

Project Management I: Monitoring Activities to Ensure Compliance with Specifications

National Association of Elevator Contractors



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About this Study Guide

This guide is intended to supplement your individualized Skillsoft learning by providing materials and examples specific to the vertical transport industry.

The learning objective for this study guide is for the student to be able to identify monitoring actions and related reporting systems to ensure compliance with job specifications and contract requirements.

Information included in this study guide is intended for educational purposes only. Check with your company for specific guidelines.

Skillsoft related lessons:



Skillbriefs: Developing the Project Charter-The Completed Project Charter-Project Planning (proj 20 a01 bs en)
Direct, Monitor and Control Project Work (proj 20 a02)
Quality assurance and quality control(Proj 24 a02)
Monitoring and Controlling Basics PROJ_20_ A02_bs

Job Aid: Job Aid - Quality Management Template (Proj_24_a01_bs_en)

Expert Summary

The project specifications need to be studied and understood when the bid or estimate is being prepared. It is best to break the specification down by component. If the project requires outside vendors to provide pricing for material, the estimator should forward the appropriate sections of the specification to the vendor. It is the responsibility of the estimator to review vendor quotes to ensure compliance. The estimator should document compliance and list any deviation or clarifications. Keep in mind, specifications are not perfect. Sometimes, the specs are modified from other jobs or pulled from a website. It is important to understand the "intent of the specifications". Once a job is bid..... you are stuck with the specifications. Therefore, you need to make sure your deviations and clarifications are specific and understood. When a quote turns into a contract, you will not have the ability to take further exceptions. The specifications should be reviewed several times during the course of the job. (quote, upon contract, during submittal process, prior to purchasing material, prior to installation, and during project completion)

- Review Specifications in detail paying special attention to project description, location and AHJ/code
- Identify items needing vendor quotes and forward to appropriate vendor(s) accordingly
- Identify discrepancies and submit Request for Information(RFI) as required
- Identify clarifications, exclusions, inclusions and submit with bid
- Identify special operations, subcontractor requirements and/or any / all labor needs

Documents referenced in this example

See documents "Sample Specs" "Sample Bob's Garage subcontract with XYZ elevator company", Attachment 3, sections 2.1 and 2.2.,

Example

In the elevator industry, project monitoring can be viewed as two phases, preparation and initiation/execution. The tasks to support compliance with specifications are identified for each phase. (See *Sample Specs*)

Preparation phase: The following tasks performed by the responsible person contribute to the compliance of job performance with job specification. These tasks would take place in the bidding process.

TASK	RESPONSIBLE PERSON
Review specifications	Estimator
Clarify/document assumptions and deviations	Estimator
Secure and review vendor quotes and delivery	Estimator
Secure labor duration quote	Estimator with supervisor
Confirm labor rates against regulatory standards	Estimator
Consider limitations arising from client organizational infrastructure (i.e. days site is unavailable for work)	Estimator
Consider limitations arising from organizational infrastructure, policies, guidelines (human resources /capital equipment, overtime and vacation policies)	Estimator with appropriate management person
Consider marketplace conditions (seasonal and economic supply and demand cycles)	Estimator with suppliers
Consider relevant historical information (similar jobs)	Estimator with other estimators, supervisors and project managers
Assess known and unknown risks	Estimator with supervisor, project managers

Initiation and execution phase: The following activities contribute to the compliance of job performance with job specifications and contract requirements. Actions are based on Sample Bob's Garage subcontract with DEF General Contractor, Attachment 3, sections 2.1 and 2.2. These sections outline the meeting schedule, documents for review and persons who need to attend.

Section 2: Management/Coordination

[Modification of the below items to be determined by separate Work Authorization]

2.1 Kickoff Meeting: *Subcontractor's Key Project and other personnel as required by DEF General Contractor, as a minimum, shall attend a mandatory two (2) hour kickoff meeting prior to the commencement of Subcontractor's work on the site. The purpose of this meeting is to familiarize everyone with the site, go over Project communication procedures, verify scope of Work inclusions and exclusions, review the Project's safety and logistics plan, coordinate submittal and Work schedules, and to discuss other issues that DEF General Contractor and or Subcontractor consider appropriate.*

2.2 Job Progress & Coordination Meetings: *DEF General Contractor will conduct regular job progress meetings to ensure clear communications and a smooth flow of the work. The Subcontractor's on-site supervision and any management or detailing resources and other personnel, as required are required to attend and participate in these meetings and provide appropriate information in order to allow for the timely monitoring and flow of the Work. Below is a schedule of planned meetings:*

MEETING	RECURRENCE	APPROXIMATE DURATION
Subcontractor Progress Meeting	weekly	1 hours
MEP Coordination	weekly	2 hours

Other activities that require monitoring are related to material procurement and involve ordering, tracking, receiving, confirming compliance with specs, and delivery to site.

Final exercise questions will be based on

Expert summary, documents referenced in example and example.