

Detailing Your Scope-of-Work

by Bob Kovacs

Sorry, but that's not in my bid." What contractor doesn't cringe upon hearing those words from a sub?

Picture yourself driving to the site to meet your new plumbing contractor, who's due to start the underground rough-in for the spec home you're building. You pull up to the site, and he and his helpers are leaning against their truck (which is overflowing with PVC) looking annoyed.

"You told me the site was ready," the plumber says. "The excavator hasn't dug the trenches for my piping."

"That wasn't in his bid," you reply.

"Well, it's not in mine, either. Call me when you have the trenches dug," he says as the plumbers pile into the truck to head for another job. You stand there wondering how you're going to pay for the excavation work that you thought you'd already "bought" from the plumber and, more important, how quickly you can get the trenches dug so your schedule doesn't go down the drain.

Or perhaps it happens the other way round. As you arrive at the site to meet the plumber, you notice a rented backhoe and trailer hitched to his truck. His crew is walking along the fresh trenches that the foundation sub dug the day before, wondering if they're in the right location. It seems you forgot to tell him that the foundation sub would be digging and backfilling the plumbing trenches.

Details, Details

A detailed scope-of-work for each trade can prevent such situations, sparing you and your subs all that aggravation. With the use of a computer and word-processing software, developing work scopes can be painless, as much of the information can be boilerplate that gets used repeatedly for every trade.

What's Included

A scope-of-work document contains a detailed description of all the work to be handled by a particular subcontractor on a job. For example, it might include the following:

Provide all labor, material, and equipment to lay out, excavate, and backfill all trenches as required for underground piping work. Include sand bedding and 4-in. sand cover on all plastic piping. All trenches are to be compacted in 8-in. lifts during backfilling operations.

Be sure to specify whether sub A is to supply labor and material or just labor. If material is being supplied by others, specify sub A's responsibility for the material, if any. For example:

Provide all labor to install door hardware (furnished by others), including all latchsets, hinges, wall stops, and kick plates. Upon delivery of material to the site, this subcontractor shall inventory the material and distribute it as required prior to installation. Once material is inventoried, any shortages shall be reported to the general contractor immediately, or the shipment shall be considered complete.

Supplier copy. If a supplier is supplying material only, he should receive a scope-of-work as well, delineating all materials to be included, as well as any delivery requirements. It might say something like:

All material shall be delivered to the site by supplier (costs of delivery to be included in price) and unloaded and stacked by supplier's personnel. Material will be inventoried by the installing contractor upon delivery,

and any discrepancies shall be noted on the delivery ticket.

What's Excluded

Just as important, the scope-of-work must contain detailed descriptions of all work excluded by the subcontractor.

Perhaps the trenching and backfilling in the example above was to be done by the foundation contractor. In that case, his scope-of-work might read:

Provide painted layout for all underground piping runs. Excavation to be completed by others. Trench depth requirements to be reviewed with excavator upon layout. Sand for bedding and 4-in. cover over pipe to be placed at the side of trenches by others, for installation by the plumbing contractor. Backfill to grade and compaction to be performed by foundation contractor.

This sample paragraph clearly delineates where one contractor stops work and the other starts, to avoid misunderstandings and work overlaps.

Other Provisions

In addition to the work to be included and excluded, the scope-of-work document can contain (or reference) other items to make sure that everyone is on the same page once work begins. Some of these items include:

- standard provisions for all subcontractors regarding working hours, insurance requirements, cleanup, site access, billing and payment procedures, change order policies, and so forth
- a reference to the document list, which will list the most current drawings and specifications for the

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job, ensuring that no one is working from an obsolete plan

- coordination procedures between subs (typically between the framer and the mechanical subs) that outline who takes precedence over whom with regard to duct runs, piping, and so forth
- a copy of the project schedule, to make sure everyone is working with the same start and completion dates
- payment schedules, punchlist and quality control procedures, and time frames for any warranty work that may be necessary

Boilerplate Saves Time

Generally, much of this information stays the same from project to project. Rather than duplicating it for each new job (especially with subs you work with regularly), create a separate boilerplate document that can be referenced in the scope-of-work document. I call mine “Subcontractor Standards”; every sub I work with has a copy. Any modifications to the “Subcontractor Standards” on a particular job can be added into the scope-of-work and a sentence like the following added for clarity:


Where conflicts occur between the “Subcontractor Standards” and this document, this document shall take precedence.

Site cleanup provides a perfect example of how you might use a boilerplate. Typically, your company may supply dumpsters to the site but require subs to carry their own trash to the dumpster (as outlined in your “Subcontractor Standards”). If there is no room for a dumpster on a particular job, however, subs may be required to haul away their own trash daily. In that case, the scope-of-work statement might read as follows:

Due to restrictive site access, on-site dumpsters will not be provided. All subcontractors will be required to remove from the site, on a daily basis, all debris generated by their work. Any debris left on the site will be hauled away at the subcontractor’s expense after 24 hours’ notice to remove such debris.

Signoff

In a perfect world, scopes-of-work would always be prepared before bidding a job. That would allow subs to review what they are to include and exclude in their bids. If the scopes can’t be written in advance, be sure to review them with the subs when you review their bids, to make sure everything is covered. You’ll usually have to adjust the bid amount either to include items that were missed or to delete items that were included when they shouldn’t have been.

Finally, provide a space for both your company representative and the sub to initial each page of the scope-of-work. When you hear, “Sorry, but that’s not in my bid,” it can be very satisfying to pull out a document with the sub’s initials at the bottom of the page, confirming that the item in question is, in fact, in his bid. 

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