MARJORI & DUNCAN TODD

A Perfect Fit

essential steps for finding the right contractor

Every day in your community, a general building contractor is heading out to a job, whether it be a commercial structure, a new residence or even a kitchen remodel. But not every day is that contractor's truck en route to a funeral home project, and therein lies the rub.

On a daily basis, we at Duncan Stuart Todd Ltd. speak with contractors who are working on funeral home jobs all across the nation. When we talk with them about building our preparation rooms, it is often their first and only occasion to work on a funeral home-related project. Local contractors do not often have an opportunity to gain experience in the more unusual aspects of this kind of construction.

One of our clients recently told us told us that his contractor, who he liked, had never built a funeral home, and communication was difficult.

When it comes to specialized work, such as a preparation room, one needs to take extra steps to help ensure the most successful outcome. Funeral directors must comply with issues not pertinent to most other businesses, including OSHA mandated standards for a safe preparation room environment. For this reason, contractors need a clear scope of work to overcome the special challenges of the embalming room.

The following are some essential steps you can take to ensure a smooth construction project.

- **Check the contractor's license.** Check the license number with the appropriate agency, usually found on your state's official web site. No license? Don't even go there. Also, verify that no enforcement actions have been taken against the contractor.
- **Verify that the contractor is insured for liability.** No insurance? Again, don't even go there. Be sure to obtain a copy of their liability insurance as a verbal acknowledgement isn't sufficient.
- **Check for Worker's Compensation Insurance.** No compensation insurance? You got it. Without this coverage, you will be on the hook if an employee is injured on your property.
- **Check references.** Try to obtain a list of 10 references and check at least three of those references. It is helpful to frame your reference questions with simple yes or no answers. Some questions you may want to ask:

Did he show up regularly without prompting?

Was there always a knowledgeable, in-charge person on site?

Did the foreman/supervisor appear to be responsible, knowledgeable and professional?

Was the job site well maintained and kept in a neat, clean and orderly manner?

Were there a large number of change orders on the job – that is, extra cost above the bid amount?

Would you hire them again? (This is one of the most important questions to ask.)

- **Check the Better Business Bureau and private rating services.** Verify with the BBB that there are no complaints filed against the contractor. In addition, there a number of private rating services that you can check. Although we would not discount a firm simply because they were not listed on a particular private service, it would be a plus mark in their column if they were.
- **Meet the contractor in person.** Good chemistry is important in any relationship, especially with your contractor. The contractor might have the best company in town, but if you clash on a personal level, we suggest you look elsewhere.
- **Look at the contractor's work.** See for yourself the quality of the work this contractor has performed and pay attention to the details. In our experience, a good contractor will often direct your eye to specific items he is particularly proud of, such as:

Trim and moldings around windows, doors, baseboards, etc. Make sure the joints are tight and clean. You should hardly notice the joints in a good job.

Tile work and other finish materials. Are the grout lines uniform, straight and consistent? Are the carpets smooth and the seams invisible? Are

the wall paints evenly applied? Are the walls plumb, straight and sound?

Cabinets and counter tops. Are the doors and drawers level and straight? Are the tops smooth and clean at the joints? Do doors and drawers open and close easily?

Hardware, lighting and accessories. Are the various handles, knobs, light fixtures, mirrors and other accessories straight, plumb and level?

Exterior finishes. Is the concrete finish good? Is it cracking, heaving or otherwise failing? The same applies to tile or stone finishes, both on the ground surface and vertical wall surfaces.

- **Obtain a written estimate.** Reputable contractors will provide a written estimate. Ensure that all details are spelled out so that you can compare estimates.
- **Work out payment details.** Set a payment schedule as part of the contract and to be sure that payments don't get ahead of the work performed. Never make a final payment until the work is 100 percent complete.
- **Agree on a warranty.** Will the contractor stand behind his workmanship? For how long? What types of failures would be covered under warranty?
- **Always sign a contract.** Insist that all details, including project scope, materials to be used, price, payment schedule and any oral promises be put in writing. Be sure that you keep a copy of the contract.

Pre-Qualifying Contractors

Now let's look at some specific methods to use when selecting a contractor. The first step – pre-qualifying the contractor – uses a referral pool of contractors from the client. If your construction project has a local architect or engineer, ask that they provide you with a list of names. If you don't have a professional on board, ask any local architect, your colleagues, neighbors and friends.

After you have a preliminary list of possible contractors, make an introductory telephone call to each contractor. Provide the contractor with a basic description of the project and your needs. If the company is interested in the project, send a pre-qualification questionnaire, such as the one on page ___. This generic questionnaire, which can be modified for your project, is a helpful tool in the pre-qualification stage.

After tabulating your pre-qualifying responses, cut your list down to between three and five companies for your in-person interviews.

Interviews

At this point, every company on your list is equally qualified, and you are ready for personal interviews. Your goal is to come out of the personal interviews with no more than two finalists. Plan for 1.5 hours per interview, spaced two hours apart.

What you are evaluating during the interview is management styles and personalities. Try to stay objective by asking the same questions of all parties, even though this is a subjective process. Here are some sample interview questions:

You are required to provide preliminary pricing. Is there a cost for this service? How many sets of plans will you need to provide for this service?

Can you meet the schedule for the project?

How long will the project take?

What other projects will you be running at the same time? Sizes? Locations?

Who will supervise this job on site? How often do you visit the job site?

Are there any other comments you would like to make?

Concluding the Selection Process

With the information you have collected, select two firms. Request bids from the finalists, and make it clear that the contractor has a 50 percent chance of getting the job. Normally, with a well managed selection process, the bids are close. In the end, you select the contractor who is the perfect fit for you – the one you really want to work with. In some cases, he may not be the lowest bidder.

A Word to the Wise

The unusual specialty items and OSHA-mandated requirements that are specific to preparation rooms are not typically well understood by contractors. If you have the good fortune to have selected a contractor experienced in funeral home construction, you are ahead of the game. Still, when it comes to the

preparation room, there are very important issues to coordinate with your contractor. Share all available information about air quality (OSHA regulated), safety devices (OSHA and locally regulated) cross-connect control (locally regulated) as well as other specialty equipment and its impact on the construction and installation process.

Provide a comprehensive set of drawings and supporting documents created by your design professional to your contractor. The documents should fully illustrate and describe the work to be performed and these documents should be clearly part of the project scope.

Cover the specialty areas of the preparation room construction in a pre-construction conference call between the contractor, funeral director and design professional.

The goal is to have a smooth, coordinated construction process delivered on time and on budget and that passes all permits and licensing inspections the first time around. You can achieve this goal by performing a thorough and well planned contractor selection process, and go one step further by providing specific OSHA and code related information directly to your selected contractor.

Even with the best of contractors, your project needs to be watched carefully. If you are working with an architectural firm, retain them for the construction phase of your job. If you are not working with a design professional, maintain a diligent construction observation schedule and meet with the contractor on a regular basis to go over outstanding issues.

Best of luck with your building or remodeling project. •

Marjori and Duncan Todd own and operate Duncan Stuart Todd Ltd. They can be contacted at 877 832 6898 or by visiting www.dstlimited.com.

Pre-Qualification Questionnaire

1. How long has your firm been in business?
2. What is the license number?
1. What is the largest project you have completed?
3. The smallest?
4. Have you worked with our architect before?
5. Do you have: an office, fax, pager, cell phone, support staff?
6. Are you computerized for all correspondence, scheduling, costing, etc.?
7. How many employees do you have?
8. How long have they been with you?
9. What trades do you sub-contract?
10. What kind of insurance do you carry? Limits?
11. What kind of Contract for Construction do you use or prefer?
If not an A.I.A. document, provide a copy of your contract. Use of your contract will be at owner discretion. Otherwise, an A.I.A. format will be required.
12. What are your rates for profit, overhead and supervision for this project?

Please attach a listing of your projects over the past 24-36 months, listing scope of work, size, construction cost and construction duration. Include references that the owner may contact.

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