



Job-Site

Procedure Manuals

An experienced tradesman is usually more productive than a guy who's just starting out. Not only does he know more about building, but he has systems for tasks he does on a regular basis. If the boss asks him to hang a door, he knows which tools he needs and can picture every step it takes to complete the job. The guys

by Rob Boram

who manage construction projects are in the same boat. The ones who have a system have a good shot at bringing jobs in on time and under budget. But people who manage haphazardly receive a lot of unwelcome surprises and almost never make schedule or budget.

Every one of our jobs is managed by a lead carpenter who swings a hammer and supervises subs. Our guys are able to wear both hats because we've created procedures that provide a framework for managing jobs.

Job Folder

At the beginning of every project, we give the lead carpenter a job folder containing information needed to run the job. The folder contains plans, specs, and a detailed cost estimate. It also has phone numbers for subs and suppliers, as well as for the police, fire department, and the local emergency room. We work in three different states — Ohio, Pennsylvania, and West Virginia — so having a comprehensive list of phone numbers is important.

If budget and schedule are destinations, your management system is the road map

The Lead Man Folder

Each lead carpenter also has a Lead Man Folder. Unlike job folders, these aren't linked to a specific project, but go with the lead man from job to job. The folder is actually a large binder filled with clear plastic sleeves that contain items like the company's contractor license, a copy of the change-order policy, change-order forms, message reply forms, and a weekly planner form. The binder also includes a company policy manual and a section outlining our standard construction details.

Weekly planner: Every Friday afternoon, the lead men turn in a completed planner form for the coming week. There's a

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Name _____ Date _____

Full Name _____
Signature _____

Lunch _____ Start Time _____ Finish Time _____

DO IT RIGHT THE FIRST TIME

Total Hours			
80 Supervision			
380 Tear Out			
840 Excavation			
1140 Concrete			
1359 Foundation			
1360 Masonry			
1540 1st Floor System			
1560 1st Exterior Wall			
1565 Basement Framing			
1570 1st Interior Wall			
1600 2nd Floor System			
1610 2nd Exterior Wall			
1620 2nd Interior Wall			
1630 Roof Framing			
1670 Ceiling Framing			
1700 Rough Stairs			
1710 Decks			
2000 Insulation			
2050 Roofing			
2420 Exterior Doors			
2430 Interior Doors			
2520 Windows			
2680 Siding			
2702 Millwork			
2710 Countertops			
2790 Finish Stairs			
2810 Shelving & Rods			
2840 Cabinets			
2880 Gutters & Downspouts			
2900 Soffit & Fascia			
3130 Drywall			
3151 Ceilings			
3170 Interior Painting			
3180 Exterior Painting			
3230 Floor Covering			
3250 Interior Staining			
3260 Exterior Staining			
3310 Tile			
3380 Special Ties			
3420 Bath Accessories			
3560 Plumbing			
3760 Electrical			
3880 HVAC			
4000 Clean Up			
4020 Dump Run			
4040 Material Run			
4060 Travel/Down Time			
4140 Punchlist			

INJURY REPORT: Did you get hurt or see someone get hurt? (PLEASE CIRCLE ONE)

Who: _____

Where: _____

When: _____

How: _____

Mileage Report

Destination _____ Date _____ Mileage _____

Every employee turns in a separate time card for each day worked. On the front, hours are posted to job-cost work codes; the back (above) provides space to report job-site accidents.

space for each day of the week, which the carpenter fills in with a list of what he and the other people on the job plan to do that day. The simple act of completing the form ensures that some kind of plan is in place at the beginning of each week.

Time cards. Every Monday lead men are given time cards for that week. Cards are preprinted with the job, employee name, date, and day of the week. Date and day of the week are included because there's a card for each day of the week. (A carpenter working a regular week turns in five cards.) The front side of the card has a list of codes for various work operations and blank spaces to record time spent on those tasks. On the back of the card is a place to record reimbursable mileage and a daily accident report.

The employee is required to sign a statement on the back of the card saying that he did or didn't witness an accident that day. If he did, he's supposed to write a description of what happened. A comp claim is legitimate if someone hurts himself on Friday, but doesn't realize how bad it is till Saturday. What you don't want is someone filing a claim on Monday for an injury he says he got the previous week but that really happened when he was bungee jumping or working a side job over the weekend. Requiring people to report accidents on a daily basis makes it easier to separate legitimate claims from phony ones.

Time log. Lead carpenters are required to keep a log of who's working on their projects on any given day. Helpers go from

project to project, so the information in the log helps to verify how many hours the helper actually worked each week. It's also a record of which carpenters and subs worked which jobs, and when.

Message reply forms. Our company does remodeling, but that doesn't mean clients are always around when we need them. At the beginning of every job we designate a particular location as a message center. Usually, it's a clipboard or bulletin board near the phone. When the lead carpenter wants to pass a message to the client, he leaves it at the message center. Likewise, the client can do the same to get in touch with the lead man. Lead men are required to write messages on a triplicate form we get from NEBS (500 Main St., Groton, MA 01471; 800/225-6380). The client gets the original, a copy is sent to our office, and the lead man keeps one for his records. Copies are important because we want to be able to verify who said what and when they said it. It's hard for clients to claim you didn't tell them about something when you can produce dated copies of messages you sent them. Likewise, it's tough for them to say they didn't agree to something when you've got a note in their handwriting saying they did. We don't save messages so we can wave them in front of clients like Perry Mason would, but we think it's important to document communications because customers don't always remember exactly what you told them or what they told you.

Change-order policy form. Every lead man has a copy of our change-order policy in his binder. Lead carpenters are allowed to handle small change orders in the field. The lead man estimates the cost of the change and has the client sign a change order before proceeding with the work. Processing small changes in the field helps to move the job along, but our lead guys don't have time to estimate the cost of large or complicated changes. When the cost of a change is likely to exceed \$500, the lead man asks the client to call the office for the estimate. Also included in the policy sheet are the hourly rates charged for lead carpenters and helpers.

Punchlist Forms

Our company has two kinds of punchlist forms, the preclose-in punchlist form and the final punchlist form.

Preclose-in punchlist. The preclose-in form is a standard checklist of details to look for before we hang the drywall. The lead man walks the job to verify that items such as lights, receptacles, vents, and pipes are properly located in the wall. In some cases, we ask the client to accompany the lead man when he does the inspection. We tell them that if they want to add an outlet or move a vent or fixture, now's the time to do it, because after the drywall is up it will cost them a lot more to make changes.

Final punchlist. When the project reaches the point where we believe it's substantially complete, we meet with the owner and fill out the final punchlist. The job is substantially com-

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ADDENDUM TO CONTRACT PROPOSAL
CHANGE ORDER POLICY

1. The Company policy on Change Orders is that any changes will be priced according to Contractor's normal pricing policy and will also include an administrative charge of \$50 to compensate the Company for time lost, scheduling changes and other administrative costs.
2. However, there will be no administrative charge for changes caused by unforeseen conditions or beyond the control of the client. These will be charged at the Company's normal pricing policy.
3. Carpenter labor will be charged at an hourly rate of:
\$28.00 per man hour
General labor will be charged at an hourly rate of:
\$17.00 per man hour
4. All change orders must be completed in writing with signatures of both client and Contractor's representative. All change orders will be priced prior to start of work or quoted with Contractor's hourly rate. Payment is to be made in full immediately upon completion of the extra work. For changes costing over \$500, a partial payment of 50% will be required in advance, with balance upon completion of work called for in the change order.

Company Representative: _____

Owner's Acceptance: _____

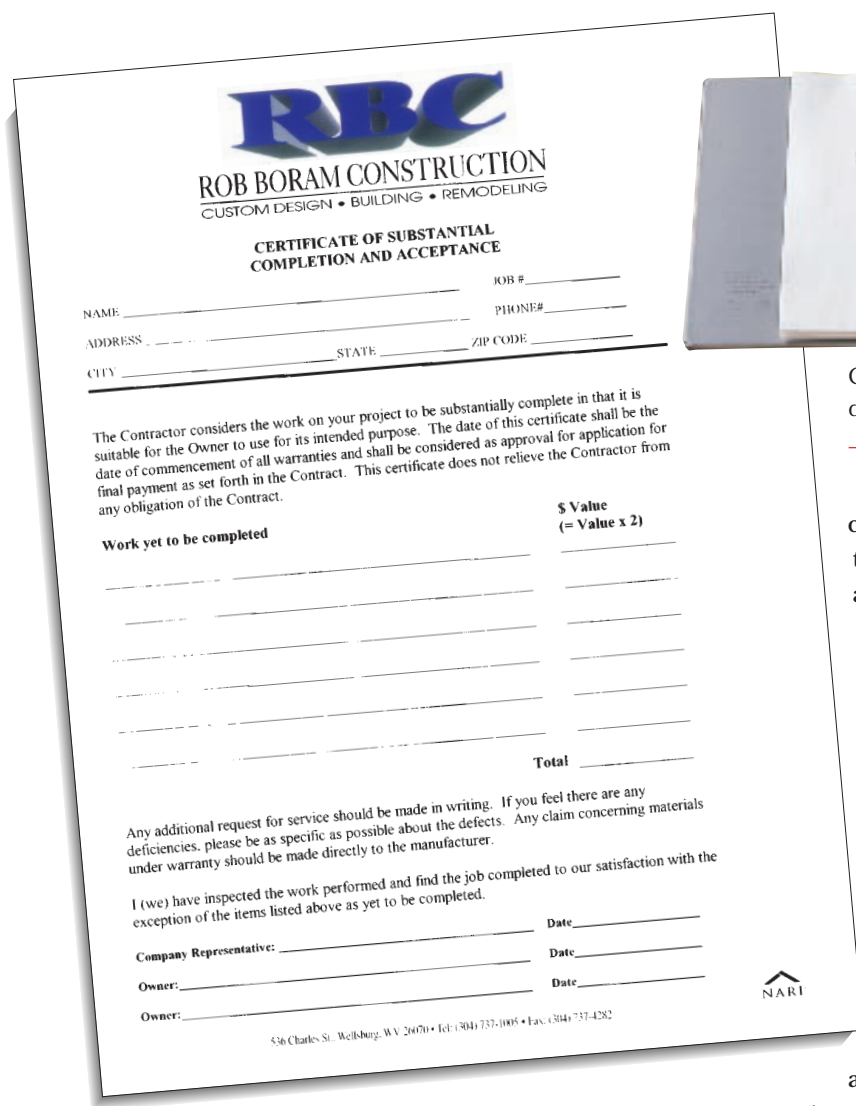
Date: _____

Lead carpenters use this form to write change orders on the spot for additional work valued at less than \$500.

plete when the part of the building we're working on is ready to occupy. In most cases, that means it's 99.9% finished. Our contracts specify that when the job is substantially complete, we're to receive the final 10% payment less twice the value of the items on the punchlist. The client has every right to expect us to bring the project to 100% completion, but it's unreasonable for them to withhold 10% of the contract just because \$75 worth of cabinet knobs are on back order.

The way we do it, we get most of what's coming to us, plus the client's protected because he's holding twice the amount needed to fix the items on the punchlist should we fail to perform.

At the preconstruction meeting, we tell clients our office will issue a certificate of substantial completion in exchange for the final payment. Throughout the job, we tell the client that the thing the lead man is working towards is the issuance of the substantial completion certificate. The certificate has no legal standing, but it's a reminder to the clients that they agreed to our payment terms before we started the job. We rarely issue the certificate, because clients usually pay up without a big fuss. It only comes up when we're having a hard time getting that last big check. In 20 years in the business, there were only two jobs where I failed to collect everything that was owed to me.



Company policies, standard forms, and construction details are carried from job to job in a three-ring binder.

Prehung exterior door units often come with an extra-long screw to shoot through the upper hinge and into the jack stud. The screw keeps the door from sagging, so when we created our standards, we decided that every door should get a king-size screw through the upper hinge. We also specify where to shim and nail jambs and how big the gaps under doors should be.

