CONSTRUCTION FIELD RECORDER

IF we have court reporters for legal transcripts

and, field records are used in Court as a contemporaneous record,

then, Why aren't Construction Field Recorders trained in field processes, practices and general knowledge?

For accurate and formatted contemporaneous records,

Why don't construction schools recognize this as an occupation and teach it?

This Fellow Is Not Sure At All

I CAN DO THAT

New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

Sent: Tue 7/10/2012 11:39 AM

To: Gordon Aronson

LinkedIn Groups

- **Group:** Construction Claims Network
- **Discussion:** Poor Construction Daily Reports

a complete and well documented daily report can and usually is very useful for making or defending claims.

an incomplete and poorly documented report is a useless piece of paper (I'd rather not use the S.H.I.T. word, as it stinks.).

in my practice, i usually had a junior lawyer at site from day one specially designated as responsible for revising the daily reports in detail.

in my experience, it has always been worth having this system.

Posted by Norbert Marcher-Mühle

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CONSTRUCTION IMPACT ANALYSIS

There is Simply No Excuse!

New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

Sent: Tue 7/10/2012 11:40 AM

To: Gordon Aronson

LinkedIn Groups

- **Group:** Construction Claims Network
- **Discussion:** Poor Construction Daily Reports

Gordon - I don't have any hard copy, but I can recall an instance where the General Superintendent of a large institutional project would fill out his daily report by writing, "See Subcontractor's Daily Report." In his defense, he was actually an excellent superintendent, but was behind the eight ball through no fault of the contractor, and did this in the interest of saving time. We discussed how difficult it would be to address any claim or back-charge based on this kind of daily reporting, and he made the extra effort to complete the report with all the essential information.

Posted by Cheryl Howard

Like this comment » Comment » Stop Following Discussion »

WHY DIDN'T THEY HIRE ME?

CONSTRUCTION IMPACT ANALYSIS

We Have A Critical Job That No One Wants To Do!

- Who out there agrees? *(audience)*
- If no one, then: *(lead-in to next slide)*

Please Introduce Me To …

- A superintendent, General Foreman, foreman or any field manager who can say, "I really enjoy writing Daily Reports and Incident write-ups," or
- "My reports are accurate, descriptive, and carefully linked to all important documents and critical identifying job elements," or
- "Please don't take the report writing task away from me, that's my job."

Let's See Some Examples

- Are they valuable documents?
- Are they full of factual gaps?
- Are they informational or do they add to the level of confusion?

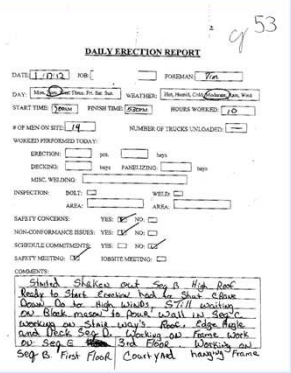
EXAMPLE 1

EXAMPLE 2

EXAMPLE 3

REMEMBER:

- You were never at the job during construction
- The person who created this document is long gone
- You have no explanation of the format of the form or what the yes/no bullets mean
- Where there are incomplete thoughts, you must use your understanding of construction to complete them or draw meaning from them
- Then you must make use of your interpretation!



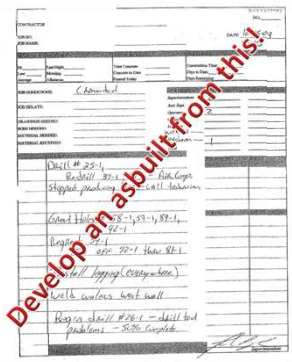
"THIS ARE MY EXPERT OPINION"

- Who has testified as a percipient witness? *(raise your hands)*
- Who has testified as an expert witness? *(raise your hands)*
- Who has based their opinion solely on existing documentation? *(raise your hands)*
- Who believes that well written contemporaneous documents are extremely important documents?

THEN WHY?

- Do we accept substandard daily reports?
- Why are we not proactive in managing this extremely important company document?
- How in the world can we accept useless trash as our company's vital records?
- You can forfeit your company's entire job profit by an unsuccessful litigation; simply negate years of work.

HOW MUCH IS THIS WORTH



CONSTRUCTION IMPACT ANALYSIS

I Don't believe we will ever have consistently good daily reports from these folks

CONSTRUCTION IMPACT ANALYSIS

We need trained people who are hired to keep field reports and who understand that this is their full-time and very important only job responsibility

They are evaluated on the quality and completeness of their reports and are ready to testify

CONSTRUCTION IMPACT ANALYSIS

LinkedIn Groups
Group: Construction Claims Network
Discussion: Poor Construction Daily Reports
Hi Gordon
I do not have any proforma's for Daily Records because Contractor's reporting methods are invariably completely worthless.
They should - at the very least - follow two basic principles:
1. Report on the Programme Tasks
2. Record who did what when and where and in a comment column Why.
Following this protocol a weekly record is usually good enough.
Best regards
Mike Testro
Posted by Mike Testro
Is This What We Want?
This What We've Got!
LinkedIn Groups
Group: Construction Claims Network
Discussion: Poor Construction Daily Reports
Gordon, I agree that formal, detailed daily reports often form the "foundation" of any future successful claim. I have also found that the contents of personal "logs" or "field books" of key project personnel often yield valuable insight and critical information on sensitive information which might not make it to a formal daily report for various reasons. I would stress to the audience the importance of keeping such logs which, by the way, is good project engineering practice in of itself. I have found that the ultimate "finders of fact" in many dispute resolution forums find such info very "interesting" when presented via a good project fact witness. Of course one has to be mindful of the "double-edged sword" of offering such evidence as the intimate nature of such logs may offer fodder for the opposition on cross examination. Good luck with your talk. - Steve
Posted by Steve Schassler
CONSTRUCTION IMPACT ANALYSIS

They Must Be Consistently Good or Better than Good!
New comment on "Poor Construction Daily Reports"
messages-noreply@bounce.linkedin.com on behalf of Construction
LinkedIn Groups
Group: Construction Claims Network
Discussion: Poor Construction Daily Reports
The problem I find with the contractor dailies is that they are often sporadic, which drains all value. Agree with Gordan and Mike that the daily reports are often Friday look backs (or worse), rushed, and appear to be just going through the motions. I will say that if done properly and issues are tracked contemporaneously (particularly those that are heading for dispute), these dailies coupled with a seasoned superintendent make for a very credible show.
Posted by Chuck Asmar
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CONSTRUCTION IMPACT ANALYSIS

We must Be Able To Count On Our Daily Reports!
New comment on "Poor Construction Daily Reports"
LinkedIn Groups
Group: Construction Claims Network
Discussion: Poor Construction Daily Reports
Gordon
I can't tell you the times I have been down the road with daily reports of varying value. - They run the scale from those that are very detailed to those that are pretty much useless.
We do a seminar on scheduling and the first thing I tell the group is that any entry made in your schedule (or anywhere else) need to have a source document by which it can be verified. Your as built schedule is no good if it isnt backed up by the DAILY REPORT and other source documents including meeting minutes, photographs, telephone conversation records, bar charts (hand drawn or Excel), tabular lists (work plans) etc. Its awfully difficult to separate out a single document (such as the superintendents daily report) without touching on the other "tools" in the pouch used to document a project and the importance of accuracy and support in all of them.
In this day of electronic media I find a lot of contractors are doing the daily log electronically which isn't as effective or as good as the old smudged up hand written diary. Back in the day I kept mine in a Surveyor's level book because it fit in the hip pocket of a pair of Levis really well.
Unfortunately the best daily reports I'd like to send you for examples were hard copies and have been sent to storage (I just looked - I did have one example that is not so good that I am e-mailing).
I should restate that the absence of good daily reports has hurt more than one contractors chance of recovery in claim ..... probably more damage by not having good reliable information in them than by no information at all. The authors of diary reports do sometimes write some "damning" statements.
I'd really like to have a copy of Mikes paper and your presentation: smithey@hcaps.com
Like this comment » Comment » Stop Following Discussion »
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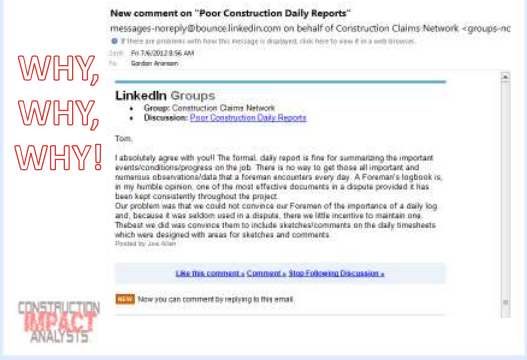
CONSTRUCTION IMPACT ANALYSIS

WHY, WHY, WHY!



New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Fri 7/6/2012 8:56 AM

To: Gordon Aronson

LinkedIn Groups

- Group: Construction Claims Network
- Discussion: Poor Construction Daily Reports

Tom,

I absolutely agree with you!! The formal, daily report is fine for summarizing the important events/conditions/progress on the job. There is no way to get those all important and numerous observations/data that a foreman encounters every day. A Foreman's logbook is, in my humble opinion, one of the most effective documents in a dispute provided it has been kept consistently throughout the project.

Our problem was that we could not convince our Foremen of the importance of a daily log and, because it was seldom used in a dispute, there we little incentive to maintain one. The best we did was convince them to include sketches/comments on the daily timesheets which were designed with areas for sketches and comments.

Posted by Joe Allen

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CONSTRUCTION IMPACT ANALYSIS

What Training Do Field Managers Get on How To Do Reports?

New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 7/5/2012 8:41 AM

To: Gordon Aronson

LinkedIn Groups

- Group: Construction Claims Network
- Discussion: Poor Construction Daily Reports

John, The company I worked for is mid-sized, annual volume of $120 Million. You are correct that most Owner's representatives compile their own reports daily, weekly or monthly. We found that many were either not recording the information correctly, not recording data critical to our progress or otherwise missing the mark. We decided to establish a regular, reliable and consistent reporting system to document a project. We do not provide the foreman's timesheets to the Owner or any other labor cost information unless we get into a dispute. By having consistent and reliable information we have prevailed on several disputes.

To slightly expand the topic, we also insisted on having regular progress meetings with the Owner to go over critical items and update everyone on delays, approvals, etc. We also provided an updated schedule monthly along with a two-week look-ahead schedule to show upcoming activities to allow the Owner to plan his inspection forces. The minutes of the meeting were written up and presented to the other parties for their review and approval. We did not want the old excuse of "if I had only known about it ..."

Posted by Joe Allen

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This email was intended for Gordon Aronson. Learn why we included this. ©2012 LinkedIn Corporation. 2029 Stierlin Ct. Mountain View, CA 94043, USA

CONSTRUCTION IMPACT ANALYSIS

IT CAN BE DONE

New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Wed 7/4/2012 5:23 PM

To: Gordon Aronson

LinkedIn Groups

- Group: Construction Claims Network
- Discussion: Poor Construction Daily Reports

My comments are from over 40 years in the heavy/highway construction industry. Each of our jobs were unique due to design, owner, job site conditions, weather, etc. Invariably, disputes would arise and, in several cases, advance to a formal dispute resolution. Early in the company's history, we implemented the daily progress report (DPR) and formal field time sheets. A DPR was submitted each day for every project until completion, even if we were in winter shutdown. The DPR's were on pre-printed forms with places for date, project number, progress for each discrete pay item worked on, delays, weather and any other comments. We were strict in demanding them filled out each day and not permitting any editorializing or personal comments - just the facts, even if they were not favorable to us. All reports were reviewed corporately and the project promptly contacted if anything abnormal was noted - no exceptions. If you wrote it, be prepared to back it up. The Owner was given a copy each day to review and comment on.

The time recorded on the daily timesheets submitted by each Foreman was coded to discrete pay items which were also used in the DPRs. This permitted us to establish baselines of production for each item worked on. Since most work items never became the subject of disputes, it would be very difficult to manipulate the system for the few exceptions and were were consistent in the way were recorded data.

The final element in our documentation process was each project had to have a project schedule (Primavera P3) approved by the Owner in writing. If they would only give a verbal approval, we would document that with a letter memoralizing their approval. If a delay occured we immediately inserted a schedule item into the project schedule, updated it and gave a formal revised copy to the Owner. If it impacted the critical path, a written preliminary analysis was included to alert the Owner of schedule/financial impacts. We always gave them a letter describing the added schedule item and the potential impact on the project. When a formal dispute arose, the above items became invaluable in documenting the delay, notification and damages. There are several more details about our system but this should give you an idea of the importance of DPRs and other project documents.

Posted by Joe Allen

Like this comment » Comment » Stop Following Discussion »

CONSTRUCTION IMPACT ANALYSIS

Poor documentation, No As-built

↓

No As-built, No Retrospective Analysis

↓

No Retrospective Analysis No Proof

↓

No Proof, No Cause-and-Effect

↓

Bye, Bye $$$

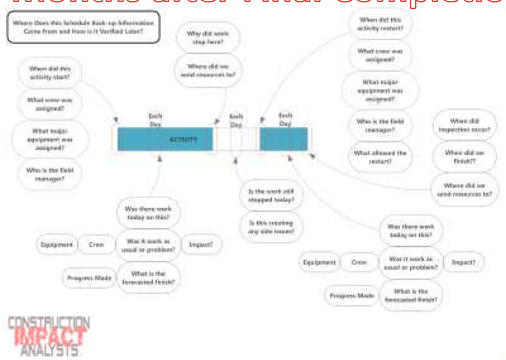
CONSTRUCTION IMPACT ANALYSIS

Create An As-built From Documents

- Requires various forms of contemporaneous documents
- Long hours of careful study and fact extraction
- Many fragments of information are needed to create even a reasonably good as-built
- As-built means After The Fact

CONSTRUCTION IMPACT ANALYSIS

6 Months after Final Completion



CONSTRUCTION IMPACT ANALYSIS

How Do I Create an As-Built

NOT Just For Claims Support

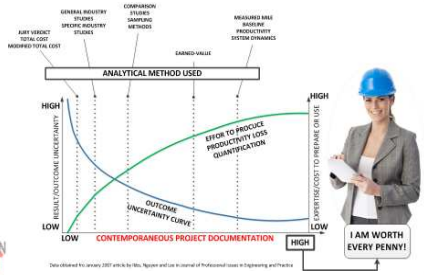
- Feedback for Proactive Management
- Highlight trouble/weak spots that need help
- Inter-coordination of Trades
- Space/access management
- Procurement chain management

CONSTRUCTION IMPACT ANALYSIS

It may not ever get recorded!

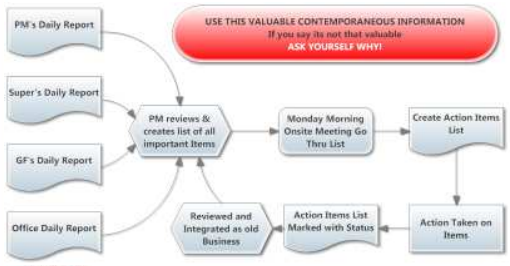
CONSTRUCTION IMPACT ANALYSIS

Good Daily Reports Lessens Your Cost of Recovery Significantly!



CONSTRUCTION IMPACT ANALYSIS

Make Daily Reports Mainstream



What A Field Recorder Must Learn

- Field Safety
- Construction Terms and Field Jargon
- The Construction Site and Contract Scope
- Names, People and Responsibilities/Authority
- What a Daily Report Must/Should Contain
- How to take Construction Photos and Integrate into Report
- Who are the Best Sources of Information
- How to Ask the Right Open-Ended Questions and How to Understand the Answers Correctly
- Understand the schedule and the field work plans

CONSTRUCTION IMPACT ANALYSIS

This Person Is A Professional

- Must be seen as a Professional
- Must be fully recognized as a member of the Project/Field Teams
- Must be Respected, Fully Utilized, and Communicated With On a Timely Basis
- This person is the Job's/Company's Historian
- This Person May Have to Testify in Your Behalf
- This Person Must Be Compensated as a Professional

Traits Of A Field Recorder

- Be a good and Careful Listener!
- Be Continuously wide open to learning
- Be self initiated, extremely curious and inquisitive, detail-oriented, (No question is stupid or unimportant; that's the job)
- Be a good handle on the English Language!
- Be a typist and not afraid of a computer
- Be not easily intimidated, but polite
- Be able to function in a chaotic, loud, down to earth work environment

They Are NOT

- They are not doing this one day and filling in for someone else the next; THIS IS THEIR FULL-TIME JOB
- They are not a designer
- They are not a flunky
- The are not a laborer
- They are not an errand boy/girl

As An Intelligent/Knowledgeable Field Reporter

- Now the Superintendent and/or foreman can intelligently communicate contemporaneous information and facts
- This is where the training and ongoing experience pays off
- The field reporter and other field personnel have two-way communications that create accurate and succinct documentation.

WHY NOT STOP PREACHING and START DOING

New comment on "Poor Construction Daily Reports"

messages-noreply@bounce.linkedin.com on behalf of Construction Claims Network <groups-nc

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Sat 7/7/2012 10:17 AM

To: Gordon Aronson

LinkedIn Groups

- Group: Construction Claims Network
- Discussion: Poor Construction Daily Reports

Yes Joe..... Your humble opinion is the same as mine. Compliance has been and I suspect will continue to be a problem and we will continue to see varying degrees of it. We just continue to preach the sermon in hopes of making believers of them. Lessons learned from mentors along the way who were smarter than me.

Posted by Tom Brithey, AIC, CPC, LEED-AP, CET, ALCM