



Bulletin

Pre-Job Conference

Foreword

“Planning Ahead” is a basic management concept for businessmen in any industry. In construction management, it is essential for the successful completion of a job.

One technique of planning that we highly recommend is holding a Pre-Job Conference with the owner, architect and all contractors on the job. This should be done as soon as possible after contracts are signed or as far as possible in advance of starting work.

The attached bulletin outlines the importance of the Pre-Job Conference and presents an agenda for your use at these meetings. For more information on this subject, please review the section in MCAA’s Project Manager’s Manual.

The Pre-Job Conference serves a very important communications function on a project. It is of such importance that one should be held on every major job.

In fact, the general or special contract conditions frequently may specify that such a conference be held. If there is no such requirement in the general and special conditions of a contract on any job, a mechanical contractor should hold such a conference anyway—one with the owner and architect and one with the subcontractors. It should become part of each contractor’s job management procedures.

Not only may these conferences be the first occasion that all parties on the construction team have to meet face-to-face and become acquainted, they also

set the stage for continued communications and better job relations.

The Pre-Job Conference may be chaired by the owner, architect or general contractor. In addition to these people or their representatives, the meeting should include the resident inspector or consulting engineer, all prime contractors, main subcontractors, and sub-subcontractors, if desired.

Following this meeting, the subcontractor should have an in-house conference with both his key people and all subcontractors in attendance. Many important matters can be clarified at this time. Although requirements will vary from job to job, the following example may be helpful in establishing an agenda for such a conference:

AGENDA FOR PRE-JOB CONFERENCE

CORRESPONDENCE:

- (1) Mailing address of owner, architect, engineer, general contractor and other major subcontractors _____
- (2) E-mail address of owner, architect, engineer, general contractor/construction manager and other major subcontractors. _____
- (3) Cell phone numbers of owner, architect, engineer, general contractor/construction manager and other major subcontractors' field representatives. _____
- (4) Who is responsible for the job conference minutes and will a copy be mailed to everyone? _____
- (5) Who will call future meetings? _____

SUBMITTALS:

- (1) Number of copies for each party _____
- (2) Length of time for processing _____
- (3) Shop drawings—responsibility for review _____

INSPECTIONS:

- (1) Are notices required? _____
- (2) Authority of the inspector _____
- (3) What tests require written reports or signature? _____
- (4) Daily Reports _____
- (5) Photos _____

JOBSITE CONDITIONS:

- (1) Special hazard areas _____
- (2) Welding permits required _____
- (3) Shutdowns _____
- (4) Parking _____
- (5) Working hours _____
- (6) Security clearance (badges required) _____

(7) Change house _____

(8) Contractor gate _____

(9) Temporary toilet facilities _____

(10) Craft jurisdictional problems _____

(11) Temporary heat _____

ACCIDENTS:

(1) Ambulance service available _____

(2) Doctors to be listed for service _____

(3) Nearest medical facility _____

(4) Accident reporting procedure _____

OWNER FURNISHED EQUIPMENT:

(1) Delivery schedule _____

(2) Receiving, storage, installation, start-up, guarantee _____

(3) Insurance to be furnished _____

SAFETY PROGRAM:

(1) OSHA requirements _____

(2) Tool box meetings _____

(3) Safety equipment required and/or available _____

(4) Safety responsibility of various contractors _____

SCHEDULES:

(1) C.P.M _____

(2) General Contractor's schedule _____

(3) Subcontractor's input to schedule _____

(4) Notification of change in schedule _____

STORAGE AND WAREHOUSING:

(1) On-site locations _____

(2) Off-site locations _____

(3) Bonded warehouse _____

(4) Contractor's yard _____

BILLINGS AND PAYMENTS:

(1) Cut-off date _____

(2) Billing date _____

(3) Payment date _____

(4) Approval of billing _____

(5) Approval of percentages _____

(6) Retention _____

(7) Material stored _____

CHANGE ORDERS:

(1) Who approves _____

(2) Field change orders _____

(3) Overhead and profit percentages _____

(4) Hand tool rate _____

(5) Equipment rental schedule _____

(6) Mark-up on subcontractors _____

BACKCHARGES:

(1) Require they be billed out separately _____

(2) Require that they be rendered monthly _____

(3) Percentage of overhead for labor and material _____

(4) Require that work sheets must be signed by firm representative _____

(5) Require immediate notice of backcharges to determine responsibility _____