

# COMING TO GRIPS WITH Job-Site Paperwork

If you're a solo tradesperson or the boss of a small company with just one crew, you probably don't think much about paperwork. But as your company grows, adds employees, and

by **Tim Faller**

takes on more work, you'll quickly find out how important paperwork can be.

I worked for years as a project manager and supervisor for Hopkins and Porter, a successful multicrew remodeling firm in Maryland. That's where I got familiar with the Lead Carpenter system, a method that puts one highly skilled carpenter in charge of managing each job from beginning to end. That individual supervises, coordinates subs, and also does a major share of the on-site carpentry. I now specialize in teaching and advising companies about how to implement the Lead Carpenter system.

At Hopkins and Porter I also learned to handle paperwork efficiently. In my initial excitement to get everything documented, I created form after form to be completed by the field crews. Eventually, I realized that most of those forms never came back.

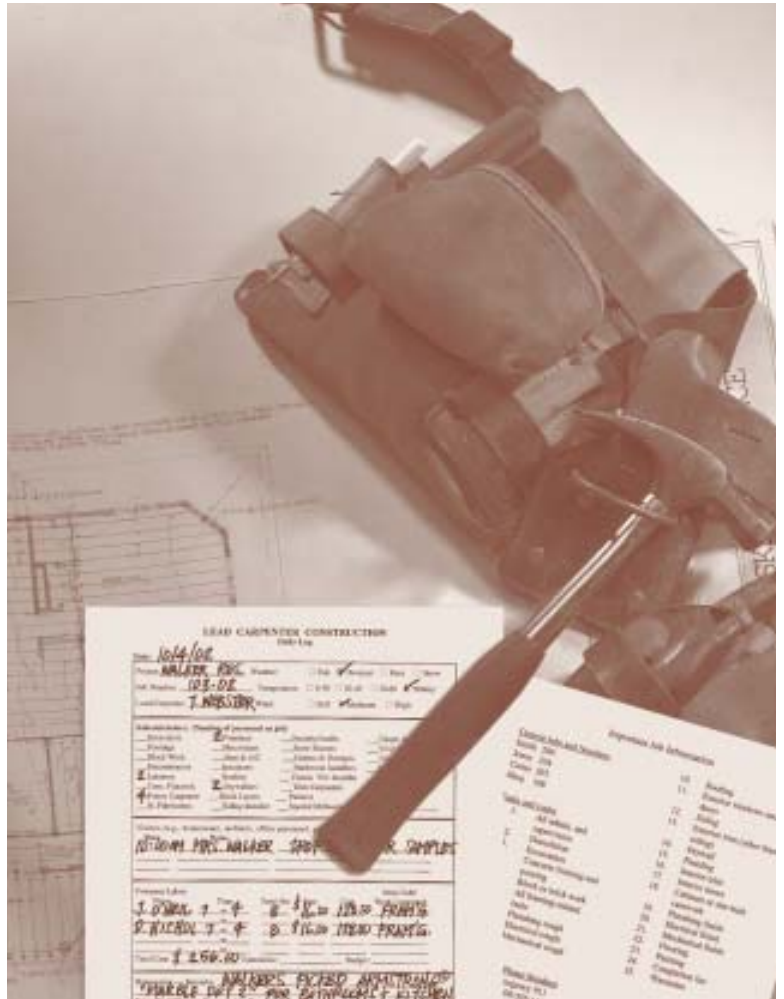
When the field crews and I talked it over, I figured out the problem: Paperwork plays a crucial role in running a business, but it can also kill your productivity on site. If there's too much, the lead carpenter has a natural tendency to let it slip to the bottom priority, just so he can keep getting his work done.

Once I grasped that idea, we cut the paperwork back to the essentials. That's when it really began to serve its intended purpose.

## Paperwork: What's It Good for?

Thorough paperwork provides the only accurate record of the actual work on a job. When the owner of a company shifts responsibility for decision making to the lead carpenter, it becomes a means of informing the owner about what is being done on his or her behalf.

**Blazing a trail.** When information gets lost, or details are forgotten, or important events are simply



A few clear, simple forms will keep everyone on the same page, without bogging down the work

miscommunicated, the owner of a company is responsible for someone else's decisions without knowing what really happened. Good records eliminate confusion, preventing each day's routine discussions from turning into disagreements. In the worst case, a clear paper trail gives the owner and the lead carpenter a concrete record of the job that can be worth its weight in gold when it comes time to settle an argument or resolve a court case. The responsibility for keeping track of this vital information logically falls to the person closest to the process being documented — and for production on the job, that's the lead carpenter.

### Principles of Good Paperwork

So how do we keep paperwork from being the problem instead of helping to prevent problems? Here are four key principles my experience has taught me:

- **Keep it simple.** Any form you send to the field should be as simple to complete as possible — not because carpenters are stupid, but because it's to everyone's advantage to be able to dispense with it quickly and accurately, without holding up production.

Use checklists if at all possible. A checklist lets the user simply check off an answer instead of having to invent words or phrases, and it reminds the user of all the options. If the information can't be covered in a checklist, use a form that requires only simple write-in answers.

- **Make it readable.** Forms should be easy to read for the person in the field and also for the office staff. Type in as many items as possible before you send it out. And make sure to use the words and phrases your workers use on a daily basis — no legalese or architectspeak.

- **Use it to communicate.** Keep the purpose of the paperwork in mind as you develop and use it. Paperwork is a communication tool. Never let it turn into "busywork" that's being done just to be done; use a form only when it's the best way to communicate.

This can be tricky. The owner or manager of a company understands why the paperwork needs to be done, but the field staff may not. Try to explain it with an example that site employees can relate to. For example, I like to point out that a receipt is the tool that the bookkeeper works with. If the receipts aren't clean and properly coded, it's as if someone sent a saw blade out to the job that

## LEAD CARPENTER CONSTRUCTION

### Daily Log

Date: \_\_\_\_\_

Project: _____	Weather: Fair Overcast Rain Snow
Job Number: _____	Temperature: 0-30 30-40 50-60 60&up
Lead Carpenter: _____	Wind: Still Moderate High

Subcontractors: (Number of personnel on job)			
Excavators _____	Plumbers _____	Security/Audio _____	Carpet Installers _____
Footings _____	Electricians _____	Stone Masons _____	Vinyl Installers _____
Block Work _____	Heat & A/C _____	Gutters & Dwnspts. _____	Cntrpt Installers _____
Exterminators _____	Insulators _____	Hardwood Installers _____	Mirror/Shwr/Hdwr. _____
Laborers _____	Roofers _____	Ceram. Tile Installer _____	Driveway Installers _____
Conc. Flatwork _____	Drywallers _____	Trim Carpenters _____	Cleaners _____
Frame Carpenter _____	Brick Layers _____	Painters _____	Landscapers _____
St. Fabricators _____	Siding Installer _____	Special Millwork _____	Other _____

Visitors (e.g., homeowner, architect, office personnel, construction manager):

Time	Name	Remarks

Company Labor:					
Name	Time	Total Hrs	Rate	Cost	Item Code/ Work Completed
	to _____				
	to _____				
	to _____				
	to _____				
	to _____				
Total Cost: _____		Cumulative: _____		Budget: _____	

Homeowner — Remarks: \_\_\_\_\_

Extra Work/Changes Requested by Homeowner: \_\_\_\_\_

Selections/Decisions to be made by Homeowner: \_\_\_\_\_ By (date): \_\_\_\_\_

Daily Notes: \_\_\_\_\_

Reviewed by: \_\_\_\_\_ Date: \_\_\_\_\_

The job log provides a paper record of each day's events and can be critical in case of any disagreement or dispute. Instead of having to rely on memory, a contractor can turn to the record made at the time. This form is easy to fill out — for many items, circling the answer or simply writing a number is sufficient to complete it. Detailed sections serve as reminders of the key information that should be part of each day's record.

was dull and missing several teeth. Can the carpenter still use it? Yes, but it will make his job a lot harder and slower. Good construction workers don't want to slow the other guy down; when you explain it this way, they tend to cooperate.

• **Train and reinforce.** Job sites are busy, complicated, and often hectic. Workers caught up in the front-line activity of the job often see paperwork as item number one on the Top Ten Things to Forget About list. So in addition to reducing your field crews' paperwork burden to the barest minimum, you have to take routine action to keep it on their radar screen.

Training is one of the keys to that. Whether it's carpentry skills or any other productive behavior or activity, a lot of contractors seem to think learning on the job can be left to some sort of natural trial-and-error process by which the employee just soaks up the lessons. In reality, companies do much better when they take the time to formally train their workers on a regular basis. Completing paperwork is no different from running trim or installing a cabinet: There are right and wrong ways to do it, and no one is born knowing them. Don't assume that people know how to use your forms; train them to do the paperwork the way you want it done.

Then remember that you're going to have to reinforce what you want over and over again. Praise good behavior publicly. When you get a good time card in, thank the employee at the next crew meeting for turning in his or her time card, and mention specifically what it is that you like about that time card.

And of course, provide time on the clock to do paperwork. Good documentation is important to you, not to them; don't expect people to do it at home in the evenings.

## Essential Paperwork

There are six basic pieces of paperwork that I believe should be required from field staff. Beyond these six items, you should think carefully about what the extra time spent on paperwork will do to production. If it's worth it, fine — but make sure it really is.

**Job logs.** I've come to believe that every company ought to have every lead carpenter — the person running a job — fill out a job log every day. The job log is just a brief description of any significant events on the site. It should include some simple information: name of the job, the date, the weather, what happened on the job, who

was there, and whether the client requested any changes or made any complaints.

The job log should note which employees worked on the job on particular days. This helps management to check the accuracy of time cards, and it allows the lead carpenter to track the cost of his labor and compare it with progress on the job. Perhaps most important, the job log should record any problems with subs or suppliers.

A complete, up-to-date job log is an invaluable legal safeguard. For example, I heard recently of a lead carpenter who could not get the plumber to return to the job to set fixtures and finish up. The lead noted in the job log his phone calls and the results. Finally, with the completion date looming, he went out and bought the necessary materials and completed the plumbing work himself. In his job log, he documented the materials purchased and the labor he spent finishing the plumber's job. When the plumber sued the remodeler for the final draw, the job log was produced in court to show the effort the lead had expended in trying to get the plumber to finish, and the expense he incurred to complete the work. The case was resolved in favor of the remodeler, saving the firm \$1,500.

**Time cards.** The time card is the one form that every field employee needs to fill out, not just the lead. To support precise job costing, the time card should accurately reflect how much time an individual spends on each particular task. For that, the worker has to write down the time spent (whether it's 30 minutes or 8 hours), the job-cost code, and a brief description of what was done.

Beyond making sure that the employee gets the correct wages, this communicates to the owner of the company how time is being used on the site. That allows the company to refine estimating and selling numbers to reduce guesswork and prevent losses.

Here again, training is key. You have to teach your staff how to fill in the card and also explain its importance. Most workers assume that the time card is just used to pay them. If you spell out for them all the other ways the time card helps the company, they're more likely to give you useful data on the forms.

**Site surveys.** The lead person on a site should fill out a form that records existing site conditions at the start of each job. There are two major reasons for this: First of all, unless you document existing conditions, you'll end up having to fix them. Repairs to simple preexisting wall cracks or floors that were already worn could cost thousands of

**Important Job Information**

Current Jobs and Numbers  
 Smith 206  
 Jones 234  
 Carter 265  
 Shop 108

Tasks and codes

1. All admin. and supervision	10. Roofing
2. Demolition	11. Exterior windows and doors
3. Excavation	12. Siding
4. Concrete forming and pouring	13. Exterior trim (other than siding)
5. Block or brick work	14. Drywall
6. All framing related tasks	15. Paneling
7. Plumbing rough	16. Interior trim
8. Electrical rough	17. Interior doors
9. Mechanical rough	18. Cabinets or site-built casework
	19. Plumbing finish
	20. Electrical finish
	21. Mechanical finish
	22. Flooring
	23. Painting
	24. Completion list
	25. Warrantee

Important Phone Numbers  
 Medical emergency 911  
 Joe's cell 800-555-1111  
 Office 800-555-1212  
 Bill's Lumber 555-1313  
 Courier service 555-1414

**Weekly Time Card**  
 Lead Carpenter Construction

Name \_\_\_\_\_ Week Ending \_\_\_/\_\_\_/2002

Day	Job Code	Tasks Completed	Task Code	Task Hrs.	Total Hrs.
Mon.		1.			
		2.			
		3.			
		4.			
Tues.		1.			
		2.			
		3.			
		4.			
Wed.		1.			
		2.			
		3.			
		4.			
Thurs.		1.			
		2.			
		3.			
		4.			
Fri.		1.			
		2.			
		3.			
		4.			
		<b>Weekly Totals</b>			<b>Hrs</b>

The time card is a simple 5x8 index-card form that each employee turns in weekly. Each day's section should be filled out that day, before details are forgotten. The detailed record of hours spent on particular tasks is vital to accurate job-costing and future estimating. The contractor should instruct employees on the use and purpose of the cards and encourage thorough and conscientious completion; otherwise, the cards may be inaccurate and lack useful detail.

dollars. These little (and not so little) extra expenses get paid for out of the profit of the job and can make the difference between profit and loss.

This list also serves as a gentle reminder to your clients that extras are really extra and will show up on the bill. That's important, because without a clear understanding of this matter between the client and the lead, money issues can cause problems.

A further purpose for the site-survey form is that it forces the lead carpenter to inspect all existing conditions before the work is started. Unnoticed details can add cost to the job, and the later the problem is noticed, the higher that cost is likely to be. An existing floor level may require the new foundation to be laid a little differently than usual, or the actual height of the second-floor walls may dictate some change that the architect or designer did not see. The person taking on the

responsibility of running the job should be careful to inspect all existing conditions and *relate them to the plans* before the job starts. This practice can avoid costly mistakes.

**Receipts.** Obviously, receipts need to be saved. But the other main concern regarding receipts is that they be accurately coded. A cost code or number should be added to each item, so the cost of that item can be tracked by job. This allows the company owner to see at a glance if the material budgets are accurate.

A system that many companies use assigns a number to each phase of the fieldwork: #1, for example, might be site supervision, #6 framing, #10 exterior trim and siding, and so on. When materials are delivered to the job, the lead carpenter can look at the receipt and write the numbers by the items as needed. If a receipt is only for exterior trim, he just writes the appropriate code on

## PRECONSTRUCTION SITE ASSESSMENT FORM

JOB NAME: \_\_\_\_\_ CONTRACT #: \_\_\_\_\_ DATE: \_\_\_\_\_

### SECTION 1 Site Prep

Locate:

- |   |  |
|---|--|
| <input type="checkbox"/> Trash pile                       | <input type="checkbox"/> Landscape protection      |
| <input type="checkbox"/> Lockbox                          | <input type="checkbox"/> Parking                   |
| <input type="checkbox"/> Bathroom                         | <input type="checkbox"/> Job phone                 |
| <input type="checkbox"/> Material storage, interior       | <input type="checkbox"/> Dust protection assessed  |
| <input type="checkbox"/> Material storage, exterior       | <input type="checkbox"/> Floor protection assessed |
| <input type="checkbox"/> Furniture/breakables to be moved |  |

### SECTION 2 Site Conditions

- Wall finish condition: \_\_\_\_\_  
\_\_\_\_\_
- Floor condition: \_\_\_\_\_  
\_\_\_\_\_
- Ceiling condition: \_\_\_\_\_  
\_\_\_\_\_
- Windows & doors condition: \_\_\_\_\_  
\_\_\_\_\_
- Trim condition: \_\_\_\_\_  
\_\_\_\_\_
- Bath fixtures: \_\_\_\_\_  
 Water supply \_\_\_\_\_  
 Drain \_\_\_\_\_  
 Finishes \_\_\_\_\_
- Kitchen cabinets: \_\_\_\_\_  
 Water supply \_\_\_\_\_  
 Drain \_\_\_\_\_  
 Countertops \_\_\_\_\_  
 Appliances \_\_\_\_\_
- Driveway condition: \_\_\_\_\_
- Landscaping: \_\_\_\_\_

The site assessment form documents any existing problems or defects in the house so that the contractor will not be blamed for damage he did not cause. Also, it helps the lead carpenter identify in advance any conditions that may complicate the job. Detailed categories structure the assessment so that no important concerns will be overlooked.

the slip to show the bookkeeper how that material was used on the job.

This is best done by the lead person on site. Someone in an office might be right about the coding 75% of the time, but the person on the job will know exactly what each item is being used for. Suppose it's a quantity of 1x6 primed finger-jointed #2 pine. Interior trim? Exterior trim? Cabinet work? The lead carpenter will know. This helps companies work up accurate job cost reports.

**Change orders.** I believe that the people in the field ought to be involved in helping to write change orders, because they're the ones who


know what's going to be done, how much time it will take, and what materials are going to be used in the process. Perhaps the salesperson or estimator actually writes up the change order, but the lead carpenter and others in the field need to be involved in identifying the parts of the work that they control.

The structure of the change-order forms will depend on whether the actual write-up is the responsibility of the field lead person or someone in the office. In either case, the field crew needs a form on which they can describe the work to be done and list the materials, labor, and subs necessary to accomplish that work. If you are asking the field crew to create the change order, they need to leave spaces to note the total cost and the markup as well.

**Meeting notes.** The final paperwork task that may fall to the field staff is taking notes during meetings. Brief, simple meetings could just be noted in the job log. But some meetings — such as formal site meetings that are attended by the owner, the client, the lead carpenter, and perhaps the architect — are long enough to warrant a separate form. This should be a carbonless triplicate form with a simple meeting agenda and an area for notes. One copy goes to the client, one goes to the office (to keep the staff informed of the discussions on the job), and the lead carpenter keeps one. In a busy company, you'll find that it's very handy to be able to go back and look at who said what, where, and when.

## Enough Already

Beyond this list, companies should be careful about any pieces of paper going out to the field. If there is some kind of information that you absolutely need the field staff to document, go ahead — but explain what's needed, make the form simple, and be sure that it comes back. Don't send paperwork out to the field if it is unimportant or if somebody else can do it.

The key is to ask the question, "Where is the money (time) spent best?" If you're thoughtful and disciplined about creating paperwork, and if you strive to keep it to the necessary minimum, paperwork will work for you, instead of you working for it. 

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