

PUNCH LIST

When trouble comes, wise men take to their work;
weak men take to the woods.

- Elbert Hubbard



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"can do" spirit will help the Owner to persevere and overcome obstacles during the Design/Build experience but there is always room for improvement. A standard of **zero defects** may seem impossible to attain; however, the ideal presents a measure for Trade Contractor and Supplier performance. A **PUNCH LIST** organizes and states those details which remain incomplete, unrepaired, lacking parts, or requiring review. To a great extent, if an installation or product does not maintain a standard of zero defects, it becomes a line item on the Punch List.

The Punch List begins as a single note written on a scrap of paper.....a simple reminder to call a Supplier requesting two screws to replace the one's missing in the installation package. By the end of a construction project, a scrap of paper may evolve into a five page document with over one hundred line items in need of final attention. If this happens, you will be required to dedicate several weeks at the end of your project to complete the Punch List. In other words, the Punch List becomes a proverbial nuisance: a source of **procrastination and aggravation**.

To minimize this source of aggravation, Owners are advised to incorporate a few **TRICKS OF THE TRADE**. By using the techniques suggested here, one's Punch List can be kept to a one page document with less than two dozen items. Action is taken on incomplete tasks and activities **when they occur** by constant vigilance and persistence. What follows are descriptions of five techniques to assist project coordination. Use them to control lengthy and bothersome Punch Lists.

1. DESIGN/BUILD COLLAGE. Find a large wall in a designated area of your current residence to act as a huge bulletin board. Separate the wall area into two sections: one for **interior** Design/Build package, and another for **exterior** Design/Build package. On the first day you begin the decision making process of the Design/Build experience, begin hanging pictures, colors, samples, sketches, newspaper excerpts, magazine pages, or photographs with stick pins to the wall. Add to or subtract from this visual collection on a daily, weekly, monthly basis changing your mind as you improve your preferences for **YOUR** life and home style. Since these

are approximations of your end result, don't get bogged down in details. This is **ART WITH A PURPOSE**.

2. CARDBOARD BOX FILES. Find a cardboard box with interior dimensions of at least 13" wide by 24" long. Purchase a box of manila file folders with tabs. Place manila folders in cardboard box labelling according to the major activities of the "*Generic Project Schedule*." Consider this activity a natural extension of the files created previously for the "*Design/Build Matrix*." More than pictorial representation, your filing system will be for technical information, product guides, proposals from Trade Contractors and Suppliers, contract documents from principal players, and official building plans and permits. Eventually, this cardboard box becomes a place for warranties, installation instructions, and information sheets for future reference or turn-over to the next homeowner.

3. ACTIVITY FLOW CHART. Purchase a Spiral Ring Notebook and several felt tip marking pens in different colors. Open the Notebook so there's a clean page facing you on both left and right sides. Let both pages represent a full week's worth of work, and write across the top of the pages each day of the week from left to right. Go through the Notebook and label every other page Weeks 1 through 24. (This timeline will vary depending on the size and complexity of your project.) Refer to the "*Generic Project Schedule*" to determine what should be happening in Week 1, Week 2, Week 3, and so forth. Using **LARGE CAPITAL LETTERS** write each major activity in the center of the page on the appropriate week leaving enough space above and below the capital letters for additional information and jobsite notes. When you talk with Trade Contractors, Suppliers, and your Building Department there will be supplemental information to add which supports each activity. Key ideas and support activities can be written in different colors above and below the sequence of events which reference the Owner to critical points in work flow from week to week. Begin developing your flow chart during "*Design Development*" to better understand how activities relate to one another.

4. JOB DIARY. Purchase an inexpensive Business Card Index, a Weekly Appointment Book, an Incoming/Outgoing Message Register, and a pad of Memo Forms with duplicate sheets attached. Dedicate these items to the Design/Build process noting all contacts, meetings, letters, phone calls, conversations, and changes which occur from beginning to end of your home building project. A thorough record will accurately describe all communications and become **a source to freshen memories and**

maintain order. Use the Memo Forms to put into written form all verbal agreements; be polite, honest, and accurate in your written communications; place copies in respective files. Remember the old builder's adage: ***Hard Copy cures amnesia.***

5. COST LEDGER. In addition to using your Check Register/Job Cost Journal to track expenditures, record payments following the outline provided by the "*Cost Analysis*" (See Pages 71 - 76). Breakdown your cost ledger into four parallel columns labeled: ***budget estimate, bid proposals, actual payments, extra costs.*** For each line item there will be immediate indication for what you estimated the cost would be and what the Trade Contractor's proposal indicated the cost to be **versus** what actually was paid for the product or service and any extra costs which might have occurred. ***Attention should be given to line items costing more than allotted in the Trade Contractor's proposal.***

Here's how these five techniques will assist project coordination.

Using an inexpensive writing pad, list item by item any task remaining incomplete for whatever reason. ***This is your PUNCH LIST.*** Best results occur if you're able to note questions or concerns **BEFORE** the item becomes incomplete or incorrect. The value of your "*Design/Build Collage*" and "*Activity Flow Chart*" is ***to anticipate problems/solutions.*** Beside each item of concern write name and phone number of contact person; pertinent identification or model numbers should be written on same line for immediate referral. Your "*Cardboard Box Files,*" "*Job Diary,*" and "*Cost Ledger*" will be useful ***to locate key information.*** Use Message Register to record dates, times, and content of all communications whether or not the problem was solved. ***Set deadlines*** and place weekly phone calls to eliminate as many incomplete tasks as possible.

During the final week of construction activities, you'll call for a final inspection by your local Building Department. This will be their attempt to maintain a standard of zero defects by reviewing your project one last time. Keep in mind that any code requirements which may have been overlooked during the original plan review and did not get noted on the "*approved*" Drawings will still apply to your project. For instance, most local jurisdictions require house numbers be placed prominently on a new home. You probably won't find this written on the "*approved*" Drawings but the first

comment the field inspector will make as s/he arrives for final inspection is *"Where's the house numbers?"* Prepare yourself for surprises!

If you thought by hiring an Architect or Designer these type of surprises would be entirely avoided, think again. Standard language utilized by Architects and Designers is *"If there is a conflict between Drawings/Specifications and Code, Code will govern."* In other words, as construction professionals they strive to do their best work but sometimes rely on Plan Examiners to discover their design errors. Likewise, Plan Examiners may rely on Field Inspectors to catch any requirements they may have overlooked during their review. And Field Inspectors expect each Trade Contractor and Supplier to be familiar with building requirements and code compliance whether or not noted on *"approved"* Drawings/Specifications. ***This is why your choice of Trade Contractors and Suppliers is crucial to project success and completion of Punch List items.***

As a result of this final review, you may be required to *"call-back"* Trade Contractors and Suppliers who need to correct deficiencies in their work. If you were able to anticipate difficulties, you may have withheld 10% of the contract price (See 4.4 on Page 24) from your payment. This will be a definite incentive to expedite correction of deficient or defective work; otherwise, repeated phone calls may be required to get the *"call-back"* completed. As a courtesy to Trade Contractors and Suppliers, make a Punch List identifying what will be required to finalize their work on your project. Don't ask for work to be done piecemeal. Provide each respective business with their Punch List to correct and complete all remaining work, **and then be done with it.**

Rather than clean windows, floors, and cabinets during this final week, there's a great convenience in engaging the services of a professional cleaning crew to put the polish to your new home. Your time may be better allocated toward the coordination of Punch List activities. Another factor to consider is the amount of effort dedicated to moving your furnishings from one residence to another. If your busy cleaning, who's responsible for placing phone calls and making arrangements for logistics?

If your Punch List has been given its proper attention throughout the project, you'll enter the final week with your mind on what it takes to move-in. With good organization and control, this should be your situation.