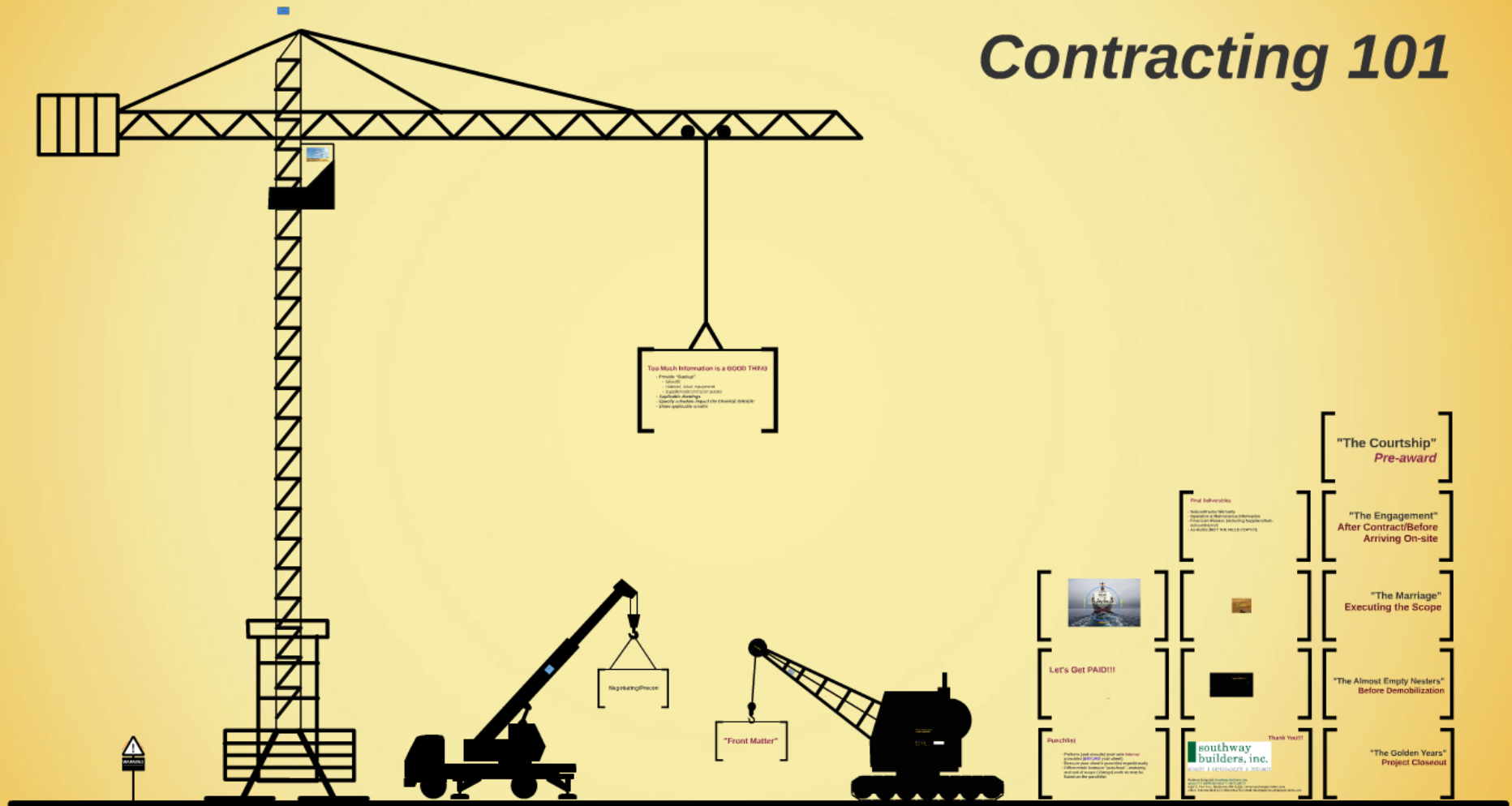


Contracting 101



Project Management & Field Operations

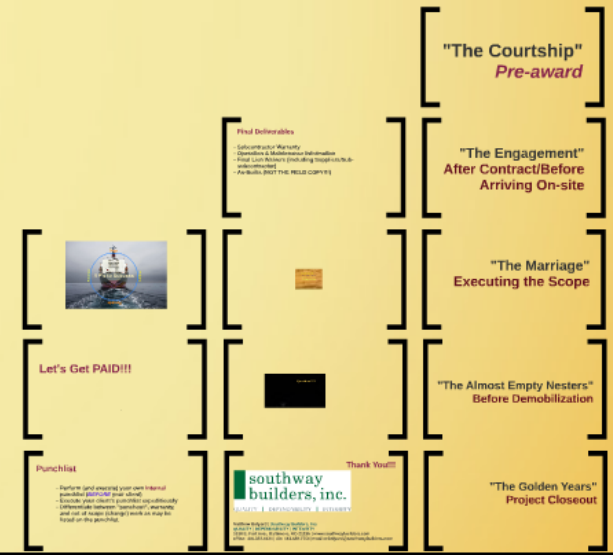
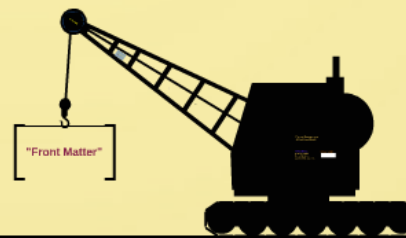
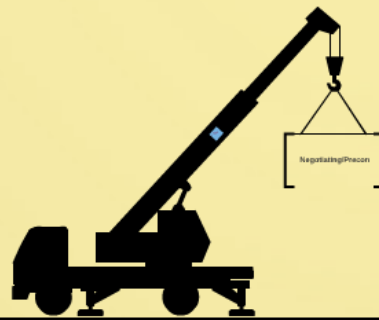
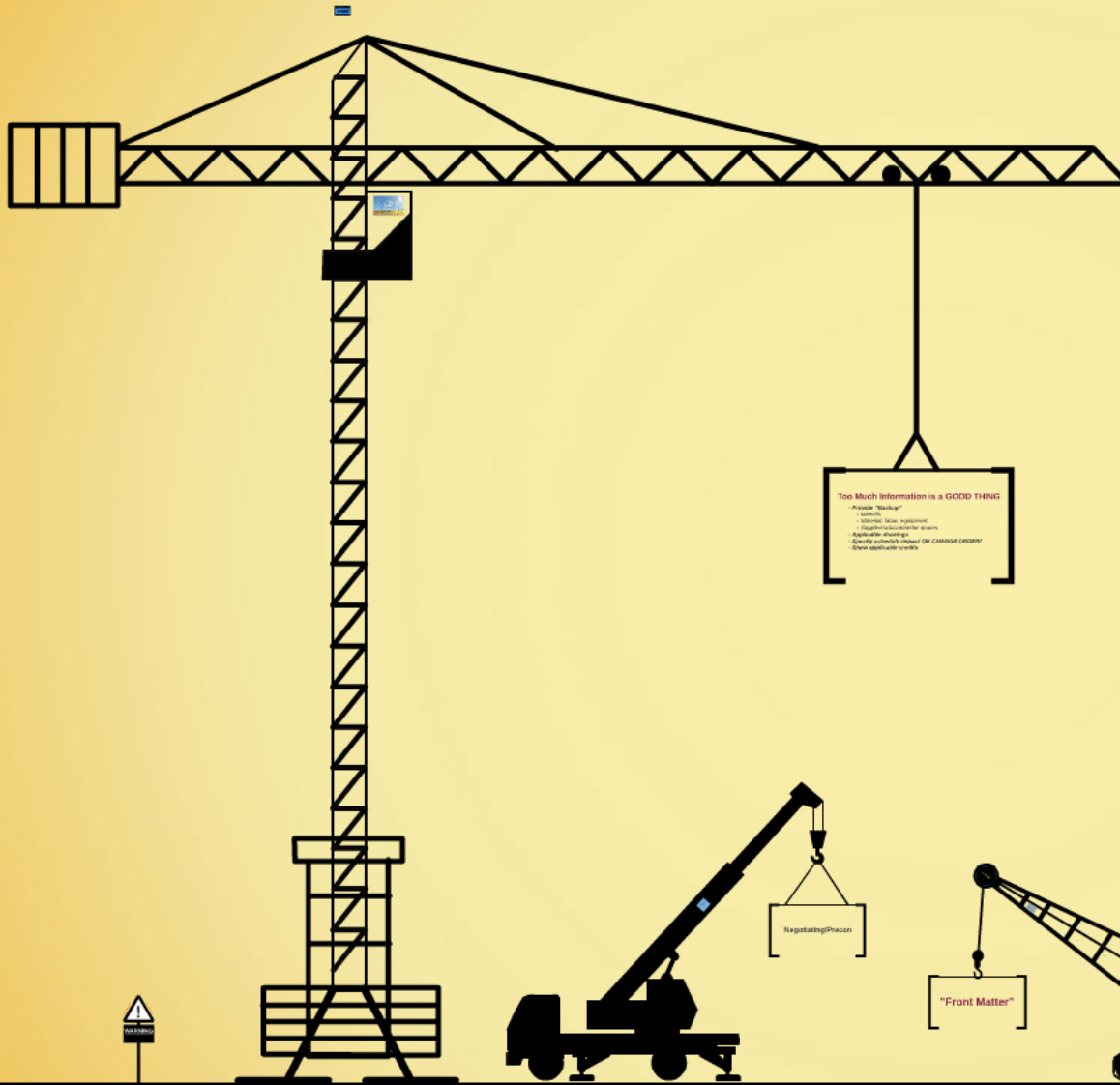
Presented by:

Matthew Bolyard
Project Executive
Southway Builders, Inc.

Sponsored by:

PROCORE

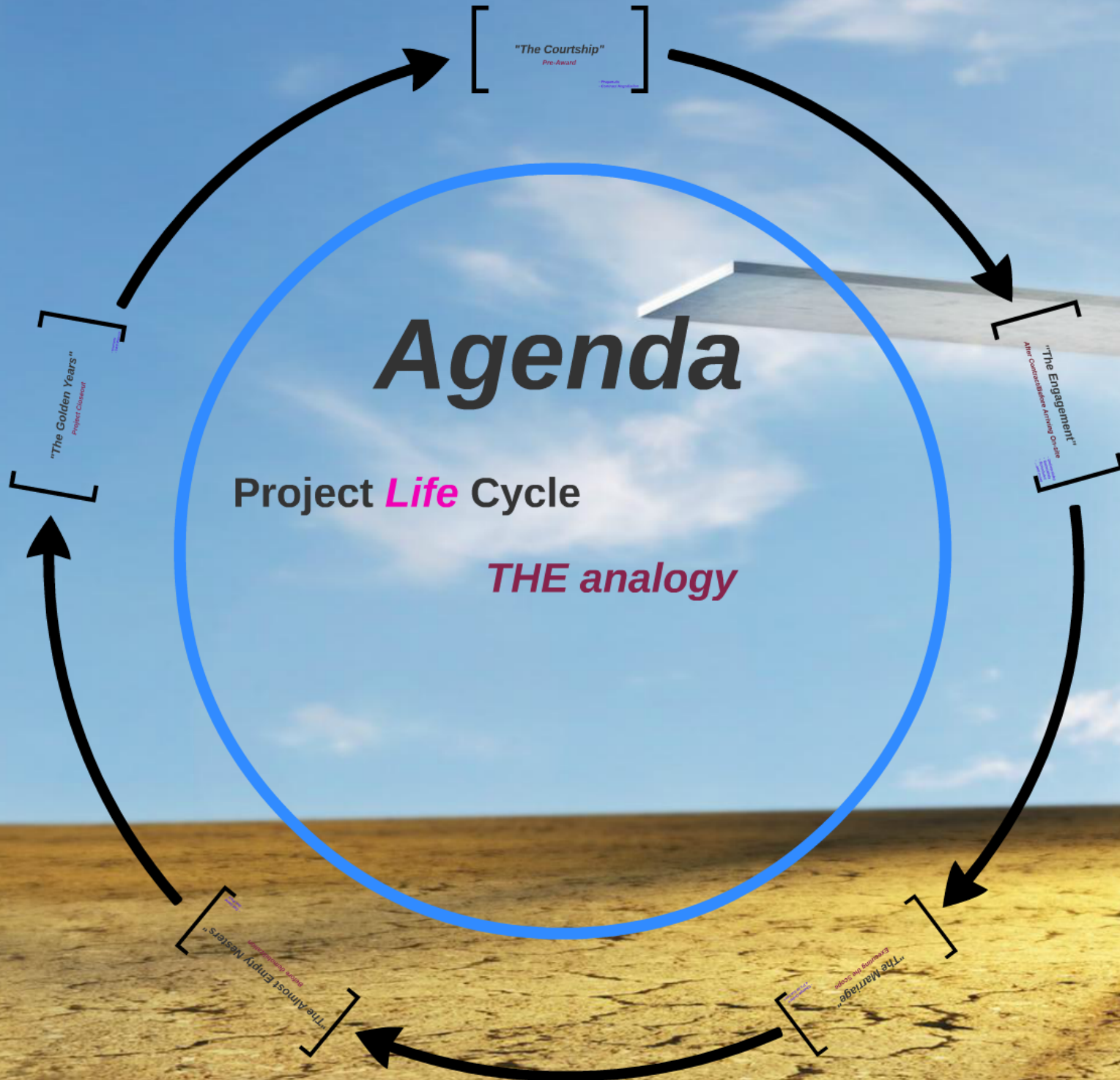
Contracting 101



Agenda

Project *Life* Cycle

THE analogy



"The Courtship"

Pre-Award

- *Proposals*
- *Contract Negotiation*

"The Engagement"

After Contract/Before Arriving On-site

- ***Deliverables***
- ***Submittals***
- ***Schedules***
- ***...and more***

"The Marriage"

Executing the Scope

- *Change Orders*
- *4 P's to Success*

"The Almost Empty Nesters"

Before demobilization

- *Get Done*
- *Get Paid*

"The Golden Years"

Project Closeout

- *Warranty*
- *O&M Manuals*

It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently.

-Warren Buffett

The illustration shows a construction site with three cranes. A large tower crane on the left has a speech bubble that says "Too Much Information is a GOOD THING" and lists the following details:

- Possible "Building"
- Location
- Material type, appearance
- Usage/Intended application
- Application drawings
- Quantity and/or Unit Required OR CHANGING ORDER
- Short application details

A truck-mounted crane in the center has a speech bubble that says "Ragging@precon". A smaller crane on the right has a speech bubble that says "Front Matter".

Negotiating@Precon

"Front Matter"

Punchlist

- Perform (and credit) your own **leverage**
- **parallel** **DETERMINE** your share
- Execute your client's purchase, especially
- Differentiate between "purchase", usually

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Thank You!!!

**"The Golden Years"
Project Closeout**



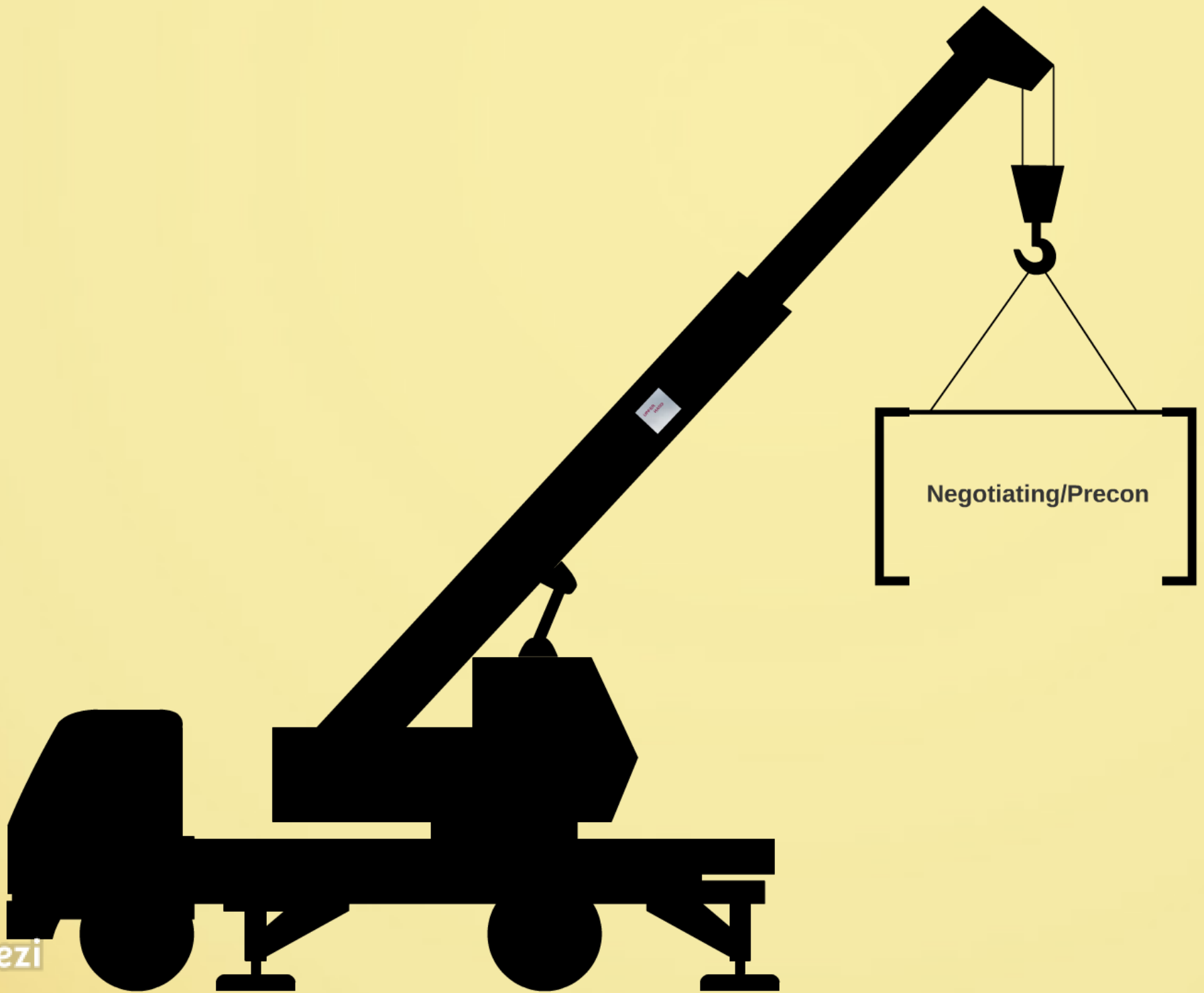
"The Courtship" *Pre-award*

Negotiating/Precon

"Do's"

- *Request a scope review*
- *Read the **ENTIRE** Contract*
- *Review **ALL** Contract Documents*
- *Request AIA Subcontract Form*
- *Submit Qualifications*





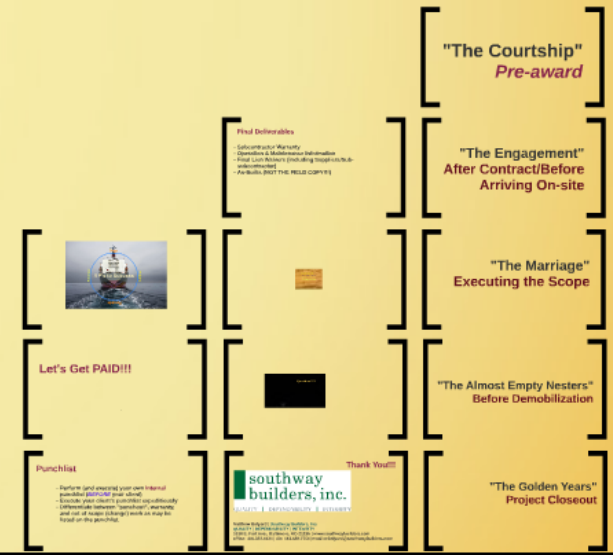
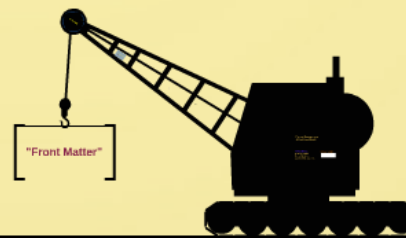
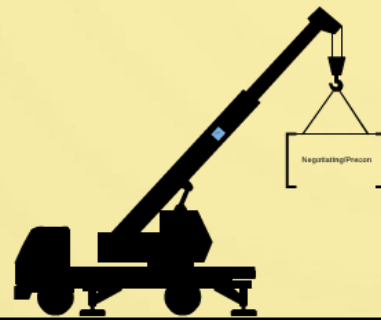
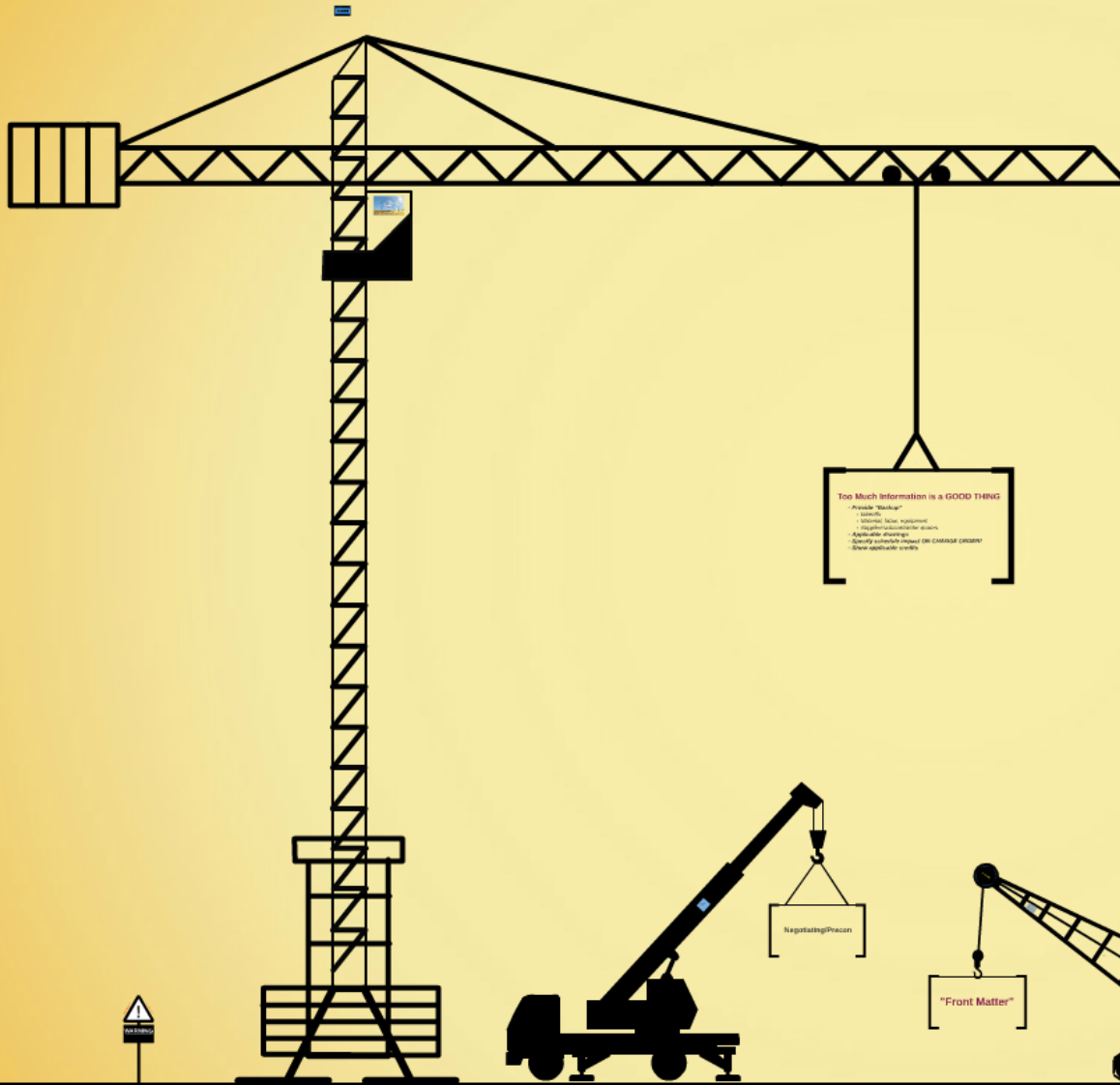


UPPER HAND

"Don'ts"

- *Assume that your proposal will “protect” you*
- *Assume that your substitutions will be accepted*
- *Expect that your client will be willing to assist with third-party payment*

Contracting 101

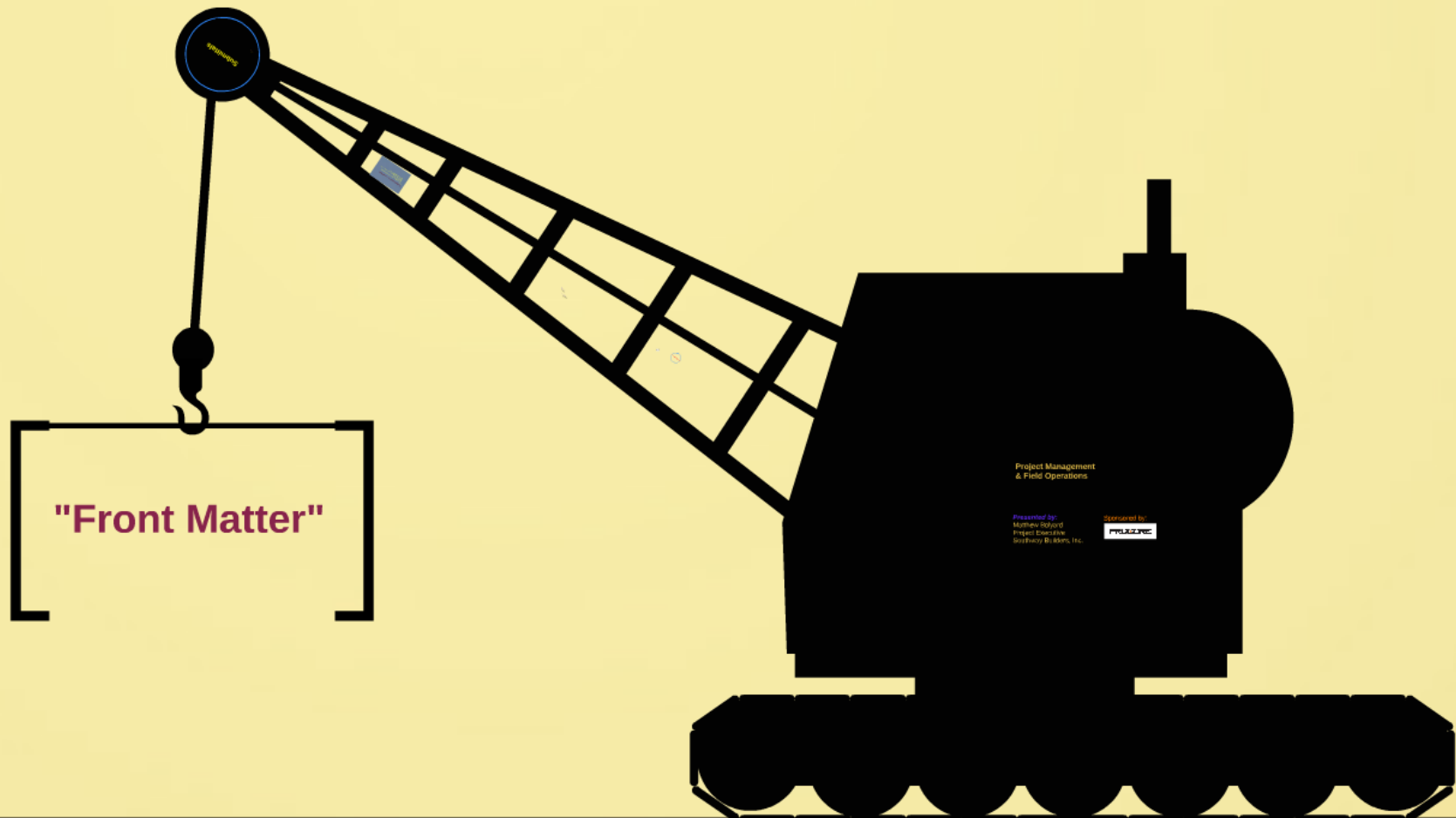


"The Engagement"

After Contract/Before Arriving On-site



"Front Matter"



Too Much Information is a GOOD THING

DO:

- *Return signed contract and any attachments*
- *Provide a schedule*
- *Provide a list of suppliers or sub-subcontractors*
- *Provide a submittal schedule*

Submittals

Submittal Types

1. **Design Submittals**

2. **Construction Submittals**

3. **Material Submittals**

4. **Equipment Submittals**

5. **Finish Submittals**

Submittal Types

- *Product Data*
- *Shop Drawings*
- *Samples*
- *Product Schedule*
- *Informational*
- *Material test reports*
- *Research/eval reports*
- *GREEN!!!!*



READ THE SPECIFICATIONS!!!

Identification

- *of Submittal*
- *of Product*

Considerations

- *Review schedule*
- *Consider Lead Times*

NO SUBSTITUTIONS!!!

Except if the substitution...

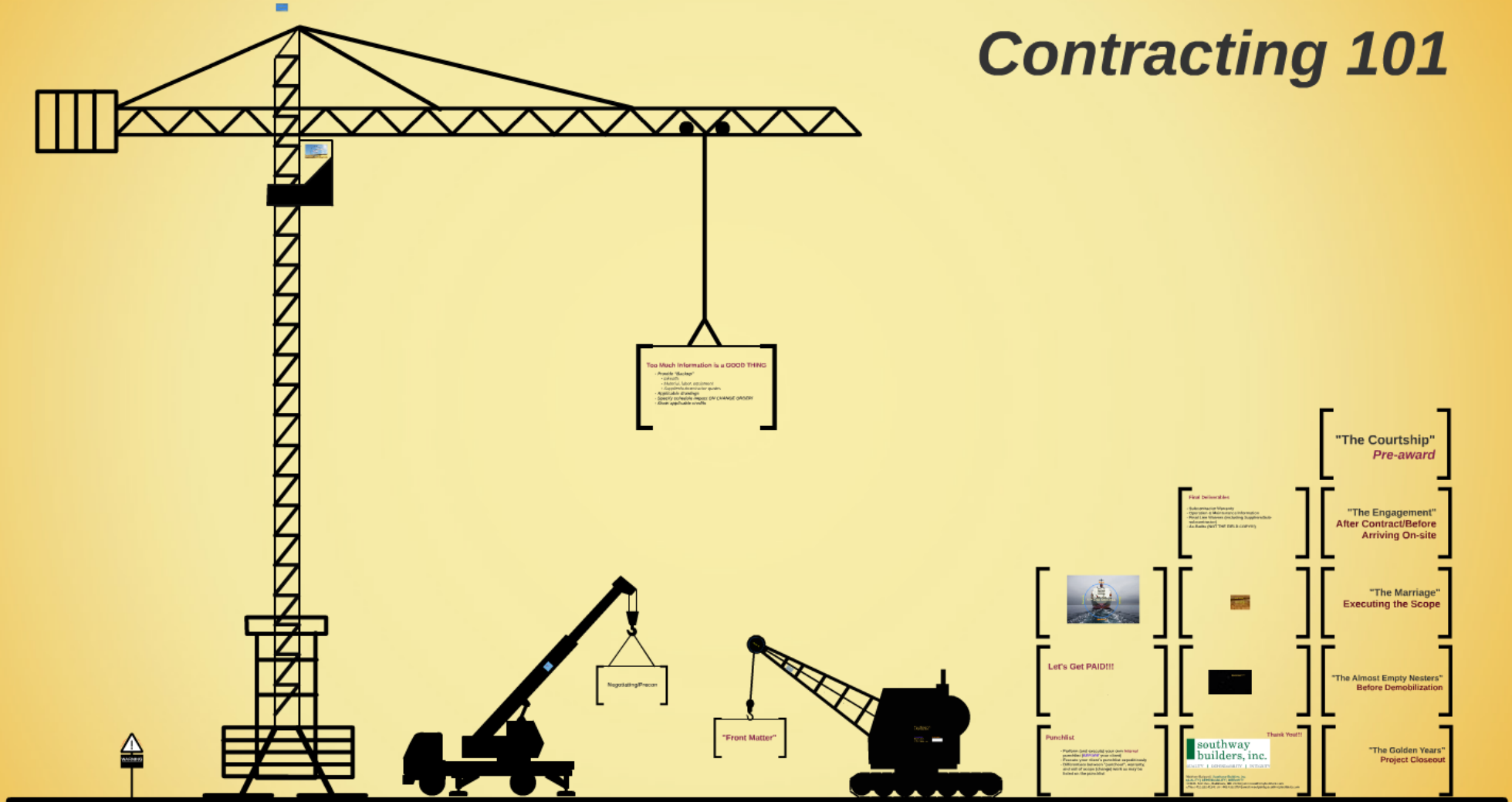
Adds **VALUE** for your Client

PS - use the substitution form in the specs!!!

"The Marriage"

Executing the Scope

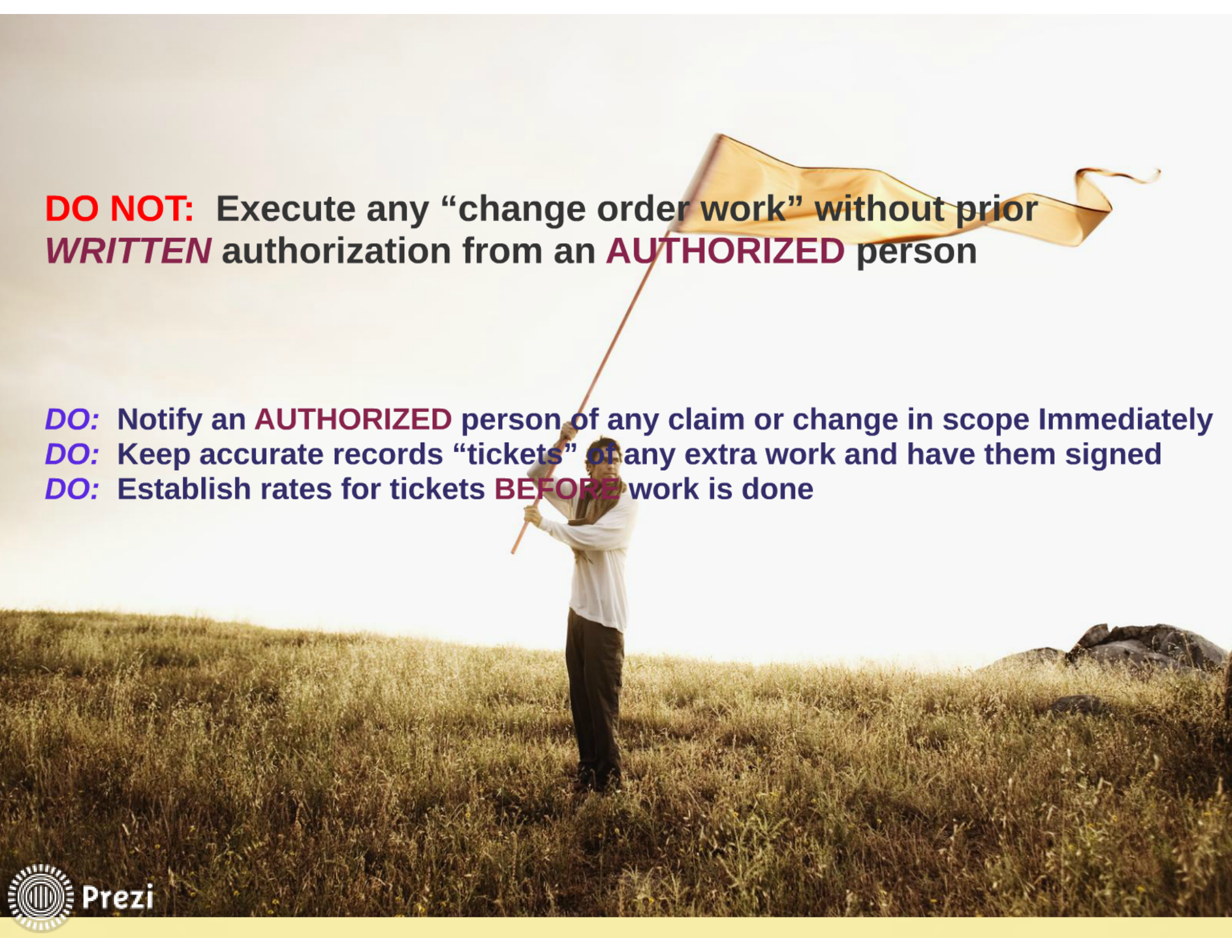
Contracting 101





Too Much Information is a GOOD THING

- ***Provide “Backup”***
 - *takeoffs*
 - *Material, labor, equipment*
 - *Supplier/subcontractor quotes*
- ***Applicable drawings***
- ***Specify schedule impact ON CHANGE ORDER!***
- ***Show applicable credits***



DO NOT: Execute any “change order work” without prior **WRITTEN** authorization from an **AUTHORIZED** person

DO: Notify an **AUTHORIZED** person of any claim or change in scope Immediately

DO: Keep accurate records “tickets” of any extra work and have them signed

DO: Establish rates for tickets **BEFORE** work is done



READ THE CONTRACT!!!

Plan

Promote

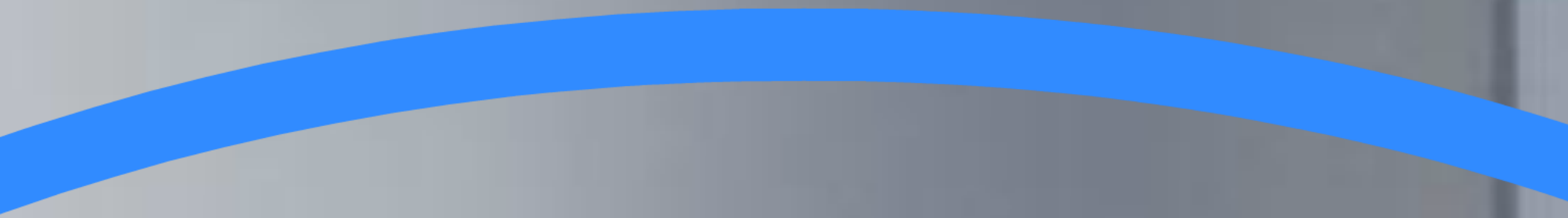
4 P's to Success

Prepare

Provide

Plan

Prepare



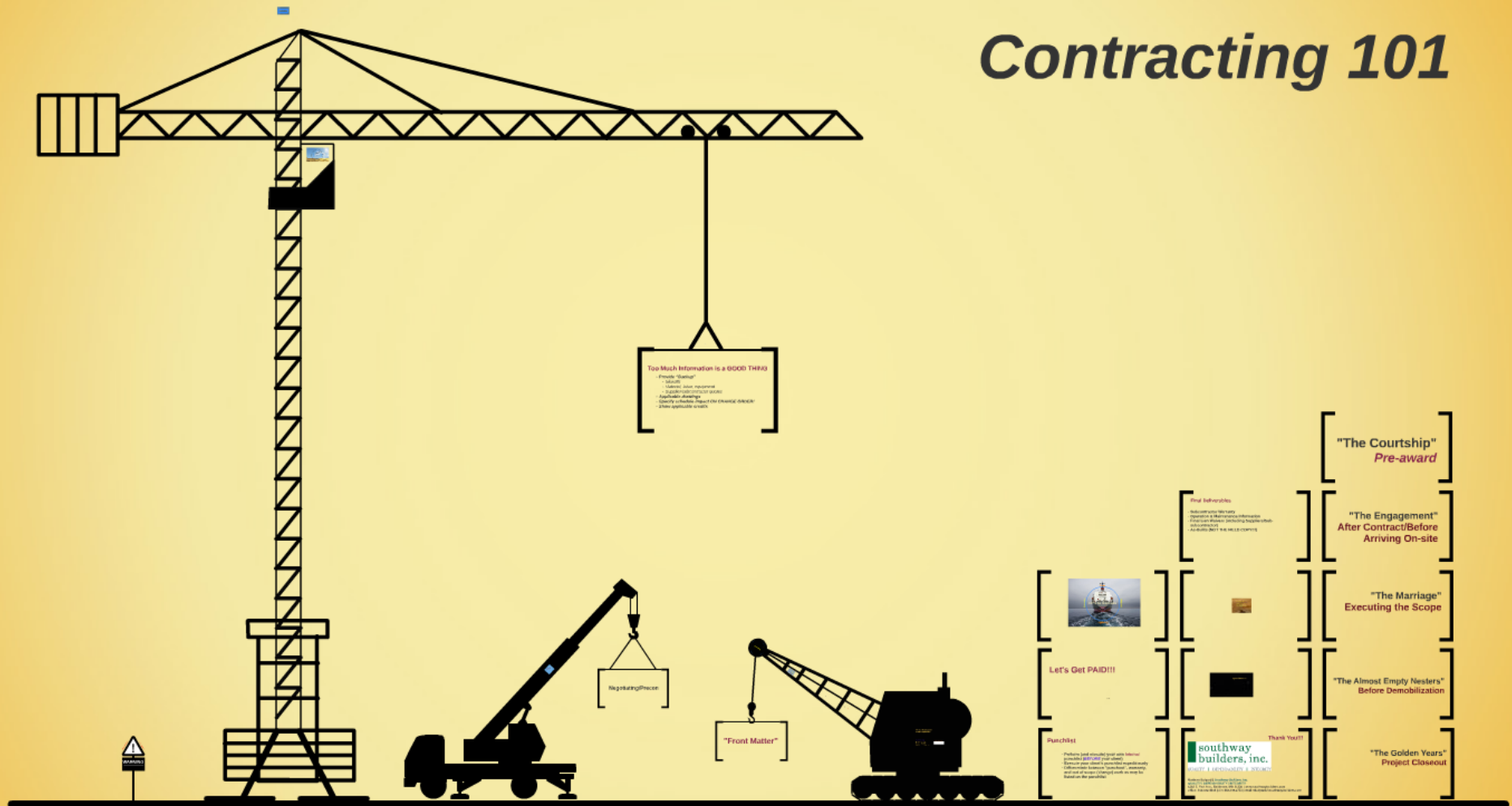


Provide

Promote



Contracting 101



"The Almost Empty Nesters" **Before Demobilization**

DO's

- *Know your Contract's payment terms (**not necessarily your client's**)*
- *Use AIA G702/G703 Invoicing*
- *Resubmit invoices "revised" by your client*
- *Provide "real" breakdown*
- *Provide Lien Waivers (including suppliers)*



READ THE CONTRACT!!!

DON'Ts

- *“Front load”*
- *Overbill*
- *Request early payment*
- *Request joint-check agreements*
- *Forget to submit other required deliverables*
- *Bill for change orders not approved*

Punchlist

- Perform (and execute) your own **Internal** punchlist (**BEFORE** your client)
- Execute your client's punchlist expeditiously
- Differentiate between "punchout", warranty, and out of scope (change) work as may be listed on the punchlist

"The Golden Years"

Project Closeout

Final Deliverables

- Subcontractor Warranty
- Operation & Maintenance Information
- Final Lien Waivers (including Suppliers/Sub-subcontractor)
- As-Builts (NOT THE FIELD COPY!!!)



READ THE CONTRACT!!!

Lessons Learned

Conduct a thorough After Action Review

- *Upward and Downward involvement*
- *Create a formal report with Key Recommendation for future projects*
- *Don't forget to highlight success!*



Questions???

Thank You!!!



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Matthew Bolyard | *Southway Builders, Inc.*

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1318 E. Fort Ave., Baltimore, MD 21230 | www.southwaybuilders.com

office: 410.332.4134 | dir: 443.438.2754 | email: mbolyard@southwaybuilders.com