

## Intro- Lyle

### Present Bullet Highlights of Outline- 2-3 Minutes

Judd-

#### 1) Clearly defined scope (contracts & plans) & change orders (deviance from original plans and scope).

**Commentary & Framework:** Review the bid documents, plans and budgets with the Production Team and ensure that the plans are up-to-date. Conduct a site review and develop the Production Schedule and resource allocation to include the best Supervisor for the job, determine crew sizes (which may not be the same throughout the project), material delivery schedule and equipment needs. Managing the job starts with putting the right people and the right equipment with the right materials on the job at the right times. If this is well planned and executed, the Supervisor will then have time to focus on the problems/challenges that arise instead of being distracted by not having the basics prepared ahead of time.

#### Efficiency Tools or Methods:

##### A) Labor Budget for Job Supervisor

Make sure whoever is running the crews knows how many hours are in the bid. No overtime unless covered in the bid or by change orders.

Electronic Time Clock- We recently went to an electronic format for our crew time in the field. It has been really amazing to see how the actual hours have come down overall. No more rounding by the field crews has made a significant impact.

Be proactive, not reactive.

##### B) Change Order Form **Document- Handout #1**

Get a signed change order before proceeding with any additional work. No overtime unless covered in the bid or by change orders. Once working on the site, try to get a feel for additional changes that may occur so you may have an opportunity to capitalize on the changes or to minimize expenses for tearing out work to accomplish a change when it would be easy to do at an early stage (installing an electrical conduit before irrigation starts instead of after sod and mulch have been placed for example).

Bobby-

#### 2) Resource (Human & Equipment) Allocation & Training

##### Commentary & Framework:

Finding or assigning the best personnel and most efficient methods can make or break a project. Don't assume everything is going as planned on a job. The person responsible for that job should be reviewing job reports each week to check hours and material. If anything is going south, you are going have a much better chance to make it up or correct it earlier than later in the project. Developing employee skill sets (teaching a new task on-the-job) may not be the most productive for the current project, but may pay off on future jobs once the employee has mastered the new skill. This is a balancing act between production on the current job and investing in future production but is critical to the long-range development of a versatile team.

#### Efficiency Tools or Methods:

A) **Pre-construction Checklist Document- Handout #2**

Make sure all items are checked off on a preconstruction checklist (Utilities Located, Material Ordered, Preconstruction walkthrough with your supervisor and the GC's superintendent, Updated plans and the site is ready to start work).

B) **Production Schedule (Job Specific) Document- Handouts #3 #4, & #5**

Outline the tasks in order to identify a critical path and milestone items that must occur before continuing to the next step (i.e. power & water for the sprinkler system before installing sod). Identify equipment needs based on the production schedule to ensure that the right tools are available to perform the work efficiently (trencher versus hand digging). This schedule needs to be evaluated on a daily basis because change orders or weather may effect when equipment is required and it is better to not have anything in the way or idle when another crew could be using the equipment on another job.

Schedules are a tool, not the law. Reality happens all the time that can alter a schedule. Schedules must remain flexible to be effective.

C) **Production Schedule (All Jobs)**

Project Managers should be looking ahead knowing that project schedules are continuously changing. Knowing that, it is always important to have backup jobs for your crews to go to if a job gets shut down or is delayed.

D) **Training Document- Handout #6**

List important skill sets that employees need to master and then document when an employee has become proficient with the task so that you have an overall concept of your available resources.

Encourage employees to seek out professional certifications such as CLT, Backflow Testing, or Qualified Supervisor License for Pesticides that can benefit the company.

Lyle-

**3) Safety and Liability Management (Employee safety and jobsite safety and drainage/erosion control)**

**Commentary & Framework:**

Avoiding the cost of fines and utility repairs is a cost savings because there is no allowance in budgets for these costs. Working safely is a cost savings to overhead by keeping insurance costs down through avoiding injuries and work time losses for key production employees.

**Efficiency Tools or Methods:**

A) **Pre-construction Checklist and a Utility Request Form Document- Handout #2 & #7**

Scheduling Utility Locates and refreshes for both public and private utilities can identify hand dig areas during the first days on-site which can then allow machinery to be used to its maximum potential.

B) **Signs, Barricades and/or Fencing** for site hazards such as open holes during work hours as well as off hours or weekends. It is critical to schedule the necessary safety materials to be on-site at the start of the project or before they are needed in order to avoid last minute fire-drills to acquire these items and to avoid hazards being exposed for even a few hours.

C) **Personal Protective Equipment** (hard hats, safety glasses, etc...)

Supplying employees with the necessary equipment and maintaining a focus on the use of these items is not something that should be the employee's choice, it must be mandatory and strictly enforced.

Judd-

#### 4) Material handling & Cost Control

##### Efficiency Tools or Methods:

- A) Make sure whoever is ordering material knows what is in the bid. Make sure whoever is running the crews knows how many hours are in the bid. Get a signed change order before proceeding with any additional work. No overtime unless covered in the bid or by change orders. Once working on the site, try to get a feel for additional changes that may occur so you may have an opportunity to capitalize on the changes. Be proactive, not reactive.
  - B) Purchase Order systems
  - C) Available Storage Space and Proper Sequencing of deliveries, I.E. Don't order sod on day 1 before soil prep and irrigation is complete.
  - D) Material Handling Equipment scheduling. Machines with forks being available versus hand unloading pavers for example.
  - E) Project Closeout & Final Inspection Report
- Document- Handout #8**  
Defining the "Completion" Date is critical to begin the warranty period. Costs for sprinkler winterization or start-up as well as an allowance for plant replacement should have some value or allowance in a job budget. If the end of the warranty period is never defined by a Final Inspection, the warranty period could linger beyond the budgeted allowances.

Lyle-

#### 5) Adherence to local codes

##### Commentary & Framework:

Adherence to codes is an often overlooked item that can become costly and undermine the relationship with the client. It is fine to "Exclude" permits, licenses and fees on your bid, but someone will have to handle these items sooner or later. The responsible practice is to discuss this openly with the client before beginning and decide who will handle plan submissions, City/County approvals, who will be paying for these costs including the time to prepare and submit these documents.

##### Efficiency Tools or Methods:

- A) Know when a task requires a licensed contractor such as a Plumber for backflows, an Electrician for power supply, or a Landscape Architect for plan preparation.
- B) Ask about HOA guidelines for plan submittals and work hour limitations.
- C) Learn the requirements for Sales and Use Taxes for each job.
- D) Know local codes regarding water usage, soil amendment requirements including inspections, and storm water management issues.

#### Job Orientation Document- Handout #9

# FIELD CHANGE ORDER

DATE \_\_\_\_\_

DATE(S) WORK DONE \_\_\_\_\_ Job # \_\_\_\_\_

JOB NAME \_\_\_\_\_ OWNER/GC/ARCH \_\_\_\_\_

CONTACT \_\_\_\_\_ ADDRESS \_\_\_\_\_

*The Owner / General Contractor / Architect hereby authorize LANDSCAPE COMPANY INC. to perform the following additions and/or deletions to the work at the above project in accordance with the contract specifications:*

DESCRIPTION OF WORK: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

AUTHORIZATION FOR WORK TO BE DONE: \_\_\_\_\_

<i>Quantity</i>	<i>Item</i>	<i>Unit</i>	<i>Total</i>
<i>Total</i>			

By: \_\_\_\_\_  
*Landscape Contractor*

By: \_\_\_\_\_  
*Owner/Gen Contractor/Architect*

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## PRE-MOBILIZATION CHECKLIST

Job No.:  Date of Inspection:

Job Name:  Time of Inspection:

Job Address:  (Company) Inspector:

**Others present (if applicable):**

Owner:  Architect:

Other:

YES (Must enter 1) NO

All Concrete Installed?  
(Including curb, gutter, handicapped ramps)

Grades set with tolerances as per proposal?  
(+ / - 1/10 ft of finish grades)

Are there any drainage issues that need to be addressed?

Building Exterior Finished?  
(Including painting, roofing, stucco,  
brick work, cleaning of brick)

Other Site Contractors finished or out of the way?

All site utilities installed including conduit?

Site is cleaned up of debris from other contractors?

Irrigation copper stubbed outside  
the building or above ground?

Is electricity available for irrigation controller?

Have locates been called in (private & public)?

If any of the above items are answered "NO", please explain:

Date of re-scheduled walk through if needed:

# LANDSCAPE CHECKLIST

Job No.: \_\_\_\_\_  
 Job Name: \_\_\_\_\_  
 Job Address: \_\_\_\_\_  
 Date of Inspection: \_\_\_\_\_

	YES		N
	Proj Mgr	Foreman	
Have all drainage issues been resolved prior to installation of landscape material? Todo lo relacionado al drenaje esta resuelto antes de la instalacion del material de Jardineria?			
Have all trees been staked and wired properly with tags removed? Todos los arboles han sido estacados; amarrados y las etiquetas removidas?			
Have all trees and shrubs been pruned as needed? Todos los arboles y plantas han sido podadas como sea necesario?			
Branches from shrubs planted in rock and mulch areas are not buried? Las ramas de plantas no estan Cubiertas por grava o paja?			
All downspouts are in the down position or if connected to drain pipe, the pipe drains and daylight correctly? Todos los desagues de la casa estan abajo y si estan conestados a pipa de drenaje estan correctamente drenados?			
Is the depth of the rock or mulch groundcover @ 3" or required depth, no fabric underlayment showing? La paja o grava estan a la cantidad requerida ya sea a 3" o como la requiera la cantidad de fabric se ve y cortarse?			
All trees and shrubs have the correct amount of drip emitters and are working properly? Todos las plantas y arboles tienen la cantidad de emisores de agua y trabajan apropiadamente?			
Annual beds have irrigation? Areas de floras tienen irrigacion?			
Trees and shrubs in native and sod areas have had mulch installed around them? Arboles o plantas en areas de semilla tienen irrigacion y se les ha instalado paja?			
All items installed are as per plans? If no, does (Company) have approval for an alternate installation? El jardin ha sido instalado como lo ensena el plano? If no, (Company) ha aprobado alternativa instalacion?			
Explain:			
Are all irrigation heads and valve boxes installed at the correct height? Todos las cajas de valvulas y cabezas de irrigacion y se les ha instalado paja?			
If erosion control netting is required, has this been installed? Si se requiere netting de control de erosion, ha sido instalado?			
If yes, explain:			
Are all areas around job site cleaned up? Todos las areas han sido limpiadas?			
Have all sidewalks, patios, streets, walkways been cleaned up and washed down? Todos las banquetas, patios, calle han sido limpiados y lavadas?			
Has this job been completed 100%? El trabajo se ha terminado al 100%?			
If no, explain:			
Are all tools including attachments for equipment accounted for and ready to be removed from jobsite? Todo la herramienta incluyendo las partes de skid loader se han recogido del trabajo?			
Has (Insert Your Company Name) damaged any concrete, siding, fence, etc. that needs to be repaired? Se ha cometido algun dano al concreto, a la casa, barda, etc. necesita alguna reparacion si se requiere?			

Project Manager/Foreman Name: \_\_\_\_\_

# IRRIGATION PUNCH LIST

## LISTA PARA CHECAR EN IRRIGACION COMERCIAL

Job No.: \_\_\_\_\_  
 Job Name: \_\_\_\_\_  
 Job Address: \_\_\_\_\_  
 Date of Inspection: \_\_\_\_\_

Yes (Must use 1)		NO	
<i>Proj Mgr</i>	<i>Foreman</i>	<i>Proj Mgr</i>	<i>Foreman</i>

Heads (Cabezas de Sprinkles)

1. Height, Grade; 1" above sod and flush with concrete, distance; 2" from concrete edge.  
 Altura, 1" arriba del nivel de la tierra para el pasto y al mismo nivel con el concreto distancia 2" orilla del concreto.
2. Flushed, nozzled, adjusted.  
 Se le corrio agua para sacarte la tierra a los sprinkles, se le instalaron las boquillas se ajustaron.


Valve Boxes (Cajas de Valvulas)

1. Height, Grade, Orientation  
 Esta correcta la altura para el nivel del pasto piedra, esta orientada correctamente.
2. Rock, Fabric, Bricks - As per plan.  
 Piedra, fabric, ladrillos, fueron instaludos como lo ensena el plano.
3. Valves wired.  
 Se conectaron los cables de las valvulas.
4. Wires coiled correctly.  
 Los cables fueron enrollados en forma de spiral correctamente.
5. Ball valves open.  
 Las valvulas de bola estan abiertas.
6. Branded lid with correct zone number.  
 Las tapas de las cajas fueron marcadas correctamente con el numero do la zona.


Controller (Reloj)

1. Labeled and programmed correctly or as per plan.  
 Fue programado y marcado con las zonas instaladas o' fue instalado como lo ensena el plano.
2. All zones turning on and off through controller.  
 Todas las zonas fueron prendidas y apayadas a travez del controlador (reloj).
3. As built. Complete and turned into the office.  
 Elplano de irrigacion fue marcado definiendo como fue instalado el sistema, terminado y entregado en la oficina.


Drip (Riego por Goteo)

1. All areas receiving water, all zone controls open.  
 Todas las areas estan recibiendo agua, todos las controles de la zona estan abiertas.
2. Flush caps installed on all drip ends.  
 Flush caps fueron instaladas en todos los finales de la manguera.
3. Drip programmed properly on controller.  
 El riego por gateo (drip) esta programado apropiadamente en el controlador (reloj).


Have all discrepancies been addressed / corrected?

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Project Manager/Foreman Name: \_\_\_\_\_

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## Hand Tools Training Guide

(Part of "Tailgate Meetings that Work : A Guide to Effective Construction Safety Training" series)



Other languages: [Versión en español](#)

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[Robin Baker](#), [Robert Downey](#), [Mary Ruth Gross](#), [Charles Reiter](#)  
 Labor Occupational Health Program

These tailgate/toolbox talks were developed for use under California OSHA regulations. The complete set is available from the Labor Occupational Health Program at UC Berkeley. For ordering information, visit the website ([www.lohp.org](http://www.lohp.org)) The American Conference of Government Industrial Hygienists (ACGIH) has adapted these talks to apply to federal OSHA regulations. To contact ACGIH, visit its web site ([www.acgih.org](http://www.acgih.org)).

*Before you begin the meeting...*

- Does this topic relate to the work the crew is doing? If not, choose another topic.



- Did you read this Training Guide and fill in the blanks where the appears? (To find the information you need, look over the Safety Walkaround Checklist for this topic.)
- If possible, did you bring a defective hand tool that's been removed from service to show the crew?

*Begin:* Almost everyone in the trades has been hurt by a hand tool. We expect it to happen. We figure it will be minor. But sometimes it isn't.

Hand tools can cause serious accidents. You could even lose a finger or eye. A hand tool, from a screwdriver to an axe, is most dangerous when you misuse it or don't keep it in good repair.

Hand tools can also contribute to "ergonomic" injuries. These are injuries to the muscles, tendons, joints, and nerves. They include strains and sprains in many parts of the body, tendinitis, and carpal tunnel syndrome. Ergonomic injuries can happen right away or develop over time.

Always choose the right tool for the job. You're inviting trouble if you use a tool for a job it isn't designed to do. You can damage the tool, ruin your work, and injure yourself.

*You or a crew member may want to add a personal story about hand tools.*

*Next, point out a few hand tool hazards you have noticed at this particular job site:*



<b>ASK THE CREW THESE QUESTIONS:</b>
--------------------------------------

*After each question, give the crew time to suggest possible answers. Use the information following each question to add points that no one mentions.*

### **1. What safety rules should you keep in mind when you use hand tools?**

- Use the right tool for the job. Never use a tool for a job it wasn't designed to do. Make sure you're familiar with your tools and know how to use them properly.
- Select tools that fit the hand comfortably, have soft grips that don't cut into your hand, and are not too heavy.
- Keep secure footing and balance when you use tools. The area where you're standing shouldn't be slippery or cluttered.
- Use tools on a stable work surface. Hold the work with a vise or clamps if necessary.
- Use tools in a well-lighted area.
- Avoid awkward positions when using hand tools. Some tools are poorly designed and force you to work with unnecessary strain on your wrists, arm, shoulder, or back. Use tools with a better design. For example, a longer handle can minimize reaching. Sometimes an angle between the handle and tool can help keep your wrist straight.
- Make sure you have enough space to work, and can keep your body at a comfortable angle to the work. Adjust the position of the tool, or the orientation of the work surface, to minimize bending your wrist or body, reaching, or twisting.
- Keep tools where they belong. Never leave them on a ladder, scaffold, or overhead work space. Keep them where they won't fall on someone or trip someone up.
- Carry tools properly. Use a tool belt, especially when you're on a ladder. But be sure your tool belt isn't too heavy. It may strain your lower back and hips. Carry only essential tools.

### **2. How do you make sure your tools stay in safe condition?**

- Keep tools clean. Keep them away from water, oil, chemicals, and hot surfaces that may damage them.
- Inspect your tools every day before you use them. Check them for sharpness, chips, "mushrooming," wear, and metal fatigue. Also make sure that bolts, nuts, and screws are tight.
- Remove damaged or defective tools from service. Tag them: DO NOT USE.
- If the company owns the defective tool, turn it in after you tag it. It will be repaired or disposed of.



On this job site, turn in defective tools to-

Give name and location: \_\_\_\_\_

- If you own the defective tool yourself, take it to your car or truck immediately after you tag it. Remove it from the site as soon as possible.
- Never use damaged or defective tools until they have been properly repaired.

### **3. What precautions should you take when using saw blades, knives, or other sharp tools?**

- Keep blades, knives, scissors, and other sharp tools sharp. Dull tools are more hazardous than sharp ones.

- Let the cutting surface do the work—don't force it.
- Keep your knife in a sheath.
- With any sharp tool, always cut away from yourself. (Except with draw knives.)
- Stay alert.

**4. Do you need to use special tools when you work near a flammable substance?**

- Yes. It's safer to use special spark resistant tools near any highly flammable substance (whether it's a gas, vapor, or liquid).
- Ordinary iron or steel hand tools can produce sparks when you use them. Spark resistant tools are usually made of brass, plastic, aluminum, or wood.



We \_\_\_ will or \_\_\_ will not require spark resistant tools on this site.

*(If applicable:)*

We need them in these jobs and locations: \_\_\_\_\_

**5. What protective equipment might you need when you work with hand tools?**

You may need:

- Safety glasses, goggles, or other eye protection.
- Wire mesh gloves and an apron if there's a risk of cuts.
- Steel-toed safety shoes if there's a chance of injuring your feet.
- Boots if you're working in a wet area.
- Hearing protection (ear plugs or ear muffs) if your work will create a lot of noise.

On this job, we require you to use the following protective equipment when working with hand tools-



List types required on the site, and where to obtain: \_\_\_\_\_

\_\_\_\_\_

- If you have to use any of the personal protective equipment (PPE) that we've discussed, the company is required to supply it and train you in its use.

**CAL/OSHA REGULATIONS**

*Explain:* Most of the safety measures we've talked about are required by Cal/OSHA. We have to take these precautions—it's the law. Also, Cal/OSHA recently adopted a new ergonomics standard. On any construction job, if there has been more than one ergonomic injury within a year to workers doing the same task, the company must take steps to identify and correct these hazards. We must also provide relevant training. I have a Checklist of the Cal/OSHA regulations on hand tools. If you'd like to know more, see me after the meeting.

**COMPANY RULES**

*(Only if applicable.)* Besides the Cal/OSHA regulations, we have some additional company rules about hand tools.



Discuss company rules: \_\_\_\_\_

\_\_\_\_\_



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# LOCATES REQUEST FORM

Ticket # \_\_\_\_\_

Today's Date \_\_\_\_\_ Requested by \_\_\_\_\_

Job Name \_\_\_\_\_ Job # \_\_\_\_\_

Client Name \_\_\_\_\_

Property Address: \_\_\_\_\_

(please be **specific... St, Ave, Blvd**)

City \_\_\_\_\_ County \_\_\_\_\_ Zip \_\_\_\_\_

Major Cross Streets \_\_\_\_\_

Is access open to property? \_\_\_\_\_ Need locate done by \_\_\_\_\_

Area to be located (please be **specific...include length/width in feet of area**):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Type of work \_\_\_\_\_ Max. dig depth \_\_\_\_\_

Directional boaring? \_\_\_\_\_

Meet ? Yes \_\_\_\_\_ No \_\_\_\_\_

If there's a choice, what's a good meet date \_\_\_\_\_ & time \_\_\_\_\_?

Meet Location (please be **specific**): \_\_\_\_\_

\_\_\_\_\_

## Office Use

-----  
Ticket # \_\_\_\_\_ Locate Date \_\_\_\_\_ Time \_\_\_\_\_

Called in by \_\_\_\_\_ Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

------(Office Use Cont.)-----

Locate will include the following:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_
- 8) \_\_\_\_\_

Need to call the following (not included in locate):

- |                     | Ok                       | Othr                     |
|---------------------|--------------------------|--------------------------|
| 1) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 2) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 3) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 4) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 5) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 6) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |
| 7) _____ phn: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____               |                          |                          |

# FINAL INSPECTION REPORT

Job No.:

Date of Inspection:

Job Name:

Time of Inspection:

Job Address:

Warranty Start Date:

(Company) Representative:

**Others present (representing):**

Owner:

Architect:

Maintenance Co.:

Other:

**Areas Inspected:**

Yes	N/A	Item	Y	N/A	Item	Y	N/A
<input type="checkbox"/>	<input type="checkbox"/>	Turf	<input type="checkbox"/>	<input type="checkbox"/>	Bed Areas	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Irrigation Sytem	<input type="checkbox"/>	<input type="checkbox"/>	Annual Beds	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Plant Material	<input type="checkbox"/>	<input type="checkbox"/>	Hardscape	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Drainage	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Grading	<input type="checkbox"/>	<input type="checkbox"/>

PUNCH LIST?

Yes  
 No

Date Punch List completed:

NOTES	
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**Turnover items to Owner / Contracor:**

Yes	N/A	Item	Y	N/A	Item
<input type="checkbox"/>	<input type="checkbox"/>	Specifications	<input type="checkbox"/>	<input type="checkbox"/>	Irrigation Parts
<input type="checkbox"/>	<input type="checkbox"/>	Keys	<input type="checkbox"/>	<input type="checkbox"/>	As-Builts
<input type="checkbox"/>	<input type="checkbox"/>	Manuals	<input type="checkbox"/>	<input type="checkbox"/>	

Turned over to:

Maintenance Period:

30 Day Internal       30 Day  
 12 Month                       Other (fill this in)

**Job Orientation Agenda**  
**"Without a Who and a When it is Merely a Wish"**  
**"There are No Wishes Here"**

Items	Responsibility/ Who	Notes	When
-------	------------------------	-------	------

**The following is based upon : We are awarded a contract. What is next?**

Review proposal and contract to verify matching in scope of work to be performed. Submit job number request.	Estimator	Done prior to submitting for job number.	Before
Set Job Orientation Meeting	Operations Mgr.	Gets the motion set for the job. Needs to be done within a week of it getting placed on schedule list.	Before
"Estimate Information"	Estimator	Information put into estimating after sale and before distribution	Before
Job Information	Estimator	Put together all job information in Newcommondata & Job Book	Before
Build Job Book	Estimator		Before
Submittals	Estimator & Project Manager	May not be done by the meeting, but we need to be working on them. This may lead to changes in materials and will need to be reviewed during meeting.	Before/ During
Copies of Plans (3)	Estimator/Designer	Immediately after award of project	Before
Review Plans: color and verify quantities	Project Manager	Should be done prior to the meetings, on own, so vision is not skewed	Before
Site Visit	Project Manager & Estimator	Prior to meeting. Meet with Client (if possible). Take photos and document existing.	Before
Estimate Review	Project Manager	Should be done prior to meeting, on own, so vision is not skewed	Before
Assign Note Taker		Decide who will be recording the information.	
Plan Q&A	Project Manager & Estimator	Question and answer session during makers and breakers.	During
Estimate Q&A	Project Manager & Estimator	Question and answer session during makers and breakers.	During
Estimate Notes	Estimator	Go over notes/ correspondence during the bidding process that may have an impact.	During
Contract	Estimator	Go over any pertinent info that the field may need to know about and follow.	During
Completion Dates	Estimator & Project Manager	Discuss timeframes and completion dates. (Liquidated Damages)	During
(Company) Proposal	Estimator & Project Manager	Review notes and clarifications & Verify that the contract is consistent	During
Permits/ License	Estimator	Go Over any permits/ lisenses that we may need to complete the project	During

Items	Responsibility/ Who	Notes	When
Vendor Discussion	Project Manager & Estimator	Project manager to contact suppliers including in house to arrange for materials and delivery dates. Vendor may change, so wait on PO'S	During
Field Report Review	Project Manager & Estimator	Done during maker's and breakers- Determine crew that may be needed including specialty items	During
Equipment	Estimator & Project Manager	Determine what type of equipment is needed on site including duration/ dates.	During
Addendums	Estimator	Review addendums and the impact they have on scope	During
Change Orders Prior to Start	Estimator	Review any changes to plans and specifications (including costs/ production)	During
Billing & Change Orders	Estimator/ Sales/ Project Manager	Go over billing requirements and submittal dates, coordinate what info and when needed to complete. Determine change order process.	During
Long Lead Items (4 or more weeks)	Estimator	Depending on schedule, estimator may need to order Will still need PO.	During
Specialty Items	Estimator	Discuss specialty items (items typically not done in house) ie: (signs, walls , special licenses, pottery, out side of our area)	During
Sub-Contractors	Estimator/AP	Discuss quotes/ terms from determined subcontractor and expectations. Must have signed contract and insurance certificate.	During
Irrigation POC & Electrical (Responsibilities)	Project Manager & Estimator	Discuss responsibilities	During
Site Photos (Pre-Construction)	Estimator & Project Manager	Any Photos of pre-existing conditions that may be useful to construction Photograph most everything, any preexisting damage, drainage, weeds anything that may impact the project. Download into proper file	During
Pre-Construction Site Analysis	Project Manager	Before crews mobilize on site	Post
Verification to Vendors	Project Manager	After Makers and Breakers	Post
Purchase Orders	Project Manager/Accounts Payable/Nursery mgr	Get with accounts payable prior to starting the job	Post
Change Orders After Start	Project Manager & Estimator	Need to set up the "How to" when the situation arises.	Post
Preliminary production schedule	Project Manager	Set up preliminary construction schedule for crews/ equipment/ materials	Post

## **Contacts & Links**

### **Top Five Challenges & Efficiencies for Landscape Construction/Installation Crews**

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**To acquire a detailed outline and the example forms used in the  
presentation:**

**[progreenexpo.com](http://progreenexpo.com)**

**The click on this Seminar Title, and then click on Download Handouts**

#### **Additional helpful links:**

**A Guide to Effective Construction Safety Training**

**<http://www.elcosh.org/en/document/266/d000260/hand-tools-training-guide.html>**

**Associated Landscape Contractors of Colorado**

**[alcc.com](http://alcc.com)**

**Planet (National)**

**[landcarenetwork.org](http://landcarenetwork.org)**