PROJECT MANAGEMENT ESSENTIALS

Step by Step Instructions and Guides for Construction Project Managers

CONSTRUCTION LOGS

TABLE OF CONTENTS

Project Management Forms

Request for Information (RFI)

Step-by-Step Directions:

1. Fill out the RFI Form on Excel, Word, or a similar program
2. Save RFI Form as a PDF File
3. If you are a General Contractor, Send RFI Form PDF to the following (as applicable):
    a. Engineer & Engineers Assistant
    b. Owner/Owner's Representative(s)
    c. CC The Following:
        i. Superintendent (Your Company)
        ii. Project Manager (Your Company)
        iii. Subcontractor (if affected by RFI)
        iv. Any other relevant parties
4. If you are a Subcontractor, Send RFI Form PDF to the following (as applicable):
    a. General Contractor
    b. CC The Following:
        i. Superintendent (Your Company)
        ii. Project Manager (Your Company)
        iii. Any other relevant parties
5. Document the RFI in your RFI Log with the following information at a minimum:
    a. RFI Number
    b. Description
    c. Date Sent
6. Upon receiving the RFI Response do the following:
    a. Send to any affected parties, such as the following:
        i. Superintendent/Field Lead
        ii. Project Manager
        iii. Subcontractor
        iv. Any other affected parties (vendors, etc…)
    b. Document the RFI in your RFI Log
    c. Save RFI Response in your RFI Folder
    d. Establish if this RFI Response adds/removes cost to your project
        i. If so, proceed with a Change Order

Tips:

- Be thorough and precise with your RFI question. Vague questions leave room for interpretation and may result in an insufficient response.
- Include photos, marked up drawings, sketches and any relevant images attached to your question(s). Images go a long way in describing your question!
- Need a response right away? Note that the RFI is "Urgent" or "Critical" in the RFI Form and the email.

Submittal

Step-by-Step Directions:

1. Gather all the information required in the Specifications, paying thorough attention
2. Fill out the Submittal Form on Excel, Word, or a similar program
3. Save Submittal Form as a PDF File and combine it with all required attachments
4. If you are a General Contractor, Send Submittal Form PDF to the following (as applicable):
    a. Engineer & Engineers Assistant
    b. Owner/Owner's Representative(s)
    c. CC The Following:
        i. Superintendent (Your Company)
        ii. Project Manager (Your Company)
        iii. Subcontractor (if affected by Submittal)
        iv. Any other relevant parties
5. If you are a Subcontractor, Send Submittal Form PDF to the following (as applicable):
    a. General Contractor
    b. CC The Following:
        i. Superintendent (Your Company)
        ii. Project Manager (Your Company)
        iii. Any other relevant parties
6. Document the Submittal in your Submittal Log with the following information at a minimum:
    a. Submittal Number (this number should include the specification section number)
    b. Description
    c. Date Sent
7. Upon receiving the Submittal Response do the following:
    a. Send to any affected parties, such as the following:
        i. Superintendent/Field Lead
        ii. Project Manager
        iii. Subcontractor
        iv. Any other affected parties (vendors, etc…)
    b. Document the Submittal in your Submittal Log
    c. Save Submittal Response in your Submittal Folder
    d. Order materials that were submitted promptly (if applicable)

Tips:

- Read the specifications very carefully and gather all required information to submit. Sending incomplete submittals is a common cause of delays, as the engineer will require a resubmittal.
- If you send a submittal that is intentionally missing information, note that you will be submitting that information separately. This will increase chances of approval for that portion.

Change Order

Step-by-Step Directions:

1. Notify the Owner or General Contractor that you will be issuing a Change Order
2. Fill out the Change Order Form on Excel, Word, or a similar program
    a. You will need to fill out a letterhead summary sheet and a cost breakdown sheet
    b. List both the monetary cost and the time extension requested (if applicable)
3. Save Change Order Form as a PDF File and combine it with any applicable invoices/documents
4. If you are a General Contractor, Send Change Order Form PDF to the following (as applicable):
    a. Owner/Owner's Representative(s)
    b. CC The Following:
        i. Project Manager (Your Company) any other relevant parties
5. If you are a Subcontractor, Send Change Order Form PDF to the following (as applicable):
    a. General Contractor
    b. CC The Following:
        i. Project Manager (Your Company) any other relevant parties
6. Document the Change Order in your Change Order Log with the following information:
    a. Change Order Number
    b. Description
    c. Date Sent
    d. Total Cost and Time Extension Requested
7. Upon receiving the Approved and Executed Change Order do the following:
    a. Notify any affected parties, such as the following:
        i. Superintendent/Field Lead
        ii. Project Manager
        iii. Subcontractor (Schedule activities if applicable)
    b. Document the Change Order in your Change Order Log
    c. Save Approved Change Order in your Change Order Folder
    d. Order materials and schedule activities
    e. Add time extension and activities to your schedule
    f. Add the Change Order costs to your Schedule of Values (in your Pay Application)

Tips:

- Make sure you include costs for Taxes, Overhead, Profit, Bond and Labor Burden in your Change Order. You could be missing out on valid compensation!
- Some commonly forgotten costs are General Conditions, Equipment and Miscellaneous Rentals.
- If you are forced to negotiate, provide as many invoices and receipts as you can to back up your charges. It is hard to argue against factual costs.
- If negotiations go against your favor on costs, consider negotiating a larger time extension, beneficial use of the other party's equipment, or using money from the project allowance, as some examples. Get creative!

Purchase Order

Step-by-Step Directions:

1. Draft a sample Purchase Order at the beginning of each project
    a. Long form Purchase Orders should be used for all major purchases (Example: $5000+)
    b. Short form Purchase Orders can be used for smaller purchases that have less liability
2. Fill out the Purchase Order Form on Excel, Word, or a similar program
    a. Describe in detail all material requirements, and reference drawings & specifications
    b. Specify what is and what is not included in the total price
    c. Note any required warranties and the time span of the warranties
    d. Break down the total cost as well as the State and County Tax
3. Save Purchase Order Form as a PDF File and combine it with any applicable quotes/documents
4. Send an Email or Mail copy of the Purchase Order to the selling party (let the other party sign first)
5. When you receive a signed copy, examine carefully for any edits the selling party may have made. It is common for them to cross off or modify paragraphs.
    a. If you are in agreeance to the changes (if any) sign and send them a fully executed copy
    b. If you do not agree to certain terms, negotiate and sign a mutually accepted copy
6. Document the Purchase Order in your Purchase Order Log with the following information:
    a. Purchase Order Number
    b. Description
    c. Date Sent & Date Finalized
    d. Total Cost
7. Upon receiving the Executed Purchase Order do the following:
    a. Notify any affected parties, such as the following:
        i. Superintendent/Field Lead
        ii. Project Manager
        iii. Any other affected parties (owner, etc…)
    b. Save Executed Purchase Order in your Purchase Order Folder
    c. Send any related submittals to the engineer for review
    d. Finalize details and order the materials promptly

Tips:

- Make sure you include costs for both State and County/Local Taxes in the Purchase Order.
- As a best practice, include a page notifying the other party that any changes made to the Purchase Order need to be detailed in a separate sheet. This will make any changes to the contract clear, so that they are not missed.
- Always save a paper copy of your signed Purchase Orders, in the case that the electronic copy is deleted (intentionally or not). Having the original signed copy will also hold better should it ever go to court.
- Commonly missed additions to the Purchase Order are warranty terms and required spare parts. Be sure to research these items on your specifications, and add them in.

Subcontract

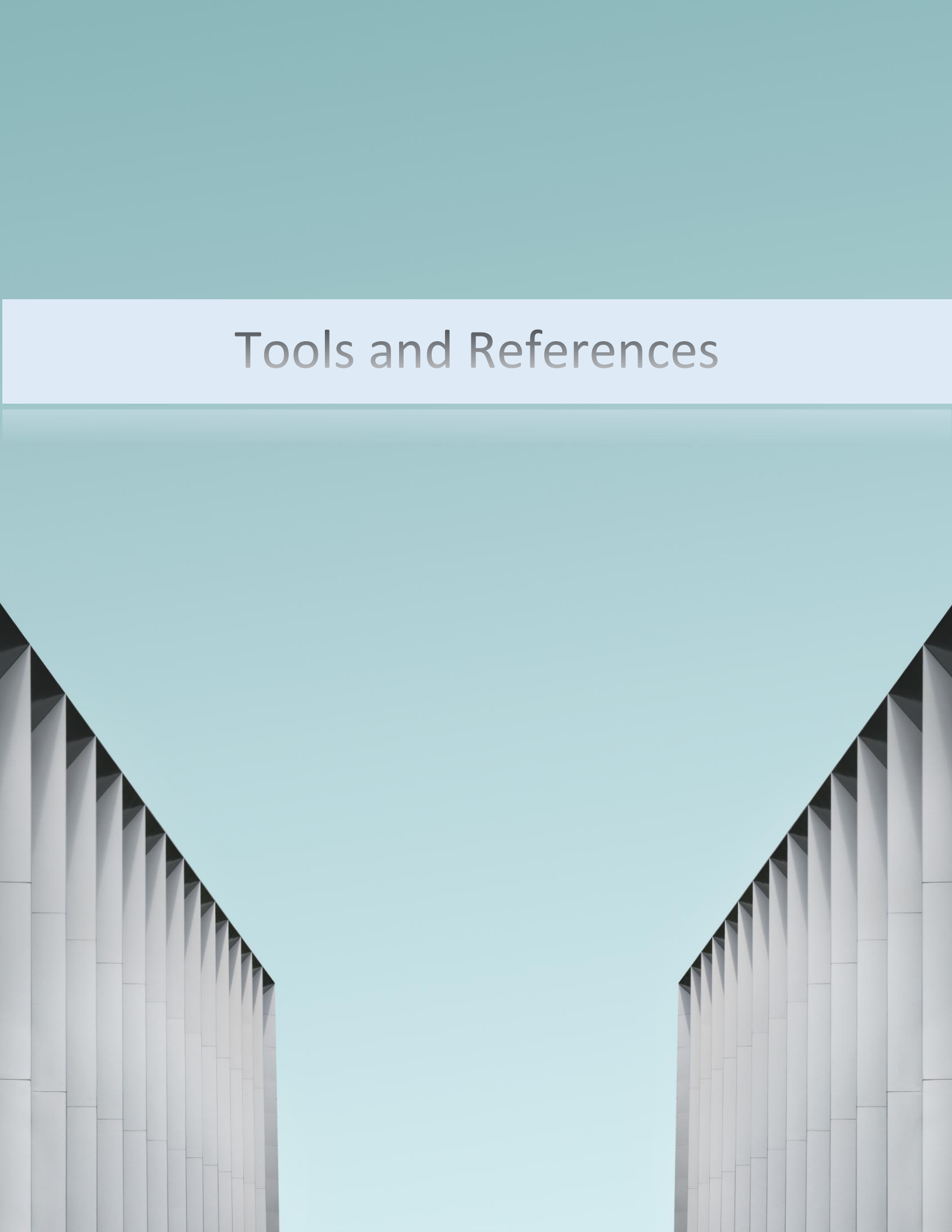
Step-by-Step Directions:

1. Draft a sample Subcontract at the beginning of each project
    a. Every subcontractor must sign a contract (This is crucial for insurance liabilities)
2. Fill out the Submittal Form on Excel, Word, or a similar program
    a. Describe in detail all services & materials, and reference drawings & specifications
    b. Specify precisely what is and what is not included in the total price
    c. Note any required warranties and miscellaneous terms
    d. Note the start and end date of the subcontract
    e. Specify the retainage as well as any liquidated damage terms
    f. Specify the Certificate of Insurance and Lien Release requirements
3. Save Submittal Form as a PDF File and combine it with any applicable quotes/documents
4. Send an Email or Mail copy of the Subcontract to the Subcontractor (let them sign first)
5. When you receive a signed copy, examine carefully for any edits the subcontractor may have made. It is common for them to cross off or modify paragraphs.
    a. If you are in agreeance to the changes (if any) sign and send them a fully executed copy
    b. If you do not agree to certain terms, negotiate and sign a mutually accepted copy
6. Document the Subcontract in your Subcontract Log with the following information:
    a. Purchase Order Number
    b. Description
    c. Date Sent & Date Finalized
    d. Total Cost
7. Upon receiving the Executed Subcontract do the following:
    a. Notify any affected parties, such as the following:
        i. Superintendent/Field Lead
        ii. Project Manager
        iii. Any other affected parties (owner, etc…)
    b. Save Executed Subcontract in your Subcontract Folder
    c. Send any related submittals to the engineer for review
    d. Finalize details and schedule the work to begin promptly

Tips:

- The start date, end date, and duration should be clearly spelled out. If the subcontractor goes over their schedule, this will be crucial in holding them accountable.
- As a best practice, include a page notifying the other party that any changes made to the Subcontact need to be detailed in a separate sheet.
- Always save a paper copy of your signed Subcontract, in the case that the electronic copy is deleted (intentionally or not).
- Make sure you have a Certificate of Insurance prior to the subcontractor beginning work.
- Prior to sending your final payment and retainage, ensure that they send you a Lien Release.

Tools and References



Divisional Overview and Tools

Division 2 - Site Construction

- Stone/Rock Calculator – Click Here
- Asphalt Calculator – Click Here
- Soil Density Calculator – Click Here
- Division 2 Overview – Click Here

Division 3 – Concrete

- Average weight of concrete = 150LB/CF
- L (ft) * W (ft) * D (ft) / 27 = CY
- Concrete Calculator – Click Here
- Epoxy Calculator - Click Here
- What to know before ordering Concrete
  - Desired Mix and Slump
  - Total CY
  - Time of Arrival
  - Spacing between concrete trucks
  - Is pump required?
  - Is priming grout required?
- Maximum time concrete can stay in truck is typically 90 minutes
- Division 3 Overview – Click Here

Division 4 – Masonry

- Masonry Calculator – Click Here
- Masonry Tolerances – Click Here
- Masonry Overview – Click Here

Division 5 – Metals

- Metals Calculator – Click Here
- Beam Dimensions – Click Here
- Division 5 Overview – Click Here

Division 6 - Wood and Plastics

- Nominal vs Actual dimensions – Click Here
- Division 6 Overview – Click Here

Division 15 – Mechanical

- Pipe size charts – Click Here
- Beam Dimensions – Click Here
- Division 15 Overview – Click Here

Notices and Disclaimers

This E-Book is Free of Charge and cannot be sold or reproduced in any manner, without permission from ConstructionLogs.com.

If you find that any of the links are no longer working, please notify us on our contact page so we can repair them.

ConstructionLogs.com is not affiliated with and is not receiving any form of compensation from the links in this E-Book.

We hope you enjoyed this book!

Created By ConstructionLogs.com