

# CONA 105 – Construction Office Management

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## Comprehensive Outline

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### Course Purpose

CONA 105 trains students to run (or support) day-to-day operations in a construction office. The course builds practical competence in office workflow, project documentation systems, scheduling support, vendor coordination, billing support, compliance tracking, and communication—using real job scenarios, logs, and templates.

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### Learning Outcomes

By the end of the course, students will be able to:

- Set up and maintain a complete job filing system (digital + physical) from award to closeout
  - Track core construction documents (RFIs, submittals, COs, POs, invoices, lien waivers, permits)
  - Support scheduling coordination, meetings, and field-to-office information flow
  - Maintain vendor/subcontractor records, COI/W-9, and compliance checklists
  - Support basic billing workflow and document packages (backup, approvals, status tracking)
  - Produce clear professional communications and status reports
  - Apply internal controls, confidentiality, and audit-ready documentation habits
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### Unit 1 — Construction Office Management Fundamentals

#### 1.1 Role of the Construction Office

- How the office supports PMs, supers, field crews, subs, suppliers, inspectors, owners
- Key responsibilities: documentation, communication flow, tracking, compliance, billing support
- Office “rules of the road”: accuracy, version control, response times, records retention

## In-class practice

- “What happens if...?” case scenarios: missing waiver, outdated plan set, unlogged change, late RFI

## 1.2 Construction Project Lifecycle (Office View)

- Pre-award → award/contract → mobilization → active build → closeout
- Common deliverables by phase
- Hand-offs between estimating, PM, superintendent, accounting, owner

### Example: lifecycle deliverables snapshot

Phase	Office Deliverables	Common Risks
Award	Job setup, contacts, insurance, contract docs	Missing COI/W-9, incomplete scope
Active	RFIs/submittals, logs, meeting minutes	Untracked approvals, outdated docs
Closeout	O&M manuals, warranties, final waivers	Payment delays, missing closeout items

## Unit 2 — Job Setup, Admin Systems, and Controls

### 2.1 Job Setup Checklist (Award to Day 1)

- Job number, cost code basics, folders, templates, distribution lists
- Vendor/sub onboarding pack (W-9, COI, contract, compliance)
- Communications standards: subject lines, naming conventions, folder rules

**Ready-to-Use Table: Job Setup Checklist**

Category	Task	Owner	Due	Status	Notes
Admin	Create job number + folder structure	Office			
Contacts	Build project contact list	Office			
Contract	File contract, exhibits, scope	PM			
Compliance	COI/W-9 collected for subs	Office			
Docs	Start logs (RFI/Submittal/CO/PO)	Office			

**2.2 File Systems: Digital + Physical (Audit-Ready)**

- Folder architecture by phase and doc type
- Version control (rev dates, “Issued for Construction,” superseded sets)
- Scan/attach standards, PDF control, email-to-file habits
- Physical binders: permits, field reports, safety, submittal sets (when used)

**Example: Standard Job Folder Structure**

- 01\_Admin & Contacts
- 02\_Contracts & Scope
- 03\_Plans & Specs (Issued / Current / Superseded)
- 04\_RFIs
- 05\_Submittals
- 06\_Change Orders
- 07\_Purchase Orders & Procurement
- 08\_Invoices & Billing Backup
- 09\_Permits & Inspections
- 10\_Meetings (Agendas/Minutes/Logs)
- 11\_Closeout (O&M / Warranties / Final Waivers)

**2.3 Internal Controls (Keep the Office Clean)**

- Why controls matter: disputes, payment, claims, audits
- Separation of duties basics (who approves, who files, who pays)
- Required “backup” standard for any cost/document decision

## Mini-lab

- Build an “approval trail” for a PO + invoice + waiver
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## Unit 3 — Communication, Professional Writing, and Customer Service

### 3.1 Email & Phone Standards for Construction

- Clear subject lines, threading, response expectations
- “Confirm in writing” habits
- Escalation rules (when to pull in PM/super)

#### Ready-to-Use Table: Email Subject Line Patterns

Situation	Best Subject Pattern	Example
RFI	RFI #__ – Topic – Location	RFI #14 – Door Hardware – Level 2
Submittal	SUB #__ – Spec Section – Item	SUB #07 – 09 29 00 – Drywall
CO	CO Request – Scope – Date	CO Request – Additional Demo – 2/26
Invoice	Invoice – Vendor – Job – Period	Invoice – ABC Electric – Job 2417 – Jan

### 3.2 Meeting Support (Agendas, Minutes, Action Items)

- OAC / subcontractor meetings
- Capturing decisions, deadlines, responsible party
- Action item tracking and follow-up

#### Ready-to-Use Table: Meeting Minutes + Action Log

**Date Topic/Decision Action Item Owner Due Date Status**

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## Unit 4 — Core Document Control: RFIs, Submittals, and Drawings

### 4.1 RFI Management (Request for Information)

- When RFIs are required
- Intake, formatting, tracking, and responses
- Linking RFIs to drawings/specs and downstream impacts

### Ready-to-Use Table: RFI Log

**RFI # Date Sent To Subject Location Due Response Date Status Linked Docs**

#### Example RFI entry

| 14 | 02/26 | Architect | Door hardware conflict | L2 Corridor | 03/04 | 03/02 | Closed | A2.11, Spec 08 71 00 |

### 4.2 Submittal Management

- Submittal register and spec sections
- Review cycles: contractor → PM → design team → resubmit
- Substitutions vs “as specified”
- Stamping, distribution, and storing “approved” items

### Ready-to-Use Table: Submittal Log

Sub #	Spec Section	Item	Submitted	To	Due Back	Returned	Status	Notes
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### 4.3 Drawing/Spec Control

- Current set vs superseded sets
- Revision clouds, bulletins, addenda, ASIs
- Issuance tracking: who received which version and when

### Ready-to-Use Table: Plan Set Issuance Log

**Issue Date Doc Type Rev/Version Recipients Method Confirmed Notes**

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## Unit 5 — Procurement Support: Vendors, POs, Deliveries, and Backorders

### 5.1 Vendor/Subcontractor Records

- Vendor master list essentials
- W-9, COI, licenses (as applicable), contacts, lead times
- Communication logs and “single source of truth”

### Ready-to-Use Table: Vendor/Sub Master

**Company Trade Contact Phone/Email W-9 COI Lead Time Notes**

## 5.2 Purchase Orders and Delivery Tracking

- PO basics: scope, price, terms, delivery dates
- Tracking deliveries, backorders, damaged goods
- Field receiving documentation (packing slips, photos)

### Ready-to-Use Table: PO & Delivery Tracker

**PO # Vendor Item Amount Ordered Needed By ETA Received Status Backup Filed**

#### Example

| 2231 | SupplyCo | 2x rooftop units | 38,400 | 02/10 | 03/15 | 03/08 | | In Transit | PO, confirmation |

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## Unit 6 — Change Management: Change Orders, Directives, and T&M

### 6.1 Change Order Workflow

- What triggers change: design, field condition, owner request
- Tracking change from first notice to executed CO
- Maintaining backup: quotes, emails, drawings, approvals

### Ready-to-Use Table: Change Order Log

CO #	Date	Description	ROM/Value	Status	Approved Date	Billing Ref
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### 6.2 Time & Material (T&M) Tracking

- Daily T&M sheets: labor, equipment, materials
- Sign-off habits and disputes prevention
- Converting T&M into formal change documentation

### Ready-to-Use Table: T&M Daily Sheet (Summary)

**Date Work Description Labor Hrs Equip Materials Approved By Backup**

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## Unit 7 — Billing Support, Pay Applications, and Waivers

### 7.1 Billing Workflow (Office Support Role)

- Invoice intake checklist: PO match, receiving proof, approval
- Coding basics (cost categories/codes conceptually)
- Status tracking: submitted → approved → paid → filed

#### Ready-to-Use Table: Invoice Intake & Status Log

**Invoice # Vendor Date Rec'd Amount Job/Cost Area Approved By Sent to AP Paid? Notes**

### 7.2 Pay Applications (Intro Level)

- What a pay app is and what backup looks like
- Typical components: schedule of values (SOV), backup, stored materials
- Common issues: missing waiver, mismatch to approved COs

#### Ready-to-Use Table: Pay App Backup Checklist

Item	Required?	Received	Notes
Current period invoice(s)	Yes		
Conditional waiver (current)	Yes		
Unconditional waiver (prior)	As needed		
CO backup (approved)	If applicable		
Stored materials proof	If applicable		

### 7.3 Lien Waivers (Operational Handling)

- Conditional vs unconditional
- Partial vs final
- Collecting and organizing waivers by vendor and pay cycle
- Red flags: incorrect job name, wrong amount/date, missing notarization (where required)

#### Example: Waiver Tracking Mini-Register

**Pay Period Vendor Waiver Type Amount Signed Filed Location Status**

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## Unit 8 — Scheduling Support and Field Reporting

### 8.1 Schedule Basics for Office Staff

- Milestones vs activities
- Look-ahead schedules (2-week, 3-week)
- Impacts: long lead items, inspections, subs sequencing

#### Ready-to-Use Table: 2-Week Look-Ahead Tracker

**Week Area Planned Work Trade Needs/Constraints Owner Status**

### 8.2 Daily Logs, Photos, and Field-to-Office Flow

- What belongs in a daily log
- Photo naming and storage discipline
- Capturing delays and critical events (weather, inspections, deliveries)

#### Ready-to-Use Table: Daily Log (Office Summary)

Date	Weather	Crew/Trades Onsite	Work Performed	Deliveries	Issues/Delays	Notes
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## Unit 9 — Permits, Inspections, and Compliance Tracking

### 9.1 Permit Documentation Basics

- Permit board requirements (where used)
- Permit tracking, inspection scheduling, re-inspection loops
- Document retention: approvals, sign-offs, certificates

#### Ready-to-Use Table: Permit & Inspection Log

**Permit/Inspection Authority Requested Scheduled Result Next Steps Docs Filed**

### 9.2 Compliance: Insurance, Safety, and Vendor Requirements

- COI tracking, expiration dates, additional insured requirements
- Sub onboarding compliance checklist
- Incident documentation routing (office role)

**Ready-to-Use Table: COI Tracker**

**Company COI Received Expiration AI/Endorsements Verified By Status**

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**Unit 10 — Reporting, Dashboards, and Office Performance**

**10.1 Weekly Status Reporting**

- What PMs and owners need: open RFIs/submittals, pending COs, long leads, inspections
- Turning logs into a clean “one-page status”

**Ready-to-Use Table: Weekly Project Status Snapshot**

Category	Open Items	Due Next	Risk/Notes
RFIs			
Submittals			
COs			
Procurement			
Inspections			

**10.2 Office Metrics (Practical KPIs)**

- Aging RFIs/submittals
- CO cycle time
- Invoice approval aging
- Missing waivers / compliance gaps

**Example KPI Table**

Metric	Target	Current	Trend	Action
RFI avg days open	≤ 7	11	Up	Escalate older than 10 days
Submittals overdue	0	3	Flat	Follow up + confirm receipt

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## **Unit 11 — Closeout Management (Office-Led Organization)**

### **11.1 Closeout Requirements**

- Punch list tracking basics
- O&M manuals, warranties, as-builts (record docs)
- Final inspections and sign-offs
- Final lien waivers and closeout package

#### **Ready-to-Use Table: Closeout Checklist**

##### **Item Required Assigned To Due Received Filed**

### **11.2 Building a “Closeout Binder” (Digital)**

- Standard sections and naming conventions
  - Deliverable confirmation and owner handoff
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