

BY CLAYTON DEKORNE WITH RICK MILLS, JEREMY KASSEL, AND MIKE WHALEN

Project Logistics

Last month, JLC began this series with Rick Mills, Jeremy Kassel, and Mike Whalen to explore the roles and responsibilities of project managers. Each of these individuals works under a slightly different business model: Jeremy operates as a “bags on” general contractor and assumes the role of project manager on his renovation projects in and around Albany, N.Y.; Mike is a lead carpenter at DBS Remodel, a design-build residential remodeling company based in Poughkeepsie, N.Y.; and Rick is senior project manager for Jackson Andrews Building + Design, a custom-home builder based in Virginia Beach, Va.

In this second article, we pick up the discussion examining the project manager’s role in keeping a project running smoothly. It’s not so much about tips and tricks for organizing the site. Rather, it’s an extension of the job-site-etiquette discussion we published in the first article. Here, the main concern is managing relationships with clients, crew, and trade partners to keep the job flowing, as well as efficiently handling problems that arise.

—Clayton DeKorne

STARTING THE JOB

Rick Mills: With our new construction builds, obviously, we arrive on the site having already spent time to wrap our heads around what’s on the plans. But the first steps were set in motion before we arrive. For the past few years, most of our jobs have been on the water, and to be able to build on one of those waterfront lots, we need to have a hearing with the Chesapeake Bay Preservation Area Board. But to even schedule the hearing, you’ve got to have all the engineering done to define what you’re proposing to build. Included with that, our civil engineer does a site plan that gives us all the street protection [runoff controls] and silt-fence locations. So for our first steps, we are following that site plan and working with a trade partner who is in the business of installing those protections on the site. This then needs to be inspected, and once we get CBPA’s blessing, we can bring in the job trailer we use for a jobsite office and begin to schedule the footings.

On a lot of the projects we’ve been doing, there was a house on the lot that was either vacant or had been torn down. On these projects, we will have the existing driveway, but all the utilities had to be disconnected for the demo, so we’re setting a temp pole, getting power back, and then, usually, we’ll have our plumber come out. If the water meter got pulled, we’ll have to reschedule with the city to install the water meter, and then our plumber will give us a stand pipe for water.

To secure the site, we have started doing more of what you’ll see on a commercial site: erecting a 6-foot temporary chain-link fence. We hang a banner with our company logo on it, and at the

entrance, we also post job rules for trade partners and delivery people, clarifying start times, no loud music, that sort of thing. This is mostly for the trades, but it’s also good for clients and neighbors to see. It says, “Hey, these builders actually care about how their trades conduct themselves.”

Part of this sign also discourages neighbors or passersby, anyone not working on the project, from coming onto the site. This is needed for insurance reasons and to give the clients some privacy. We also have to post “no trespassing” signs elsewhere, particularly near the waterline. We keep the fence gate locked after hours, and I have a camera on it that I can monitor with my phone. Again, all this is mostly for insurance, and to discourage vandalism, but we’ve been lucky that we haven’t had too much of that, and we haven’t had any robberies after hours. Usually, it’s just kids who cross the site after getting dropped off by a boat, and they’re walking to their house. I am always reminding the guys to take the perspective of a teenager who might make bad decisions: “Don’t leave ladders up; don’t leave the keys in the machines. Let’s try to prevent them from doing something dumb.”

For any new trade partner coming in, we need to explain what we expect beforehand. But people tend to forget. There’s always a policing part to it.

Mike Whalen: For us, it’s a different process because we’re a smaller outfit on smaller jobs. About two weeks before the preconstruction meeting, I get the job book, so I have a chance to review it and make notes, and am familiar with what’s involved when I walk into the meeting. Where we start will vary by the type of job. If it’s a second-floor bathroom on the other side of the house, like I’m on now, I’ll know how much protection is required—it’s dropcloths everywhere, 1-mil poly on everything we walk by, Ram Board on the floors, Masonite on the steps, a Build Clean unit running. This is very different from, say, a kitchen on the first floor that has a rear-slider entry off the deck, where we don’t have to protect anything except the deck.

I am always the first one on site. As a lead carpenter/project manager, I rely heavily on trade partners for a lot of the work. My

role is to make sure everything is prepped for them when they walk on the site, and all our trade partners have been with us awhile, so they know how to carry themselves—no swearing or yelling or smoking, and such. For any new trade partner coming in, we need to explain what we expect beforehand. But people tend to forget. If they are smoking outside where the homeowner may be, we have to remind them; there's always a policing part to it.

We remind ourselves what to do constantly, too. In a meeting every month, all the lead carpenters discuss pain points we have run into on other jobs. We remind ourselves that we not only need to put planks down to protect the driveway from the rollers, but we also need to put a tarp down under the dumpster. The dumpsters can be rusty, and we don't want rust marks on a nice, new driveway. Landscaping is another big one: "That favorite rose bush that Aunt Sally gave the client two years ago got stepped on. So let's remember to put up scaffolding with plywood to protect those things." Every month, something comes up, and it's important we all recognize how important these issues are to clients, so we won't repeat the same kinds of mistakes.

Jeremy Kassel: I try to set expectations early on, even before maybe somebody has signed on the dotted line. So much of what we do is in the client's domain. I say, "I'm at your house. This is the scope of work that we're doing. For that we're going to need things like half of your garage to stage materials; we're going to bring in a dump trailer and park it here, etc." I think it's important to set those expectations way before the job has started, even before they've signed a contract, so that on the day the job begins, we aren't surprising anyone, we are only reminding them, this is where we agreed the dump trailer is going, or this is the half of the garage that we talked about.

We don't have nearly as many sub-trades on site as Rick does, so I'm relying less on infrastructure—a fence with signs and cameras and such—to remind everyone and leaning more on providing early notice and follow-up reminders to keep subcontractors aware of the client's best interests.

LOGISTICAL CHALLENGES

JLC: Once the job gets underway, what are the biggest logistical challenges?

RM: The site that I'm on currently is extremely tight. It's at the end of a cul-de-sac, and the house takes up most of the lot. The neighbors on both sides are more than ready for us to be done, because managing parking, well, it's been pretty wild out there.

There have been numerous days when I can count at least 20 vehicles on site. I've resorted to painting parking lines on site. But even this doesn't always work. Yesterday, we had a new trade partner on site doing some block work for us. They just pulled in like they're the only ones working there that day, and I'm there saying, "You know, guys, we have these lines. I need you to park in them so that I can manage all the cars here." And that's just on the site. On the street, I've got to set cones that define where you can't park past, because otherwise it will create a bottleneck, and neighbors can't get in and out. I've also got cones that indicate you can't park past

here because it's going to block the neighbor's mailbox, and so on. We may have to move people farther down to another street in the neighborhood. I've had to tell the neighbors: "The more cars you see here, the faster we're going to get this done and get out of your way if you can just bear with us."

JK: Very recently, we wrapped up a window-replacement job in a brick row house, which was in the middle of the block with no driveway in front or back, and no garage, just a small shed about 5½ feet tall. There's no place to store anything here.

This basically leaves me to store stuff inside the home. Fortunately, this is a client who I've worked with before, and she knows what to expect. A lot of materials—dimensional lumber, windows, tools—ended up stored in the occupied living room because there's literally nowhere else to store it, and it's impractical for me to bring tools to and from the job every day. Those are the types of jobs that make me wish I just had a different career entirely. (Laughs)

We run into that a lot in row houses in some places, where there's just no access, and most people who own these homes are aware of the issue.

We also have the issue that in downtown Albany in the center square, we are required to use licensed plumbers and electricians. And I work with licensed plumbers and electricians nearby in Schenectady and Troy who will not work in downtown Albany because they can't pull into a driveway, or they have to keep their van locked during the job. That forces me to find another licensed plumber who's willing to work there, which limits the pool of available subs considerably.

RM: Delivery drivers are a constant challenge; I'm not sure what it is about them. I know it's a tough job, but they really do seem to have little regard for anything besides getting offloaded. Don't get me wrong; there are some good ones. But on my most recent project, we were at the end of a cul-de-sac, and they would back down and stop right in the middle [of the street] so that none of the neighbors could exit their driveway.

The most helpful thing that I find is I try to request a call 30 to 60 minutes ahead. That way, we can be on the lookout for their arrival and help orchestrate the offloading process. Now of course, you have the ones that don't call even though the top of the delivery tickets states to do so.

JK: A few times, we have had delivery drivers either park, drive, or set down their outriggers on a neighbor's lawn. The struggle here is that those drivers are serving me and my client, so they have an objective. However, and I hate to generalize, many drivers just simply don't care about lawns. If driving on a neighbor's lawn is a consequence of that delivery objective, so be it. It puts everyone in a bad spot—me, my client who becomes the "bad guy" in the neighborhood for having the delivery, the company and driver who are doing the damage, and the neighbor who now has a damaged lawn. When something like this happens, I immediately take photos and notify the delivering company and then also contact the neighbor.

I always ask that any driver have my cell number and that they call when they are on their way. I also ask what type of truck they

are driving when the order is placed. This can be a big deal. No driver wants to back an 18-wheeler down into a cul-de-sac. Straight trucks are better for that. Knowing and understanding what type of truck is being used for the delivery is hugely important. Also, is the driver coming alone?

I always try to be extra polite with lots of “please” and “thank you” to these guys. Most of them are treated poorly and get paid poorly. I almost always offer to help offload if there’s no piggyback, or Moffet.

In the last few years, many of our regular vendors have started taking photos of the delivery after it’s been dropped at the site. This protects most parties to say in effect, “Here are the materials, this is where they were left, and they’re in this condition.”

RM: One thing I’ll add is that we have starting adding a telehandler (jobsite fork lift) to most of our projects (which we budget/charge for). Of course, in the renovation world, this may not be feasible. But this has made all the difference for expediting the offloading process, especially for LTL [less-than-truckload] freight delivery trucks that show up without a lift gate. Without that or a forklift, you are stuck breaking down pallets and offloading piece by piece. This is a sure way to tick the driver off.

MW: One thing I also try to do with deliveries is request how they build the load sometimes. If we are doing an addition, a big deck, or a porch, I want the flooring materials on top and the rafters below, etc. We also check everything when it’s delivered as much as we can. Kitchen cabinets, bathtubs, fixtures, sinks, and such to make sure they’re not damaged and to reconfirm with the client that it’s what they have selected. We use a designated area that is clear for storage in the garage, basement, or a cleared-out living room. We have also arranged to have storage pods and or an extra job trailer on site for extra space to keep materials dry and secure.

JLC: That touches on another challenge: handling and storage of materials on site. Besides asking suppliers to stack the delivery, are you able to stage materials to avoid having to move them?

RM: I run through a process for material management, asking myself, is this the most effective location for the trade using this material, and is this going to be in the next guy’s way coming along? I can speak from experience there is no perfect location for any material. I call it the “constant material shuffle.” No matter where you place something, it’s eventually in someone else’s way. I just let trades know, “Hey, if you need anything moved, let us know what, and we’ll see what we can do.”

JK: On material handling, sometimes less tenured folks need to be reminded to handle things with care. Seems super obvious, but at times you have to explicitly tell people to be careful, don’t walk on stuff, don’t stack boxes a certain way, that sort of thing.

When we do a window job, we either have the screens shipped separately or immediately take them out of the window units and store them far, far away from any work space.

LANDSCAPING AND OTHER EXCLUSIONS

MW: Landscaping can be a challenge, but it varies from job to job. We always make an effort to protect plants if we’re doing, say, siding or a roof. Certainly, shrubs and other plantings near the house

are part of the conversation at the preconstruction meeting. Where the clients come down on this issue can be very different.

I’m finishing up a job now for a new front porch and roof. The clients were taking out the landscaping anyway, so they said it wasn’t much of a concern. We were just mindful of where we put our trailers—we kept them off the lawn—and made sure no lumber deliveries were placed on the lawn.

For other people, though, their lawn is immaculate, and they don’t want us out there at all. We’ve been on jobs where we’re vacuuming sawdust off the front lawn with a shop vacuum just because the lawn is like the fairway on a golf course. While there are others who will let us drive the truck right up to the back door. So it depends. But as a rule, we take as much precaution based on the situation as possible.

JK: I have an exclusion clause in my contracts when we are doing exterior remodeling work that reads, and I’m just paraphrasing: “Excluded from the cost of the scope of work, and excluded thereby from the scope of work, is any type of lawn repair.” This means if we build a deck at your home and the deck takes a week and a half to build, and in the course of that week, we wreck your lawn, you have to pay us above and beyond the contract price if you want us to repair it. I know that sounds like I’m really putting my foot down, so to speak, but we don’t know if it’s going to rain for five straight days. We don’t know if we’re going to have a drought for two weeks. They could say, “Hey, I don’t like the way the lawn looks. You have to fix it.” Well, I’m not going to pay out of my own pocket to fix it.

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That is very different than, say, if you’re doing a bathroom remodel: We make sure we put down floor protection between the front door and the bathroom. I can’t very well exclude the flooring, and if I did, I doubt I would get the contract signed. But we don’t need to exclude it, because that’s something we can control.

I don’t know if that seems wild to you guys or not, but the lawn exclusion protects me from having to pay out of my pocket to address something that I never have a ton of control over when somebody has hired me to work at their home.

MW: That does not seem wild at all. We also have an exclusion clause to cover the lawn, if we’re doing additions or a deck. We also have one specifically excluding damage to driveways. If there’s a crack in the driveway, was it there when we arrived? And in part of the contract, we identify everything we’re not touching. It’s a list for every job, and sometimes it seems obvious, but you do have to identify

it because, like your example with the lawn, a homeowner can just go outside if there's no boundaries. They'll just keep going and then you're on the hook for something that wasn't ever part of the scope of work. So, no, it's not crazy at all. This is protecting yourself.

JK: We insisted on another exclusion on a new house build a couple of years ago. The client had a shared driveway with his brother. I had the brother and the brother's wife sign my contract with my client to say that we were not responsible for repair work to the shared driveway: We knew we would have dump trucks with crushed stone, multiple concrete trucks, low boys coming in with a bulldozer and excavator; truck after truck on a shared driveway. I saw it coming and knew I had to get all parties concerned to exclude damage to the driveway. In essence, I was telling the client's brother, "If your brother wants to build a house, this is what has to happen."

Neighbors do take special consideration. I tell anyone who is working for me—employee, driver, sub—to not engage any neighbors. That's my job or the client's.

MANAGING NEIGHBORS

JLC: You bring up neighbors, and they're different. They don't have the same motivation to "just get it done" that a client might have. I used to work jobs in Manhattan, and before one job that involved jackhammering out a bathroom slab in an apartment building, the contractor's lawyer insisted on the neighbors allowing an inspection of the finishes and structure of their property, and signing off on existing conditions. At first I felt, "Wow, are people really so litigious?" But the project manager pointed out to me that if you are next door, and someone starts jackhammering a slab, you may begin to think, "What is all that vibration doing to my place?" Suddenly, they start seeing hairline cracks in the plaster—cracks that might have been there all along and went unnoticed. Now they see them and think they were caused by the work they hear. They're not necessarily predatory; they're just protecting their interests." So I can imagine someone seeing cracks in the driveway that they didn't see before, and they make false assumptions. For sure, you shouldn't have to pay for that, and your exclusions seem right on. But I can also see their point of view.

JK: Neighbors do take special consideration. I tell anyone who is working for me (employee, driver, sub) to *not* engage any neighbors. That's my job or the client's.

MW: We will sometimes introduce ourselves to the neighbors and give them a gift card to Dunkin' Donuts. It can be a nice ice breaker to let them know we may be outside early making noise. It depends on the type of job it is. We'll do this on an addition, siding,

roofing, or deck. If we are doing a bathroom project inside, we don't make it as much of a priority to let the neighbors know. The exception to this is in a condo complex. I have one of these coming up, and there are adjoining units connected on each side, so we have to let everyone know and also abide by the HOA [homeowner's association] rules around parking on street, no dumpsters allowed, and no job signs.

THE CHALLENGE OF NEW HIRES

RM: We have a lot of trades that we work with year after year. When we do have new trades coming on, we will email them a package that goes through our expectations. But it's not uncommon they will have a new hire who is not up to speed on what our standards are on site. That's been happening more recently. So we make a point of reviewing those standards when we have new trades that come on site.

MW: I agree, new hires for trade partners can be a challenge. One example: We had a guy who ran a one-man operation installing shower doors and glass panels in bathrooms. We've always used him, and we were always able to reach him. Over the past couple of years, he's been scaling his business. He wants to grow like many businesses do, of course. And we want him to grow so we can do more work with him. But once you start scaling, there's that training element. He's had new office staff, and maybe they're not relaying some things to him they're not used to, so he's sometimes hard to reach now. Those are natural growing pains, but it means we're feeling them, too.

Another example: We have a plumber who has a new hire, an apprentice. The apprentice is going to be doing the major work, but they're going to do some of it. What if a small leak occurs? It's happened, and then there's a ripple effect: We get some drywall damage. It's not about money for damages so much as the disruption with the homeowner.

We don't go around announcing that someone's training, or is an apprentice or a new hire. It's a touchy line to walk. As project managers, we want to constantly convey professionalism, experience, craftsmanship. The best we can do is stay on top of our trade contractors, especially the new hires, and maybe pull the senior person aside and say, "We can't have your apprentice doing this particular job because there are high expectations and not much room for error here."

It's the same for our own new hires. Of course, we are careful to not throw someone into a new situation to fend for themselves. But we're constantly asking, "At what point do you let them expand and try different things?" With that comes mistakes. With new hires we have to be willing to take that chance—take the time needed to train, be willing to fix the mistakes, and take the financial hit. It's all part of our cost of doing business. The only advice here is we need to be very intentional about it. And, of course, it goes back to what we talked about in the previous article: What matters when mistakes arise is how you handle it with the homeowner. If you do it right, that's what the home owners will remember, and they will tell others you did the right thing.