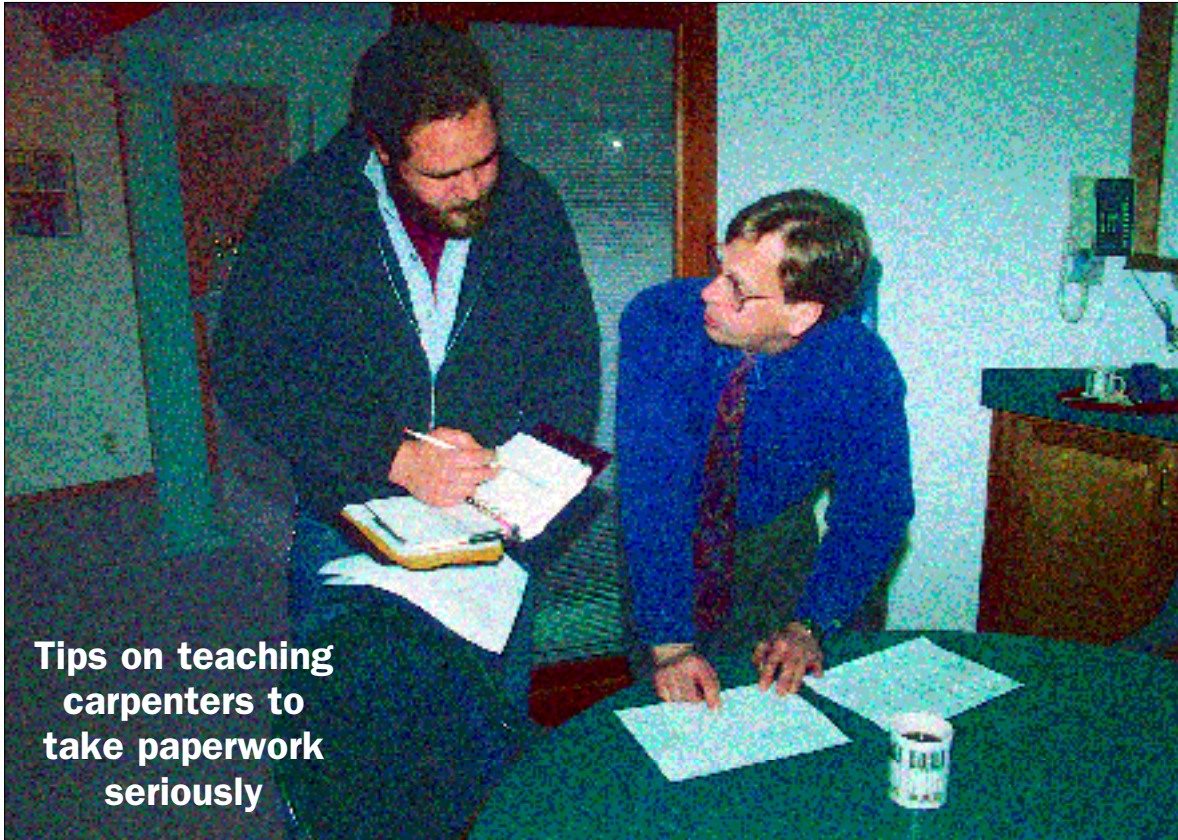


Office Basics for Field Carpenters

by John Sylvestre



Tips on teaching carpenters to take paperwork seriously

All employees in the author's company receive a planner as part of their training. Filled with addresses, phone lists, time cards, and job data sheets, as well as daily and monthly calendars, the planners keep all job-related information in one place.

Carpenters enjoy the smell of a freshly cut pine board, and they like stepping back to see the progress after eight hours of framing. But most carpenters don't enjoy paperwork. In fact, when given the opportunity to "move up" to supervisor, many carpenters decline, just to avoid paperwork.

The perspective in the office is different. In my case, I realized just how inefficient and inaccurate our on-site information-gathering process was. It was clear that our carpenters and foremen needed training in field-office basics so that the home office could count on steady, accurate data. Here's how we educate field carpenters to generate the valuable information needed by the home office.

The Right People

From the outset, I make sure that new employees are in harmony with our thinking about staying organized and doing paperwork. And because paperwork gets even more important as you climb the management ladder, I'm careful to find out if production carpenters really want to move up to lead carpenter and site manager positions. If a person has a resistant attitude toward organization and record-keeping, I seriously question his or her management intentions.

The Reason for Paperwork

Even motivated people need good reasons for what may seem to be mindless paperwork. People who haven't run a construction company probably don't understand a concept like job-costing, let alone why it's so important. As an owner, it's your responsibility to help them see the "big picture," as well as teach them the fundamentals.

My company's most important teaching example (and one I have repeated dozens of times) uses our time card with labor codes (see Figure 1, next page). I explain that in a typical remodeling job, 90% of cost overruns are labor. Without good feedback from the time cards, our estimators will never know what is really happening out on the job site. It's the job of carpenters on site to accurately transmit the labor costs to the office. The same is true of the daily job log and change orders. In every case, I try to explain to field carpenters the connection between good information and getting more jobs — which translates to more work and job security for them.

Crawl before you walk. Often our new employees are afraid that they will be overwhelmed with paperwork, so we start them off gradually. We furnish them a small spiral notebook with a pen, and encourage them to write topic

will keep on thinking that it takes 8 hours to frame an addition instead of the 12 hours actually spent.

Field personnel must also understand that we need information in a timely manner so we can make changes or adjustments, sometimes during the job, to keep the labor costs in line as well as to modify future estimates.

Garbage in, garbage out. At times our system has proved to be too complicated for our own good. At one time we had over 70 codes on our time card. It's only a slight exaggeration to say it took 40 hours to complete the time card. We have since consolidated these into 10 categories — enough to give the office the detail it needs, yet keeping it simple enough for the field staff to fill out quickly (Figure 2).

Time-card procedures. New employees are given an employee manual, which contains a section devoted to time-card procedures. We also spend time during their introductory meeting reviewing the importance of time cards (and all information flowing in from the field) and how to fill them out.

Each carpenter is responsible for his or her own time card, which is due in the office Tuesday morning (we provide stamped, addressed envelopes). The intent is for employees to fill in their cards after work Friday, then drop them into the mail on the way home from work. In the real world this doesn't always happen, but they are still responsible for getting them to the office on time.

Change orders. Our change orders are written in the office and sent out to the field. We use a preprinted change-order form that signals to the owner that this is standard operating procedure. Often, it's the field carpenter who gets the change order signed and sends it back to the office for processing. We teach our carpenters that until it is back in the office, the change order is not considered complete.

Short-Term Paperwork

Short-term, project-oriented paperwork is more satisfying to deal with — once you complete a project you can turn it in. This category includes anything related to a specific project, including contracts, building permits, change orders, job invoices, shop drawings, and lumberyard bills. This infor-

mation needs to be on the job site, protected and well organized.

The easiest way to organize project-specific material on a small job is to have a single manila folder labeled with the job name. The paperwork for larger jobs is broken into several categories. We put the contract and change orders in one file, and have one file each for lumberyard invoices and office memos. Very short (one- or two-day) jobs still need a folder, because sorting information as it comes in is much faster than having to recreate it in the office.

I prefer folders with a large folding staple on top. You can keep papers in chronological order, and they don't fall out (you'll need a two-hole punch, however). Pocket folders in three-ring binders also work. This eliminates the hole punch, and you can stuff papers quickly into the file, but the papers are less orderly and need to be sorted often.

Long-Term, Ongoing Paperwork

Because phone numbers and addresses for suppliers, subcontractors, and emergencies are reference material that

field workers constantly use, we create a company reference list. We update it regularly, print it on card stock, punch holes in it, and make it part of each employee's planner system.

At each job, we also stock preprinted, prepunched pads for lumber, door, and window takeoffs, as well as to-do schedules and materials orders (Figure 3, next page). We've formatted the order pads and lumber schedules to fit in the planners (the more of these forms you can get into the planner, the better). Finally, there are safety books like OSHA and HAZCOM that are required on the job site at all times.

What System Works for You?

It would appear that a carpenter has a ton of paper to organize and manage. How are you going to keep this material organized? The first step is to distinguish short-term, job-related paper from documents you will need for the long term. Short-term, job-related paper goes in job-labeled manila folders. Long-term paper, such as permits or job specs, will go in a file folder or, on large jobs, a file

Time-Card Tasks		
#10 Supervision	#30 Framing	#60 Insulation
Phone calls to office	Floors/sheathing	Insulation
P.M. job-site meetings	Walls, exterior & interior	Vapor barriers
Work with subs	Modify openings	Foam windows
Time spent setting up task	Soffits	Install air chutes
Organizing job site	Roof framing	Foundation insulation
Ordering material	Roof sheathing	
Putting together materials lists	Rough stairs	#70 Drywall
Talks with client		Install wallboard
#20 Prelim/demo	#40 Exterior finish	#80 Interior finish
Temporary walls	Soffits, rough & finish	Interior trim: windows
Temporary doors	Install windows	doors
Footings	Install doors	base
Backfill	Siding	Cabinets
Fence removal	Exterior trim	Countertops
Demolition	Garage door trim	Stairwork
Transfer to dumpsters	Decks	
Removals: plaster	#50 Roofing	#90 Cleanup
siding	Roof felt	Daily cleanup
flooring	Ice & water membrane	Weekly cleanup
Move lumber	Roofing	Straighten lumber piles
	Flashing	
		#100 Miscellaneous
		Work not on contract

Figure 2. Too much information can be just as confusing as too little. The author's time-card codes evolved from over 70 codes to the 10 shown.

ORDER NO.:
JOB NO.:
ADDRESS:
TEL. NO.:
CITY: ST. / PM
LEAD:

BOOK IN 1st COPY

5' Black Poly 8x10' or 10x100'	---	---	---
Foundation waterproofing 5 gal	---	---	---
Foundation insulation	---	---	---
1"x4x8 Foil face or styro	---	---	---
2"x4x8 Foil face or styro	---	---	---
1 1/2" - 4x8 TYPOMAX	---	---	---
Sill Sealers - rolls	---	---	---
TREATED PLANKS	---	---	---
2 x 8--8'	---	---	---
2 x 8--10'	---	---	---
2 x 8--12'	---	---	---
2 x 6--_____ other	---	---	---
W/ JOISTS SPF OR T&T	---	---	---
2 x _____ x 8'	---	---	---
2 x _____ x 10'	---	---	---
2 x _____ x 12'	---	---	---
2 x _____ x _____	---	---	---
2 x _____ x _____	---	---	---
FLOOR JOISTS (circle)	---	---	---
2 x _____ x 8'	---	---	---
2 x _____ x 10'	---	---	---
2 x _____ x 12'	---	---	---
2 x _____ x _____	---	---	---
2 x _____ x _____	---	---	---
W/ INSULATION	---	---	---
sq. ft. R-19	---	---	---
CROSS BRACING (solid blocking)	---	---	---
1x2 100/bundle 16" or 14" sq	---	---	---
W/ FLOOR	---	---	---
3/4" x 4 x 8 CDX	---	---	---
3/4" x 4 x 8 T&G	---	---	---
3/4" x 4 x 8 wafer board	---	---	---
UNDERLAYMENT	---	---	---
1/4" Luan	---	---	---
1/2" CDX	---	---	---
5/8" CDX	---	---	---
3/4" CDX	---	---	---
1/2" particle board	---	---	---
3/4" particle board	---	---	---
1x6 BATTEN W/ FINISH	---	---	---
3/8" x _____ 3", 4", 5"+	---	---	---
1/2" x _____	---	---	---
WOOD	---	---	---
SPF, T&T, cedar, redwood	---	---	---
4x4 - 8, 10, 12, 14, 18	---	---	---
6x6 - 8, 10, 12, 14, 18	---	---	---
EXTERIOR DOORS & SILLS	---	---	---
2 x _____ x 8'	---	---	---
2 x _____ x 10'	---	---	---
2 x _____ x 12'	---	---	---
2 x _____ x 14'	---	---	---
2 x _____ x 16'	---	---	---
EXTERIOR WINDOWS & CRYPANE	---	---	---
2 x _____ x 92 5/8" or 8 or 10'	---	---	---
2 x _____ x 92 5/8" or 8 or 10'	---	---	---
2 x _____ x 92 5/8" or 8 or 10'	---	---	---
EXTERIOR BRACING	---	---	---
1/2" x 4 x 8 CDX	---	---	---
1/2" x 4 x _____ Builtrite	---	---	---
3/4" x 4 x 8 CDX/Builtrite	---	---	---
EXTERIOR TRIMMING	---	---	---
2 x 10 x 8'	---	---	---
2 x 10 x 10'	---	---	---
2 x 10 x 12'	---	---	---
2 x 10 x 14'	---	---	---
2 x 10 x _____	---	---	---
1/2 CDX for headers	---	---	---
EXTERIOR WALL INSULATION	---	---	---
R-11 sq. ft.	---	---	---
R-19 sq. ft.	---	---	---
EXTERIOR ROOF WEAR	---	---	---
1/2" felt 472 sq ft/roll	---	---	---
Tyvak 9' x 135' per roll	---	---	---
MATERIALS FOR LAYING OUT FOUNDATION	---	---	---
Stakes 1x2 bundles	---	---	---
Batter boards 1 x 4	---	---	---
Footings form 1x8, 1x10	---	---	---
ISOLATION W/ FINISH	---	---	---
1/2" x 2 1/2"	---	---	---
1/2" x _____	---	---	---

Figure 3. Preprinted materials lists that live in the planner speed up the takeoff process and help to make estimating understandable to everyone on the crew.



Figure 4. Polyvinyl boxes with tight-sealing lids make good containers for job records (left). The Auto Office Seat Desk from Rubbermaid retails for \$90, and turns the passenger seat into a transportable desk (right).

cabinet. This system will help you "file, then find" the information.

If you have a lot of small projects going on at the same time, an expanding-paper file is a good idea. This will accommodate the manila file folders (the ones you have divided up for each of your jobs), and can expand to hold more files and thus more jobs.

Transporting the Paper

Unfortunately, paper usually moves from the job site to the office in a pickup truck, where it tends to get lost or mixed up with fast-food wrappers and gas receipts. Some kind of container (other than Carhart jacket pockets) for transporting job records is a must. I know that "briefcases" have a bad connotation among carpenters, but over-the-shoulder models are becoming popular. The Duluth Trading Company (P.O. Box 7007, St. Paul, MN 55107; 800/505-8888) offers one that is designed for contractors. In any case, workers need something that will hold all the job paperwork and be in one spot that can be easily moved from site to site.

For the long-term and project-specific paperwork, we store our hanging file folders in PVC containers with handles on top. Rubbermaid (1427 William Blount Dr., Maryville, TN 37801; 800/827-5055) makes storage bins with tight-fitting tops that effectively protect and transport field-office materials from job site to job site (Figure 4). Rubbermaid also makes the Auto Office Seat Desk, a transportable office that fastens to the passenger seat of a car or truck.

When organizing the interior of any of these containers, use different-colored pocket folders with tabs. Label the folders with bold markers, both on the tab and on the side of the folder.

Keeping paperwork in order may seem like an overwhelming task, but if you take it one step at a time, it's manageable. Spend some time thinking about the paperwork items that you deal with and design a system that you feel comfortable with. Finally, make sure you and your crew are on the "same page" when it comes to the daily chore of organizing paperwork. ■

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