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CONSTRUCTION FORMS FOR CONTRACTORS

by Karen Mitchell & Craig Savage

Includes inside the back cover:

A CD-ROM with the forms in RTF, PDF and Excel formats to customize for your own use.

Craftsman Book Company
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To the staff at Craftsman Book Company, for their diligence, for their hard work and determination to get this book done, and for being our interpreters. They made our written word understandable – what we turned in and what came out are very different. Most wouldn't have attempted to start what they somehow accomplished.

And to Nancy, for her participation and contribution.

The sample *Company Policy* on page 259 is based on one developed over many years by Jud Motsenbocker, of Indiana, for use in his own construction company. Mr. Motsenbocker was inducted into the NAHB Remodelers Council Hall of Fame, and has been twice named *Remodeler of the Year.* Now a nationally-recognized construction industry speaker, he gives seminars sharing what he's learned during his nearly half-century in the trade. The company policy is included in his seminars, and we are happy that he has permitted us to share a version of it with our readers as well.

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Introduction

"Paperwork never built anything."

"It's a waste of time!"

"The less, the better!"

That's how some contractors feel about keeping good records. If you agree and can't be convinced otherwise, there's not much we can do to help.

But the fact that you're reading this page means there's hope — a chance that you'll join the majority of experienced construction professionals who understand what it takes to run a construction contracting business.

Implementing Good Systems vs. Learning the Hard Way

Most of us learn by watching others. For example, apprentice carpenters learn to set a nail before driving it. But for many, it takes a good whack on the thumb to bring the lesson home. Painful mistakes can be the best teachers.

It's the same way with construction contracting. The most painful lesson can be the most instructive. Here's an example.

Every construction contractor has been asked to take a verbal change order. "Let's do it right. I don't care what it costs." Then when you've made the change, you may hear, "Who authorized that? Not me. And certainly not at *that* price!" Lesson learned: A simple form, used at the right time, can save thousands.

Here's another example. Have you had an audit by your worker's compensation carrier lately? A worker's comp audit can make any construction contractor a believer in good records. No certificates of coverage from subcontractors? No time cards from your employees? No problem. Every insurance carrier knows exactly how to handle that — and exactly how much to tack onto your next billing.

Do It the Easy Way

Avoid the extra pain and expense. Get organized. Find and use a good set of forms designed for your business. You could do that even without this book. But this manual has the most complete, most practical set of forms available for the company you're running:

1. *Good forms protect your company.* Many contractors have trouble getting paid for extra work. Follow the change order procedure we recommend and you'll have the legal right to collect for every change — no wiggle room.

2. *Good forms identify you as a business professional.* The forms on the disk in the back of this book can include your business name, address and company logo. Good forms put you in the league with heavy hitters who know the importance of making the best possible presentation. Estimates, proposals, change orders and invoices follow the same style — they're a matching set. A polished image is a competitive advantage. Clients understand that you have your act together. Most clients may never see your office, but all will see your business forms, and may judge the quality of your work by the quality of your paperwork. If you can't even come up with a professional-looking form, can you come up with a professional-looking room addition? They might not want to chance it.

3. *Good forms enforce office procedures*. They force you and your staff to list, schedule, record, deduct, add, and follow established procedures. This creates consistency and accountability. It reduces errors and oversights, extending your control over both employees and customer relationships. A good form can make things happen automatically. No direct supervision needed. No creativity required.

4. *Forms create a paper trail*. Good forms make it hard for others to shift blame or legal responsibility. The higher the value of work, the greater your work volume, the more important your records become.

5. *Good forms level the playing field*. Every contractor has seen “standard” contracts so one-sided that a builder could never make a dime. Don’t get bullied into signing one of these biased agreements. Use the samples in this manual, and available software, to create your own “standard” contracts.

Maybe best of all, good forms don’t take extra time. They *save* time. They simplify your workflow. No innovation required. Just fill in the blanks. When paperwork stops being a burden, you’ll have more time for productive work — and will get paid sooner.

What You’ll Find in This Book

Fan the pages of this book. You’ll see 12 form categories:

1. Accounting
2. Change Orders
3. Contracts & Warranty
4. Client
5. Estimating
6. Field
7. Human Resources
8. Liens
9. Office
10. Bids & Proposals
11. Subcontractor
12. Timesheets

All of these forms are on the disk in the back of the book. Use any version of Microsoft Word or Microsoft Excel (1997 or newer) to personalize each form for your business. You can add or delete anything you want. Insert your company name and logo. Then save the modified form to your hard drive.

If you don’t use a computer in your business, simply photocopy the blank ones printed here. Or photocopy one, customize it with your company details, then use that as your master. Make as many copies as you need.

But that’s just the start. Each form comes with a detailed explanation on what the form is for, who fills it out, and step-by-step instructions on how to fill it out, provided by construction consultants who advise and organize thousands of small construction companies across the country. If you’re an experienced business owner, you’ll already know how to use the forms. But if you’re new at construction office accounting — you can build a house from the ground up, but filling out office forms . . . that’s something else — you’ll find the instructions invaluable. In most cases, a sample filled-out form is shown with the explanation to demonstrate what goes where.

Not every form will work perfectly for your company. In some cases we offer several forms that serve the same general purpose. Read the description. Then decide which form works best for your purposes. Even better, adapt the form to meet your needs. Increase or reduce the space between lines, change row heights or column heads. We've created a generic form that will work, but you're free to customize it for your company and your own special needs.

Legalities

We're contractors and we know what works in a construction company. Karen Mitchell is also a C.P.A. and an accounting consultant to construction companies. But none of us is a lawyer, and certainly not a lawyer in your state. The forms in this book haven't been reviewed for legal content and may not comply with the laws in your state, which can change almost daily. The best source of legal advice is a licensed attorney in your community.

Installing the Forms

To write the forms to the hard drive of your computer, place the CD in the drive and follow the instructions on your screen. We recommend selecting the defaults. When installation is complete, you'll notice a new folder under Documents (or My Documents): *Craftsman*. Under Craftsman, you'll find the folder: *Construction Forms for Contractors*. In that folder, you'll find two folders: *Company Forms* and *Original Forms*. The *Company Forms* folder will be empty. We recommend using it to store forms customized with your company information. All of the original (unmodified) forms that appear in this book and on the CD are located in the *Original Forms* folder. The files in that folder can be reinstalled from the CD anytime. Reinstalling won't affect anything in your *Company Forms* folder.

If you prefer not to install, you can copy just the forms from the *Forms* folder on the CD. When you copy a file off the CD and write it to your hard drive, the file on your hard drive will retain the "read only" attribute. To change that:

1. Open Windows Explorer.
2. Right-click on the file name.
3. Click **Properties**.
4. Click to remove the check mark before Read-only and you'll be able to make any changes needed.

Blank PDFs

All the forms are included as PDFs (just print them and fill them out by hand), and as either Microsoft Word documents or Excel spreadsheets, or both.

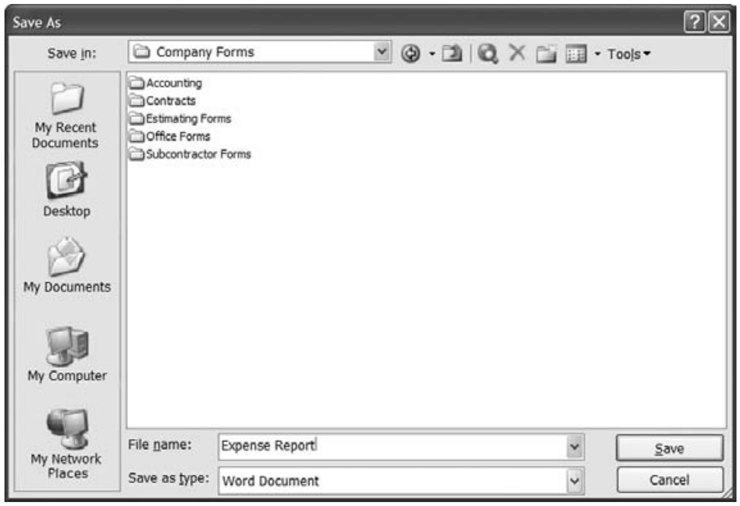

Figure 1
Give the form a descriptive file name that you'll easily recognize

Using the Word Processing Forms

Although the word processing forms (RTF files) provided on the CD can be accessed and used by a wide variety of word processing applications, they work best in MS Word 2002, 2003 and 2007. In testing the forms with those versions, they functioned exactly as we designed them. If you open the files in other applications, some formatting options, such as the "fill-in" fields, may not work as smoothly. This doesn't mean the forms are unusable to you, but that you may need to invest a little more time to fine-tune them.

To open a form and save a template in MS Word or any other word processing program able to read an RTF file:

1. Click the **Office** button (in Word 2007), or **File** (in Word 1997 to 2003). Click **Open**. Be sure the file type is "All Word Documents" (in Word 2007) or "Word Documents" (in Word 1997 to 2003). Navigate to the *Construction Forms for Contractors* folder and the *Original Forms* sub-folder. Double-click on the directory and/or file name you want to open.
2. Click the **Office** button, or **File**, then select **Save As**.
3. In the **Save in** dropdown box, navigate to the *Company Forms* folder and any sub-folder you've created (such as Office Forms). See Figure 1.
4. In the **File name:** box, enter a descriptive file name that you'll easily recognize later, for example, Expense Report.
5. Click **Save**.

6. Enter your company information in the boxes labeled Your Company Name, Your Address, Your City, State, Zip and Phone Number.

7. Add any text and graphics you want to appear in new forms based on this template. Delete anything you can do without. See page 13 to unlock the document before proceeding.

8. If you want, change the margins, page size, orientation, style, etc.

9. Click the **Office** button (or **File**) and then **Save**.


Time & Materials Contract

Quality Construction, Inc.

CLIENT INFORMATION:

I. PARTIES

II. SCOPE OF WORK

III. CONTRACT DOCUMENTS

IV. CONTRACTOR'S DUTIES

Using a Customized MS Word Form

1. Navigate to your *Company Forms* folder and the appropriate sub-folder. Locate the form you want to use and double-click on the file name.

2. Enter information in the form. Use the **Tab** key to move forward from field to field. To move backward, hold down the **Shift** key while pressing **Tab**.

3. When the form is exactly what you want, click **File** and **Save As**.

Caution: It's important to select **Save As**, not **Save**, and to give the file a new name. That writes the revised file to your hard drive under the new name and leaves the original file unchanged.

Getting and Staying Organized

Good organization doesn't start and end with a good set of forms. Consider keeping your forms organized as well. Here are a few tips.

Note the sub-folders in Figure 1. The forms in this book can be sorted into four broad categories: contracts, estimating forms, office forms and subcontractor forms. Those names make good folder titles in the *Company Forms* folder. And maybe you want to start a new folder for each new job or client name. For example, sub-folders under the *Construction Forms for Contractors* folder might be titled:

Current Projects
  Client A
  Client B
Closed Projects
  Client 1
  Client 2
Projects Out to Bid

Use Windows Explorer to create new sub-folders:

1. Right-click on the folder where the sub-folder will be located.
2. Click **New** and **Folder**.
3. Type the folder name.

Locking and Unlocking Your MS Word Forms

Once a template form has been customized just the way you want it, consider locking the form to prevent accidental changes. MS Word 2007 and 1997 to 2003 allows you to lock a document so it can't be changed without unlocking.

To lock a form in Word 2007:

1. From the Menu Bar, click **Review**, then click **Protect Document**.
2. In the "Restrict Formatting and Editing" dialog box, select the "Allow only this type of editing in the document" check box. Then from the dropdown box, select "Filling in forms."
3. Then click **Yes, Start Enforcing Protection**. Enter password (optional).
4. Click **OK**.

To lock a form in Word 1997 to 2003:

1. Navigate to the *Company Forms* folder and double-click on the form you want to change.
2. From the **View** menu, select **Toolbars**, then **Forms**.
3. From the Forms toolbar, click the **Protect Form** button (the padlock at the far right). See Figure 2.
4. Now the form can't be changed without unlocking. Even saving the form under a different file name doesn't unlock the form.

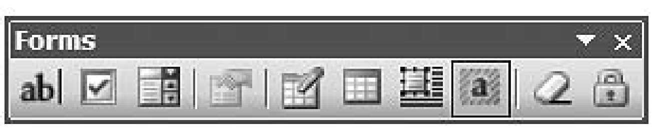

Figure 2
Use the padlock icon to lock and unlock a form

To *un*lock a form in Word 2007:

1. From the Menu Bar, click **Review**, then **Protect Document**.
2. At the bottom of the “Restrict Formatting and Editing” dialog box, click **Stop Protection**.

To *un*lock a form in Word 1997 to 2003:

1. From the **View** menu, select **Toolbars**, then **Forms**.
2. From the **Forms** menu, click the padlock button to release it.


Journal Entry Worksheet
Quality Construction, Inc.
Accounting Adjustment

Spreadsheet Forms

To open a form and save a template in MS Excel or any other spreadsheet program able to read an Excel file:

1. Click the **Office** button (in Excel 2007) or **File** (in Excel 1997 to 2003). Click **Open**. Be sure the file type is “All Excel Files” (in Excel 2007) or “All Microsoft Excel Files” (in Excel 1997 to 2003). Navigate to the *Construction Forms for Contractors* folder and the *Original Forms* sub-folder. Double-click on the file you want to open.
2. Click the **Office** button (in Excel 2007) or **File**, then select **Save As**.
3. In the **Save in**: dropdown box, navigate to the *Company Forms* folder and the sub-folder you prefer (such as *Office Forms*).
4. In the **File name**: box, enter a descriptive file name that you’ll recognize later, for example, Profit and Loss.
5. Click **Save**.
6. Enter your company information in the boxes labeled Your Company Name, Your Address, Your City, State, Zip and Phone Number.
7. Add any other text and graphics you want to appear in new forms based on this template. Delete anything you can do without. See page 15 to unlock the document before proceeding.
8. If you want, change the margins, page size, orientation, style, etc.
9. Click the **Office** button (or **File**) and **Save**.

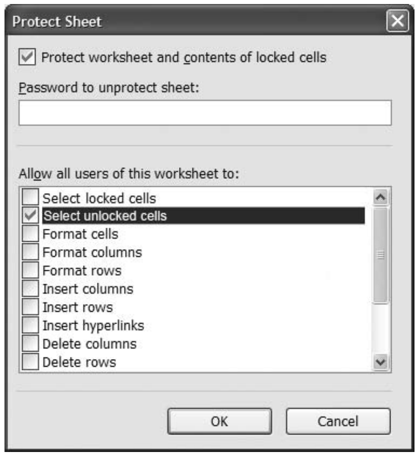

Figure 3
After modifying a form, protect it so it doesn't get inadvertently changed

Locking and Unlocking Your Excel Forms

To make changes to a form, you must first unlock the document:

1. Navigate to the *Company Forms* folder and the appropriate sub-folder. Locate the form you want to use and double-click on the file name to open it.
2. To unlock the document: In Excel 2007: From the Menu Bar, click **Review**, then click **Unprotect Sheet**. In Excel 1997 to 2003: From the **Tools** menu, click **Protection**, then click **Unprotect Sheet**.
3. The document is now ready for you to make changes.
4. After you've made the changes you want, consider locking or protecting the document before you save it so it can't be inadvertently changed.

   - To lock or protect the form in Excel 2007: From the Menu Bar, click **Review**. Click **Protect Sheet**. Enter password (optional), then click **OK**.
   - To lock or protect the form in Excel 1997 to 2003: From the **Tools** menu, click **Protection**. Then click **Protect Sheet**. The Protect Sheet window will appear. Make the selections as shown in Figure 3 and click **OK**.

5. When done, click **File** and **Save As**.

You may want to protect a formula or text in a specific cell rather than protecting the entire sheet. To lock or unlock a *cell*:

1. Right-click in the cell, then click **Format Cells** (in Excel 2007), or from the **Format** menu (in Excel 1997 to 2003), click **Cells**.

2. In the Format Cells window, click the **Protection** tab.

3. Select or deselect **Locked**. See Figure 4.

That's about all you need to know about opening, saving and modifying these construction forms and contracts. In the following sections we get down to business – putting these powerful forms to work in your office.

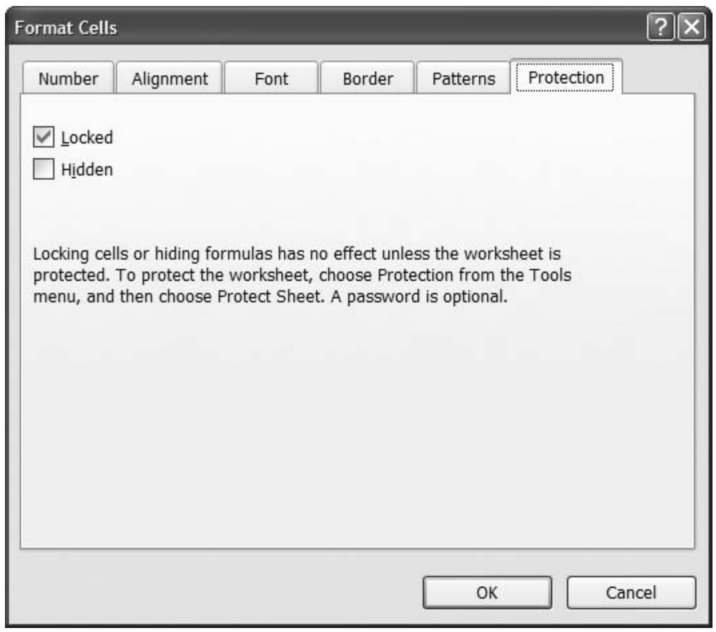

Figure 4
You can make specific cells accessible on a locked form by de-selecting **Locked**

Accounting Forms 1

Bookkeeping and accounting-related tasks for a construction company can be some of the most difficult and/or frustrating aspects of running a construction business. However, if you know what to expect, how to gather the information, and how to track it properly, you'll find yourself moving toward a smoothly-run operation.

The Forms

Expense Report, *19*
Some expenses incurred by company employees are reimbursable. Use this form to track these expenses.

Journal Entry Worksheet, *23*
On this form keep a manual audit trail of all journal entries posted into your accounting system, including the date of each posting.

Hourly Labor with Burden Rates, *26*
This form lets you see at a glance the true costs of labor by job classification.

Over/Under Billings Report, *31*
This report gives you the information you need to get monthly financial reports in balance. You'll be able to compare earned revenue to the associated costs during any given month. If a customer is invoiced for a job that isn't

yet complete, this report will take into account the revenue associated with the portion not yet completed. Earned revenue will be compared to the costs associated with that revenue.

Product Invoice, *35*

It's essential to keep track of items purchased for each job. If your company doesn't have a computerized accounting system, or if the system is inconvenient for this purpose, the *Product Invoice* will also help you get an invoice out quickly.

Profit & Loss Report (P&L), *38*

Are you making a profit or operating at a loss? Some accounting systems don't have a user-friendly P&L. This professional-looking *Profit & Loss Report* (P&L) is designed specifically for the construction industry and lets you see your company's net profit or loss instantly.

Time & Materials Log, *46*

This form lets field personnel submit information in a timely manner, while keeping tabs on costs.

Vendor IRS Letter & W-9 Form, *49*

The IRS requires that you have on file a completed W-9 form for every subcontractor. This letter informs the sub of this requirement, and is sent along with a W-9 for them to fill out and return.

Expense Report

File name on CD
ExpenseRpt

Expense reports are used by employers to track reimbursable expenses incurred by authorized employees. These forms should be comprehensive, organized for daily entries, and be easy to complete.

In the construction business, it's common for crews to travel long distances to jobsites. An expense report should be completed by employees when the company pays for their travel, food, and accommodations.

The employee should have a receipt for every expense he enters on this form. Remind your employees to fill out their expense reports as completely as possible, since expenses that aren't documented may not be reimbursed. Receipts also assist your accounting department when it processes the employee's reimbursement check.

Completing the Expense Report

On this form, the employee will list all expenses incurred on jobs away from home, including travel to and from the work site. Each employee completes the form on a daily basis, and submits it weekly to the job manager or supervisor, along with receipts and timesheets.

Using the Excel file on the CD-ROM when you tab from one column to the next, the numbers you enter will automatically convert to dollars and cents, in a running total. At the bottom of each column, the program auto-generates the total expense. As each amount is entered, the *Total Expense* line changes, giving the current expenditure. Now let's look at the form in detail.

Employee and Project Information

The employee enters his information, dates the report, and enters the project number and details.

Week Ending

In the *Week Ending* section, enter the last day of the work week. For example, if your employee works Monday through Sunday, he would submit an Expense Report the following Monday for that previous week.

Detail of Daily Expenses

It's advisable to enter any recurring expense items that are common to your business. For instance, in our sample form under *Detail of Daily Expenses*, we've entered Travel Mileage. Our particular employees spend a lot of time on the road. If your employee drives his own vehicle to the jobsite, he would enter the round-trip mileage and the rate per mile allowed.

Customizing the Form

This form is easily altered to meet your company's specific needs. On the next five lines of our sample, we grouped costs involving transportation. On the Excel file, to change the mileage cost from the preset 0.36, just click on it. The cell will be highlighted, and you can enter the amount your company pays. (Don't forget the decimal point if it's needed.) Then, in the Travel Mileage row above, enter the miles driven for each day. The Excel form automatically multiplies miles driven by the travel allowance, displays the cost in the row below, and includes it in the total at the bottom of the sheet.

After *Hotel*, you'll see headings for other expenses: Breakfast, Lunch, Dinner and Entertainment.

Misc and Other

There are two rows labeled *Misc* and *Other*. Those rows are for expenses that don't fit into any of the itemized categories. Receipts should be submitted to confirm any expense or purchase that's claimed on the form.

Total Expenses

At the end of the work week, the *Total Expenses* cell is automatically calculated. Keep a copy of each completed form for your company records. That's good organizational practice and has an extra perk: it'll prove invaluable at tax time, when you need to itemize expenses. Generally, any cash transaction of less than $20 doesn't require a receipt.

Entertainment Expenses Broken Out

In our item list, you'll see that *Entertainment* has an asterisk (*) after it. At the bottom of the form, the *Entertainment Expenses Broken Out* area is preceded by an asterisk. This area is for detailing client-related meals and entertainment expenses. Not only are receipts necessary; the *reason* for the meeting expense must be documented as well, in the section provided.

Expense Report

Quality Construction, Inc.

Date: 05/15/10

Employee Information

Name:	Madison Mitchell	**Project Number:**	09-237
Address:	543 E. Greencreek Court Bayshore, CA 94545	**Project Name:**	Foxwood Suites
		Project Address:	1262 Crestview, Seashore, CA
		Week Ending:	05/12/10

Detail of Daily Expenses

Item	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Travel Mileage	35	35	36	20	45		
x (0.36)/Mi.	12.60	12.60	12.96	7.20	16.20	0.00	0.00
Gas, Oil, Lube							
Parking, Tolls	2.00	2.00	2.00	2.00	2.00		
Auto Rental							
Taxi, Bus, Limo							
Air, Railway							
Hotel							
Breakfast							
Lunch	15.00						
Dinner							
Laundry							
Phone							
Tips							
Entertainment *					76.50		
Misc.							
Other							
Daily Total	**$29.60**	**$14.60**	**$14.96**	**$9.20**	**$94.70**	**$0.00**	**$0.00**

Total Expenses: **$163.06**

*Entertainment Expenses Broken Out

Date	Item	Who	Reason	# of People	Receipt	Amount
05/10/10	Dinner	Bud Builder	Reviewed new plans	3	Yes	76.50

Expense Report

Date: ____________________

Employee Information

Name: ____________________
Address: ____________________
____

Project Number: ____________________
Project Name: ____________________
Project Address: ____________________
Week Ending: ____________________

Detail of Daily Expenses

Item	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Travel Mileage							
x (________)/Mi.							
Gas, Oil, Lube							
Parking, Tolls							
Auto Rental							
Taxi, Bus, Limo							
Air, Railway							
Hotel							
Breakfast							
Lunch							
Dinner							
Laundry							
Phone							
Tips							
Entertainment *							
Misc.							
Other							
Daily Total							

Total Expenses: ____________________

*Entertainment Expenses Broken Out

Date	Item	Who	Reason	# of People	Receipt	Amount

Journal Entry Worksheet

File name on CD
JrnalEntry

The *Journal Entry Worksheet* is a multi-purpose form, originally created by accountants to give a list of journal entries to bookkeepers so they could keep track of what they need to post and how to post the entries each month.

It serves as a paper audit trail for journal entries or adjustments in your accounting system. Weeks, months, or even years later, you may need to know what a particular entry or adjustment was for, who posted it, and when. A journal entry might be entered to reallocate a transaction from one account to another. For example, if the phone bill was allocated to Utilities but was supposed to be allocated to Telephone, a debit would be entered to Telephone, and a credit to Utilities.

This worksheet would also be used for posting non-cash transactions like depreciation expense, prepaid expenses and other items such as monthly recurring automobile payments made electronically, and bad debt write off.

Keeping a *Journal Entry Worksheet* puts the information at your fingertips. Plus, in the inevitable occurrence of a computer crash or an accidental deletion, you have a hard copy to re-enter the data from.

Completing the Journal Entry Worksheet

The person preparing the journal entry should enter his name in the *Prepared By* field, and the date it was prepared. Typically, it would be the company bookkeeper or accountant. Enter the name of who posted the journal entry information into the accounting system and the date, in the *Posted By* and *Date Posted* fields.

Accounting Adjustment

Account # Column

In *Account #,* enter the number of the expense account. Account numbers can be determined by using your Chart of Accounts.

Account Name Column

In the *Account Name* column, enter the name or category associated with the account number. For example, auto expense, meals, and job-related costs.

Description Column

In the *Description* column, enter an explanation. In our example, it was for fuel, to buy lunch for the crew, and to purchase some hardware for the Cambridge job. The description should be complete enough that you'll know what the expenses were for if you're looking at it a year from now.

Debit and Credit Columns

Generally a debit is used when increasing a balance in an expense account (like meals or gas) and a credit would be used to show that cash was depleted (or used) to pay for that expense. It's important to remember that for every debit, you must have an equal credit. At the bottom of the form, total the credit and debit columns and make sure they match.

Journal Entry Worksheet

Quality Construction, Inc.

Prepared By: Nancy Jones **Date Prepared:** 05/15/10
Posted By: Sadie Woods **Date Posted:** 05/17/10

Accounting Adjustment

Account #	Account Name	Description	Debit	Credit
1140	Petty cash	Cash spent between 05/01 and 05/15		145.00
6140	Auto expense	Fuel	45.00	
6550	Meals	Lunch for crew	50.00	
5110	Job-related costs	Hardware for Cambridge job	50.00	

Journal Entry Worksheet

Prepared By: ____________________ **Date Prepared:** ____________________

Posted By: ____________________ **Date Posted:** ____________________

Accounting Adjustment

Account #	Account Name	Description	Debit	Credit

Hourly Labor with Burden Rates

File name on CD
HrLbrBurdn

This form is usually prepared by the accounting or payroll department. It calculates and records the total hourly labor costs for each worker in any given wage rate classification. Enter the base hourly rate, fringe benefits, taxes and insurance to get an accurate hourly labor cost for each classification. Your labor burden includes all taxes and insurance that must be paid on the hourly wage. Many contractors find their labor burden is, on average, 35 percent of labor costs. In most cases, workers' compensation is the largest component of labor burden for field employees.

The Form

Now, let's look at the *Hourly Labor with Burden Rates* form. Estimators should use this data when computing their labor costs. Use a separate copy of this form for each wage rate classification. With the information gathered here, you can get a pretty good estimate of labor costs.

Complete a new form whenever there's a change in pay scale, taxes, insurance, or any other benefit. It's common practice to revise this form at the start of each year, when new payroll tax tables arrive.

General Information

The first section consists of four lines: *Classification, Date, Period From,* and *Through.*

Classification and Date

Only one job-type is entered under *Classification.* A single form is used for each wage rate. Enter the current date.

Period From and Through

The estimated duration of the job, in days, should be indicated on the *Period From* and *Through* lines. Enter the dates of the particular job; for instance, our example job began on 01/01/10 and will take a year, ending on 12/31/10.

Base Hourly Rate

Base Hourly Rate refers to the total gross hourly wage paid to the employee in this job classification, including the rate per hour and, if applicable, vacation and holiday pay.

- Hourly Rate
  In our example, we pay $20 an hour to our finish carpenter; that's his wage, or *Hourly Rate*. It's what we agreed to pay him, and what he sees on his paycheck before deductions.

- Vacation Pay
  Vacation Pay is figured as an hourly cost. If a 40-hour-a-week employee is paid $20 per hour and gets one week of paid vacation annually, here's how we figure his pay:

  40 hours × $20 = $800. If he works 40 hours a week, 52 weeks a year, that's 2,080 hours per year you're paying him for.

  Divide $800 by 2,080 to find his vacation pay, which in this example is 38.46 cents per hour. On the sample, we rounded that to 38 cents.

- Holiday Pay
  Calculating *Holiday Pay* is similar to figuring vacation pay. Suppose your employees get six paid holidays a year – New Year's Day, Presidents' Day, Memorial Day, Christmas, etc. That equals 48 hours of holiday pay.

  Multiplying by $20/hour, you get $960. Divide $960 by 2,080 hours per year, for a per hour cost of 46.15 cents (shown rounded to 46).

You don't calculate holiday or vacation pay on overtime or double time because you only pay those benefits for *regular* hours worked. Consequently, it isn't always a bad idea to have employees work overtime. The rate per hour may be higher, but the benefits generally stop at 40 hours per week.

Total Base Hourly Rate

In *Total Base Hourly Rate,* calculate the sum of the employee's hourly rate, hourly vacation and holiday pay. For our finish carpenter, that's $20.84.

Labor Burden

This section on the form contains everything that falls under the umbrella of *Labor Burden* – taxes, insurance, workers' comp, etc. The majority of these will be a percentage of gross wages; a few are dollar amounts.

Social Security, Medicare, and Federal Unemployment

You must enter the applicable percentages for each in order for the spreadsheet to calculate correctly. The year this book was written, and as you'll see in the sample, Social Security tax was 7.6 percent, Medicare 1.45, and FUTA 0.08. Most years they change a bit. You can find the current rates at www.irs.gov, or get them from your accountant.

State Unemployment, Other State Taxes, Workers' Compensation, and General Liability Insurance

The percentage for these taxes is dictated by each state. If you don't have the current rates, call your state government or insurance company to get them.

Medical Insurance and Other Benefits

If you pay for the employees' medical insurance, make pension fund contributions, etc. you'd figure them as either cost/hour or percentage/hour of the worker's wages. To calculate the hourly cost, total the amount paid per month for the employee (let's use $100 as an example), multiply by 12 (for 12 months), then divide by 2,080 hours. $100 × 12 divided by 2,080 comes to $.58 per hour. This is the amount per hour you'd enter into the box.

If you're one of the few who pay your employees' union dues, enter the amount you pay per hour. Add these benefits to the hourly rate to determine the *Total Labor Burden.*

Total Labor Burden and Total Hourly Labor Cost

Finally, *Total Base Hourly Rate* plus *Total Labor Burden* equals the *Total Hourly Labor Cost* for each wage rate category. The total calculates automatically.

The company's liability insurance carrier should be able to give a percentage rate per hour if it bases its liability insurance coverage on payroll. If the company pays towards its employees' medical insurance, multiply the amount paid per month by 12 for an annual rate, then divide by 2,080 to get the hourly rate.

As a Percentage of Wage

The labor burden as a percentage of the base labor rate can also be determined by dividing the total labor burden by the total base labor rate. For example, divide an $8.06 labor burden by a total base labor rate of $20.84 per hour. The labor burden for that classification is 40 percent. This rate is often used to confirm that the estimator has the correct hourly rate for labor when estimating labor costs for a project.

Hourly Labor with Burden Rates

Quality Construction, Inc.

Classification: Finish Carpenter
Period From: 01/01/10
Date: 05/15/10
Through: 12/31/10

Base Hourly Rate	Straight Time	Overtime	DBL Time
Hourly Rate	$20.00	$30.00	$40.00
Vacation Pay	0.38		
Holiday Pay	0.46		
Total Base Hourly Rate:	**$20.84**	**$30.00**	**$40.00**

Labor Burden	%/$				
Social Security Tax	7.60%		1.58	2.28	3.04
Medicare Tax	1.50%		0.31	0.45	0.60
Federal Unemployment (FUTA)	0.80%		0.17	0.24	0.32
State Unemployment (SUI)	2.00%		0.42	0.60	0.80
Other State Taxes	0.10%		0.02	0.03	0.04
Workers' Compensation	21.00%		4.38	4.38	4.38
General Liability Insurance	3.00%	/hr	0.60	0.90	1.20
Medical Insurance	$0.58	/hr	0.58	0.00	0.00
Other Benefits	$0.00	/hr	0.00	0.00	0.00
Union Dues					
Total Labor Burden:			**$8.06**	**$8.88**	**$10.38**

Total Hourly Labor Cost:	**$28.90**	**$38.88**	**$50.38**
As a Percentage of Wage:	**38.68%**	**29.60%**	**25.95%**

Hourly Labor with Burden Rates

Classification: ______________________ **Date:** ______________________

Period From: ______________________ **Through:** ______________________

Base Hourly Rate	Straight Time	Overtime	DBL Time
Hourly Rate			
Vacation Pay			
Holiday Pay			
Total Base Hourly Rate:			

Labor Burden	%/$			
Social Security Tax				
Medicare Tax				
Federal Unemployment (FUTA)				
State Unemployment (SUI)				
Other State Taxes				
Workers' Compensation				
General Liability Insurance				
Medical Insurance				
Other Benefits				
Total Labor Burden:				

Total Hourly Labor Cost:			
As a Percentage of Wage:			

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Client Forms 4

Staying in contact with the client before, during, and after the job is one of the most important things you can do to keep him happy. A happy client brings in referrals and referrals mean more business.

In this chapter we focus on forms that help you start, and keep, a professional dialog going with each client (or potential client) from the first time they contact you through the end of the project.

This chapter contains example letters and forms used to gather information about the potential customer and job, organize job information, acknowledge that you have received the signed proposal or contract, intro-duce yourself to the neighbors, follow up on bids submitted, and survey job satisfaction.

The Forms

First Contact Sheet, *133*
This form guides initial conversations with new or potential clients. It contains basic questions that help you evaluate the needs or objectives of a client when they first contact you.

Job Information Form, *138*
This form enables you to keep all the information for the job in one place. Architectural drawings and specs, schedule and site information, and other pertinent data can all be accessed from this one source.

Acknowledgement of Proposal Acceptance, *141*
This form provides confirmation to the client that you received the signed proposal. It also provides an outline of the next steps to be taken in preparation for the project to begin.

Neighborhood Notification Letter, *143*
Use this letter to open a positive line of communication with the neighbors, while informing them of the proposed construction.

Bid Follow-up Letter, *146*
When you present a bid, but aren't contacted about the results, send this letter to the prospective customer.

Losing Bid Feedback Form, *148*
In the event your company isn't awarded a contract, you need to determine the reason. This form provides a forum for the client to acknowledge which part of your proposal wasn't acceptable.

Client Satisfaction Survey & Company Evaluation, *151*
Use these forms to gather information from clients on your company's performance and, hopefully, their satisfaction with the work.

Thank You Letter, *155*
A thank you letter signifies the job's transition from "in process" to "complete." It accompanies your final invoice and thanks the client for his business. It also requests consideration for future jobs.

■ First Contact Sheet

File name on CD
FirsContac

There's an old saying, "You don't get a second chance to make a good first impression." It's important to train your office staff to answer the phone in a courteous, businesslike fashion, so when potential clients initially contact your office, they're given a positive impression of your company.

Keep a supply of *First Contact Sheets* near office telephones and at your receptionist's desk. When a potential client calls or comes into the office, your employee can simply ask the questions in the order listed. The data provided can be entered into the company's database later, to save for lead-tracking.

Most contractors get, on average, about one out of every four jobs they go after. You can improve your odds from the beginning by separating the serious prospects from people who are just curious, or dreaming, and who will just waste your time.

How to Use This Form

Client Information

Be as thorough as possible when recording the client and job data. You need contact information, but also, the address will let you know if it's way on the other side of town and your crews will be spending an hour in traffic each way. Knowing the type of work will allow you to decline right off, if, say, it's primarily plumbing work and you don't have a qualified plumber on staff.

The person speaking to the prospect and completing the form enters their name in Prepared by.

Project Information

Ask the prospect if he owns the site of the proposed project. In most cases they do, but there are occasions where a renter may be authorized by the property owner to have work done at his leased space, at his own expense. In that case, he'd answer "No" to owning the property. Be sure to ask more questions if he's not the owner. You don't want to illegally alter a property!

On the subject of financing, approach this tactfully. In a way, you're asking for the client's financial information. However, as a contractor, you need to feel secure that the money will be there when it's time for you to be paid. If you can't get a clear answer on this, be wary.

Understanding the client's budget and comparing it with the job he wants done gives you a good idea of how realistic his plans are and if you should invest the time in estimating and bidding the job. Many clients haven't the faintest idea what construction costs.

It's good business practice to ask about project financing. Don't think of it as prying. You're in the contracting business to make money, not to take chances. You have a right to know where the money's coming from.

The date the client would like to start the project may or may not fit into your project scheduling, so it's important to get this information. Many prospective clients assume you'll start work immediately after they give you the go-ahead.

Asking if an architect is designing the project is helpful from the outset. Architectural drawings are precise, and can sometimes work against the contractor. It could mean no "wiggle room" for you to suggest alternative materials or construction methods.

If the client is taking other bids, it helps to know how many. If it's several, you know they're bid shopping, and you can decide if you want to enter the competition to be lowest bidder.

Finally, it's important to track marketing efforts and referrals. Referrals not only bring in more business, they suggest your work has been exemplary. You may want to send a thank you note to the person who referred you, as Quality Construction will in the case of Julie Guthrie, who referred Darrin Fox.

Type of Project

Typical types of contracting jobs are listed in this section. By the time you're ready to bid on the project, you might not remember what you were asked to bid. The details of this particular project might not be fresh in your mind. Check as many boxes as you need to describe the job. The more information you give now, the easier it'll be to refresh your memory down the road.

Directions to Jobsite

Driving directions are included so you or a company representative can visit the work site. This is very important. Potential obstructions or problems could make you turn down the work right off the bat. Excessive rock, for example, or a site previously used for storage of hazardous materials, could be deal-breakers. It also helps to know the lay of the land and any possible obstacles to construction, such as trees or difficult site access.

Use a *Job Information* form (discussed next), to note irregularities or potential problems.

Bid Outcome

This last section is completed when the client makes a decision to accept a bid — hopefully yours.

When the contract is awarded, get this *First Contact Sheet* out of your files and enter the award information, whatever the outcome. If your company wasn't selected for the project, this information can help you successfully bid a future project.

First Contact Sheet

Quality Construction, Inc. **Date:** 10/05/10

Client Information:

Name:	Darrin Fox	**Project Address:**	1262 Crestview
Address:	1316 Washington		Seashore, CA 94547
	Bayshore, CA 94545	**Type of Work:**	Build parking & storage structure
Telephone:	650-555-9000	**Prepared by:**	Madison Mitchell

Project Information:

Does Client own the property?	[**X**] Yes [ ] No
How will project be financed?	Owner-financed
Client's budget:	$20,000 to $35,000
When is project planned to begin?	07/01/10
Does Client have an architect?	[**X**] Yes [ ] No
Is Client taking other bids?	[**X**] Yes [ ] No
If yes, how many?	3
How did Client hear about Quality Construction, Inc.?	Referral from Julie Guthrie

Type of Project:

[ ] Addition	[ ] Kitchen	[ ] Roofing
[ ] Bath	[ ] New Home	[ ] Siding
[ ] Carport	[ ] Patio	[ ] Windows
[ ] Deck	[ ] Porch	[ ] Other (Describe)
[**X**] Garage	[ ] Renovation	______________________

Directions to Jobsite:

From Bayshore, CA, take Pacific Coast Highway north 3.5 miles to Seashore, CA. Turn left at mile marker 18. Go 500 yards to 1262 Crestview.

Bid Outcome:

Date of Bid:	06/20/10
Bid Price:	$32,000
Acceptance Date:	07/05/10
Work Scheduled to Start:	07/15/10
Rejected. Awarded to:	______________________

First Contact Sheet

________________________________ **Date:** __________________________

Client Information:

Name:	________________	**Project Address:**	____________________________
Address:	________________		____________________________
	________________	**Type of Work:**	____________________________
Telephone:	________________	**Prepared by:**	____________________________

Project Information:

Does Client own the property?	[ ] Yes [ ] No
How will project be financed?	________________
Client's budget:	$_____________ to $_____________
When is project planned to begin?	________________
Does Client have an architect?	[ ] Yes [ ] No
Is Client taking other bids?	[ ] Yes [ ] No
If yes, how many?	________________

How did Client hear about ________________________________? ________________

Type of Project:

[ ] Addition	[ ] Kitchen	[ ] Roofing
[ ] Bath	[ ] New Home	[ ] Siding
[ ] Carport	[ ] Patio	[ ] Windows
[ ] Deck	[ ] Porch	[ ] Other (Describe)
[ ] Garage	[ ] Renovation	__________________________________

Directions to Jobsite:

____

____

Bid Outcome:

Date of Bid:	________________________
Bid Price:	$_______________________
Acceptance Date:	________________________
Work Scheduled to Start**:**	________________________
Rejected. Awarded to:	________________________

■ Job Information Form

File name on CD
JobInfo

The *Job Information Form* is an outline that you can flesh out as the project progresses. Use the form to keep proposed construction project information together. Having everything in one place is a time-saver, especially when your mind is on several different facets of the project at once. This form guides the preliminary study of a project and, once work on the job begins, is helpful to the field supervisor.

How to Use This Form

Your company name is all you need at the top, since this form doesn't go out to a client. The form, with the client information section filled out, is given to the person estimating the project. The remainder of the form will be completed at the jobsite.

This form includes a list of points to investigate when visiting the site, and when studying the plans and specs. By following the list in its entirety, and in sequence, an estimator gets into the habit of being thorough. Most importantly, he'll generate a more accurate assessment of the site, resulting in a final estimate with few or no omissions.

Architect Information, Drawings, and Specifications

If an architect is involved in the project, enter his information here. Even if there's no architect, there are plans or drawings for every project, so indicate whether or not you have a complete set of drawings. Always enter the most recent revision date to confirm the plans in hand are the most current.

Schedule

Using information gathered from the prospective client on the *First Contact Sheet,* enter the anticipated start date, estimate the number of working days you expect the job to take, and then use a calendar to calculate the anticipated finish date. Since most clients count in calendar days, whereas contractors count the number of *working* days a job will take, there's an opportunity for a misunderstanding. Be clear which you'll put on the contract. And give yourself some leeway to account for surprises and weather.

Site Information

Using this list of on-site situations, you can gather information about the jobsite quickly and efficiently. Regardless of the scope of the project, always check for unusual conditions that could affect the project schedule or its cost.

Notes

Miscellaneous information can be listed under *Notes*. We've included the distance from the home office to the jobsite, and the distance from the site to the disposal area. In jobs involving significant demolition, the distance you have to truck the demolished material is very important.

Comments

In the *Comments* section, we further note that neighbor H. Hageman is willing to grant access via his property to the Foxwood Suites project site.

Job Information Form

Quality Construction, Inc. **Date:** 07/01/10

Client Information:

Name:	Darrin Fox	**Project Address:**	1262 Crestview
Address:	1316 Washington		Seashore, CA 94547
	Bayshore, CA 94545	**Type of Work:**	Covered parking & storage structure
Telephone:	650-555-9000	**Prepared by:**	Madison Mitchell

Architectural Information, Drawings, and Specifications:

Fred Smith, AIA
650-555-5055
Drawings: **[X]** Complete [ ] Incomplete
Latest Revision Date: 05/13/10

Schedule:

Estimated Start Date: 07/15/10
Estimated Duration: 44 working days
Estimated Finish Date: 09/23/10

Site Information:

Good access	**[X]** Yes	[ ] No	Available natural gas	[ ] Yes	**[X]** No
Available water	**[X]** Yes	[ ] No	High security risk	[ ] Yes	**[X]** No
On-site obstructions	[ ] Yes	**[X]** No	Available office facility	[ ] Yes	**[X]** No
Available power	**[X]** Yes	[ ] No	Demolition needed	**[X]** Yes	[ ] No
Poor soils	[ ] Yes	**[X]** No	Debris disposal	**[X]** Yes	[ ] No
Available telephone	[ ] Yes	**[X]** No			

Notes:
35 miles from QCI main office
12 miles from disposal area

Comments:
Neighbor to the north (H. Hageman) will grant access through his property, located at 1272 Crestview, to the Foxwood Suites project site at 1262 Crestview.

Job Information Form

____ **Date:** ________________

Client Information:

Name:	____________________	**Project Address:**	____________________
Address:	____________________		____________________
	____________________	**Type of Work:**	____________________
Telephone:	____________________	**Prepared by:**	____________________

Architectural Information, Drawings, and Specifications:

____

____

Drawings: [ ] Complete [ ] Incomplete

Latest Revision Date: ____________________

Schedule:

Estimated Start Date: ____________________

Estimated Duration: ____________________

Estimated Finish Date: ____________________

Site Information:

Good access	[ ] Yes	[ ] No	Available natural gas	[ ] Yes	[ ] No
Available water	[ ] Yes	[ ] No	High security risk	[ ] Yes	[ ] No
On-site obstructions	[ ] Yes	[ ] No	Available office facility	[ ] Yes	[ ] No
Available power	[ ] Yes	[ ] No	Demolition needed	[ ] Yes	[ ] No
Poor soils	[ ] Yes	[ ] No	Debris disposal	[ ] Yes	[ ] No
Available telephone	[ ] Yes	[ ] No			

Notes:

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Comments:

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■ Acknowledgement of Proposal Acceptance

File name on CD
PropAccept

Send the *Acknowledgement of Proposal Acceptance* letter as soon as you receive the proposal, signed by the client, indicating that he accepted your bid. This letter expresses appreciation that your company was selected to perform the work, and that you look forward to working with the client and completing the job to his full satisfaction.

This letter further states that the paperwork is being prepared, and that a company representative will contact him as soon as everything is finalized and you're ready to begin construction.

By sending this letter, you generate good will and give confidence that you'll handle the project in a professional and timely manner.

How to Use This Form

If you don't have letterhead, enter your company name and information at the top of the form. Address it to the client. In our sample, the client is Darrin Fox, whose address is in Bayshore, CA.

In the body of the letter, be sure to specify the project, in the event the client is one you've previously contracted with, or if the client has work being done by other contractors. This helps avoid confusion for you as well as the client.

Include the name of your company representative who will be contacting him to present the construction schedule.

Because this form contains only a small amount of text, we haven't provided a printed blank copy. If you're not using the digital file on the CD, use the wording on the sample as a guide to create a letter that suits your needs.

Quality Construction, Inc.

1 Main Street
Bayshore, CA 94545
650-555-1000 Fax: 650-555-1234
License # 1234567
Email: sales@qualityconstruction.com

July 10, 2010

Darrin Fox
1316 Washington
Bayshore, CA 94545

Dear Mr. Fox:

This letter is in reference to the construction proposal we sent you for the project known as Foxwood Suites. We've received your signed copy of that proposal, indicating your choice of Quality Construction, Inc., to construct a 4-car parking and storage structure at 1262 Crestview, Seashore, CA.

We appreciate your patronage and confidence in our company. The paperwork is being prepared for the Foxwood Suites project, and our job superintendent, Joe Smith, will be contacting you to schedule construction.

Quality Construction, Inc. is well-known and respected in the community. I am confident that our crew will complete the work in a timely manner, and to your satisfaction.

Thank you for selecting Quality Construction, Inc.

Sincerely,

Madison Mitchell

Madison Mitchell
Owner
Quality Construction, Inc.

■ Neighborhood Notification Letter

File name on CD
Neighborhd

When you're hired for any kind of construction project, it's good policy to inform the neighboring residents of the impending work. This simple gesture can neutralize any disturbance cause by noise, construction trucks, and dust at a work site. Most property owners appreciate acknowledgement of the inconvenience. A *Neighborhood Notification Letter* shows that you recognize the imposition about to be placed on them, and that you intend to keep the disturbance to a minimum.

How to Use this Form

At least a week before starting work, send the *Neighborhood Notification Letter* to every neighbor who might be impacted, and include your company's contact information. That way, if a neighbor encounters any difficulties caused by the construction, he can contact you instead of the police. And if there's something unusual going on at the site after hours, he can alert you immediately. Rapid response to complaints is extremely important, and can help move you up a notch in a neighbor's estimation. And happy neighbors are potential clients.

Keep the lines of communication open, even after construction is completed, in case they have questions about the work you did, or want to inquire about work they want done.

Quality Construction, Inc.
1 Main Street
Bayshore, CA 94545
650-555-1000 Fax: 650-555-1234
License # 1234567
Email: sales@qualityconstruction.com

July 5, 2010

Harry Hageman
1272 Crestview
Seashore, CA 94547

Dear Mr. Hageman:

Quality Construction, Inc. will be doing remodeling work in a residence in your neighborhood, at 1262 Crestview, beginning around July 15, 2010. This letter is to inform you that our trucks and equipment will be in the area for the duration of this project, estimated at 44 days. We apologize for any inconvenience this might cause.

Please contact us immediately if you have concerns about the project, or if there is any way we can help minimize the temporary impact our work may have on your lives. We appreciate calls about safety issues, and will respond at once in the event any resident witnesses suspicious activity at the site after hours. We may be reached 24 hours a day, at the number listed above.

Our company takes pride in its reputation in the Seashore area, both in remodeling and helping build a better community. If you need repairs, remodeling, or new construction in the future, we hope you'll call the professionals at Quality Construction, Inc.

Sincerely,

Madison Mitchell

Madison Mitchell
Owner
Quality Construction, Inc.

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Dear ____________________________:

______________________________________ will be doing remodeling work in a residence in your neighborhood, at ______________________________________, beginning around ______________________________. This letter is to inform you that our trucks and equipment will be in the area for the duration of this project, estimated at ____________________________. We apologize for any inconvenience this might cause.

Please contact us immediately if you have concerns about the project, or if there is any way we can help minimize the temporary impact our work may have on your lives. We appreciate calls about safety issues, and will respond at once in the event any resident witnesses suspicious activity at the site after hours. We may be reached 24 hours a day, at the number listed above.

Our company takes pride in its reputation in the ______________________________________ area, both in remodeling and helping build a better community. If you need repairs, remodeling, or new construction in the future, we hope you'll call the professionals at ___________________ __________________________.

Sincerely,

____

____

____

■ Bid Follow-up Letter

File name on CD
BidFolowUp

Most construction jobs are awarded to the qualified contractor who submits the lowest bid. In an ideal world, the client informs every bidder of the outcome, disclosing the winning bid and the name of the bidder. But in the real world, often the only one notified is the contract winner. The losers eventually guess the result, hopefully without making embarrassing inquiries of the prospective client.

If you find yourself in this position — a bidder who wasn't contacted about the contract award — send a *Bid Follow-up* letter. Following up with the potential client is reasonable business practice, and can be a subtle reminder to the client that those who didn't win the contract would like to be notified, too.

The letter is direct, and asks the client, his representative, architect, or general contractor to respond to the inquiry. Creating an accurate bid is hard work. All bidders deserve a response for their efforts, even if they didn't win.

How to Use This Form

Your company data goes at the top of this letter, including your fax and email information, to make the client's response a simple matter.

Be sure to identify the project as specifically as possible — the client may have several projects out for bid. Help the client by citing the prospective work site address and the day you submitted the bid, along with the description of the work to be done. In our example, Madison Mitchell is inquiring about the proposed Mac's Restaurant project, at 600 Main Street, in Bayshore, California.

By adding that your company has a number of projects in the works, and expressing a desire to include this one in your schedule suggests your work is in demand and that you consider scheduling important — in other words: We're busy, but will make a place in our schedule for you.

It could be that a final decision on the bid hasn't been made yet. In that case, this letter could remind the client of your professionalism and efficiency in following up, and maybe sway the decision in your favor.

Because this form contains only a small amount of text, we haven't provided a printed blank copy. If you're not using the file on the CD, use the wording on the sample as a guide to create a letter that suits your needs.

Quality Construction, Inc.
1 Main Street
Bayshore, CA 94545
650-555-1000 Fax: 650-555-1234
License # 1234567
Email: sales@qualityconstruction.com

4/10/10

Landis Grant
CSI Development, Inc.
456 Capital Expressway
Bayshore, CA 94545

Dear Mr. Grant:

SAMPLE

On March 5, 2010, Quality Construction, Inc., submitted a bid on your project, Mac's Restaurant, located at 600 Main Street, Bayshore, CA.

This letter is to inquire if you have yet made a decision on our bid.

We are presently scheduling a number of new projects and would like to include your job among them. If there is anything you need to know regarding our bid or Quality Construction, Inc., or any item in the bid that needs clarifying, please call or email me.

I look forward to hearing from you.

Sincerely,

Madison Mitchell
Madison Mitchell
Owner
Quality Construction, Inc.

■ Losing Bid Feedback Form

File name on CD
LosingBid

The *Losing Bid Feedback Form* is used primarily in design-build businesses. It's sent to clients when your company submitted a design-bid package, and you didn't get the job.

The information gathered from this feedback form shows areas of perceived weakness. Once you have a good idea as to why your company isn't being chosen for projects, you can make the necessary changes and improve your chances the next time you make a presentation and bid.

In our sample form, Jim and Carolyn Millet say they changed their minds about proceeding with the project. Be careful when you get this type of response, though. If you get a majority of forms returned saying the clients changed their minds, you'd better re-think your proposals. People can have a hard time saying what they really think of your design; it's easier for them to say they just changed their mind.

How to Use This Form

Supply your company information at the top, the date, and the client's address. Enclose a self-addressed stamped envelope. Consider offering movie tickets or a coffeehouse gift certificate to the client when he returns the form to you. That greatly improves your chance of getting a response.

Quality Construction, Inc.
1 Main Street
Bayshore, CA 94545
650-555-1000 Fax: 650-555-1234
License # 1234567
Email: sales@qualityconstruction.com

May 5, 2010

Jim & Carolyn Millet
1234 Broadway
Seashore, CA 94547

Dear Mr. and Mrs. Millet:

We at Quality Construction, Inc. thank you for the opportunity to bid on your project. Although our bid was not selected for this project, we'd greatly appreciate your feedback concerning the matter.

Our company goal is to exceed our customers' expectations. Your opinion is valuable to us, and will help improve our service to future clients. Please take a few minutes to answer the questions below and return this form in the enclosed envelope. Your comments will help us become the company you'll consider for future construction work.

Thank you,

The staff at Quality Construction, Inc.

---

1) Was our representative knowledgeable? [**X**] Yes [ ] No

2) Were you satisfied with the conceptual design we presented? [**X**] Yes [ ] No
Comments: ______

3) Did our design presentation for your project meet your expectations? [**X**] Yes [ ] No
Comments: ______

4) Was our preliminary bid competitive on this particular project? [**X**] Yes [ ] No
Comments: ______

5) What could we have done differently in our proposal to gain you as a client?
Comments: ______

Other comments: *We've decided against going forward with this project. It isn't within our budget at this time*.

Thank you for your valuable input.

____

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Dear ____________________________:

We at ____________________________ thank you for the opportunity to bid on your project. Although our bid was not selected for this project, we'd greatly appreciate your feedback concerning the matter.

Our company goal is to exceed our customers' expectations. Your opinion is valuable to us, and will help improve our service to future clients. Please take a few minutes to answer the questions below and return this form in the enclosed envelope. Your comments will help us become the company you'll consider for future construction work.

Thank you,

The staff at ____________________________

---

1) Was our representative knowledgeable? [ ] Yes [ ] No
2) Were you satisfied with the conceptual design we presented? [ ] Yes [ ] No
   Comments: ____
3) Did our design presentation for your project meet your expectations? [ ] Yes [ ] No
   Comments: ____
4) Was our preliminary bid competitive on this particular project? [ ] Yes [ ] No
   Comments: ____
5) What could we have done differently in our proposal to gain you as a client?
   Comments: ____

Other comments: ____

Thank you for your valuable input.

■ Client Satisfaction Survey & Company Evaluation

File name on CD
ClientEval

A construction contractor's reputation in the community is his most valuable asset. Consequently, if a client isn't satisfied with the finished project, the contractor wants to be the first to know. Satisfied customers are the basis of a successful contracting business.

Identify Strengths and Weaknesses

This form expresses thanks to the client for his business. To show that you're concerned about the quality and reliability of your work, the survey provides a way for a client to rate his construction experience. The responses on the *Client Satisfaction Survey & Company Evaluation* can help you identify potential problem areas, and give you an idea of what clients think of your company.

This survey takes only a few minutes for the client to complete. You may wonder, "Why not just ask these questions in person?" Because you'll generally get more truthful responses on a form than in a face-to-face conversation.

Responses and Your Marketing Plan

Answers to several questions asked on the *Client Satisfaction Survey & Company Evaluation* can be used for future reference. For example, if the response to, "How did you find out about our company?" is overwhelmingly *Newspaper advertisement,* you know that's the media giving your company the best coverage. On the other hand, if no one responded that they'd seen the newspaper advertisements, and that's where you put all your marketing money, you'd be wise to move that money to a media that'll give you more exposure.

Responses Work in Your Favor

The responses to the *Client Satisfaction Survey & Company Evaluation* can be viewed as grades on your company's report card. If mostly positive results are received, use those responses in advertising: "90 percent of our clients rated our overall construction performance as excellent…" But be sure you can back up those numbers with data that confirms them.

Send a *Client Satisfaction Survey & Company Evaluation* every time you finish a job. As an incentive for the client to return a completed survey, some contractors send a free T-shirt or cap printed with the company logo when the form is returned. That's good for public relations, and provides an extra bonus: free advertising!

How to Use This Form

Enter your company data in the top section if that information isn't already printed there. Complete the sections for client and project information, including project number, name, and address, along with your site supervisor's name.

It's essential that you personalize the salutation. After all, you've taken the client's money, so you want him to know he's not just a number on a worksheet.

Be sure to send a self-addressed stamped envelope, so the client has the means to return the questionnaire. Include your fax and email information as well, in case the client prefers to respond via one of those means. By evaluating the responses monthly, you'll see where improvement is needed, as well as what you're doing right.

______________________________ **Date:** ______________________

____

____

____

____

____

Client Information:

Name: ______________________

Address: ______________________

____

Telephone: ______________________

Project Information:

Project Number: ______________________

Project Name: ______________________

Project Address: ______________________

Site Supervisor: ______________________

Dear ______________________:

Thank you for the opportunity to work on your project. We trust that you are satisfied with the quality of our work. Client comments are essential to help us maintain our high standards. Please take a few moments to complete this short survey. Any suggestions to help us improve our performance would be greatly appreciated.

Thank you.

---

1. How did you find out about our company?

____

2. Were our crew and subcontractors respectful of your property? [ ] Yes [ ] No
   If no, please explain any difficulties you had:

____

____

3. How would you rate our company's overall construction performance?
   [ ] Excellent [ ] Satisfactory [ ] Unsatisfactory

4. How would you rate our administrative performance?
   [ ] Excellent [ ] Satisfactory [ ] Unsatisfactory

5. How would you rate our work?
   [ ] Excellent [ ] Satisfactory [ ] Unsatisfactory

6. How did we handle the job on a day-to-day basis?
   [ ] Excellent [ ] Satisfactory [ ] Unsatisfactory

7. How could we have improved your construction experience?

____

____

____

8. Was the project:
Started on time? [ ] Yes [ ] No

Completed on time? [ ] Yes [ ] No

9. Was the finished project cleaned to your satisfaction? [ ] Yes [ ] No

10. Did we fulfill our responsibilities? [ ] Yes [ ] No

11. Are you satisfied with your completed project? [ ] Yes [ ] No

12. Were problems dealt with to your satisfaction? [ ] Yes [ ] No

13. Will you consider us for future projects? [ ] Yes [ ] No

14. May we use you as a reference on future jobs? [ ] Yes [ ] No

Other comments:

____

____

____

____

_______________________________________ _______________________________________

Signature **Date**

Thank you very much for your input. Please return this form in the addressed, stamped envelope enclosed, or fax it to us at ____.

If you have any other comments or have future plans that you'd like to discuss, feel free to contact us at

____.

■ Thank You Letter

File name on CD
ThankYou

Contractors' reputations have become tarnished over the last few decades. They're generally characterized (along with lawyers, politicians, and car salesmen) as people *least* likely to be trusted. The sooner you can find a way to separate yourself from contractors who give the industry a bad name, the better. Writing *Thank You* letters can help set your company apart from the pack.

How to Use This Form

Include a *Thank You* letter with the final invoice. Enter your company information at the top, the date, and client's address.

You want to be sure that your client is truly satisfied. Before you send this letter, use the *Final Project Punch List* (found in Chapter 6) to make sure you've completed all the important tasks related to the project. Don't send this note until the work is *really* finished.

Some contractors send an inexpensive but thoughtful gift with the letter. A thank you gift creates a feeling of good will at the end of the job. A T-shirt with your company logo, a bouquet of flowers, or a bottle of champagne are appropriate gifts, depending on the time and expense involved in the project.

After a month, follow up with the *Company Evaluation & Client Satisfaction Survey*. By then, any problems that may turn up after completion will have been revealed and hopefully fixed, and they, or people they know who have seen the finished product, may be interested in another project.

Because this form contains only a small amount of text, we haven't provided a printed blank copy. If you're not using the file on the CD, use the wording on the sample as a guide to create a letter that suits your needs.

Quality Construction, Inc.

1 Main Street

Bayshore, CA 94545

650-555-1000 Fax: 650-555-1234

License # 1234567

Email: sales@qualityconstruction.com

September 30, 2010

Darrin Fox
1316 Washington
Bayshore, CA 94545

Dear Mr. Fox:

With the receipt of this invoice we complete our cycle of service to you on your project, the 4-car parking and storage structure at 1262 Crestview.

It has been a pleasure working with you. We hope you are fully satisfied with the timeliness and quality of work provided, and happy with the finished product. If you have any concerns or questions, just let us know and we'll respond immediately.

Once again, thank you for allowing us to work with you on this project. If you have any construction projects in the future, we hope you will consider Quality Construction, Inc.

Sincerely,

Madison Mitchell

Madison Mitchell
Owner
Quality Construction, Inc.

5 Estimating Forms

Estimating is one of the most important, possibly most time-consuming, tasks a contractor performs. An organized, efficient system for estimating keeps costs in check and helps your company maintain a good reputation with customers.

Having specific forms simplifies the estimating process, helps you collect information faster, and ensures that important bid items aren't omitted. They also save time, and help avoid costly mistakes. These forms provide a basis from which to start the estimating and bidding process.

The forms in this chapter can be used as checklists to help you remember items or tasks on a bid. If you're more comfortable estimating on a napkin or a notepad than you are using a laptop or PC, make a copy of the form you need and manually enter the information.

Types of Estimates

There are three basic types of estimates, or methods of estimating — *stick estimating*, *unit cost estimating*, and *assembly estimating*. Most estimators use whichever method best suits the particular job, the time frame, and the bidding environment. On some jobs, estimators use a combination of these methods.

Stick Estimating

In this method, design plans are used to prepare estimates for every item needed. For example, you could count the number of 2 x 6s used in the garage, or the number of drywall sheets needed. This method is generally used by subcontractors or specialty contractors (like electrical or plumbing), as well as some general contractors, until they develop a reliable cost database.

Unit Cost Estimating

In Unit Cost Estimating, a cost per unit is used. For example, a contractor building new homes might give an estimate to a prospective homebuyer of between $145 and $165 per square foot, depending on the finishes. When the contractor does a formal estimate, he'll ask subcontractors for bids, then he'll come up with a final cost per square foot.

Assembly Estimating

An assembly is a group of items that make up a unit. For example, an interior wall is an assembly composed of 2 x 4s, drywall, tape, texture, and paint. Generally, estimators using the assembly estimating method are experienced, and base these numbers on prior completed projects. They're able to estimate much faster than contractors using the other methods, quickly churning out accurate bids.

The two estimating forms printed here, *New Home Estimate* and *Remodel Estimate,* use a simple numbering system developed over the years and are quite widely used. You can use the categories and numbers we use, or create your own, based on what work your company does. As long as you use it consistently, it'll work just fine.

The Forms

Bid Submittal Log, *159*
Keep abreast of the bids coming in for each phase of construction with this form.

Quantity Sheet, *163*
An in-house form used to track materials ordered for each project.

New Home Estimate and **Remodel Estimate, *167***
Use the New Home Estimate form to estimate labor and materials for all the stages of building a new home, from the planning stage to final exterior finishes.

The Remodel Estimate form is specific to remodeling work. It covers only the areas you'd expect in a remodeling project — it's easier to use than a general construction form where you have to sort through numerous phases that don't apply to your type of work.

Material Schedule, *193*
Provides an easy-to-use listing of materials ordered for each project, including installation locations, quantities, and product specifics.

■ Bid Submittal Log

File name on CD
BidSubLog

The *Bid Submittal Log* collects information about bids requested and bids received on each of your projects. Essentially, the *Bid Submittal Log* lists the type of work contractors are bidding, the bidders' names, and the bid amount. There's also a column to keep track of plan modification numbers. Remember to update this log whenever you get a bid for each phase of the project. The estimator must be able to look at this form and quickly figure out who did the bidding and what the bid price was for each type of work.

Now we'll look at the form more closely.

How to Use This Form

Enter the project number, name, and address.

We'll go over the bid information to include in each column of this log. Generally speaking, job phases determine bid order. For example, you'd probably award a contract for framing before you look at bids to install appliances.

Modification Number (#)

Generally, bids are based on the most recent set of plans, and plans don't usually change that often. However, if you're getting bids on a job where there have been modifications to the plans, make sure you keep track of the plan modification number in the number field. It might not be important for the majority of the bids, but will be in certain circumstances. Let's say the change to the plans between modification # 1 and modification # 2 happens to be related to plumbing. One bidder has a price of $20,000, while the other's bid is $25,000. If they both have the same set of plans with the same modification number, you're comparing apples to apples. But, if these two bids referred to two different modification numbers, it would be comparing apples to oranges — you wouldn't know which bid was actually lower.

On our sample, ABC Plumbing was bidding on plan modification #2, whereas Mike's Plumbing and XYZ Plumbing are bidding on modification #3.

Type of Work / Bidder

You can use a broad category, such as *Plumbing*, or you can break it down to smaller parts, such as *Rough plumbing* and *Finish plumbing*.

In our sample log, we're getting bids for the Taylor kitchen remodel. So far, ABC Plumbing, Mike's Plumbing and XYZ Plumbing submitted bids for the plumbing work, but then ABC Plumbing withdrew. We also have one bid for the electrical, two for the cabinets, two for the flooring and one for insulation.

Comments

Any important notes should be added here. See the drastic difference between the two plumbing bids — XYZ's is almost double Mike's? That's because, as shown in the Comments column, XYZ's bid *includes* the fixtures and Mike's doesn't. It's important that you make notes like this so the estimator can see at a glance if bids are based differently. You can also use this column to keep track of the plans. If you're currently handing out blueprints and holding a deposit until you get them back — you can see at a glance who has returned the plans and who hasn't.

These days, blueprints aren't as common as they used to be — plans can be emailed, handed out on a CD or flash drive, or put on a website for downloading. In those instances, of course, you won't be getting any plans back.

Bid Due and Received

When you're at the starting point in a project and taking bids, you need a realistic due date for each phase out to bid. Give the bidders adequate time to determine competitive bids, but be sure to close the bids on the day you've stipulated. Any contractor who can't make a bid on schedule probably isn't going to be a good bet on a construction project, either. Those who haven't responded by the due date should be crossed off the list.

You'll see in our sample that we have the same bid due date for the three plumbing bids.

Bid Price

This is self-explanatory: the bid price represents the bid that was submitted. Just be sure to check the Comments column in case there's a difference in what's being bid on.

Bid Submittal Log

Quality Construction, Inc.

1 Main Street
Bayshore, CA 94545
650-555-1000 Fax: 650-555-1234
License # 1234567
Email: sales@qualityconstruction.com

Date: 10/23/10

Project Name and Address		Project Information	
Name:	Taylor Kitchen Remodel	**Project Number:**	09-240
Address:	1316 Washington Bayshore, CA 94545	**Sheet Number:**	01

Mod. #	Work	Bidder	Comments	Bid Due	Bid Received	Bid Price
2	Plumbing	ABC Plumbing	Decided not to bid	10/18/10	10/15/10	0
3	Plumbing	Mike's Plumbing	No fixtures included	10/18/10	10/05/10	1,400
3	Plumbing	XYZ Plumbing	Fixtures included	10/18/10	10/19/10	2,650
2	Electric	Bud's Electric		10/19/10	10/18/10	3,200
3	Cabinets	Art's Cabinets	Includes installation	10/20/10	10/18/10	13,000
3	Cabinets	Cabinets R Us	Includes installation	10/20/10	10/21/10	16,500
3	Flooring	Mark's Hardwood	Includes all materials	10/20/10	10/18/10	9,000
3	Flooring	Elegant Floors	Carpet included	10/20/10	10/18/10	16,500
2	Insulation	Insulation Plus		10/20/10	10/18/10	634

Bid Submittal Log

Date:

Project Name and Address		Project Information	
Name:		Project Number:	
Address:		Sheet Number:	

Mod. #	Work	Bidder	Comments	Bid Due	Bid Received	Bid Price

Quantity Sheet

File name on CD
QuantSheet

Most of us have used the “napkin approach” to bidding and found out its drawbacks the hard way — there’s no way you can remember how you arrived at the estimate. It was all on the napkin you used one day at lunch.

When you’ve finished a job, you need to know why your estimate was $5,000 too low. Or how you ordered double the amount of sheathing you needed. Or why you ran out of siding before you finished the north wall. To get the answers, you have to be able to review your calculations. If you don’t have them any more, expect to make the same mistakes over and over. That’s an expensive way to learn estimating.

Start to estimate in a more manageable way using the *Quantity Sheet*. It provides a permanent record that you’ll refer to constantly, so make sure every calculation is entered. The *Quantity Sheet* can organize takeoffs, reduce math errors and duplications, and increase the reliability and accuracy of your estimate. The *Quantity Sheet* can be added to or modified to suit your estimating style and the size of your project.

Whether your estimator prefers *one piece at a time*, *stick-by-stick*, *unit price*, or *assembly* estimates, this sheet provides a good starting point. It’s a convenient place for recording all materials needed, and for doing calculations when required. But no pricing takes place on the *Quantity Sheet*. That comes later, and will be explained in this chapter.

How to Use This Form

This is an in-house tally sheet, so you don’t need all the company information at the top of the form. But you *do* need to identify the project number, project name, and address.

What’s important is that you show all the calculations clearly so you know exactly *how* the total quantity for each was determined. You’ll be able to make adjustments more easily, and be able to backtrack in case you made a math error.

Material Description

The *Material Description* column names the item being estimated. Be specific. Don't put just "lumber." Enter the quantities needed for each part of the project. For a small job like a room addition, you could have concrete, steel, lumber, and drywall all on one sheet. For larger jobs, you'd use a separate sheet for each division of the work. For example, one for excavation work, one for the footings, one for framing, and so on.

Unit and Location

The *Unit* column is for describing the unit used for the material: cubic yard (CY), square foot (sf), linear foot (lf), yard (Y), each (ea), etc. The *Location* column is to indicate where on the job that material will be installed. Our example is for a garage addition, so the location for both items listed are the garage. But if you were adding, say, a family room and a den, and the family room has two light fixtures and the den just one, in the first row you'd describe the light fixture, by name or code number, enter *Family* under Location and *2* under Quantity. Then in the next row, you'd again describe the fixture, or put ditto marks if it's the same as the ones in the family room, and enter *Den* under Location and *1* under Quantity. And your total would be *3*.

Dimensions

Some materials listed under Material Description will need corresponding dimensions that identify that material. The columns under *Dimensions* describe the coverage area: *W* for width, *L* for length, and *H* for height. In our sample *Quantity Sheet* below, the concrete slab has a width of 40 feet, a length of 25 feet, and is 4 inches thick, or high. This calculates to 333 cubic feet, or 12.34 cubic yards. So you'd order 13 yards of concrete. Having this written down when you're ordering materials is always a plus.

For larger projects, use a separate sheet for your materials, then use one row of the form to define each specific area. For a drywall take-off, use one line for each room. Follow these steps for each cost item in the project. It makes it easy to make changes and to catch and correct errors in your estimate, and greatly reduces the risk of over- or under-ordering.

Project Name: Foxwood Suites Garage Addition
Project Address: 1262 Crestview
Seashore, CA

Material Description	Unit	Location	Dimensions W	L	H	Qty	Notes
5 Sack Concrete Slab	CY	Garage	40	25	4	13	5 mil poly, wire mesh 6 x 6
2" x 4" x 8' stud, DFL 3 X Btr	Ea	Garage	4"	8'	2"	100	1 stud per LF

Quantity Sheet

Date: ____________________

Project Information

Project Number: ____________________

Project Name: ____________________

Project Address: ____________________

____

			Dimensions				
Material Description	Unit	Location	W	L	H	Qty	Notes

			Dimensions				
Material Description	Unit	Location	W	L	H	Qty	Notes

Timesheets

12

Construction industry employees typically choose their profession because they like to work outdoors and don't like paperwork. We kept that in mind as we were creating the forms in this chapter. The timesheets are easy to fill out and understand, and don't take much time to complete. However, each form gathers the information you need to track time spent on each task and job.

Estimating accurately is one of the most important aspects of a profitable, successful construction business. In order to accurately estimate labor costs you need to know how much time it takes to complete a task and phase of a project. The only way to do that is to track actual costs on every job. That's never easy. Recording actual job costs will probably be one of your greatest challenges — but the timesheet provided here is an ideal starting point. Use it, and the other time management forms in this section, to keep tabs on your jobs, your workers, and to bring your estimates closer to your actual costs.

The Forms

Time Management Worksheet, *339*
Most of us overestimate the amount of work we'll get done in a day, and the result is either the tasks planned for the later part of the day don't get done, or you put in too many hours to get the work done. Use this handy sheet to create a realistic schedule for the day.

Timesheet Category List, *342*

In order to keep track of time spent on each job and by each worker, you need a simple system for categorizing each phase of construction and each task within that phase. This category list will enable your workers to correctly fill out a timesheet. Adopt the numbering on the list printed here, adapt the copy on the CD to fit your needs, or simply create your own list, using ours as a guide.

Weekly Timesheet, *344*

Keep a weekly timesheet for each employee to keep track of the total hours put in each week, and to keep you apprised of exactly what tasks are being done, on what projects, and how long each task is taking. At the end of a project, add the hours from all the timesheets to get the total labor expended on that project, and compare it with your estimate. You'll have a better basis for your labor estimates on future jobs.

Timesheet Detail, *347*

This form serves some of the same purposes as the Weekly Timesheet, but it records the worker's exact hours each day — the time he came in, the time he took lunch, moved on to the next jobsite, and so on. You need to keep tabs on people on your payroll, as well as the time spent on each project. This form helps you do that, and also provides tracking in case there's any disagreement over hours.

■ Time Management Worksheet

File name on CD
TimeManage

Every business owner knows how a day can just get away from you. You expect to get a whole bunch of work done, but at the end of the day, you're wondering what happened. The *Time Management Worksheet* will help you focus your efforts and schedule your time, so what has to get done, gets done. It's flexible, so you can use it to schedule appointments, as a to-do list, and to set daily goals. Provide it also to your employees, especially your office staff. They need to manage their time as well as you. Keep it in a folder on your hard drive, or print copies to put in a three-ring binder. Use it as a log of your business and leisure activity, available for future reference.

How to Use This Form

This is an in-house form, so your company name, your name, and the date are all that's required at the top.

At the top of the form, circle the appropriate day. On the digital file, check the box.

In the left-hand columns, record appointments scheduled throughout the day, from 6:00 AM until 7:00 PM, divided into half-hour segments.

On the right, identify what you have to do and estimate how long you expect it to take. If you add up the hours in the last column and find the total is well into the double digits, it's time to either get realistic about what you can expect to do, or to increase your efficiency on each task so you can meet your goals for the day. Your schedule shouldn't be what you *wish* you could do; it should be what you *will* do.

At the bottom, *Goals for the day* lets you summarize what you plan to accomplish. It helps you look past the small daily details to remind you of the larger goals.

Time Management Worksheet

Quality Construction, Inc.

Filed by: Madison Mitchell
Date: 01/12/11

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Time	Appointments	Action Record	Time
6:00			
7:00	Office	Work up estimate for Gavin project	2
8:00			
9:00	09-237 Foxwood Suites parking & storage	Jobsite	1.5
10:00			
	Office	Code bills for Project #09-237	1.5
11:00			
NOON	Lunch: Darrin Fox	Review project progress	2
		Discuss future jobs	
1:00			
2:00	09-235 Edgewood Manor	Jobsite	1
3:00	Office	Meet with Joe & Kelly Taylor	1
		Review job process	
4:00	Office	Catch up on paperwork	1
5:00	Gawen Field	Kristin's soccer game	2
6:00			
7:00			

Goals for the day:

Visit project sites
Complete Gavin estimate
Meet with project clients
Code vendor bills with job #s & phases for A/P entry

Time Management Worksheet

Filed by:

Date:

Monday **Tuesday** **Wednesday** **Thursday** **Friday** **Saturday** **Sunday**

Time	Appointments	Action Record	Time
6:00			
7:00			
8:00			
9:00			
10:00			
11:00			
NOON			
1:00			
2:00			
3:00			
4:00			
5:00			
6:00			
7:00			

Goals for the day:

Index

D

E

F

G

H

I

J-K

Practical References for Builders

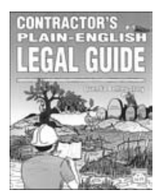
Building Code Compliance for Contractors & Inspectors

An answer book for both contractors and building inspectors, this manual explains what it takes to pass inspections under the 2009 *International Residential Code*. It includes a code checklist for every trade, covering some of the most common reasons why inspectors reject residential work — footings, foundations, slabs, framing, sheathing, plumbing, electrical, HVAC, energy conservation and final inspection. The requirement for each item on the checklist is explained, and the code section cited so you can look it up or show it to the inspector. Knowing in advance what the inspector wants to see gives you an (almost unfair) advantage. To pass inspection, do your own pre-inspection before the inspector arrives. If your work requires getting permits and passing inspections, put this manual to work on your next job. If you're considering a career in code enforcement, this can be your guidebook. **8½ x 11, 232 pages, $32.50**

National Repair & Remodeling Estimator

The complete pricing guide for dwelling reconstruction costs. Reliable, specific data you can apply on every repair and remodeling job. Up-to-date material costs and labor figures based on thousands of jobs across the country. Provides recommended crew sizes; average production rates; exact material, equipment, and labor costs; a total unit cost and a total price including overhead and profit. Separate listings for high- and low-volume builders, so prices shown are specific for any size business. Estimating tips specific to repair and remodeling work to make your bids complete, realistic, and profitable. Includes a CD-ROM with an electronic version of the book with *National Estimator*, a stand-alone *Windows*™ estimating program, plus an interactive multimedia video that shows how to use the disk to compile construction cost estimates.
496 pages, 8½ x 11, $63.50. Revised annually

Contractor's Plain-English Legal Guide



For today's contractors, legal problems are like snakes in the swamp — you might not see them, but you know they're there. This book tells you where the snakes are hiding and directs you to the safe path. With the directions in this easy-to-read handbook you're less likely to need a $200-an-hour lawyer. Includes simple directions for starting your business, writing contracts that cover just about any eventuality, collecting what's owed you, filing liens, protecting yourself from unethical subcontractors, and more. For about the price of 15 minutes in a lawyer's office, you'll have a guide that will make many of those visits unnecessary. Includes a CD-ROM with blank copies of all the forms and contracts in the book. **272 pages, 8½ x 11, $49.50**

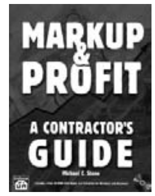
CD Estimator

If your computer has *Windows*™ and a CD-ROM drive, CD Estimator puts at your fingertips over 150,000 construction costs for new construction, remodeling, renovation & insurance repair, home improvement, framing & finish carpentry, electrical, concrete & masonry, painting, earthwork & heavy equipment and plumbing & HVAC. Monthly cost updates are available at no charge on the Internet. You'll also have the *National Estimator* program — a stand-alone estimating program for *Windows*™ that *Remodeling* magazine called a "computer wiz," and *Job Cost Wizard*, a program that lets you export your estimates to *QuickBooks Pro* for actual job costing. A 60-minute interactive video teaches you how to use this CD-ROM to estimate construction costs. And to top it off, to help you create professional-looking estimates, the disk includes over 40 construction estimating and bidding forms in a format that's perfect for nearly any *Windows*™ word processing or spreadsheet program.
CD Estimator is $98.50

How to Succeed With Your Own Construction Business

Everything you need to start your own construction business: setting up the paperwork, finding the work, advertising, using contracts, dealing with lenders, estimating, scheduling, finding and keeping good employees, keeping the books, and coping with success. If you're considering starting your own construction business, all the knowledge, tips, and blank forms you need are here. **336 pages, 8½ x 11, $28.50**

Markup & Profit: A Contractor's Guide



In order to succeed in a construction business, you have to be able to price your jobs to cover all labor, material and overhead expenses, and make a decent profit. The problem is knowing what markup to use. You don't want to lose jobs because you charge too much, and you don't want to work for free because you've charged too little. If you know how to calculate markup, you can apply it to your job costs to find the right sales price for your work. This book gives you tried and tested formulas, with step-by-step instructions and easy-to-follow examples, so you can easily figure the markup that's right for your business. Includes a CD-ROM with forms and checklists for your use. **320 pages, 8½ x 11, $32.50**

Contractor's Guide to *QuickBooks Pro* 2010

This user-friendly manual walks you through *QuickBooks Pro*'s detailed setup procedure and explains step-by-step how to create a first-rate accounting system. You'll learn in days, rather than weeks, how to use *QuickBooks Pro* to get your contracting business organized, with simple, fast accounting procedures. On the CD included with the book you'll find a *QuickBooks Pro* file for a construction company. Open it, enter your own company's data, and add info on your suppliers and subs. You also get a complete estimating program, including a database, and a job costing program that lets you export your estimates to *QuickBooks Pro*. It even includes many useful construction forms to use in your business.
344 pages, 8½ x 11, $57.00

See checklist for other available editions.

Craftsman's Construction Installation Encyclopedia

Step-by-step installation instructions for just about any residential construction, remodeling or repair task, arranged alphabetically, from *Acoustic tile* to *Wood flooring*. Includes hundreds of illustrations that show how to build, install, or remodel each part of the job, as well as manhour tables for each work item so you can estimate and bid with confidence. Also includes a CD-ROM with all the material in the book, handy look-up features, and the ability to capture and print out for your crew the instructions and diagrams for any job. **792 pages, 8½ x 11, $65.00**

Construction Contract Writer

Write contracts that comply with law in your state and that fit each job exactly, anticipate the most likely disputes, as well as resolve key issues in your favor. You draft each contract by answering interview questions. No legal background needed. Favor either the contractor or the owner. Contracts can be as detailed, or as simple as the job requires. Includes legal updates for one year from purchase. If you get stuck, click the "Get Help from an Attorney" button. You'll have an answer in 24 hours. No charge. No limit. **$99.95**
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Business Letters for the Construction Industry

Here you'll find over 100 professionally-written model letters for virtually every situation. Put your business in the best possible light with a well-written letter — especially when you can use that letter to improve a bad situation. Use these letters over and over again to resolve disputes, win new clients, clarify proposals, coordinate with architects, subcontractors, owners, and insurers, schedule meetings and inspections, and to respond to complaints or difficult situations. Included are letters responding to threats of legal action, of commendation to workers, of job performance, apology for defective or delayed work; letters for justification of change orders and price increases; letters explaining your insurance liability, drug testing, injury at work, overtime, equipment use, and more. Practically every letter you'll have to write is in this book, already written, and available on *MS-Word* on the CD-ROM enclosed. Just load the letter you need, change a few phrases, print out and send, or e-mail, and you're free to spend your time on more productive endeavors.
376 pages, 8½ x 11, $59.95

Contractor's Survival Manual Revised

The "real skinny" on the down-and-dirty survival skills that no one like to talk about — unique, unconventional ways to get through a debt crisis: what to do when the bills can't be paid, finding money and buying time, conserving income, transferring debt, setting payment priorities, cash float techniques, dealing with judgments and liens, and laying the foundation for recovery. Here you'll find out how to survive a downturn and the key things you can do to pave the road to success. Have this book as your insurance policy; when hard times come to your business it will be your guide. **336 pages, 8½ x 11, $38.00**

Construction Estimating Reference Data

Provides the 300 most useful manhour tables for practically every item of construction. Labor requirements are listed for sitework, concrete work, masonry, steel, carpentry, thermal and moisture protection, doors and windows, finishes, mechanical and electrical. Each section details the work being estimated and gives appropriate crew size and equipment needed. Includes a CD-ROM with an electronic version of the book with *National Estimator*, a stand-alone *Windows*™ estimating program, plus an interactive multimedia video that shows how to use the disk to compile construction cost estimates. **432 pages, 11 x 8½, $39.50**

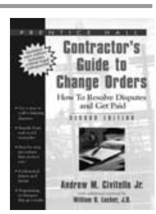
Getting Financing & Developing Land

Developing land is a major leap for most builders — yet that's where the big money is made. This book gives you the practical knowledge you need to make that leap. Learn how to prepare a market study, select a building site, obtain financing, guide your plans through approval, then control your building costs so you can ensure yourself a good profit. Includes a CD-ROM with forms, checklists, and a sample business plan you can customize and use to help you sell your idea to lenders and investors. **232 pages, 8½ x 11, $39.00**

Contractor's Guide to the Building Code

Explains in plain, simple English just what the 2006 *International Building Code* and *International Residential Code* require. Building codes are elaborate laws, designed for enforcement; they're not written to be helpful how-to instructions for builders. Here you'll find down-to-earth, easy-to-understand descriptions, helpful illustrations, and code tables that you can use to design and build residential and light commercial buildings that pass inspection the first time. Written by a former building inspector, it tells what works with the inspector to allow cost-saving methods, and warns what common building shortcuts are likely to get cited. Filled with the tables and illustrations from the *IBC* and *IRC* you're most likely to need, fully explained, with examples to guide you. Includes a CD-ROM with the entire book in PDF format, with an easy search feature. **408 pages, 8½ x 11, $66.75**

Contractor's Guide to Change Orders



This book gives you the ammunition you need to keep contract disputes from robbing you of your profit. You'll learn how to identify trouble spots in your contract, plans, specifications and site; negotiate and resolve change order disputes, and collect facts for evidence to support your claims. You'll also find detailed checklists to organize your procedures, field-tested sample forms and worksheets ready for duplication, and various professional letters for almost any situation. **382 pages, 8½ x 11, $79.00**

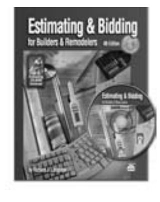
National Construction Estimator

Current building costs for residential, commercial, and industrial construction. Estimated prices for every common building material. Provides manhours, recommended crew, and gives the labor cost for installation. Includes a CD-ROM with an electronic version of the book with *National Estimator*, a stand-alone *Windows*™ estimating program, plus an interactive multimedia video that shows how to use the disk to compile construction cost estimates. **672 pages, 8½ x 11, $62.50. Revised annually**

DeWalt Contractor's Daily Logbook and Jobsite Reference

The secrets of today's successful contractors include two things: having a way to logically and efficiently document jobsite activity, as well as the resources and references to complete the documentation. This new book gives you a two-in-one resource that provides all of the necessary elements needed to run and complete a construction project. Part One offers daily log pages, carefully designed to assist in documenting everything necessary on the jobsite, from daily activities to weather conditions to schedules, deliveries, subcontractors, OSHA requirements, and more. Part Two includes a variety of resources related to the daily log, including a math/calculations section, an extensive jobsite safety/OSHA requirements section, Spanish/English translations and a comprehensive reference section. **335 pages, 8½ x 11, $24.95**

Estimating & Bidding for Builders & Remodelers

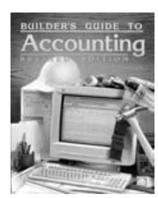


This 5th edition has all the information you need for estimating and bidding new construction and home improvement projects. It shows how to select jobs that will be profitable, do a labor and materials take-off from the plans, calculate overhead and figure your markup, and schedule the work. Includes a CD with an easy-to-use construction estimating program and a database of 50,000 current labor and material cost estimates for new construction and home improvement work, with area modifiers for every zip code. Price updates on the Web are free and automatic. **272 pages, 8½ x 11, $89.50**

National Home Improvement Estimator

Current labor and material prices for home improvement projects. Provides manhours for each job, recommended crew size, and the labor cost for removal and installation work. Material prices are current, with location adjustment factors and free monthly updates on the Web. Gives step-by-step instructions for the work, with helpful diagrams, and home improvement shortcuts and tips from experts. Includes a CD-ROM with an electronic version of the book, and *National Estimator*, a stand-alone *Windows*™ estimating program, plus an interactive multimedia tutorial that shows how to use the disk to compile home improvement cost estimates. **520 pages, 8½ x 11, $63.75. Revised annually**

Builder's Guide to Accounting Revised



Step-by-step, easy-to-follow guidelines for setting up and maintaining records for your building business. This practical, newly-revised guide to all accounting methods shows how to meet state and federal accounting requirements, explains the new depreciation rules, and describes how the Tax Reform Act can affect the way you keep records. Full of charts, diagrams, simple directions and examples, to help you keep track of where your money is going. Recommended reading for many state contractor's exams. Includes test questions for every chapter. **360 pages, 8½ x 11, $35.50**

Craftsman's Illustrated Dictionary of Construction Terms

Almost everything you could possibly want to know about any word or technique in construction. Hundreds of up-to-date construction terms, materials, drawings and pictures with detailed, illustrated articles describing equipment and methods. Terms and techniques are explained or illustrated in vivid detail. Use this valuable reference to check spelling, find clear, concise definitions of construction terms used on plans and construction documents, or learn about little-known tools, equipment, tests and methods used in the building industry. It's all here.
416 pages, 8½ x 11, $36.00

Paint Contractor's Manual

How to start and run a profitable paint contracting company: getting set up and organized to handle volume work, avoiding mistakes, getting maximum production from your crews and the most value from your advertising dollar. Shows how to estimate all prep and painting. Loaded with manhour estimates, sample forms, contracts, charts, tables and examples you can use. **224 pages, 8½ x 11, $28.50**

Warranties for Builders & Remodelers

As customers become more knowledgeable, they expect warranties on your work. Providing a warranty also shows that you stand behind the work you do. But the question is: Are you doing it right, or are you digging yourself a hole you can fall into? This revised edition, written by the NAHB staff attorneys, helps you market your business by providing the services your customers require while protecting yourself and your business from liability. Here you'll find clear explanations of implied warranties, statutory warranties, warranties imposed by courts, and more. You'll find simple language and formats for warranty documents as well as tips for drafting warranties that really work. Each state has different legal requirements, so you'll also find a list of state-by-state cases and statutes applicable to construction claims. Warranties can be a two-edged sword. This book explains, in easy-to-understand language, your rights, responsibilities, and recommended practices and procedures to help make sure that you don't get cut. Published by: Builders Office Manuals. **130 pages, 6½ x 8½, $29.95**

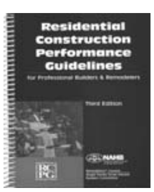
Visual Handbook of Building and Remodeling

If you've ever had a question about different types of material, or the dimensions required by Code in most installations – you'll find the answers quickly and easily in this 632 page illustrated encyclopedia. This expanded third edition of the classic reference includes the latest Code information, new full-color drawings, and a new section on making homes green. 1,600 full-color drawings provide a clear look at every aspect of home construction and systems, to visualize exactly how to tackle any building project or problem. There are charts, dimensions, and illustrations on design, site and climate, masonry, foundations, wood, framing, sheathing, siding, roofing, windows and doors, plumbing, wiring, the thermal envelope, floors, walls and ceilings, storage, heating, cooling, passive solar, lighting, sound, and more. **632 pages, 8½ x 11, $29.95**

Estimating Home Building Costs Revised

Accurate estimates are the foundation of a successful construction business. Leave an item out of your original estimate and it can take the profit out of your entire job. This practical guide to estimating home construction costs has been updated with Excel estimating forms and worksheets with active cells that ensure accurate and complete estimates for your residential projects. Load the enclosed CD-ROM into your computer and create your own estimate as you follow along with the step-by-step techniques in this book. Clear, simple instructions show how to estimate labor and material costs for each stage of construction, from site clearing to figuring your markup and profit. Every chapter includes a sample cost estimate worksheet that lists all the materials to be estimated. Even shows how to figure your markup and profit to arrive at a price. **336 pages, 8½ x 11, $38.00**

Residential Construction Performance Guidelines

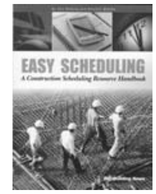


Created and reviewed by more than 300 builders and remodelers, this guide gives cut-and-dried construction standards that should apply to new construction and remodeling. It defines corrective action necessary to bring all construction up to standards. Standards are listed for sitework, foundations, interior concrete slabs, basement and crawl spaces for block walls and poured walls, wood-floor framing, beams, columns and posts, plywood and joists, walls, wall insulation, windows, doors, exterior finishes and trim, roofs, roof sheathing, roof installation and leaks, plumbing, sanitary and sewer systems, electrical, interior climate control, HVAC systems, cabinets and countertops, floor finishes and more. **120 pages, 6½ x 8½, $44.95. Published by NAHB Remodelers Council.**

Plumber's Handbook Revised

This new edition shows what will and won't pass inspection in drainage, vent, and waste piping, septic tanks, water supply, graywater recycling systems, pools and spas, fire protection, and gas piping systems. All tables, standards, and specifications are completely up-to-date with recent plumbing code changes. Covers common layouts for residential work, how to size piping, select and hang fixtures, practical recommendations, and trade tips. It's the approved reference for the plumbing contractor's exam in many states. Includes an extensive set of multiple-choice questions after each chapter, with answers and explanations in the back of the book, along with a complete sample plumber's exam. **352 pages, 8½ x 11, $41.50**

Easy Scheduling



Easy Scheduling presents you with a complete set of "real world" scheduling tools that are specifically tailored to meet the needs of small- to medium-sized construction businesses. Step by step, it shows you how to use *Microsoft Project* to build a schedule that will synchronize everyone's efforts into an organized system that becomes the foundation of all planning and communication for all your jobs. You'll see how to establish realistic project goals, set checkpoints, activities, relationships and time estimates for each task, as well as establish priorities. You'll learn how to create a project flowchart to keep everyone focused and on track, and see how to use CSI (Construction Specification Institute) coding to organize and sort tasks, methods, and materials across multiple projects. If you want an easy way to schedule your jobs, *Microsoft Project* and *Easy Scheduling* is the answer for you. (Does not include Microsoft Project.) **316 pages, 8½ x 11, $59.95. Published by BNI.**

The Contractor's Legal Kit

Stop "eating" the costs of bad designs, hidden conditions, and job surprises. Set ground rules that assign those costs to the rightful party ahead of time. And it's all in plain English, not "legalese." For less than the cost of an hour with a lawyer, you'll learn the exclusions to put in your agreements, why your insurance company may pay for your legal defense, how to avoid liability for injuries to your sub and his employees or damages they cause, how to collect on lawsuits you win, and how to protect yourself from claims related to mold. It also includes a FREE CD-ROM with contracts and forms you can customize for your own use.
352 pages, 8½ x 11, $69.95

ADA & ABA Accessibility Handbook

Gives all accessibility guidelines for buildings and facilities and contains the full text of the ADA and ABA guidelines, organized and presented in an easy-to-use format with an extended index and enhanced illustrations. Sections, drawings and details for practically every area of a building or facility that must comply with ADA standards: wheelchair access, ramps and slopes, parking and loading, elevators, doors, bathrooms, signage, alarms, telephones, assembly, restaurants, offices, lodging, transportation, historic buildings, alterations, and more. You'll find all like subjects contained in the same chapter, with cross-references to all relevant guidelines, and special advisories to enhance your understanding of the guidelines and their practical application. All current accessibility requirements are listed in this massive encyclopedia of information. Published by: BNI Building News.
756 Pages, 8½ x 11, $89.95

Home Builders' Jobsite Codes

A spiral-bound, quick reference to the 2009 *International Residential Code* that's filled with easy-to-read and understand code requirements for every aspect of residential construction. This user-friendly guide through the morass of the code is packed with illustrations, tables, and figures, to illuminate your path to inspection and approval. **281 pages, 5½ x 8½, $28.95**

Concrete Construction

Just when you think you know all there is about concrete, many new innovations create faster, more efficient ways to do the work. This comprehensive concrete manual has both the tried-and-tested methods and materials, and more recent innovations. It covers everything you need to know about concrete, along with Styrofoam forming systems, fiber reinforcing adjuncts, and some architectural innovations, like architectural foam elements, that can help you offer more in the jobs you bid on. Every chapter provides detailed, step-by-step instructions for each task, with hundreds of photographs and drawings that show exactly how the work is done. To keep your jobs organized, there are checklists for each stage of the concrete work, from planning, to finishing and protecting your pours. Whether you're doing residential or commercial work, this manual has the instructions, illustrations, charts, estimating data, rules of thumb and examples every contractor can apply on their concrete jobs.
288 pages, 8½ x 11, $28.75

JLC Guide to Decks and Porches

It's difficult to build attractive, structurally-sound, low-maintenance outdoor spaces that survive the rigors of weather and varying soil conditions, while battling rot and mildew damage. This new book is filled with large, full-color photos and illustrations that show you how to use the latest technology to build ledgers, railing connections, and footings that will withstand the test of time. You'll find the most common code violations and how to avoid them. You'll find footing and framing techniques for decks and porches that succeed. You'll find finishes that will last for years, water prevention techniques, and low-voltage lighting that will make the deck you build look custom and one-of-a-kind. There are even proven ideas for adding brick, stone, and tile to decks and porches.
392 pages, 8½ x 11, 39.95

Estimating With Microsoft Excel (3rd Edition)

Step-by-step instructions show you how to create your own customized automated spreadsheet estimating program for use with *Excel* 2007. You'll learn how to use the magic of *Excel* to create all the forms you need; detail sheets, cost breakdown summaries, and more. With Excel as your tool, you can easily estimate costs for all phases of the job, from pulling permits, to concrete, rebar, and roofing. You'll see how to create your own formulas and macros and apply them in your everyday projects. If you've wanted to use *Excel*, but were unsure of how to make use of all its features, let this new book show you how. Includes a CD-ROM that illustrates examples in the book and provides you with templates you can use to set up your own estimating system. **158 pages, 7 x 9½, $44.95**

Construction Estimating

This unusually well-organized book shows the best and easiest way to estimate materials for room additions or residential structures. It gives estimating tables and procedures needed to make a fast, accurate, and complete material list of the structural members found in wood- and steel-framed buildings. This book is divided into 72 units, each of them covering a separate element in the estimating procedure. Covers estimating foundations, floor framing, wall framing, ceiling framing, roof framing, roofing materials, exterior and interior finish materials, hardware, steel joist floor framing, steel stud framing, and steel ceiling joist and rafter framing. **496 pages, 8½ x 11, $49.50**

DeWalt Building Code Reference

Based on the 2006 International Building Code, this spiral-bound Code reference illustrates hundreds of the most common Code requirements, violations and installation concerns. Large, color illustrations and photos show exactly what the Code requires, so there's never any doubt in your mind. Illustrated on thick glossy industrial-strength pages made to survive — even in the harsh environment of your tool kit. With this reference you'll get the job done right — the first time — even if you have questions on materials, notching and cutting, stairs, foundations and footings, concrete, egress requirements, wall and floor framing, roof framing and coverings, trenching and excavation, and more. **88 pages, 5 x 8, $24.95**

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