

A SIMPLE Job-Site Notebook

Without a way to organize the paperwork that tends to accumulate at the job site, it's impossible to find what you need when you need it.

by Rogers Belch

On my first few jobs, the client's name went on an overstuffed file folder that lived on the passenger seat of my truck, often till months after the job was complete. Like most tools, however, the paperwork got sharper with experience.

These days I work as a project manager handling several jobs at any one time. To keep all the records straight, I use a separate, three-ring binder for each job. All paperwork relating directly to the construction process is organized into ten standardized sections, and the notebook stays on site where the crew and I — and the homeowners — use it every day. When the job is completed, the notebook goes onto a shelf in my office for quick reference.

The ten sections can easily be modified to meet the unique requirements of any construction company or of a particular job, but I've deliberately designed the organizational scheme to follow the order of construction. The simplicity of the

notebook increases the likelihood that it will be used, and to be effective it must be accessible and concise.

1 Job Schedule

Section 1 contains the "First Contact" sheet and the job schedule. I create the single-page contact sheet on a spreadsheet, then print it onto letterhead (see Figure 1, next page). The basic information is filled out in the office and added to later as necessary in the field. It includes client contact information, a brief description of the project, plus the start and finish dates. The names and numbers of all subcontractors are also recorded here, along with contact information for the designer or architect, if applicable. Depending on the job, this sheet also includes a list of required inspections, the names of the inspectors, and the dates they'll be at the site. There's also a place to make notes about site access and security, use of the owner's utilities, and other owner concerns, like child safety and pets.

This section of the notebook also contains the master schedule (Figure 2). I fill this out by hand on a preprinted 8½x11-inch blank calendar (see "Office Supplies," next page). Depending on the type of work you do, you might prefer to



*This efficient
recordkeeping
system keeps
all job-related
paperwork
in one place
on site*

use a Gantt chart or a CPM flowchart, but the schedule should be simple enough so that anyone at the site can use it. If the foreman is not at the job, the lead carpenter should be able to use the schedule to keep the job on track.

I find it helpful to think of the schedule as the by-product of the initial take-off and estimate worksheets, which are organized by construction category. To keep the schedule simple, use just enough categories to give you a clear picture of each phase of the project without cluttering its overall scope. Then insert subcontractors, inspections, and holidays into each phase to create the schedule sequence.

2 Daily Job Log

Section 2 holds the Daily Job Log, which is used to track job progress (Figure 3). The backbone of the notebook, the job log provides both an outline of the day's work and a detailed list of work done to date. It is filled out every evening and consulted every morning by the job foreman. While the job log should contain all necessary details, it should be limited to one page. This ensures that it will get used properly and also makes it much easier to scan for critical information.

Like the contact sheet, the job log can be created on a spreadsheet, then

ROGERS B. BELCH
Carpentry
Residential Remodeling
MHIC #46086

FIRST CONTACT / JOB OVERVIEW

Client Information		Project	
Name	_____	Description	_____
Address	_____	Address	_____
Home #	_____	Start Date	_____
Work #	_____	Finish Date	_____
Fax #	_____		
Designer / Architect		Plans	
Name	_____	Approved	Yes _____ No _____
Address	_____	Permit	Yes _____ No _____
Phone #	_____	Date Filed	Yes _____ No _____
Fax #	_____	Date Issued	_____
e mail	_____		
Sub Contractors		Inspections Dept	Phone #
Plumbing	_____	Type	Inspector
Electric	_____	Plumbing	P/F
Insulation	_____	Electric	Date
Drywall	_____	Framing	
Other	_____	Insulation	
Other	_____	Plumbing Final	
		Electric Final	
		Building Final	
Site Information		Special Concerns	
Access	_____	_____	
Electric	_____	_____	
Water	_____	_____	
Security	_____	_____	
Telephone	_____	_____	
Bathroom	_____	_____	

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Figure 1. Essential contact information for the client, designer, and all subcontractors is recorded on a one-page form at the front of the notebook. The form also includes the names of building inspectors and the dates for scheduled inspections.

Office Supplies

The forms I use for the job-site notebook are all readily available, either at stationery stores or by mail order. Here are the sources I use to build each notebook for as little as \$10:

Three-ring binder and columnar pads:

Wilson Jones Company (ACCO Brands, 300 Tower Pkwy., Lincolnshire, IL 60609; 800/222-6462). I equip every binder with a low-profile three-ring hole punch that can be clipped to the binder rings.

Notebook tabs:

10-Tabs Ready Index, Avery Dennison Office Products (P.O. Box 129, Brea, CA 92822; 800/462-8379; www.avery.com). The tabs and table of contents can be customized with a set of labels you specify using Microsoft Word or Corel WordPerfect.

Blank paper calendars:

The At-A-Glance Group (101 Oneil Rd., Sidney, NY 13838; 607/563-9411).

Computer-generated calendars:

Calendar, Expert Software (802 Douglas Rd., North Tower, Suite 600, Coral Gables, FL 33134; 305/567-9990; www.expertsoftware.com).

Calendar Creator version 5.0, Creative Office (The Learning Company, One Athenaeum St., Cambridge, MA 02142; 617/494-1200; www.learningco.com).

General construction forms:

Construction Forms and Contracts, The Craftsman Book Company (P.O. Box 6500, Carlsbad, CA 92018; 800/829-8123; www.craftsman-book.com). This book includes 125 customizable forms (the forms are also provided on a floppy disk).

Figure 2. The author uses a simple blank calendar to lay out the project schedule. Several computer programs are also available to generate customizable calendars.



printed out or copied as required. At the top of each sheet is a place to record the job name and date — simple but essential information when trying to piece together a chain of events after the fact. The core of the job log is the list of tasks planned for that day, the time allotted to complete the work, and the names of the crew or subcontractors who will do the work. Items on this task list often carry over to the next day or week, depending on the scope of the job.

The job log is also the place to list calls to be made, materials needed (often projected several days in

advance), and suppliers scheduled for deliveries. A separate section lists subcontractors scheduled to appear at the site, either that day or in the near future, along with any notes about lead times or unresolved questions that need clarification.

Every job log sheet stays in the notebook for the duration of the project. I like to “dog-ear” the top right-hand corner of the current page at the end of the day so the day and date for the next day show in the corner. When I visit the site the next morning, I spend the first cup of coffee with the crew

reviewing the tasks for that day.

3 Time Sheets

Employees fill out their own time sheets, breaking down individual tasks into construction categories and recording the hours spent doing the work. At the end of each week, I collect the time sheets and enter the data by hand onto a master sheet. Back in the office, I transfer this information to a spreadsheet, which calculates all of the totals, then I print out a summary report for the notebook (Figure 4, next page).

This procedure could be modified

Daily Job Log

Date: 6/12/99

Owner: EMERSON

Weather:

Project no:

Project name: KITCHEN

[illegible]

Figure 3. The Daily Job Log is used to plan each day's work and to keep track of material deliveries and subcontractors' progress. The log is filled out on site at the end of each day and reviewed at the start of work every morning.

depending on how your company is organized. For example, the foreman could collect the time sheets and fill out the master sheet by hand on site using a columnar pad like those used for accounting. Regardless of how you enter the data, the key point is to record labor hours by construction category for accurate cost tracking.

4 Subcontractors

The cover sheet for this section lists all subcontractors involved in the proj-

ect, along with their phone and fax numbers, and mailing addresses. A copy of each subcontractor's proposal is filed in this section, as well as a copy of the subcontractor agreement. Subcontractors are also given a separate schedule showing just their work, and a copy of that also goes into this section of the notebook. On big jobs, this section can be further subdivided by subcontractor.

The point of having so much information about subs on hand is to be

able to clarify any misunderstandings or discrepancies in the field without going back to or calling the office. This saves time, energy, and money.

5 Cost Tracking

As the job progresses, I keep a running total of labor, material, and subcontractor expenditures, broken down by the construction categories I use to estimate the job. The summary report gives a complete financial picture of the job, comparing estimated costs to actual expenses (Figure 5). Since I keep these

Figure 4. Information provided by employees on time sheets is summarized and printed out on a spreadsheet. Labor is broken down into construction categories to aid in job-cost accounting.

records on a spreadsheet, it's a simple matter to print out regular updates and put them in the job notebook.

Cost-tracking information is critical for people in the office, but it's also useful to the crew in the field. It is helpful for the foreman to know, for example, that two people were slated for two days of demo. The reports make it possible to identify cost overruns early, and to adjust labor allocations if the job starts to fall behind schedule. Since I do a lot of time and materials work, these reports are also useful to owners who want to stay informed on how close the project is following the budget.

6 Invoices

This section of the notebook is used to store all invoices and receipts throughout the job. When material is delivered, the supplier invoice is labeled by the job foreman with the appropriate construction category, such as "trim" or "roofing." The foreman also keeps a running list in the notebook on a columnar pad, showing the date, invoice number, supplier name or initials, the amount, and the construction category (Figure 6). This cumulative sheet stays on site in the notebook where it's always available for easy reference.

This paperwork takes a few minutes to complete in the field, but it makes a world of difference to me back in the office. At the end of each week, I pick up the invoices and enter the data into the cost-tracking system for the job. The invoices stay in the office till the job is finished, but the running record of invoices stays on site in the notebook. After the job is complete, I collect all the invoices and store them in the notebook for future reference.

Figure 5. Updated job-cost summaries make it easy for the job foreman to compare estimated costs with actual costs as the job progresses.

Sheet 1

TIME SHEET BY CATEGORIES				JOB: WHITE		
DATE	NAME	CATEGORY	DESCRIPTION	HOURS	RATE	TOTAL \$
9/14/98	RB	FRAMING	Layout/frame stairs	8	30	240
"	TOM	FRAMING	Layout/frame stairs	8	18	144
9/15/98	RB	FRAMING	Handrail/cap	5	30	150
"	TOM	PORCH CEILING	Layout/materials/shocking	3	30	90
9/16/98	RB	DEMO	North wall & siding	7	18	126
"	TOM	EXTERIOR	New siding	8	30	240
9/17/98	RB	EXTERIOR	New siding	8	18	144
"	STUART	PORCH CEILING	New T&G ceiling	8	30	240
9/18/98	RB	PORCH CEILING	New T&G ceiling	8	20	160
"	TOM	TRIM	Pantry wall / bookcase	8	30	240
"	STUART	FRAMING	Powder room	8	18	144
"	"	FLOORING*	Sub floor @ chimney	5	20	100
9/14-9/18		FRAMING				
		DEMO		29		678
		PORCH CEILING		7		126
		EXTERIOR		19		490
		TRIM		16		384
		FLOORING*		8		240
				5		100

* CHANGE ORDER

Page 1

Emerson		Account Balance Statement								
		As of: 7/30/99								
Category	Dump Fees	Demo	Framing	Exterior	Cabinets & Trim	HVAC (N.I.C.)	Flooring & Ctg (N.I.C.)	Drywall	Paint (N.I.C.)	Misc.
Labor										
Estimate Value	600	2280	1440	1520	1680	1161	0	640	0	0
Total spent to Date	220	1152	1213	1025	1430	395	695	725	70	0
Labor \$ Remaining	380	1128	227	495	250	766	(695)	(85)	(70)	0
Materials										
Estimate Value	0	0	560	1200	5600	0	0	575	0	100
Total Spent to Date	0	0	220	1131	5368			540	500	63
Material \$ Remaining	0	0	340	69	232	0	0	35	(500)	37
Summary by Category										
Labor \$ Remaining	380	1128	227	495	250	766	(695)	(85)	(70)	0
Material \$ Remaining	0	0	340	69	232	0	0	35	(500)	37
Total \$ Remaining	380	1128	567	564	482	766	(695)	(50)	(570)	37
Original Estimate Value		17356								
Total Spent to Date		14747								
Total Remaining		2609	Does not include Change Orders							

MATERIALS INVOICE RECORD			AMOUNT
7/14	JFS #48871 (FRAMING)	2x4-8 / PLYWOOD	135
7/15	STEVENS #019971 (SIDING)	STAPLES	12
7/15	JFS #49105 (FRAMING)	WINDOW / PLYWOOD	277
7/21	ALCO #10556 (SIDING)	SIDING	377
7/27	JFS #55914 (FLOORING) (2x4s) (3) SIDING		130
7/29	JFS #50454 DROP CEILING 1"		17
8/4	JFS #57169 INSULATION		38
8/5	JFS #13108 CREDIT INSULATION		9
8/5	JFS #57169 CREDIT STAPLER (TOOL)		17
8/5	STEVENS #031761 FLEX ALUM DUCT		19
8/6	ALCO #206126 HVAC		60
8/6	ALCO #206147 HVAC		44
8/6	STEVENS 027478 SCREWS/TAR		6
"	037896 SCREWS		3
"	037900 PAINT SUPPLIES		43

Figure 6. All invoices are coded by construction category and stored in the notebook. Each week, the paperwork is delivered to the office, where it is entered into the cost-tracking spreadsheet.

7 Contracts and Change Orders

This section is divided into two parts. The first part holds copies of any contracts made between the owner and the builder. Again, this eliminates the need for the field crew to check with the office about any decisions that have already been made.

The second part holds all paperwork relating to change orders, including a copy of the company's policy regarding changes. In our system, all major change orders are handled by the office, but smaller changes can be made in the field by the owner and the foreman. This keeps the project on sched-

ule, eliminating the need to stop work while waiting for approval from the office. For changes decided in the field, the foreman uses a simple one-page form with blank spaces in which changes are listed (Figure 7). The owner initials each change in a separate column, providing a written record of his or her approval of the change. Like the materials sheet, this change order form stays in the notebook on site, and provides a running history of changes.

All formal change orders are drawn up in the office and a copy is given to the foreman for the notebook. The advantage of using the change order summary sheet is that most changes can be

approved quickly on site by the foreman and owner without having to call the office. This system not only keeps the job moving, but provides quick reference should a question arise later about when a particular change was approved.

8 Permits

While the actual building permit is usually posted prominently somewhere on site, I like to keep a copy in the notebook, along with other pertinent information, such as a legal description of the property, requirements from utility companies, and any specifications required by the city or county. I also include code-related information on

[illegible]

safety and construction standards as they apply to the particular job. It's handy to have this information at your fingertips during a building inspection or a visit from OSHA.

The approved set of plans stays on the job site at all times, so the blueprints stored in the notebook are used mainly at meetings in the office. A set of plans reduced to 11x17 inches can be folded once to fit in the binder, and can still be reviewed without taking them out of the notebook. This is also a convenient

Also included in this section is a copy of the job specifications, which for most residential projects are brief enough to fit comfortably in the notebook. More lengthy specs can be made to fit by photocopying two sides to a page.

Any correspondence pertaining to the construction process should be stored chronologically in this section. This includes letters, notes, memos, and any other records of communications made

At the end of a project, we clip the punch list to the front of the notebook. While the punch list tasks will also be listed under in the Daily Job Log, it's helpful to see everything at a glance. It's also satisfying to see check marks appear in those little boxes.

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