaluation	

\* - Items required, others as appropriate; additional items as writer feels is applicable.

**II. PROJECT PLANNING & DESIGN** [Give a short narrative of the history of the planning and design phases of this project. List the principal participants from all offices and itemize unique occurrences or problems.

Briefly describe the A/E's role during the construction phase, differentiate between traditional "design related services" (in this section) and any extended "construction administration services" (in the next section) provided by the design firm. The subsections listed here and in the following sections are for guidance only. It is acceptable to write the report with just the section headings and not use the sub-headings shown below.]

- A. Planning
- B. Design
- C. Energy Conservation

D. Value Engineering

**III. CONSTRUCTION** *[Provide a short narrative of how construction was accomplished, list the principle participants and discuss unique occurrences and problems. Pay particular attention to those contract modifications that were required to correct deficiencies that came about because of inadequate planning/guidance.]*

- A. Facility Construction
- B. Construction Management
- C. Equipment

**IV. SUMMARY OF THE NEW FACILITY** *[Describe what was constructed renovated, or remodeled by this project. Include maps, floor plans, etc., showing the extent of the new construction. Discuss any detrimental effects this project has on other parts of the facility(s). Identify any deficiencies unresolved by this project. Include a tabulation of the areas contained in the completed facility in Exhibit 1.]*

**V. POST OCCUPANCY EVALUATION** *[If this project was new construction, then the information included here will come from the Post Occupation Evaluation (POE). It should be initiated approximately one year after completion of construction with the final report completed within two years after construction. Briefly note the major findings of the evaluation here and attach a copy in Exhibit 7. If the funding is from another source other not mentioned in Part I. Introduction, the warranty inspection may be used to investigate/document deficiencies in the design. The summary of that inspection could be documented here.]*

**VI. FINANCIAL SUMMARY**

The total cost of construction was \$\_\_\_\_\_, and was funded *[describe how much and where the funds came from]*. For a breakdown of the appropriation and construction costs, see the Financial Summary in the next page. The schedule of values is attached to this report in Exhibit 3.



**APPROPRIATIONS**

<u>Source</u>	<u>Amount</u>	
FY _____		\$ _____
FY _____		\$ _____
TOTAL, APPROPRIATIONS		\$ ..... _____

**EXPENDITURES**

<u>Design</u>		
A/E Fees including <i>[Site Survey, Soils, etc.]</i>		\$ _____
Change Orders		
Subtotal, Design		\$ _____ _____
<u>Construction<sup>1</sup></u>		
Base Bid & Options Taken		\$ _____
Contract Modifications		
Contract Administration		
Subtotal Construction		\$ ..... _____
<u>Equipment</u>		
_____		\$ _____
_____		
Subtotal, Equipment		\$ _____ _____

<sup>1</sup> The (approved construction contractor's schedule of values is optional) or schedule of values is attached in this report in Exhibit 3.

## **EXHIBIT 1**

### **DRAWINGS/MAPS/PLANS**

**EXHIBIT 2**

**PHOTOGRAPHS**

**EXHIBIT 3**

**SCHEDULE OF VALUES**

**EXHIBIT 4**

**BUDGET SHEETS**

**EXHIBIT 5**

**SIGNIFICANT CORRESPONDENCE**

(OPTIONAL)

**EXHIBIT 6**

**PROJECT DEVELOPMENT DOCUMENT**

## EXHIBIT 7

### REPORTS

Value Engineering	[Date]
Energy Conservation	[Date]
Post Occupancy Evaluation (required if prepared for project)	[Date]

