



H C Fennell Consulting, LLC

Applied Foam Technologies and Commissioning

Thank you for the opportunity to introduce you to my Foam Contractor Project Management (PM) services. As an architect, specification writer, and long-time foam contractor, I have developed systems and documentation for pricing, bidding, contracting, and managing projects which include polyurethane foam and high-performance air barrier installations in conventional and specialty applications. Based on this experience, I now provide document review and/or development services to industry members, as well as support for designing and implementing project management systems.

Following is an introduction to the systems (underlined below) and documentation that I have available to be developed into a complete project management system that will match the needs of your business. Training for the implementation and use of these systems is available as well.

Introduction

The documents and systems listed below are modular components of the "PM Master Checklist" system which evolved over nearly thirty years to guide project managers in processing standard and specialty projects. Elements of the system typically were added as a new market was developed or a problem first occurred, so it is completely based in real-world, often costly, experience. The PM Master Checklist covers:

- Step-by-step PM Procedures
- Building science
- Specialty applications
- PM protocols
- Procedures/Systems for Successful Project Management

This system can be an internal quality/cost control system employed to reduce the risk of cost over-runs and poor project performance. It can be used for every project to assure that critical steps are not missed, or only when an experienced PM is managing a project of a type for which he has limited experience. It can be used to define PM responsibilities in your organization, and to identify practices that you want to establish as "SOPs" that must be followed by all project managers. It can also be one part of a company-wide assignment of responsibilities that can avoid tension or disputes between management and field personnel (Also see Technician Master Checklist).

The modular concept allows the elements of this system to be implemented over time as the needs arise or as your business grows into new markets. For example, SOPs for specialty applications can be added to your program if and when projects are sold.

Procedures/Systems for Successful Project Management

- Industry relationships
 - Intro to Architectural design implications
 - Intro to Building science implications
 - Intro to related codes and standards



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- Working with General contractors and CMs
- Working with Architects, Energy Gurus, and Engineers
- Pre-qualifying projects before bidding them
 - The Client intake pre-qualification process
 - A successful project intake process
 - Client database system
 - Standardized client file organization
- Site inspections for existing buildings
- Processing bid packages
 - Bid documents and management
 - Reading plans and specifications
 - Doing take-offs
 - Estimating
 - Selling to cost reduction opportunities at bid time to get you into the negotiation phase
 - Submit multiple prices (always make it the client's choice)
 - Offer high-production and low-production prices
 - Requires minimum sq. ft. per mobilization and total mobilizations
 - Define a mobilization and give the cost for each additional mobilization
 - Offered discounts
 - Qualifications in your bid
 - Clarifying the work scope
 - Using Alternates
 - Offering QA services to raise the bar
 - Using offered guarantees
 - Writing proposals
 - The bid process
- Contract negotiation and management
 - Risk management
 - Avoiding design liability
 - Avoiding contract liabilities (small and large projects)
 - Confined spaces training and certification for crawl spaces
 - See Risk Assessment Program
 - Agreeing on the scope
 - Contract boiler plate – when to use it and when to drop it out
- Project planning
 - Project timeline and progress tracking
 - Sequencing
 - Kick-off meeting strategy



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- Permits and approvals
- Codes and regulations
- Scheduling
 - Avoiding delays
 - Start at the top and work down (reduces masking finishes installed below the work)
- Punch list system
- Project documentation for the installers
 - Work folder system
 - Use SOPs for the crews to establish initial/minimum project standards
- Subcontractors
- Cost control
- Working on union projects
- Project oversight
 - Project coordination and risk management
 - Purchasing and inventory management
 - Vehicles and equipment
 - Crew travel
 - Cold-weather project protocols and forms
 - Standard Operating Procedures
 - Project management in the office
 - Installation oversight
 - Communicating the work to the installers
 - Productivity tools
 - Safety management
 - Project Etiquette
 - Using change orders effectively
 - Quality assurance and testing
- Completed work
 - Project closeout procedures
 - Billing
 - Data collection
 - Tracking and using "actual" project data
 - Managing customer service – disputes
- Post contract
 - Submittals
 - Insurance
 - Schedule verification
- Sample projects



Estimating

- Estimating foam installations
 - Reading Blueprints
 - Understanding the Architectural documents
 - Understanding the specifications
 - The Estimating system
 - Doing take-offs and a red-flag review of the work
 - Estimating system support templates
 - Material pricing
 - Productivity records
 - Environmental condition impacts
 - Substrate impacts
 - Staging impacts
 - In-place foam density tracking
 - Volume pricing
 - Material tracking
 - Product selection criteria records and forms
 - Meeting insurance requirements (including bonding)
- Estimating coatings and air barrier systems
 - Fire protection
 - Vapor and primers
 - Exterior coatings
 - Membranes
- Estimating equipment rental and direct costs
- Using RFIs to gain an advantage in the bid process
- Dealing with design errors and omissions

Proposals/Contracts

- General Formats
 - Standard letter proposals/contracts
 - Walls
 - Roofs
 - Ceilings
 - Floors
 - Crawlspace/Basements
 - Boiler-plate proposal/contract sections
 - Pricing includes
 - Pricing does not include
 - Specific Conditions to assure an efficient project



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- Project Coordination
- Access and safety requirements
- Quality Assurance requirements
- Terms and conditions, credit card payments
- Schedule of Rates proposals/contracts
- Short-form contracts
- Site visit & inspection proposals/contracts
- Check-box take-off, pricing, and contract "one-step" forms
- Diagnostics proposals/contracts
- Addendums and alternates
- Change order proposals/contracts
- Liens and waivers
- Declining to bid forms
- Proposal/contract by project type
 - Residential
 - Walls
 - Roofs
 - Ceilings
 - Floors
 - Crawlspace/Basements
 - Commercial - full-scale proposals
 - RFI forms
 - Proposals/contracts
 - Terms and conditions
 - Submittals documents
 - LEED
 - Performance guarantee forms
 - MSDS and Product data sheets
 - Safety plans
 - Post-bid offerings (value pricing)
 - Bonding language
 - Commercial - short forms
 - Fast-track projects
- Proposal/contract by application
 - Ice dam prevention and remediation (and other specialty applications)
 - Exterior cavity-wall projects
 - Transition membranes w/options
 - Cavity-fill projects (standard construction, masonry, etc.)
 - Special use buildings (Museums, Pools and Spas, etc.)
- Proposals/contracts - Quality assurance and testing



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- Quality assurance protocols
- Quality assurance testing (materials, theatrical fog, blower door, IR thermography, adhesion, etc.)
- Mockups
- First-instance testing
- Compliance testing

Forms and checklists

- Site visit check lists
- Work orders (installation crews)
- Time sheets
- Equipment checklists
- Materials and supplies checklists
- Nonconforming work report forms
- Change order forms
- Substitution request forms
- Subcontractor daily report forms
- Safety forms
 - Written safety plans (OSHA requirement)
 - Air quality management plan and site forms
 - Safety Checklist by application
 - Injury report forms
- QA test report forms
- Travel forms
- Punch list forms
- Warrantee forms
- ABAA project forms
- High-performance buildings
 - Air barrier kick-off meetings
 - Sequencing
 - Performance guarantees

I welcome the opportunity to discuss these services at your convenience.

Henri Fennell, CSI/CDT