

CONSTRUCTION FIELD, PROJECT MANAGEMENT & SUBCONTRACTOR SYSTEMS



By
GEORGE HEDLEY

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Certified Professional Business Coach

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What Are Your Challenges?

- Not Hitting Your Goals?
- Profit Fade Or Poor Results?
- Stuck Or Out Of Control?
- Can't Get Off The Treadmill?

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ABOUT GEORGE HEDLEY, CSP CPBC

George Hedley, 'The BIZ-Builder' is an entrepreneur, construction business owner, and recognized authority on how to build a construction company that consistently produce bottom-line results, loyal customers, leaders, and profits. He is the author of several books including: "Get Your Business To Work!" and "**Get Your Construction Business To Always Make A Profit!**" George is also a popular speaker at conventions and companies, and a regular columnist in several magazines including '**Construction Business Owner.**'

George's founded & built his commercial construction and development company from \$0 to \$50 million dollars in only 7 years! For his accomplishments, George received the nationally recognized award "Entrepreneur of the Year" by Ernst & Young and "Venture" magazine. George is a graduate of the University of Southern California in Civil Engineering and has served as President of 3 industry associations. He lives in Rancho Mirage, CA. and plays golf several times a week with his favorite golf partner, his wife Alana.

Today George manages **Hardhat BIZCOACH** providing personal coaching and consulting to construction company owners and hosts ongoing peer mastermind **Hardhat BIZGROUPs** open to qualified business owners. He was recently named 'USA Business Coach Of The Year' By The Professional Business Coaches Alliance. As a popular speaker to companies and associations, George also runs **HARDHAT Presentations**. He has earned the prestigious 'Certified Speaking Professional' designation from the National Speakers Association. His 'Business Building Programs' include topics on Building Leaders, Profits, Customers, and Wealth. He also holds in-depth 2 ½ day '**BIZ-BUILDER BOOT CAMPS**' for construction business owners to help them get their companies to work. and the founder of **Hardhat BIZSCHOOL** online university for contractors.

GEORGE WANTS TO HELP YOU BUILD & GROW YOUR BIZ!

Email George for information about speaking to your organization, get involved in his **BIZCOACH** programs, attend a 2 day **BIZ-BUILDER BOOT CAMP**, join an ongoing peer mastermind **BIZGROUP**, or signup for online classes at **Hardhat BIZSCHOOL**.



E-mail George GH@HardhatPresentations.com

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GEORGE HEDLEY WANTS TO HELP YOUR CONSTRUCTION BIZ GROW & INCREASE PROFITS!



EMAIL ME INFORMATION ON HOW GEORGE CAN HELP ME:

- Grow My Business & Win More Work
- Make More Money & Increase Our Profit
- Build A Strong Accountable Management Team
- Get Organized, In-Control & Improve Field Productivity
- Draft A Winning Business Plan
- Install Written Systems That Deliver Consistent Results

- Build A BIZ That Works Without Me Doing All The Work!

I AM ALSO INTERESTED IN:

- Participating In A Regular BIZCOACH program
- Attending A 2 Day BIZ-BUILDER BOOT CAMP
- Joining An Ongoing Mastermind Construction Business Owner BIZGROUP
- Working With George Personally To Develop Our Strategic BIZ-Plan
- Working With George 1 On 1 As A Mentor & BIZCOACH
- Having George Speak At Our Company Or Association



Want BIZCOACH Help?

Email George to set-up your initial **BIZ-FIX** 90 minute Coaching Session.

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5 FACTORS TO IMPROVE CONSTRUCTION PROJECT PERFORMANCE

BY GEORGE HEDLEY

Every contractor's 'impossible dream' is to build every project perfect as planned. Completing projects perfectly would generate the following results:

1. On-budget & on-schedule completion
2. Meet all contract requirements, targets & goals
3. Safe with no accidents
4. Quality workmanship without call backs or punch-list items
5. Pro-active two-way communication
6. Proper documentation
7. No conflicts, issues or disputes
8. Prompt and complete payment
9. Satisfied customer
10. Repeat customer with referrals

In order to accomplish this impossible dream, everything would have to go perfectly as planned. But you know this isn't a reality in the ever-changing world of building construction projects. There are too many variables and things that can and will go wrong on every job. Potential problems range from material deliveries to the weather, from complete accurate plans to crew workloads, and from field conflicts to getting paid. In fact, construction is one of the most difficult processes to control including any other manufacturing operation or assembly procedure. There are just too many variables contractors can't control.

Systems & strategies improve project results!

How can you improve your construction project performance and eliminate potential issues and variables which occur on your projects? Successful construction companies work hard and enforce standard systems and controls to lower risk factors, eliminate potential problems, reduce the chances for things to go wrong, and improve their odds to achieve expected results. Some examples of systems and strategies which improve project results include: pre-job planning meetings, weekly job cost production scorecards, tool and equipment checklists, regular training sessions, pre-drywall installation inspection reports, and detailed subcontracts with inclusions and exclusions clearly identified.

Why systems?

Written, implemented, trained, monitored, tracked, and enforced systems often seem like a pain in the you know what. But they improve the odds of success. When you let each foreman decide how to install materials based on their own experience, you risk the reality that your installations will not all be performed the same way. Some will take longer and some faster. Some will require more labor and materials while other methods will require less. How can you make sure the end result will be accurate and on-budget if you let everyone decide how they install things versus a standard companywide system?

In order to improve your field and project performance, what systems will reduce your chances to eliminate problems, errors, rework, call-backs, or over-budget completion? The following is a proven process to improve your project performance based on working closely with hundreds of general contractors and specialty contractors.

Construction Project Success System

1. Pre-Construction Planning System

a. Contract

- Read, understand & follow the executed contract.
- Develop contract requirement & notice chart.

b. Hold Turn-Over Pre-Construction Hand-Off Meeting:

- Attendees: General Manager, Sales, Estimator, Project Manager (PM), General Superintendent (GS), Superintendent (S) & Foreman (F).
- Prior to meeting: PM, S & F visit jobsite and review plans, develop a construction plan, draft preliminary schedule and estimate crew hour budget.
- Review scope, inclusions, exclusions & contract terms.
- Set project goals including budget & crew production goals.
- Establish project schedule, deadlines & milestones.
- Review proposed subcontractors & suppliers.
- Draft project mobilization, staging & phasing plan.
- Create project timecard, cost codes & change order rates.

c. Hold Customer Pre-Job Start-Up Meeting Onsite:

- Train your customers to follow the contract.
- Review contract terms, payment procedures, approvals, deadlines, milestones & change order rates.

2. Project Management System

a. Procurement:

- Award & execute all subcontracts and materials within 2 to 3 weeks of job start.
- Order & commit within 2 to 3 weeks of job start.
- Confirm all material deliveries 4 weeks and 2 weeks prior to required.
- Deliver all materials to jobsite minimum 1 week prior to required.

b. Schedule:

- Develop, confirm, commit, track & communicate project schedule to customers, subcontractors & suppliers.
- Provide regular updates as schedule changes.

c. Project Management

- Be pro-active & communicate with S & F daily and with customer weekly.
- PM visit jobs weekly to perform detailed job-walk with S & F to review:
 - o Contract conformance.
 - o Job cost scorecard and updated budget.
 - o Crew labor & equipment production hours & updated job cost scorecard report - budget vs. actual.
 - o Look-ahead schedule.
 - o Quality workmanship & punch-list.
 - o Safety.

d. Submittals & Shop Drawings:

- Create list of required submittals within first week of job start.
- Include requirements and deadlines in all subcontracts and purchase orders.
- Obtain, review & obtain all approvals within 3 to 4 weeks of job start.

e. Project Paperwork:

- Maintain & document weekly all approvals, change orders, request for information, notices, claims, approved plans & specifications.

f. Change Order Management:

- Get change order rates approved at customer pre-job start-up meeting.
- Document & manage all extra or change order work and approvals aggressively.
- Manage & keep change orders current - price & submit within 7 days.
- Maintain proposed and executed change order logs.
- Document all issues, changes, notices, notices, delays, time extensions, etc. within 2 days.
- Perform no extra or free work without prior written approval.
- No verbal agreements.

g. Progress Payments:

- Prepare & submit project payment requests on-time with all required paperwork.

h. Timecards & Invoices:

- PM approve all timecards daily & invoices weekly with correct cost codes.
- PM review with S or F for accuracy.

i. Job Cost Updates:

- PM prepare updated job cost reports and calculate accurate estimated cost to complete monthly. Review with manager.
- PM prepare completed job cost report & review with GM.

j. Project Meetings:

- Hold customer pre-job start-up meeting onsite within 2 weeks of start.
- Hold customer meetings onsite weekly.
- Hold or attend all subcontractor job start-up meeting onsite.
- Hold weekly jobsite meeting with subcontractors required on job within next 30 days.
- Hold crew meetings:
 - o Daily crew huddle.
 - o Crew weekly job review.
 - o Crew weekly safety meeting.

3. Field & Crew Production Performance System

a. Pre-Mobilization Jobsite Review:

- Prior to mobilization, GS, PM or S meet with customer to review site access, staging area, storage area, security, workspace requirements, trash, safety, temporary power, water, restrooms, parking, job rules, etc.
- GS, PM or S visit jobsite 2 - 4 days prior to all move-ins to verify job is ready.

b. Supervision - Pro-active project supervisors provide & perform:

- Daily written job reports with photos.
- Approve & turn-in all crew timecards coded to accurate cost codes, and work quantities completed daily.

- Turn in company equipment and rental equipment sheets weekly.
 - Prepare updated 2 to 4 week look-ahead schedule.
 - Weekly quality, clean-up and punch-list inspection report. All identified items to be completed weekly.
 - Weekly safety job-walk inspection report.
 - Contact customer, subcontractors & suppliers 3 weeks before they're needed on job.
 - Hold job-walk with GS-S-F & customer prior to moving off job at each phase and get agreement on any outstanding items.
 - Prepare final punch-list 2 weeks prior to completion and complete all outstanding items prior to final job-walk with customer.
 - S & F never leave jobsite without lead or foreman in charge.
 - S & F never to go to hardware store or supply house. Send crew member if required.
 - Enforce company standards, policies, rules, attire and safety with crew and subcontractors.
- c. **Look-Ahead Schedule:**
- S or F prepare 2 - 4 week look-ahead schedule weekly & submit to PM Friday.
 - PM, GS, S & F meet weekly onsite to review look-ahead schedule.
 - Look-ahead schedule to include crew labor, subcontractors, materials, supplies, tools, equipment, inspections and milestones
- d. **Overtime** - No overtime allowed without prior authorized approval & within budget allowance.
- e. **Change Order & Extra Work:**
- No change order, extra work or free work allowed without prior authorized approval.
- f. **Punch-List:**
- S or F prepare weekly project punch-list, clean-up & safety inspection report - turn in Friday and complete all items weekly.

4. Job Cost Scorecard Crew Production Tracking System

- a. Accounting to produce weekly updated project crew production scorecards with actual crew hours versus budgeted hours.
- b. PM review job cost labor & equipment production scorecards weekly with GS, S & F to develop plan to complete projects on-budget.
- c. Hold weekly all S & F meeting to review all project scorecards, production performance results and areas for improvement.

5. Close-Out & Completion System

- a. Supt or Foreman hold job-walk with customer prior to leaving jobsite at each phase.
- b. PM, Supt or Foreman hold final job-walk with customer & subcontractors prior to completion.
- c. Estimator & PM review final job cost versus estimate & update cost estimating history library.

In order to produce optimum results on your construction projects, you must have a system that guarantees performance 95% of the time. Review the 5 factors outlined above and decide which of them will improve your project results. These factors came from holding numerous coaching sessions and company meetings with contractors and their project managers, superintendents & foreman. After determining your project performance system, use your list as a template to develop a winning playbook & detailed job descriptions for your team.

Construction Project Success System - 1

1. Pre-Construction Planning System



A. Contract



- Read, Understand & Follow the Executed Contract
- Develop Contract Requirement & Notice Chart.

B. Hold Turn-Over Pre-Construction Hand-Off Meeting



- Sales & Estimating To Project Team
- Attendees: Gen. Mgr. (GM), Sales, Estimator, Project Mgr. (PM), Gen. Supt (GS), Supt (S) & Foreman (F).
- Prior to Meeting: PM, S & F Visit Jobsite, Review Plans, Draft Schedule Estimate Crew Hour Budget.
- Review Scope, Inclusions, Exclusions & Contract Terms.
- Set Project Goals Including: Budget, Completion, Quality, Crew Production, Customer Satisfaction, etc.
- Create Project Budget, Cost Codes, Timecard & Change Order Rates.
- Establish & Commit to Final Project Schedule, Deadlines & Milestones.
- Review Proposed Subcontractors & Material Suppliers.
- Draft Project Mobilization, Staging & Phasing Plan.

C. Customer Start-Up Meeting

- Hold Pre-Job On-Site Meeting - Train Your Customers To Follow Contract!
- Review Contract Terms, Notices, Communication, Procedures, Payment, Approval Process & Deadlines.
- Review Change Order Process, Rates & Mark-Up.
- Review General Conditions & Time Extension Rates, Mobilizations Included & Cost & Delay Costs.

2. Project Management System



A. Procurement

- Award & Execute ALL Subcontracts & Materials Within 2 - 3 of Job Start.
- Confirm All Material Deliveries @ 4 Weeks & 2 Weeks Prior To Required.
- Deliver All Materials To Jobsite Minimum 3 to 7 days Prior To Required.

B. Schedule

- Develop, Confirm, Update & Communicate Schedule To Customer, Subcontractors & Suppliers.
- Provide Regular Updates To All Parties As Schedule Changes.

C. Project Management



- PM Is Pro-Active & Communicates Verbally With S & F Daily & Customer Weekly.
- PM Visit Jobs Weekly To Perform Detailed Job-Walk With S & F To Review & Inspect:
 - Contract Conformance, Documentation, Job Reports & Paperwork Completion.
 - Weekly Updated Job Cost Scorecard & Quantities Installed - Actual Vs. Budget.
 - Crew Production, Quality Workmanship, Conformance, Punch-List & Safety.
 - Look-Ahead Schedule & Completion Actual Vs Proposed.

D. Submittals & Shop Drawings

- Create Complete List OF Required Submittals Within 1st Week Of Job Start.
- Include Submittal Requirements & Deadlines In All Subcontracts & Material Orders.
- Obtain, Review & Obtain all Submittal Approvals Within 3 - 4 Weeks Of Job Start.

E. Maintain Project Paperwork Weekly

- Document All Approvals, Change Orders, PCOs, RFIs, Notices, Claims, Delays, Time Extensions.
- Maintain Latest Approved Plans & Specifications & Communicate To Field & Subcontracts.



Construction Project Success System - 2



2. Project Management System - continued



F. Change Order Management

- Get Change Order Rates, Mobilization & Delay Costs Approved @ Customer Pre-Job Start-Up Meeting.
- Perform No Extra, Additional Or Free Work WITHOUT Prior Written Approval.
- Document & Manage All Extra Or Change Order Work, Time Extensions & Approvals Aggressively.
- Document All Project Issues, Changes, Notices, Claims, Delays, Time Extensions, etc. Within 2 Days.
- No Verbal Agreements! Manage & Keep Change Orders Current - Price & Submit Within 3 to 7 days.
- Maintain Proposed & Executed Change Order Logs & Tracking Current.

G. Progress Payments

- Prepare & Submit Project Payment Requests On-Time Per Contract With All Required Paperwork.

H. Timecards & Invoices

- PM Approve All Timecards Daily & Invoices Weekly With Correct Cost Codes.
- PM Review With S or F For Accuracy.

I. Job Cost Updates

- PM prepare updated job cost report, calculate estimated cost to complete monthly & review with GM.
- PM prepare completed job cost report & review with GM.

J. Project Meetings

- Hold Customer Pre-Job Start-Up Meeting Onsite Within 1 - 2 Weeks Of Start.
- Hold Customer Meetings Onsite Weekly.
- Hold Or Attend All Subcontractor Job Start-Up Meeting Onsite.
- Hold Or Attend Weekly Jobsite Meeting With Subcontractors Scheduled On Job Within Next 30 Days.
- Hold Daily Crew Huddle-Up Meeting.
- Hold Weekly Crew Job Review, Training & Safety Meeting.



3. Field & Crew Production Performance System

A. Pre-Mobilization Jobsite Review

- Prior To Mobilization - GS, PM Or S Meet With Customer - Review Site Access, Staging, Storage, Security, Workspace Requirements, Trash, Safety, Temporary Power, Water, Restrooms, Parking, Job Rules, etc.
- GS, PM Or S Always Visit Jobsite 2 - 4 Days Prior To All Move-Ins To Verify Job Is Ready.

B. Supervision - Pro-Active Project Supervisors Provide & Perform:



- Daily Written Job Reports With Photos.
- Approve & Turn-In All Crew Timecards Coded To Accurate Cost Codes & Work Quantities Completed Daily.
- Turn In Company Equipment & Rental Equipment Sheets Weekly. Call Off All Equipment When Complete.
- Prepare Updated 2 - 4 Week Look-Ahead Schedule Weekly For PM To Review.
- Prepare Quality, Clean-Up & Punch-List Inspection Report Weekly. All Items To Be Completed Weekly.
- Perform Weekly Safety Job-Walk Inspection Report & Rectify All Issues Daily.
- Call & Email Customer, Subcontractors & Suppliers 4, 2 & 1 Week Before They're Needed On Job.
- Hold Job-Walk With GS, S Or F & Customer Prior To Moving Off Job @ Each Phase To Agree On Items.
- Prepare Punch-List 2 Weeks Prior To Completion & Complete All Items Prior To Final Customer Job-Walk.
- S & F Never Without A Lead Or Foreman In Charge Of Crew.
- S & F Never Leave Jobsite For Materials Or Go To Store Or Supply House - Send Crew Member If Required.
- Always Enforce Company Standards, Policies, Rules, Attire & Safety With Crew & Subcontractors.



Construction Project Success System - 3

3. Field & Crew Production Performance System - continued



C. Look-Ahead Schedule

- S Or F Prepare 2 - 4 Week Look-Ahead Schedule Weekly & Submit To PM Friday.
- Look-Ahead Schedule To Include: Crew Labor, Tools, Company Equipment, Rental Equipment, Materials, Supplies, Inspections, Work Performed, Subcontractors, Milestones & Contract Completion Date.
- PM, GS, S & F Meet Weekly Onsite To Review Look-Ahead Schedule, Upcoming Work & Performance.

D. Overtime

- No Overtime Allowed Without Prior Authorized Approval Of PM & GM Within Estimated Budget Allowance.

E. Change Order & Extra Work

- No Change Order, Additional, Extra Or Free Work Allowed Without Prior Authorized Written Approval.

F. Punch-List:

- S Or F Prepare Weekly Project Punch-List, Clean-Up & Safety Inspection Report.
- Turn In Friday & Complete All Outstanding Items & Issues Weekly.



4. Job Cost Scorecard Crew Production Tracking System

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- Job Cost Tracker To Produce Weekly Updated Project Crew Production Scorecards With Actual Crew Hours Expended To Date Versus Budgeted Hours For Quantities Installed.
- PM To Review Job Cost Labor & Equipment Production Scorecards Weekly With GS, S & F To Develop Updated Project Plan To Complete Job On-Budget.
- Hold Weekly Field Scorecard Meeting With All S & F To Review All Project Job Cost Scorecards, Production Performance Results, Areas For Improvement & Completed Projects.

5. Close-Out & Completion System



- S or F Hold Job-Walk With Customer Prior To Leaving Jobsite @ Each Move-Off Or Phase.
- PM, S or F Hold Final Job-Walk With Customer & Subcontractors Prior To Completion To Get Sign-Off.
- Estimator & PM Review Final Job Cost Versus Estimate & Update Cost Estimating History Library.

Mandatory Project & Crew Meetings



- Pre-Job Pre-Con Turn-Over Hand-Off Meeting
- Customer Jobsite Start-Up & Weekly Job Meetings
- Crew & Subcontractors Pre-Job Start-Up Meeting
- Weekly Crew & Subcontractors Job Meeting
- Weekly Field Scorecard Meeting - All S, F & PM
- Weekly Jobsite PM Job Walk With GS - S - F
- Daily Crew Huddle-Up & Weekly Safety Meeting
- Pre-Move-In & Pre-Move-Off Jobsite Walk-Thru
- Pre-Completion Jobsite Walk-Thru & Punchlist
- Quarterly All Company & Crew Meeting



Effective Pro-Active Project & Subcontractor Management

1. Solicit Multiple Subcontractor Bids & Proposals.

- Solicit Aggressively - Use Bid Solicitation Software - Minimum 4 Bids Per Trade
- Hold Regular Pro-Active Subcontractor "How We Do BIZ" Relationship Building Meetings



2. Establish Clear Scope, Specifications, Contact Terms & Project Requirements

- Bid Proposal - Use Quote Comparison Spreadsheet - Verify Complete Scope, Plans, Inclusions & Exclusions,
- Contract - Terms, Requirements, Documentation, Change Orders & Mark-Up
- Schedule - Milestones, Sequencing, Manpower, Crew Size, Hours & Duration
- Payment - Terms, Lien Releases, Joint Checks, Final Payment & Insurance Required
- Jobsite Management - Supervision, Clean-Up, Trash Bins, Job Rules, Site Planning, & Equipment Use
- Project Requirements - Submittals, Shop Drawings, Close-Out & Punch-List
 - Permits, Licenses, Inspections, Approvals, Safety & Job Rules & Weather Protection
 - Project Start-Up & Close-Out Checklists

3. Pro-Active Schedule Management

- Prepare & Update Overall Project Schedule Bi-Weekly - Transmit Updates To Customer, Field & Subs
- Prepare & Update 'Look-Ahead' Schedule Weekly - F2F Review With PM/Supt/Fore Weekly

4. Pro-Active Project Management & Supervision



- Negotiate, Procure & Execute All Subcontracts & Material Orders Within 2-3 Weeks Of Job Start.
- Communicate Daily With PM, Supt & Field Foreman
- PM Visit All Projects Weekly To Meet With Superintendent & Foreman
- Submit Accurate Monthly Project Payment Invoice To Customer By Contract Deadline Or Month End
- Approve All Project Invoices & Time Cards Weekly With Accurate Cost Codes
- Create List Of Required Submittals & Shop Drawings & Get Approved Before Start Work

6. Pro-Active & Aggressive Change Order Management

- Get Change Order T & M RATES Approved Prior To Starting Project
- Get All Extra Work & Change Orders Approved In Writing Prior To Starting Work
- No Extra Work Without Approved Signed Change Orders & No FREE Work Or 'Trade-Offs' Without Pre-Approval



7. Track & Update Project Budget, Production Job Costs & Estimated Cost to Complete Monthly

- Prepare Updated Job Cost Report With Accurate Cost To Complete & Final Cost - Monthly By 10th
- Track & Review Job Cost Production Hours Scorecard Weekly With Supt / Foreman

8. Hold Mandatory Meetings

- Pre-Con Start-Up Turn-Over Hand-Off Meeting - Estimating To Project Team / Supt / Fore
- Monthly Project Review Meeting - Meet Monthly With VP - GM - Sr.PM And PM - Supt
- Monthly All Field Supt & Foreman Meeting - Scorecard Review, Training & Safety
- Weekly Crew Foreman Production Scorecard Review Meeting
- Customer Job Start-Up & Weekly Project Meetings
- Subcontractor Start-Up & Weekly Onsite Field Coordination Meetings With All Subcontractors
- Weekly & Daily Crew Huddle - Review Safety, Job Goals & Crew Production Scorecard Results



9. Implement ZERO Punchlist, ZERO Call-Backs & ZERO Lost Time Accidents Program

- Prepare Weekly Quality Control Punch-Lists, Clean-Up & Safety Inspection Reports

10. Job Close-Out

- Review Final Job Cost & Update Estimating Cost History
- Final Walk-Thru & Close-Out Documentation Package



Pro-Active Project Steps To Build Strong Customer Relationships



Hold Contract Pre-Award Meetings



Review With Customer:

1. Establish Clear Project Goals & Expectations
2. Review Project & Contract Terms & Requirements
 - a. Price, Scope, Specifications, Plans & Documents
 - b. Inclusions & Exclusions & Allowances
 - c. Value-Engineering & Alternates
 - d. Payment, Procedure, Approval, Deadline & Retention
 - e. Change Order Terms, Rates & Mark-Up
 - f. Notices, Approvals, Authority & Procedures
 - g. Communication & Documentation Requirements
 - h. Insurance & Bonding Requirements
 - i. Claims, Disputes, Delay, L-Ds & Back-Charge Process
 - j. Supervision & Jobsite Rules
 - k. Permits, Inspections, Tests & Certifications
 - l. Completion & Close-Out Requirements
3. Review Project Schedule
 - a. Milestones, Phases & Move-Ins Included
 - b. Notices & Delays
 - c. Crew Size, Duration & Requirements
 - d. Submittals Required, Process, Timing & Deadlines
4. Review Quality & Safety Requirements
 - a. Punch-List & Clean-Up Requirements
 - b. Clean-Up, Trash, Power, Temp Facilities & Security



Hold Pre-Project Onsite Customer Meeting

1. Review Project Goals & Expectations
 - a. What would a good result look like on this project?
 - b. What do you want & expect from us as a contractor?
 - c. What matters most to you - performance, response, etc.?
2. Review Contract Pre-Award Meeting Agenda
- See List Above # 1 - 5
3. Review & Agree On:
 - a. Scope, Inclusion, Exclusions, Updated Plans & Docs
 - b. Change Order Terms & Procedures
 - c. Communication, Notices & Authority
 - d. Trash, Power, Temp Facilities & Security
 - e. Supervision & Jobsite Rules
 - f. Permits, Inspections, Tests & Certifications
 - g. Schedule, Milestones, Phases, Move-Ins
 - h. Crew, Quality & Safety Requirements
 - i. Punch-List, Clean-Up & Close-Out Requirements



Pro-Active Customer Relationship Building

Construction Company Owner Or GM

- Hold 3 Jobsite Meetings With Customer:

1. Pre-Project Onsite Meeting Before Crew Starts
2. Mid-Project Onsite Meeting To Review Progress
3. Pre-Completion Meeting To Review Performance

? Questions For Face To Face Customer Meetings

1. Please rate how well we worked with you?
2. What areas did we excel in?
3. What areas do we need to improve?
4. Was our team professional, fair, open & honest?
5. Do any of our team need to improve? - In what areas?
6. How did we perform in these areas? - Comments?

SCORE	
a. Communication	d. Quality
b. Contract Management	e. Safety
c. Schedule	f. Closeout
7. How could we do a better job or improve for you?
8. Rate our performance in these areas? - Comments?

a. Planning	f. Overall Project Management
b. People	g. Meetings & Communications
c. Pricing	h. Subcontractors & Suppliers
d. Production	i. Equipment
e. Urgency	j. Response
9. Would you recommend our team on a future project?
10. Any other comments about how we performed on this project or how we can do better in the future?

Pro-Active Project Communication



- Performed By Project Manager Or General Supt

1. Always Visit Jobsite & Meet with Customer PRIOR To Scheduling Crew Or Moving Onto Jobsites
2. Perform Weekly Jobsite Meetings - PM/GS/Fore
 - Perform Punch-List Walk-Thru With Supt / Fore
 - Review Crew Manhour Production Scorecard
 - Review Look-Ahead Schedule With Supt / Fore
 - Perform Safety Inspection With Supt / Fore
3. Supt/Fore Perform Job Walk With Customer Prior To Move Off @ Each Phase - Review Quality & Punchlist
4. Supt/Fore Perform Final Punch-List Job Walk & Get Sign-Off With Customer Prior To Completion Move-Off

WEEKLY JOB Detailed SCOREBOARD - 1 Job



Job Name:				PM:	SUPT:	FORE:										
WEEK ENDING:				CREW LABOR HOURS						EQUIPMENT HOURS						
				TOTAL		FOREMAN	TO DATE	TO DATE	TO DATE			FOREMAN				
				BUDGETED		ESTIMATED	BUDGETED	CREW	+ OVER +	BUDGETED		ESTIMATED	BUDGETED	EQUIPT	+ OVER +	
				CREW	UNIT	ACTUAL %	CREW	HOURS	(UNDER)	EQUIPT		ACTUAL	EQUIPT	HOURS	(UNDER)	
				HOURS		COMPLETE	HOURS	ACTUAL	BUDGET	HOURS		%	HOURS	ACTUAL	BUDGET	
COST CODE	WORK TASK	Quantity	Installed													
32002	LAYOUT			200	HOURS	100%	200	180	(20)	-	HOURS	100%	-	-	-	-
32005	EXCAVATE			400	HOURS	75%	300	275	(25)	100	HOURS	75%	75	80	5	
32010	FORM			1,000	HOURS	50%	500	550	50	-	HOURS	0%	-	-	-	-
32015	SET EMBEDS			250	HOURS	20%	50	60	10	-	HOURS	0%	-	-	-	-
32020	POUR			300	HOURS	0%	-	-	-	-	HOURS	0%	-	-	-	-
32050	CLEANUP			200	HOURS	0%	-	-	-	-	HOURS	0%	-	-	-	-
TOTAL				2,350	HOURS	45%	1,050	1,065	15	100	HOURS		75	80	5	

For Help With Your Field & Job Cost Tracking - Email George Hedley @ GH@HardhatPresentations.com

File: Hardhat BIZCOACH - Field Scorecards Production MH Tracking

WEEKLY ALL JOB SUMMARY SCOREBOARD



WEEK ENDING:				CREW LABOR HOURS						EQUIPMENT HOURS						
				TOTAL		FOREMAN	TO DATE	TO DATE	TO DATE			FOREMAN				
				BUDGETED		ESTIMATED	BUDGETED	CREW	+ OVER +	BUDGETED		ESTIMATED	BUDGETED	EQUIPT	+ OVER +	
				CREW	UNIT	%	CREW	HOURS	(UNDER)	EQUIPT		ACTUAL	EQUIPT	HOURS	- UNDER -	
				HOURS		COMPLETE	HOURS	ACTUAL	BUDGET	HOURS		%	HOURS	ACTUAL	BUDGET	
Job Name:	PM/SUPT / FORE	Quantity	Installed													
Mission	Dan/Bill / Dave			2,000	HOURS	50%	1,000	900	(100)	500	HOURS	50%	250	260	10	
Main Street	Dan/Joe/Jose			4,000	HOURS	60%	2,400	2,600	200	800	HOURS	60%	480	500	20	
ABC Job	Dan/Ace/Will			3,000	HOURS	30%	900	850	(50)	400	HOURS	40%	160	130	(30)	
Acme Job	Bob/Bill/Amie			800	HOURS	70%	560	600	40	200	HOURS	90%	180	150	(30)	
Jones Job	Bob/Dan/Cal			3,500	HOURS	20%	700	1,000	300	1,000	HOURS	20%	200	200	-	
Smith Job	Bob/Fred/Harry			6,000	HOURS	25%	1,500	1,400	(100)	1,500	HOURS	40%	600	500	(100)	
TOTAL				19,300	HOURS		7,060	7,350	290	4,400	HOURS		1,870	1,740	(130)	

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File: Hardhat BIZCOACH - Field Scorecards Production MH Tracking

WEEKLY ALL JOB SUMMARY SCOREBOARD




WEEK ENDING:				CREW LABOR HOURS						PERFORMANCE RATING FACTORS					
				BUDGET		FOREMAN	BUDGET	PAYROLL	+ OVER +						
				CREW	UNIT	ESTIMATED	CREW	CREW	(UNDER)						
				HOURS		%	HOURS	HOURS	BUDGET	Contract	On-	Look-Ahead	Equipment	Change	
						COMPLETE				Completion	Schedule	Schedules	Maint	Order	Safety
										Date				Document	
Job Name:	PM/SUPT / FOR	Quantity	Installed												
Mission	Dan/Bill / Dave			2,000	HOURS	50%	1,000	900	(100)	4/12/19	Good	Excellent	Good	Excellent	Excellent
Main Street	Dan/Joe/Jose			4,000	HOURS	60%	2,400	2,600	200	5/1/19	Poor	Good	Poor	Good	Good
ABC Job	Dan/Ace/Will			3,000	HOURS	30%	900	850	(50)	5/15/19	Good	Good	Good	Poor	Good
Acme Job	Bob/Bill/Amie			800	HOURS	70%	560	600	40	5/20/19	Good	Poor	Poor	Good	Poor
Jones Job	Bob/Dan/Cal			3,500	HOURS	20%	700	1,000	300	6/15/19	Poor	Good	Excellent	Good	Excellent
Smith Job	Bob/Fred/Harry			6,000	HOURS	25%	1,500	1,400	(100)	8/15/19	Good	Poor	Excellent	Excellent	Excellent
TOTAL				19,300	HOURS		7,060	7,350	290						

COMPLETED JOBS RECAP SCOREBOARD																
															Date:	
																
CREW LABOR HOURS										EQUIPMENT HOURS						
Job Name	EST	PM	SUPT	FORE	Target	MH	MH Spent	% MH Spent	+ Over + (Under)	Target	Results	% EQUIP	+ Over + (Under)			
Smith Buildings		Sam	Joe	Chuck	3,000	MH	3,200	MH 107%	200	1,200	Hrs	1,350	Hrs 113%	150		
Acme Warehouse		Sam	Will	Fred	5,000	MH	4,700	MH 94%	(300)	1,000	Hrs	900	Hrs 90%	(100)		
ABC Center		Dave	Juan	George	7,500	MH	7,900	MH 105%	400	800	Hrs	900	Hrs 113%	100		
Warner Plaza		Dave	Matt	Harry	2,500	MH	2,100	MH 84%	(400)	400	Hrs	350	Hrs 88%	(50)		
City Center Building		Bill	Jack	Ken	10,000	MH	9,600	MH 96%	(400)	1,600	Hrs	1,500	Hrs 94%	(100)		

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File: Hardhat BIZCOACH - Field Scorecards Production MH Tracking

COMPLETED JOB RECAP SCOREBOARD																		
															Date:			
																		
CREW LABOR HOURS										PERFORMANCE RATING SCORECARD								
Job Name	EST	PM	SUPT	FORE	Target	MH	MH Spent	% MH Spent	+ Over + (Under)	Compl Date	Completion Date	Schedule Completion	On-Time Paperwork	Punchlist Call-Backs	Safety	Manhour Budget	Equipment Budget	Change Orders
Smith Buildings		Sam	Joe	Chuck	3,000	MH	3,200	MH 107%	200	7/12/19	7/1/2019	Excellent	A	B	A	A	A	A
Acme Warehouse		Sam	Will	Fred	5,000	MH	4,700	MH 94%	(300)	8/1/19	9/5/19	Bad	C	A	C	B	B	C
ABC Center		Dave	Juan	George	7,500	MH	7,900	MH 105%	400	8/15/19	8/10/19	Excellent	A	D	B	A	B	B
Warner Plaza		Dave	Matt	Harry	2,500	MH	2,100	MH 84%	(400)	9/20/19	10/10/19	Poor	C	A	F	C	D	F
City Center Building		Bill	Jack	Ken	10,000	MH	9,600	MH 96%	(400)	10/15/19	10/16/19	Good	B	B	A	B	B	A

File: Hardhat BIZCOACH - Field Scorecard Production MH Tracking

Prepared By: George Hedley

For More Information Visit: www.HardhatBizSchool.com

Field Progress Measurement & Tracking Report																	
Job Name:																	
Foreman: Supt: PM:																	
LABOR BID / JOB BUDGET									ACTUAL PROGRESS TO DATE								
Timecard Cost Code	LABOR Work Item Description	TOTAL Budget Quantity	UNIT	TOTAL Budget Quan / MH	Unit	Budget LABOR Man-Hours	BID LABOR RATE	TOTAL Budget Bid \$\$\$	LABOR Work Item Description	Total To Date Completed Quantities	Unit	To Date LABOR Man-Hours	Actual ManHour% Completed	Actual % Complete	To Date Over/Under Man-Hours	Actual LABOR QUAN / MH	Unit
3001	Slab Layout	10,000	SF	166	SF / MH	60	\$ 37.25	\$ 2,244	Slab Layout	10,000	SF	64	106%	100%	3.8	156.3	SF / MH
3002	Slab Fine Grade	10,000	SF	166	SF / MH	60	\$ 37.25	\$ 2,244	Slab Fine Grade	7,500	SF	40	66%	75%	(5.2)	187.5	SF / MH
3003	Slab Forming	500	LF	25	LF / MH	20	\$ 37.25	\$ 745	Slab Forming	250	LF	10	50%	50%	-	25.0	LF / MH
3004	Slab Pour	185	CY	9	CY / MH	21	\$ 37.25	\$ 766	Slab Pour	-							CY / MH
3005	Slab Finishing	10,000	SF	312	SF / MH	32	\$ 37.25	\$ 1,194	Slab Finishing	-							SF / MH
3006	Slab Cure	10,000	SF	1,250	SF / MH	8	\$ 37.25	\$ 298	Slab Cure	-							SF / MH
3007	Slab Strip Forms	500	LF	50	LF / MH	10	\$ 37.25	\$ 373	Slab Strip Forms	-							LF / MH
TOTAL LABOR		10,000	SF	47.4	MH/SF	211	\$ 37.25	\$ 7,864	TOTAL LABOR			114	54%		(1.4)		

Construction Is A 4 Letter Word: _____!

- Construction RISK IS A 5 Letter Word? _____



- 1. Planning Results = _____% = _____ / Hours / Day
- 2. Producing Results = _____% = _____ / Hours / Day
- 3. Supporting Results = _____% = _____ / Hours / Day
- 4. Wasting Time = _____% = _____ / Hours / Day



Average Construction Crew
 Wastes _____ Hours / Day

- How Can You Reduce Wasting Time On The Jobsite?

1. Follow The Executed Contract!

- Contracting Is About _____! = Paperwork Now! - Late Means Never!
- No WIMPS! = Train Your Customers!
- Manage Change Orders Aggressively! = No V.A.'s



- WIN - No Extra Work Without Executed Approvals
- NNNN - Document Now! = Give Proper Written Notice!
- If It's Not In Writing It Didn't Happen!

Project Scorecard



1. Budget Management
 - Job Cost Results - Bid Vs Actual
 - Production Performance Results
 - Labor - Equipment
 - Material - Subs & Suppliers
2. Schedule & Completion Dates
 - Weekly - Monthly
 - Overall - Milestones
3. Quality & Workmanship
 - Punchlist, Call-Backs & Re-Work
4. Safety Plan & Conformance
5. Contract & Project Management
 - Meetings & Communication
 - Documentation & Correspondence
 - Subcontractor Relationships
 - Procurement
 - Change Order Management
 - Submittals & Approvals
 - Close-Out
6. Payment
7. Customer Relations
8. Teamwork

Field Change Order Approval Memo PCO #27

To: Customer From: Joe Supt. Project: The Perfect Project Re: Additional Slab Rebar

This Is To Confirm The Field Change Additional Work Item Authorized:

Today, Structural Engineer & Customer requested us to add #4 Rebar at 24" on center both ways in Building Slab per Addendum Detail #12. Based on Contract Terms & Pre-Approved Rates, Customer authorizes us to proceed with additional work not included in our Contract and agrees to increase contract price & completion date based on actual costs & time incurred to perform added Work. We shall proceed & submit a request for change order within 14 days after completion of work for approval & payment. SEE **PHOTO** & Details of Work Attached.

Additional COST: Cost Plus T & M Per Standard Rates **Additional TIME:** 4 Extra Days

Sincerely: _____ Approved: _____ Date: _____



Email & Get Signed Now!

2. Pro-Active Project Management!

- Supervision - Full Time = Full Profit! - Find & Keep The Best!
- RME - Responsible Managing Employee Able To COMMIT & Make Decisions
- Connected - Job & Home Office



- Maintain Project Paperwork - Maintain Approved Plans, Specifications, Addendums & Changes
- Prepare Mandatory Daily Job Reports - Track L / M / E / S / RE
- Document & Track - Contract Requirements, Notices, Updates, etc.
- RFIs, RFQs, PCOs, COs & Approvals, Shop Drawings & Submittals

3. Plan To Beat The Budget \$\$\$ - Set Job Cost Goals & Track Progress

4. Plan To Squish The Schedule - Time Is \$\$\$ - Fast Track = Fast \$\$\$



- Extend "Think-Ahead" - Update Look-Ahead Schedule Weekly
- Procurement - Award All Subcontracts & Materials Within _____ Days

5. Clear GEAR - Company Standards, PPE & Job Rules
 - Written Player Position Descriptions





BIZ-BUILDER BOOT CAMP

- The BIZ-BUILDER BLUEPRINT Action Plan

PROJECT MANAGEMENT CHECKLIST

Project Administration Checklist

- Bonding Requirements
- Billing & Payment Requirements
- Invoice Deadlines
- Lien Releases Required
- Joint Check Forms
- Discounts Available
- Who's Authorized To Sign
- Notices & Documentation Required
- Required Shop Drawings
- Required Submittals
- City & State Licenses Required
- Insurance Requirements
- Add'l Insurance Certs
- Special Cash Flow Needs
- Change Order Procedures
- Required Meetings
- Safety Requirements
- Permits Required
- Project Close-Out Reqmts
- As-Built Drawings Req'd
- Warranty Requirements
- Other:

2 - 4 Week "Think-Ahead" Schedule

ACTIVITY	M	T	W	T	F	S	S
LABOR	[Bar chart showing labor activity across days]						
-	[Bar chart showing activity across days]						
EQUIPMENT	[Bar chart showing equipment activity across days]						
- Co. Equipmt	[Bar chart showing activity across days]						
- Co. Tools	[Bar chart showing activity across days]						
- Rental Equip	[Bar chart showing activity across days]						
MATERIALS	[Bar chart showing materials activity across days]						
- Lumber / Trim	[Bar chart showing activity across days]						
- Supplies	[Bar chart showing activity across days]						
SUBCONTRACTS	[Bar chart showing subcontractor activity across days]						
-	[Bar chart showing activity across days]						

Contract Terms & Milestones

- Execution Date: _____
- Start Date: _____
- Completion Date: _____
- Calendar Days: _____
- Working Days: _____
- Weather Days: _____
- Approved Completion Date: _____
- Substantial Completion Date: _____
- Final Completion Date: _____
- Schedule Milestones/ Deadlines: _____
- Liquidated Damages: _____
- Early Bonus Amount: _____
- Change Order Mark-Up Allowed _____
- Special Contract Terms: _____



Project Approval Tracking Log - Submittals & Shop Drawings

Description	Subcontractor	Date	Date	Date	Date	Date	Approval
# Approval Item	Supplier	Req'd	Rec'd	Submit	Returned	Required	Status
1 Schedule Of Values	Hardhat Builders	1/20	1/15	1/15	2/15	2/20	Approved
2 Concrete Design	Acme Concrete	1/20	1/21	1/21	2/10	2/20	Approved As Noted
3 Roof Trusses	Key Steel	1/20	1/22	1/22	3/1	3/1	Approved As Noted
4 Door Frames	Smith Doors	1/20	1/22	1/22	2/10	2/20	Reject - ReSubmit
5 Storefront	Center Glass	2/15				3/10	
6 Light Fixtures	Jones Electric	2/15				3/10	

Notice Chart # Days

- Changed Conditions _____
- Scope Changes _____
- Change Requests _____
- Conflicts with P & S _____
- Delay Request - P & S _____
- Delay Request- Weather _____
- RFI's _____
- Different Site Conditions _____
- Claims _____
- Disputes & Protest _____
- Payments _____
- Schedules & Updates _____
- Submittals _____
- Value-Engineering _____
- Work Plans _____



Weekly Quality Punch-List, Clean-Up & Safety Inspection Report

Project: _____ Name: _____ Date: _____

Work Observed Trade / Subcontractor Comments Action Required Complete By



Job Start-Up Checklist

- _____
- _____
- _____
- _____
- _____
- _____
- _____

Project Close-Out Checklist

- Final Inspection Date: _____
- Notice of Completion Date: _____
- Warranty Start Date: _____
- Warranty & Guarantees: _____
- Utilities Switched Over: _____
- Final Job Cost Calculated: _____
- Documents / Records
 - Permit Plans & Specifications
 - As-Built Plans
 - Approved Shop Drawings
 - Certificate of Occupancy
- Certificate of Occup. Date: _____
- Punch-List Sign Off Date: _____
- Warranty End Date: _____
- As-Built Drawings: _____
- Retention Paid:
 - Job Folders & Contracts
 - Revised Plans
 - Utility Company Plans
 - Permit Cards
 - Inspections & Tests



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 HARDHAT Presentations
 BIZCOACH BIZGROUP BIZSCHOOL
 GH@HardhatPresentations.com
 www.HardhatBIZSCHOOL.com



THINK-AHEAD SCHEDULE

Look-Ahead Schedule - 2 To 4 Weeks

Created By: George Hedley

For More Information Visit: www.HardhatBizSchool.com

Email: GH@HardhatPresentations.com

PROJECT:

Filled Out By Fore/Supt - Friday

PREPARED BY:

Reviewed By PM & Fore/Supt - Monday

File: HardhatBIZCOACH - Job Form Templates

GH@HardhatPresentations.com

WORK ACTIVITY DESCRIPTION	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date	Date
	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	
ACTIVITIES	[Blue bar spanning M, T, W, T, F, S, S]																					
	[Blue bar spanning T, W, T, F, S, S, M, T, W, T, F, S, S]																					
LABOR																						
Crew Size	5	7	4																			
Company EQUIPMENT																						
Company TOOLS																						
Rental EQUIPMENT																						
MATERIALS																						
SUBCONTRACTORS / TRADES																						
INSPECTIONS																						



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Job Project Overall Schedule & Workload Tracking

		2019												2020											
		FINISH	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR							
1	City Hall Addition	5/1/19																							
2	Bill's Barn & Dentistry	6/1/19																							
3	Joe's Garage & Deli	10/1/19																							
4	Dave's Donut & Pawn Shop	7/1/19																							
5	ABCDEF Warehouse	9/1/19																							
6	ACME Explosives & Mirror	7/1/19																							
7	Frank's Frank Factory	12/1/19																							
8	Dumper's Trash Service	10/1/19																							
9	General Motors Crash Facility	5/1/20																							
10	Empire State Building	9/1/20																							
10	Jacks Restaurant & Laundry	5/1/20																							
TOTAL JOBS UNDER CONSTRUCTI		CONST	5	6	7	8	7	9	7	6	4	4	3	3	3	3	3								
		# JOBS UNDER CONST	5	6	7	8	7	9	7	6	4	4	3	3	3	3	3								

		2019												2020											
		FINISH	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR							
1	Big Belt Factory	5/1/19																							
2	Small Shopping Center	6/1/19																							
3	Scammer Office Building	7/1/19																							
4	Tiny Tank Farm	7/1/19																							
5	Smith Music Hall	5/1/19																							
TOTAL POTENTIAL JOBS		POTENTIAL # JOBS/UC	0	0	0	0	2	3	5	5	5	5	4	3	3	2	2								
		TOTAL # JOBS	5	6	7	8	9	12	12	12	11	9	7	6	6	5	5								
		PM																							
		SUPT																							



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CREW WORKLOAD Overall Tracking Schedule

Crew Workers Needed

														2020																
														2019																
														2020																
														2019																
JOBS UNDER CONSTRUCTION	CONTRACT	OH + P FEE	ODDS	MARK-UP	MARGIN	PM	PA	SUPT	FORE	DAYS	START	FINISH		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	
1 City Hall Addition	\$ 1,400,000	\$ 120,000	100%	9.4%	8.6%	Joe	Sally	Jack	Chew	200	5/1/19	5/1/19		10	10	10	5													
2 Bill's Barn	\$ 1,800,000	\$ 135,000	100%	8.1%	7.5%	Joe	Judy	Smit	Brad	210	12/1/18	6/1/19		8	12	10	6	4												
3 Joe's Garage	\$ 2,000,000	\$ 140,000	100%	7.5%	7.0%	Bill	Sally	Juan	Moë	300	12/1/18	10/1/19		6	10	12	14	16	10	6										
4 Dave's Donuts	\$ 700,000	\$ 80,000	100%	12.9%	11.4%	Bill	Judy	Mark	Fred	180	1/1/19	7/1/19		4	3	3	2	1												
5 ABCDEF Warehouse	\$ 3,000,000	\$ 180,000	100%	6.4%	6.0%	Sue	Sally	Will	Dave	275	11/1/18	9/1/19		8	12	14	14	14	8	6	4									
6 ACME Explosives	\$ 600,000	\$ 70,000	100%	13.2%	11.7%	Sue	Judy	???	???	150	2/1/19	7/1/19						2												
7 Frank's Franks	\$ 2,500,000	\$ 170,000	100%	7.3%	6.8%	Joe	Ann	???	???	270	3/1/19	12/1/19						8	10	12	12	8	4							
8 Dewey's Trash Service	\$ 800,000	\$ 50,000	100%	6.7%	6.3%	Bill	Ann	???	???	180	4/1/19	10/1/19						4	4	4	4									
9 GM Building	\$ 5,000,000	\$ 350,000	100%	7.5%	7.0%	Sue	Sally	Jack	???	360	6/1/19	5/1/20						4	10	16	16	10	6	6	6					
10 Empire State Building	\$ 7,000,000	\$ 450,000	100%	6.9%	6.4%	???	???	???	???	420	6/1/19	9/1/20						6	8	12	12	14	8	8	8					
10 Jack Restaurant	\$ 2,225,000	\$ 150,000	100%	7.2%	6.7%	???	???	???	???	300	7/1/19	5/1/20									6	8	8	8	8	4	4			
TOTAL JOBS UNDER CONSTRUCTION	\$ 27,025,000	\$ 1,895,000		7.5%	7.0%	3	3	5	5	REWORKERS NEEDED	36	47	53	53	61	52	48	42	26	22	22	48	42	26	22	10	4	0	0	

														2020																
														2019																
														2020																
														2019																
POTENTIAL JOBS	CONTRACT	OH + P FEE	ODDS	ODDS FEE	MARK-UP	MARGIN	PM	PA	SUPT	FORE	DAYS	START	FINISH	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	
1 Big Factory	\$ 3,000,000	\$ 240,000	75%	\$180,000	8.7%	8.0%					300	5/1/19						2	6	8	12	12	12	8	4					
2 Small Center	\$ 1,000,000	\$ 80,000	75%	\$ 60,000	8.7%	8.0%					180	6/1/19							2	4	4	4	4	2						
3 Large Office	\$ 2,500,000	\$ 200,000	60%	\$120,000	8.7%	8.0%					300	7/1/19								4	8	12	16	16	10	6				
4 Tiny Tank	\$ 700,000	\$ 75,000	90%	\$ 67,500	12.0%	10.7%					150	7/1/19									2	4	4	4						
5 Smith Center	\$ 3,500,000	\$ 170,000	75%	\$127,500	5.1%	4.9%					360	5/1/19						1	8	14	16	16	10	6	4					
TOTAL POTENTIAL JOBS	\$ 10,700,000	\$ 765,000		\$ 555,000	7.7%	7.1%					CREW WORKERS NEEDED	0	0	0	0	0	0	3	16	32	44	48	46	32	18	6	0	0	0	
														TOTAL # CREW WORKERS	36	47	53	53	64	68	94	92	72	54	40	16	4	0	0	



PROJECT PLAN - Labor, Equipment, Material & Subcontractors Schedule

PROJECT	Date Req'd	Ordered	CO/EQUIP	Duration	Crew Size	Total HRS	8/1	8/2	8/3	8/4	8/5	8/8	8/9	8/10	8/11	8/12	8/15	8/16	8/17	8/18	8/19
							M	T	W	T	F	M	T	W	T	F	M	T	W	T	F
Design Mix & Approval	7/25		CONC CO																		
Anchor Bolt Shop Drawings	7/25		STEEL SUB																		
Surveyor Building Stakes	7/25		SURVEY CO																		
Order Form Lumber	8/1		LUMBER CO																		
Order Embeds	8/1		HDWE CO																		
Order Form Oil	8/1		HUB																		
Order Rebar	8/1		REBAR CO																		
Schedule Backhoe	8/1																				
Schedule Concrete Pour	8/3		CONC CO																		
Order Sand & Visqueen	8/8		BLDG MATL																		
Order Concrete	8/8		CONC CO																		
Set Building Corners			CREW	1	2	16															
Layout Foundations			CREW	1	2	16															
Excavate Foundations			BACKHOE	2	2	16															
Form Foundations			CREW	2	4	32															
Set Rebar In Foundations			CREW	2	4	32															
Set Fdn Bolts & Embeds			CREW	2	2	16															
Foundation Inspection			SOILS & CITY	1	2	16															
Pour Foundations			CREW	1	6	48															
Set-Up Slab Finishing Crew	8/8																				
Schedule Slab Pour Equip	8/8																				
Schedule Slab Concrete	8/10		CONC CO																		
Form Slab			CREW	2	4	32															
Skiploader			SKIPLOADER	2	2	16															
Grade Slab Subgrade			CREW	1	4	32															
Install Visqueen & Sand			CREW	1	4	32															
Install Slab Rebar			CREW	1	4	32															
Slab Inspection			CITY	1	2	16															
Set-Up Slab Pour Equip			CREW	1	4	32															
Pour Slab Concrete			CREW	1	4	32															
Finish Slab Concrete			CREW	1	4	32															
Cure Slab Concrete			CREW	2	2	16															
Strip Forms			CREW	1	2	16															
Final Clean-Up			CREW	1	2	16															
TOTAL CREW HOURS						496	HOURS														

Must-Do Field & Project Management Systems



<u>Project Management</u>	<u>Field</u>	<u>Estimating</u>
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
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<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____



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MANAGEMENT TEAM Strategy Meeting - Monthly

1. BIZ-BUILDER BLUEPRINT - Update & Review Actions Plans, Commitments & Fix-It List
2. Company Financial Review
3. Construction Performance, Results, Manpower, & Challenges
4. Job Schedule & Crew Manpower Tracking Report
5. Sales Award Tracking Report
6. Estimating, Sales, Customer & Marketing Results & Strategy
7. Org Chart, Structure, Talent, People Plan, Training, Recruiting & Progress
8. Systems Implementation & Enforcement
9. New Strategies, Innovation, Disruption, Improvements & Initiatives



FINANCIAL Review & Update Meetings



- Weekly** - AR / AP / Payroll / Cash Report / Cash-Flow / Bank Balance
- Monthly** - P & L - Income Statement / Overhead Budget / Mark-Up & Margins Equipment P & L
- Project Job Cost Reports & Estimated Cost To Complete
- WIP Schedule / Completed Contract Schedules / Over-Under Billings
- Financials / Balance Sheet / Equity / Working Capital / Backlog / Bonding

PM PROJECT REVIEW Accountability & Enforcement Meeting - Monthly - Manager & PM

1. Review Updated Job Cost Report - Bid Vs Actual
2. Review Job Field Labor Production Scorecard
3. Verify Updated Schedule & Milestone Achievement
4. Review & Enforce Change Order Management
5. Verify Subcontracts & POs Executed
6. Verify Submittals & Shop Drawings Approved
7. Verify Documentation & Correspondence
8. Monitor Progress Payment & Invoices
9. Review Project Meetings Held & Documented
10. Project Management Must-Do's
11. Monitor Safety Program
12. Enforce Customer Care
13. Project Close-Out & Punch-List Completion
14. Analyze Project Team Performance



ESTIMATING, SALES & BIZ-DEV Meeting - Weekly

1. Review Updated BID-HIT-WIN Ratio Tracking Report
2. Review Upcoming Leads & Opportunities
3. Make Bid/No Bid Decisions
4. Review Bid Schedule & Strategies To Win Work
5. Assign & Monitor Bid Follow-Up Activity
6. Review Customer Development & Marketing Activity

FIELD LOGISTICS Meeting - Schedule Crews, Manpower, Tools & Equipment

Field Production SCORECARD RESULTS Meeting - Weekly - All GS, S, F & PM



1. Review All-Project Scorecard Production Results & Completed Jobs Results
2. Review & Production Improvement Suggestions
4. Each Supt Or Foreman Present Next Week Look-Ahead Schedule, Goals & Plans
5. Training - Team Member Train Upcoming Activity
6. Discuss Issues, Needs, Requirements, Concerns & Safety For Next Week

ALL PM Meeting Or All SUPT Meeting - Weekly Or Monthly

ALL COMPANY & Crew Meeting - Quarterly

STAFF Meeting - Optional



PROJECT JOB MEETINGS

- Pre-Job Turn-Over Hand-Off Meeting - Estimating To Project Team**
- SCORECARD & Schedule Review Meeting - PM/GS/Supt/Fore - Weekly**
- CUSTOMER Job Start-Up & Weekly Job Meeting - Onsite**
- Project Crew &/Or All Subcontractor - Start-Up & Weekly Meeting**
- CREW - Huddle-Up Daily & Weekly Safety Meeting**
- Close- Out Job Review & Estimating / Cost History Adjustments**





Project Pre-Con Start-Up Turn-Over Kick-Off Hand-Off Meeting



Hand-Off From Estimating & Sales To Project Team

Who: Estimator, Project Manager & Division Manager
Superintendent, Foreman & Project Administrator



AGENDA – Review, Discuss & Create Plan To Achieve Project Results!

1. Proposal, Bid, Estimate, Scope, Inclusions & Exclusions
2. Contract Documents, Terms & Conditions:
 - Plans, Specifications, Addendas, RFIs & Documents
 - Special Requirements, Insurance, Payment & Cash-Flow Issues
 - Permits, Permits, Inspections, Approvals, Tests & Certifications
 - Liquidated Damages, Contract Clauses, Submittals & As-Builts
 - Customer, Architect, Engineering, City & Inspector Issues
 - Schedule, Constructability, Safety & Quality Issues
3. Proposed Crew, Hours, Rates, Size, Duration & Production
4. Proposed Equipment, Hours, Rate, Duration & Production
5. Material Take-Off, Quan., Price, Long Lead Item & Delivery
6. Proposed Subcontractors, Suppliers & Buy-Out Potential
7. Project Schedule, Milestone Dates & Sequencing
8. Site Conditions, Mobilization, Staging & Site Plan
9. Project Safety Plan & Issues
10. Review Opportunities To:
 - Improve Budget Estimate, Cost, Buy-Out & Completion Dates
 - Value-Engineering Or Alternatives To Save \$\$\$
 - Maximize Change Orders & Potential RFIs
 - Identify Conflicts Or Discrepancies In Plans Or Scope
11. Set-Up Project Budget & Cost Codes For Time Cards
 - Adjust Bid Estimate To Real Project Budget
 - Adjust Crew Hours, Equip Budget & General Conditions
 - Develop Project Time Card For Job Costing
12. Draft Project Start-Up Plan
 - General Conditions, Mobilization & Logistics Plan
13. Create Project Vision, Mission, Targets & Goals
14. Create First Draft Project Schedule
 - Review Project Schedule Requirements W/ Customer
 - Include Crew Manpower Loading Schedule
 - Include Equip & Material Delivery Plan & Schedule
 - Include Long Lead Items & Milestones
15. Superintendent & Foreman Draft Project Work Plan
16. Set-Up 2 to 4-Week Look-Ahead Schedule Template
17. Proposed Required Project Meetings & Calendar
18. Project Close-Out Requirements

ACTIVITY	M	T	W	T	F	S	S
LABOR							
-							
EQUIPMENT							
- Co. Equip							
- Co. Tools							
- Rental Equip							
MATERIALS							
- Lumber / Trim							
- Supplies							
SUBCONTRACTS							
-							

Project Master BUDGET & GOAL



Contractor: HardHat Builders Job: The Perfect Project

Cost Code	Work Item	Contractor	BID BUDGET	PROJECT BUDGET
0101	Supervision	HardHat Builders	\$ 40,000	\$ 37,000
0102	Project Mgmt	HardHat Builders	\$ 20,000	\$ 18,000
0120	General Cond	HardHat Builders	\$ 30,000	\$ 25,000
340	Concrete	HardHat Builders	\$135,000	\$130,000
0620	Carpentry	HardHat Builders	\$200,000	\$190,000
0750	Structural	Slick Steel	\$100,000	\$ 95,000
1500	Plumbing	Draino Plumbing	\$ 60,000	\$ 58,000
1550	HVAC	Happy Mechanical	\$ 80,000	\$ 77,000
1600	Electric	Hot Wiring Co.	\$100,000	\$ 95,000
SUB-TOTAL			\$765,000	\$725,000
OH + P MARK-UP			\$ 76,000	\$116,000
TOTAL CONTRACT			\$841,000	\$841,000



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Monthly Project PM Review Meeting



Who: Company President or Division Manager / VP
Project Manager, Superintendent & Foreman
Project Accountant & Project Administrator

When: Monthly - Mandatory 'ACCOUNTABILITY" - 1 Hour

Where: Office Or Zoom / Jobsite for Out of Town Jobs

AGENDA - Review Project Results, Progress & Activities:

Verify all required Contract Tasks are Completed.

1. Project Job Cost Report (CCR)

Review Updated Budget
Vs. Actual Cost To Date + Estimated Cost to Complete.

2. Project Field Production Scorecard

Review updated weekly production labor & equipment scorecard. Actual labor & equipment hours versus budget. Make sure PM reviewed with field Supt. & Foreman weekly.

3. Schedule

Review Updated Schedule with Milestones & Completion Date. Assure 'Look-Ahead' schedules are current and updated weekly with photos and daily report. Confirm schedule has been reviewed with PM, Supt, Foreman and Customer.

4. Change Order Log - Proposed Vs. Executed

Review change order documentation and process. Confirm PCO / CO log and all proposed and executed change orders are current. Confirm all COs are submitted and approved and no extra work was done without prior written approval of customer or company officer.

5. Subcontracts & POs - Executed Vs. Non-Executed

Review Subcontract tracking log to confirm all subcontracts and material orders are written and executed. Make sure all subcontracts and POs are executed within 14 days of job start.

6. Submittals & Shop Drawings

Review Submittal tracking log of all required shop drawings and submittals to confirm submittal process is on-track. Assure all are submitted within 14 days of contract & approved.

7. Documentation - Correspondence, Minutes & RFI Log

Confirm project documentation & correspondence are current and updated weekly. Assure updated project plans and specifications are current. Document all project issues, changes, RFIs, delays, notices, etc. within 7 days.

8. Progress Payment & Invoices

Review project payment invoice to confirm it is current, accurate and submitted to customer by month end with all required documentation. Make sure all timecards & job invoices are current with accurate cost codes. Verify payment status, invoices and payables are current.

9. Project Meetings

- Confirm all job meetings are being held.
 - Pre-Con Pre-Project Turn-Over Meeting - Est To Team.
 - Customer Start-up Meeting.
 - Customer Job Meetings onsite weekly.
 - Subcontractor Pre-Job Start-Up Meeting
 - Weekly Project Team Meetings
 - Safety Meetings weekly
 - Crew Meetings – weekly & daily huddle

10. Project Management

Confirm all bonds, insurance, permits, testing, etc. are handled within 10 days of contract. Confirm PM visited job every week and communicates with superintendent / foreman daily.

11. Safety

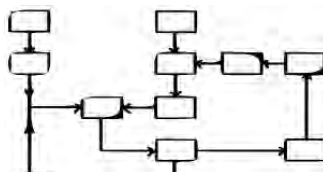
Review project safety plan is in place & maintained. Make sure all required safety meetings held & documented for crews & subs.

12. Other Project Issues

Review and discuss any Customer or Contract issues, Disputes, Claims, Or Delays. Review any Manpower Or Management Issues. Review all Production, Labor, Equipment, Subcontractor Or Supplier Issues.

13. Project Close-Out

Review project close-out, punch-list, warranty work, procedures & documentation.



WEEKLY PROJECT SUMMARY SCOREBOARD							
Job Name:						PM	
						SUPT	
						FORE	
WEEK ENDING:		CREW LABOR					
		BUDGETED	UNIT	FOREMAN	BUDGETED	CREW	+ OVER +
		CREW		ESTIMATED	CREW	HOURS	(UNDER)
		HOURS		%	HOURS	ACTUAL	BUDGET
Job Name:	PM/SUPT / FORE	HOURS	HOURS	COMPLETE	HOURS	HOURS	
			HOURS		-	-	-
			HOURS		-	-	-
			HOURS		-	-	-
			HOURS		-	-	-
			HOURS		-	-	-
			HOURS		-	-	-
TOTAL			HOURS		-	-	-



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Field Production Foreman Scorecard Meeting

- All Foremen, Supts, GS & PMs

- Weekly Or Bi-Weekly

Who: All PM, GS, Supt & Foremen

When: Weekly Or Bi-Weekly - 1 Hour

- Hold @ Office Or All Attendees ZOOM Meeting

SCORE	
	✓
	x

AGENDA - Review & Plan All Current Projects

- Opening Remarks & Overview Of Big Picture
- Review All-Project Scorecard Production Results
 - Each Foreman Review Their Job RESULTS Scorecard:
 - Weekly Production Results - Progress VS. Target
 - Weekly Safety - Issues, Targets & Requirements
 - Weekly Production - Issues, Targets & Priorities
 - Weekly Schedule - Issues, Targets & 'Look-Ahead'
 - Weekly Quality - Issues, Punchlist & Targets
 - Weekly TACTICS, Activities & Needs - L M E S Tools
- Each Foreman Present Next Week Goals & Plans
- Overall Company Issues & Challenges
 - Logistics, Planning, Manpower Or Scheduling
 - Open Discussion Regarding Issues
- Praise, Recognize & Acknowledge Accomplishments
- Training - Team Member Train Upcoming Activity
- Discuss Safety Results & Concerns For Next Week
- Turn In & Review Weekly Paperwork & Timecards
- Review Any Other Company Issues



Field Crew Weekly Strategy

- Monday Morning Quarterback Meeting

Who: Project Crew or Team

When: Every Monday Morning

Where: Jobsite - Duration: 15 to 20 Minutes

AGENDA - Review Plans, Strategy & Tactics For Week:

- Review Last Week Crew Progress Achievements
- Discuss Field Issues, Strategy, Logistics, Plans
- Praise & Recognize Individual Accomplishments
- Set Current & Next Week Goals & Targets - VISUAL
 - Safety Plan - Goals, Issues & Requirements
 - Production Plan - Targets, Deadlines & Priorities
 - Schedule Plan - Targets, Deadlines & 'Look-Ahead'
 - Quality Plan - Targets, Action & Weekly Punch-List
- Plans - Activities & Needs
 - Labor, Material, Equipment, Tools, Supplies, Delivery
 - Subcontractors, Suppliers, Inspections & Tests
- Safety Tool Box Talk

Daily Field Crew Team Huddle-Up

Who: Project Crew or Team

When: First Thing Every Morning

Where: Jobsite - Stand In Circle - 5 Minutes



Agenda - Foreman / Supt Review Plan With Crew:

- Daily Safety Plan - Goals, Issues & Requirements
- Daily Production Plan - Targets & Priorities - Visual
- Daily Schedule Plan - Goal, Targets & 'Look-Ahead'
- Daily Quality Plan - Issues, Goals & Punch-list
- Plan Activities - Labor, Mat'l, Equip, Tools, Subs
- Production Plan - Progress & Tomorrow Targets

COMPLETED JOBS RECAP SCOREBOARD										Date:
Job Name	EST	PM	SUPT	FORE	CREW LABOR HOURS			% MH Spent	+ Over + (Under)	
					Target	MH	MH Spent			
Smith Buildings		Sam	Joe	Chuck	3,000	MH	3,200	MH	107% (200)	
Acme Warehouse		Sam	Will	Fred	5,000	MH	4,700	MH	94% (300)	
ABC Center		Dave	Juan	George	7,500	MH	7,900	MH	105% 400	
Warner Plaza		Dave	Matt	Harry	2,500	MH	2,100	MH	84% (400)	
City Center Building		Bill	Jack	Ken	10,000	MH	9,600	MH	96% (400)	

Field Logistics Scheduling Meeting

Who: PMs, Gen. Supt & Equip Mgr

When: Daily Or Weekly As Required

AGENDA - Organize Crews, Labor, Equipment, Materials, Deliveries & Tools & For All Jobs



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Project GC Field Start-Up Meeting - GC & Subs

Who: Project Manager, Superintendent & Foremen
Every Subcontractor & Major Supplier
 When: Before Project Starts
 Where: Jobsite Duration: 45 to 60 Minutes

Agenda - Led by Project Supt & PM

1. Review Project Goals & Objectives
2. Issue ALL Subcontracts Before Start Job
3. Issue Approved Plans & Specifications
4. Issue & Review Project Schedule & Milestones
 - Discuss Long Lead Items, Approvals, Anticipated Problems & Coordination Issues
5. Quality Requirements
6. Customer Satisfaction Requirements
7. Job Rules, Safety Requirements, Clean-Up, Etc.
8. Permits, Licenses & Special Inspections
9. Contract Requirements & Procedures:
 - Required Notices & Approvals
 - Shop Drawings & Submittal Deadlines
 - Payment Procedures
 - Insurance Requirements
 - Authorized Personnel
 - Change Orders, Claims & Disputes



DAILY Or WEEKLY CREW TARGETS	Last Period Target	Last Period Results	Next Period Target
Safety Goals & Plan			
Production Goals			
- Quantities			
- Crew Hours			
- Equipment			
- Other			
Schedule Goals			
Quality Goals			

Crew Target Tracking

Project Field Subs Coordination Meeting

- **General Contractor & All Subcontractors**
 - All Subs & Suppliers On Job In Next 4 Weeks
 - Mandatory Attendance Or \$500 Fine!
- **Weekly Or Bi-Weekly**

Who: Project Manager, Superintendent & Foremen
 When: Weekly (Or Bi-Weekly On Small Projects)
 Where: Jobsite - Duration: 45 To 60 Minutes

AGENDA - Meeting Led By Project Supt & PM

1. Schedule, Progress, Milestones, Deadlines & Priorities
2. Manpower, Crew, Equipment & Materials Required
3. Field Coordination Issues, Problems & Needs
4. Approvals Required, Shop Drawings & Finishes
5. Permits & Inspections Required
6. Jobsite Management & Cleanup
7. Project Safety & Quality
8. Customer Relationships & Requests



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Customer Project Start-Up Meeting

- Train Your Customers How You Do Business!
- Be Pro-Active - Don't Be A WIMP!
- Always Communicate The 'Real Deal'
- Review Project Contract & Deadline Requirements



AGENDA - Review:

1. General Conditions & Project Requirements
2. Scope, Price, Budget. Allowances, Inclusions
3. Schedule Requirements, Notices & Delays
4. Change Orders, Approvals, Rates & Deadlines
5. Documentation & Notice Requirements
6. Claims & Disputes
7. Payment Procedures, Approvals & Deadlines
8. Submittals & Shop Drawings & Deadlines
9. Quality & Safety Requirements
10. Completion & Close-Out Requirements



Customer Project Meeting

- Weekly Or Bi-Weekly @ Jobsite

- Be Pro-Active! - Communicate 'Real Deal'
- Assign Responsible Party For Agenda Items
- Meeting Led By Project Supt & PM

AGENDA:

1. Schedule Update
 - Progress, Milestones, Deadlines & Priorities
2. Manpower, Crew, Equip & Material Requirements
3. Field Coordination Issues, Problems & Needs
4. Approvals Required, Shop Drawings & Finishes
5. Permits & Inspections Required
6. Jobsite Management & Cleanup
7. Project Safety & Quality
8. Customer Relationships & Requests

**Pro-Active
Customer Relationship Building**



Pre- Award Contract Review Meeting With Customer

1. Establish Clear Project Expectations
2. Review Contract, Price, Terms & Alternates
3. Plans, Documents, Scope, Inclusions & Exclusions
4. Change Order Rates & Procedures
5. Payment, Insurance & Bonding Requirements
6. Schedule, Milestones, Phases & Manpower Req'd
7. Completion & Close-Out Requirements

Pre-Project Onsite Customer Meeting To Review:

1. Clear Project Expectations & Goals
2. Documentation Requirements
3. Claims, Disputes, Delays & Back-Charge Process
4. Payment Procedures, Requirements & Deadlines
5. Communication, Approval Process & Deadlines
6. Change Order Process, Terms, Mark-Up & Rates
7. Shop Drawings, Approval Process & Deadlines
8. Schedule, Milestones, Phases & Manpower Req'd
9. Permits, Inspections, Tests & Certifications
10. Punch-List & Clean-Up Requirements
11. Close-Out Requirements

Regular Project Team Communication With Customer

1. Meet When Arrive On Jobsite
2. Weekly Punch-List Walk-Thru
3. Job Walk With Customer Prior To Move Offs
4. Punch-List Job Walk With Cust. Prior To Move-Off

Regular Owner Communication With Customer

1. Pre-Project Onsite Meeting to Share Goals
2. Mid-Project Onsite Meeting To Review Progress
3. Pre-Completion Meeting - Review & Close-Out



RFI LOG

Project:

General Contractor

Subcontractor

A / E

Owner

RFI #	Date Requested	Requested To	Description	Date Resolved	Resolution	PCO	Remarks Subcontractor



TIME & MATERIAL WORK ORDER

George Hedley

PROJECT RATE SHEET

GH@HardhatPresentations.com

Hardhat Builders

Date:

Project:

Work Description:

QUANTITY	DESCRIPTION	RATE	UNIT	TOTAL COST
----------	-------------	------	------	------------

COMPANY LABOR

	Project Manager	\$ 60.00	Hour	\$ -
	Project Superintendent	\$ 55.00	Hour	\$ -
	Project Estimator	\$ 60.00	Hour	\$ -
	Project Bookkeeper	\$ 40.00	Hour	\$ -
	Crew Foreman	\$ 55.00	Hour	\$ -
	Crew Labor	\$ 45.00	Hour	\$ -

COMPANY EQUIPMENT & TOOLS

	Pickup Truck	\$ 15.00	Hour	\$ -
	Crew Truck With Small Tools	\$ 30.00	Hour	\$ -
	Generator & Air Compressor	\$ 100.00	Day	\$ -
	Skip Loader	\$ 300.00	Day	\$ -
	Water Truck	\$ 250.00	Day	\$ -
	Dump Truck	\$ 150.00	Day	\$ -
	Truck & Low Boy Trailer	\$ 175.00	Day	\$ -

GENERAL CONDITIONS COSTS

	Office Trailer	\$ 35.00	Day	\$ -
	Storage Bins	\$ 30.00	Day	\$ -
	Temporary Power Poles, Boxes & Lights	\$ 40.00	Day	\$ -
	Temporary Toilets	\$ 20.00	Day	\$ -
	Temporary Utilities & Phones	\$ 50.00	Day	\$ -
	Temporary Fencing & Gates	\$ 20.00	Day	\$ -
	Security Guard	\$ 30.00	Hour	\$ -

MATERIAL COSTS

				\$ -
				\$ -

SUB-TOTAL

				\$ -
	MARK-UP - OVERHEAD	15%		\$ -
	MARK-UP - PROFIT	10%		\$ -
	Contractor's Liability Insurance	1.00%		\$ -
	Performance & Payment BOND	2.00%		\$ -

TOTAL WORK ORDER

				\$ -
--	--	--	--	------

APPROVED & AUTHORIZED

Contractor

Customer

Name

Title

Signature

Date Approved



CHANGE ORDER

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GH@HardhatPresentations.com

Owner	Date	2/10/33
General Contractor	RFI #	1
Subcontractor	Proposed Change Order #	14
Project	Change Order Number #	4
	Proposed By	Owner

Change Order Description Add Conference Room 2nd Floor
 Owner directed contractor to add new conference room on 2nd floor of office area.
 Price includes additional 40' walls, 2 doors, 2 HVAC ducts, 6 plugs, & 4 lights.

Change Order Time Adjustments
 The Contract Schedule Time Will Be Modified As Follows: **ADD 7 CALENDAR DAYS**

COST CODE	DESCRIPTION	CO. / SUB Or SUPPLIER	QUANTITY	UNIT	UNIT PRICE	TOTAL COST
01-3100	Project Manager	Hardhat	13.2	Hours	\$ 60	\$ 792
01-3120	Project Superintendent @ 100%	Hardhat	40.0	Hours	\$ 55	\$ 2,200
01-5000	Temporary Facilities, Office & Bins	Hardhat	7.0	Days	\$ 95	\$ 665
01-5110	Temporary Power & Utilities	Hardhat	7.0	Days	\$ 90	\$ 630
01-5400	Pickup Truck	Hardhat	7.0	Days	\$ 15	\$ 105
08-0000	DRYWALL	Hardhat				
	Labor	Hardhat				
	- Foreman	Hardhat	24	Hours	\$ 55.00	\$ 1,320
	- Framing & Hanging Drywall	Hardhat	64	Hours	\$ 45.00	\$ 2,880
	- Taping & Clean-Up	Hardhat	16	Hours	\$ 45.00	\$ 720
	- Hang Doors & Frames	Hardhat	4	Hours	\$ 55.00	\$ 220
	Scaffolding	Hardhat	7	Days	\$ 50.00	\$ 350
	Truck & Tools	Hardhat	7	Days	\$ 30.00	\$ 210
	Material	Hardhat				
	- Metal Studs, Drywall & Screws	Hardhat	40	LF	\$ 31.00	\$ 1,240
	- Taping Materials	Hardhat	1	Cost	\$ 170.00	\$ 170
	- Doors & Frames	Hardhat	2	Each	\$ 575.00	\$ 1,150
08-0000	PAINTING	Slick Painting	1.0	Bid	\$ 475	\$ 475
23-0000	MECHANICAL	Hot & Cold Mechanical	1.0	Bid	\$ 880	\$ 880
26-0000	ELECTRICAL	Sparky Electric	1.0	Bid	\$ 945	\$ 945
	SUB-TOTAL					\$ 14,952
	MARK-UP	OVERHEAD	15%			\$ 2,243
		PROFIT	10%			\$ 1,719
	TOTAL					\$ 18,914
	Contractor's Liability Insurance		1.00%			\$ 189
	Performance & Payment BOND		2.00%			\$ 382
	TOTAL CHANGE ORDER					\$ 19,485

APPROVED BY

	GENERAL CONTRACTOR	OWNER / O.R / ARCHITECT	SUBCONTRACTOR
SIGNED			
NAME			
TITLE			
COMPANY			
DATE			



MASTER - PROPOSED CHANGE ORDER LOG

Project:

General Contractor

A / E

Subcontractor

Owner

PCO #	Arch RFI #	Description	Requested By	Submitted Cost	Approved Cost	Time Extension	Date Submitted	Date Approved	OCO #



MASTER - OWNER CHANGE ORDER LOG

Project:

General Contractor

Subcontractor

A / E

Owner

OCO #	Description / PCO #'s	Requested Cost	Approved Cost	Time Extension	Date Submitted Issued	Date Executed Approved	Revised Contract Amount



REQUIRED APPROVALS, SHOP DRAWINGS & SUBMITTALS

Project:

General Contractor

Subcontractor

A / E

Owner

Required Shop Drawing or Submittal	Trade Spec Section	Subcontractor	Date REQUIRED	Date Requested	Date Received	Comments



Project Approval Tracking Log - Shop Drawings & Submittals

Project:

General Contractor

Subcontractor

A / E

Owner

#	Date Required	Subcontractor Supplier	Description Approval Item	Date Received From Sub	Date Sent To Arch.	Date Returned From Arch.	Approved Yes/No AAN/AAC	Date Returned To Sub	Date Resubmit To Arch.	Date Returned From Arch.	Approved Yes/No AAN/AAC	Date Returned To Sub



Project
Trade
Specification Section

QUOTE COMPARISON SPREADSHEET

WORK DESCRIPTION	SUBCONTRACTOR Contact			SUBCONTRACTOR Contact			SUBCONTRACTOR Contact		
	QUANTITY	\$\$\$	NOTES	QUANTITY	\$\$\$	NOTES	QUANTITY	\$\$\$	NOTES
BASE BID									
INCLUSIONS									
EXCLUSIONS									
SUBSTITUTUONS									
ADDITIONAL ITEMS REQUIRED									
VALUE-ENGINEERING ITEMS									
MOVE-INS									
TOTAL									
ALTERNATES									
REVISED TOTAL									