

# **PAINTING FOR HOMEOWNERS WHO HAVE BETTER THINGS TO DO**



**HOW TO HIRE  
THE PERFECT  
CONTRACTOR...**

**and CONSIDER IT DONE!**

**S P U N K   B U R K E**



## **QUESTIONS ON A PROJECT?**

### **I'LL BE HAPPY TO TALK WITH YOU!**

If you have questions about painting or any type of job where you will be hiring a contractor, I'd be happy to answer any questions, just send an email to [john@berkandcrew.com](mailto:john@berkandcrew.com) or give me a call at (978) 835-8588.

—John (Spunk)



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THE PERFECT CONTRACTOR  
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# FOREWORD

**JUST TO BE CLEAR:** this is not a guide on how to paint a house. It is a process you can rely on for selecting the right contractor to do the house painting project perfectly. Follow these instructions and consider it DONE!

A house that is professionally painted is, for most homeowners, a vision to behold, but it's an experience few are equipped to manage. In fact, most homeowners would just as soon do without projects of this sort; it's not an experience one looks forward to.

The difficulties of arranging a major home improvement project like house painting start almost immediately. Pre-screening local contractors well in advance of any major decisions is a major chore for homeowners. There is a significant gap between

doing the painting project yourself (DIY) and attempting to off-load it to a competent contractor (DIFM). Homeowners must contribute their desires, preferences, and make the final decisions as to who is going to execute the project and deliver satisfactory results. This division of work, which delineates the homeowner's responsibility and the contractor's duties, exists in almost every major home improvement initiative, from replacing a roof to installing a pool.

Incidentally, this guide applies equally well to any project-buying exercise.

The common DIFM (Do It For Me) project model invariably excludes the heavy responsibility of scoping the project, planning, management, and due diligence. This omission invariably occurs at the expense of consequences best avoided: misguided contractor selection, communication glitches, undesirable results, and a compromised peace of mind.

Prudent homeowners frankly admit that the mere task of launching a painting project is justifiably a royal pain in the derriere. Experienced homeowners with even a modest history of working with painters, are eager to explore options that might help mitigate

the front-end chore of arranging the project. It does not have to be difficult, however.

Time-stressed owners are sometimes oblivious to the reality that even a slight involvement in overseeing a painting project can quickly become an unwanted part-time job. Just starting a painting project can rapidly sap a homeowner's enthusiasm, no matter how exciting the desired end-result may be . . . unless you have a system.

Imagine the excitement of your house with a radically different color change in the body or the trim. Leading paint manufacturers offer software that allows homeowners to visualize color changes virtually at the click of a mouse. In reality, the process of achieving that kind of gratification is a major undertaking.

The homeowner's first task is simple: specify what they want to have accomplished. Next, they need a method for determining which contractors to invite to bid that goes beyond the standard beauty contest format. The owner then needs to meet with each candidate and share their vision, the Scope of Work (SOW), with each of the contenders. Lastly, the homeowner needs to provide a proposal format for an

“apples to apples” comparison. With a little guidance, it’s a piece of cake.

Overlooking these tasks can extract a heavy toll on a homeowner’s serenity and expectations. Poor contractor selection can cause. . . .

- Daily disruptions
- Nasty surprises
- Unprofessional workers
- Disappointed expectations
- Privacy violations
- Needy painters
- Constant haggling

Who can blame busy homeowners for protesting, *“please leave me out of this. Just get it done!”* While this is an understandable lament, the truth is that the owner does need to provide some input into the process unless they have the luxury option of outsourcing the entire responsibility to a trusted property manager.

Although the benefits of competing proposals undoubtedly enrich the buyer, the pre-execution process of inviting contractors to vie for your business can be a time-consuming ordeal:

- Conducting candidate pre-screenings before extending an invitation
- Arranging appointments that don't cost you a day
- Selecting a manageable number of appropriate candidates
- Sharing the same project parameters with all candidates

Pre-project tasks can seem like a major workload, and when these tasks are done the homeowner still doesn't have a sense of value or price. Through the tips outlined in this handbook, you can alleviate the stress involved in major home improvement projects and start saving your precious time.



# WHO'S REALLY IN CHARGE?

**CURRENT DEMOGRAPHICS STRONGLY** indicate that major household decisions like house painting tend to be made jointly by both husbands and wives, but it seems the lady of the house has assumed more responsibility in driving the process, establishing the lines of communication, making selections, and enforcing the contract.

In today's gender-neutral market, the woman's role as the painting project point-person is not only in advising her partner, but also leans toward her natural bias as to whom they should assign the project. If there is a challenge in deciding among two seemingly strong contractors, it is generally the woman who has the final word about whom they choose.

The reason for this apparent power in decision making is because the woman of the house will be instrumental in managing the selection process, and if anyone is likely to be at the house while the work is being performed, it is often the lady of the house.



# WHY PAINT NOW?

**MOST HOMEOWNERS KNOW** innately when their house needs painting: the existing coating has become soiled with mold or environmental residue, the color has faded due to the sun's ultra-violet rays, or the paint is beginning to peel, bubble, or crack. Any one of these signs indicates that it may be time to think about refreshing the siding with a new coat of paint to preserve it.

The reasons for painting a house go beyond asset preservation. New paint improves the “curb appeal” of a house that is going on the market to sell. Perhaps the owners are ready for a change in color. Maybe the house has been renovated and the addition needs paint to blend in with the rest of the structure. Or, it may be simple neighborhood pressure to bring the property up to the standard of the consensus.

The decision to paint is often based on the current condition of the house. If the condition is marginal and has to be closely inspected in order to detect any coating failure, you might be able to postpone the project for another season or year. If, however, the condition begs for remedial attention, there are good reasons to deal with it immediately rather than wait.

The most compelling reason to deal with failed paint is the potential for siding and even structural rot. Once the coating is cracked, water can enter the substrate and begin to compromise the integrity of the wood beneath the coating. Often this requires repair or replacement. Clapboards start “cupping” and the nails lose their fastening capability. The substrate is exposed to the elements and the structure begins to deteriorate.

Rot is a subject unto itself, but it is another reason to deal with failed paint immediately. This avoids further costs in surface preparation work. Prep work involves scraping, sanding, and priming. The more rot that is found in the structure, the more prep work is needed. Costs for prep work increase exponentially as more and more paint fails.

Needless to say, if you're showing your house to sell, an exterior paint job that is failing is not only going to reduce the value of any offers you receive, but it can also impact the amount of time the property remains on the market. Many property sellers paint their homes to enhance what realtors call "curb appeal."

There is also the pride of ownership factor. For most homeowners, their home is their most prized asset. It is often viewed as an expression of the owner's standing. Like a car, boat, family, or even a pet, the general public makes conclusions about the owners' prestige and standing in the community by the appearance of their house. (Why do you think proud homeowners spend a fortune on landscaping?) A house that is pristine arguably conveys an undeniable order to one's life and values.



# ALTERNATIVES TO CONVENTIONAL PAINTING

**ONCE YOU HAVE DETERMINED** it is time for a change to the exterior of your house, it's time to consider your options. Beyond painting, you can clad the house in traditional vinyl siding that looks almost like wood. Aluminum siding is almost non-existent now, principally because it is expensive and doesn't stand up to dents.

Another option is vinyl siding that is manufactured to look like wood shingles right down to the grain of the wood. A lot of newly constructed homes are going this route because of the low-maintenance factor. (Note that this is *low maintenance* relative to wood; it is NOT *no-maintenance*).

Vinyl is a popular choice, but not the only option. Some homeowners opt to re-clad their house with

products like Hardy's Cement Board. This product is more impenetrable to water damage than natural wood and touts a substrate that is permanently impregnated with color and doesn't need a protective coating. It is used frequently as an alternative to wood siding on new construction.

If you're looking to buy time before your next thorough paint job, power washing can make a lot of sense. Many owners believe that the only way to deal with common black mold spores, which can seriously blemish the siding on a house, is to cover the stains with paint. Not so fast; you'll want to treat the mold with a solution and a power washing so the paint can adhere to the siding. However, oftentimes the appearance of the power-washed house is so improved that homeowners can delay painting for a year or two. (Don't be tempted to delay painting your clean house, however, if the paint shows evidence of failure).

There is also the issue of what kind of coating to use. This argument is often settled by online research, conversations with your contractor, or by following what the neighbor did ten years ago when their finished product still looks pretty darn good.

You can choose a quality name-brand paint, a "Big Box" low cost paint, or you can change to a solid

body stain. Another option is the costly ceramic coating route. This is expensive because the big name-brand coating can only be applied by licensed technicians who have effectively created a false economic market.





# WHAT *NEEDS* TO BE DONE? VS. WHAT DO I *WANT* DONE?

**HOMEOWNERS WORKING WITH** limited budgets often struggle with the decision of how much they can afford to have done, versus the fantasy of what they'd like to have done. For some homeowners, it may make sense to cut back the scope of the project so that what they do decide to paint can be done thoroughly, without compromising on quality. For example, it may make sense to do one side of the house a year, starting with the most distressed side (usually the southern exposure). Overall, it costs a bit more to do the project piecemeal, but it tends to be more feasible from a budgetary perspective.

Other budget-driven questions to consider include: what kind of guarantee can you afford? A five-year guarantee costs more because it requires two full coats of paint. Depending on your budget, you may

have to settle for the two-year guarantee so that you don't break the bank. You'll need to consider whether or not you want to paint fiberglass doors, aluminum gutters and downspouts, and shutters (back and front?). Should you wait to paint the decks and railings until a later date? Can you paint the backyard shed yourself? This leads to the question of whether you can do the house painting yourself.

# THE DIY TEMPTATION— BONANZA OR BLUNDER?

**THERE IS NO QUESTION** that homeowners, particularly those who are relatively new to the status, are naturally tempted to try their hand at painting the home exterior to save some money and be quasi self-sufficient (they might have to ask some close friends to chip in and lend a hand for a few hours). The incentive to DIY house painting is clearly the savings accrued by putting in a little sweat equity rather than cutting a big check to a contractor. The train of thought often goes a little like this:

How difficult can it be? Oh sure, the ladder height for second-story work might be a little hazardous, but if a bunch of college kids can do it, why can't I?

Do I really need any trade skills or specific knowledge? Experience isn't an issue because I helped my dad paint a bedroom a few years ago

and it seemed easy enough. No big deal. How much experience do you need to paint a house? You move the paint from the bucket to the side of the house and you spread it out. How difficult is that? And just to be sure I'm doing a quality job there are hundreds of YouTube videos that explain everything from setup to clean up. The pros probably have some time-saving techniques and maybe a few strategies I don't know about, but I'm a smart homeowner and I'm pretty handy—I can figure it out. Painting isn't rocket science, right?

There is also the issue of control. The great part about DIY is that I can paint what I want to paint, when I want to paint, and how I want to paint it, right? And in terms of prep, what contractor is going to care more about a quality prep job than me, the homeowner? If I want to take some time off from the project (and who can blame me? I've got a life too, you know!), I've got until fall to get it done. The contractor said the whole project was going to take about a week—we could probably knock it off over 2–3 weekends. Right?

Also, I like my privacy. I don't care to have a bunch of strange workmen around my property, using the

toilet, playing their rap music, and smoking whatever. By doing the painting myself I can be certain that my privacy won't be violated. That's got to be worth something. Right?

With regard to equipment, I've got my eyes on a spiffy homeowner sprayer that's only \$159 down at the Home Depot—that should speed things up. I can rent a ladder or two, use some bedsheets for tarps, buy the EcoPak of three paint brushes I saw at the store for \$14.95, and I should be good to go.

I can borrow a sander from my neighbor. While I'm at the Big Box hardware store, I'll pick up four gallons of whatever paint they've got on sale and maybe a quart of primer just in case. Which reminds me, I should probably buy a paint scraper and some sandpaper. How hard is this?

Saturday night postscript:

I didn't break anything, but I got a pretty good sprain. I wasn't up that high—only on the third step of the ladder before I lost my balance. The doctor told me to ice it for a couple of days while he was putting three stitches in my thumb. (I never knew those scrapers were so sharp!)

I'm not sure this DIY idea is going to work out. Maybe I'll check out a contractor. I can't afford to be hurt in another accident. Besides, this scraping business takes forever! Miserable job. I didn't graduate from college to do this kind of grunt work. What was I thinking?

# DIFM ISN'T AS "HANDS-OFF" AS IT SOUNDS

**OUTSOURCING, OR DELEGATING** trade work to a contractor is a new experience for many first-time home buyers. There is good reason to be somewhat intrepid about what you are about to experience. First and foremost, the biggest question is: How expensive is it going to be to secure a contractor? Can I afford it? Is it going to take a lot of time to arrange finding the right contractor? Can I trust him to do it correctly? Will I have to spend a lot of time managing the contractor and the project? I work all day; will I have the energy and the time to oversee the work and monitor the progress daily? How do I handle grievances?

Let's explore the nature of the due diligence involved in selecting the right contractor for the project. We'll go into some detail on this subject later but suffice

it to say you don't just hand the task to the next-door neighbor's kid who worked as a painter last summer. There is a lot more at stake than getting the house properly painted. There are safety concerns, productivity concerns, security concerns, etc.

It is the hope of this author that once you have read this guide you will have the knowledge to assign this work correctly so that you can relax, confident that the results you desire will be achieved.

As a buyer of contract labor, you will need to use certain procedures to ensure you make the right decision about the contractor to entrust with your project. It will require research, discipline, and a process in order to make the best decision and avoid the painful consequences of making the wrong decision. The trades have a deserved reputation for harboring shysters, drunks, con artists, and scoundrels. The good news is you don't have to become victim to their game as long as you follow this sensible and proven advice.



# WHAT CAN GO WRONG?

**“HEY, I JUST MADE** a small mistake on who I hired: how bad can it be?”

Very.

Major catastrophes occur if a contractor doesn't adhere to sound workman standards: some circumstances can even create a fire hazard if the contractor isn't paying attention (volatile materials, poor storage mandates, exposed wires, etc.). Workmen without background checks could be tempted to steal personal property. If safety standards aren't set in place, workers could be severely injured on the homeowner's property. The wrong prep or painting techniques can irreparably damage the house substrate. Lastly, after all the work you put in to selecting the right contractor, you may not achieve

your objective of a professionally painted house.  
Arrghhh!

And it doesn't stop there. Unfortunately, a lot can go wrong if you don't adhere to a good process of selecting and managing the right contractor. It can be a nightmare!

What happens if you show your job to a number of contracting candidates and no one submits a bid on your project? It happens all the time. Some contractors will promise a bid by tomorrow, you follow up, you chase them down, and . . . they're gone. Why? They may have decided your job had too much prep, too much lead paint, the walls were too high, too difficult, too far. You might have scared them off with your demands and expectations. It happens.

At this point you're probably thinking, "Oh no! I'm going to have to do the painting myself after all."

Don't panic.

There is a system that does a great job of preventing the pitfalls just mentioned. The commencement of every painting project starts with **The Three S's: Scope, Selection, Screening** (not necessarily in this order). Ultimately the system evolves into activities

that include daily observation, monitoring progress, and project management.

### **WHAT IS THE FIRST STEP IN PRE-PROJECT PREPARATION?**

The first step is to write down your intentions. This will ultimately become the project Scope of Work (SOW). *After* you have walked the property with the contractors, be sure to add any advice or guidance they may have shared about the intricacies of the project.

Homeowners generally rely on the contractor to develop the SOW based upon the verbal instructions they receive from you. The SOW is your list of what you want them to do. The contractor's response is their project plan, which will describe how they will accomplish your list. The clearer and more comprehensive your Scope of Work, the more likely your expectations will be satisfactorily achieved. Your SOW will also be included in the Request for Proposal (RFP), and ultimately the contract. Remember, when dealing with competing contractors, there are three mandates:

**Certainty** is everything

**Details** are everything

**Clarity** is everything

The more accurate and precise your Scope of Work, the tighter the pricing of the work. Ambiguity about the project parameters tends to produce estimating lunacy.

Okay, so now that you have your work scoped out, it is time to start thinking about sourcing contractors to vie for your business.

**HOW DO I START THE VENDOR SOURCING PROCESS?** In terms of evaluating contractors, it pays to remember that you are buying results, not a person. This can make a difference when you get to the point of finally selecting a contractor. You need to pre-qualify a contractor's candidacy *before* you invite them to bid. Go to your neighborhood paint store and ask the senior clerk who they can recommend. While you're at it, see if you can pry an opinion out of them about some of the contractors you're considering. Besides scouring the neighborhood for likely candidates and related intelligence, character assessment can also be derived from online reviews.

One of the best ways to verify a contractor's interest and suitability is to test them with a small chore, like asking if they will power wash before they paint. Do they show up as they promised? What type of solution

do they use? How thorough they are in cleaning and how they leave the premises are all indications of what type of work they do as a contractor. To take it a step further, if they don't comply with the particulars of the RFP, that too is a strong signal of how they will be to work with.

There are undoubtedly dozens of local painting contractors to choose from. If you don't succeed in ferreting out the undesirable second and third tier candidates, your project will be vulnerable to disappointment. Create and stick to a list of three or four preferred contractors selected from a perspective of overall value versus just price. Preference is given to those leading contractors who have the most experience, the best ratings, have no issues with the Better Business Bureau, are vouched for by the paint store, the neighborhood, and are timely with their commitments. Contractors who are immediately available can give cause for some concern: why aren't they busy? However, contractors who must push your start date out three to four months should probably be discounted as potentially too busy to give your project the attention it deserves.

Now that you have a pool of candidates to invite to bid on your house painting project, you need to

develop a brief Request for Proposal (RFP) that should include a number items:

1. The Scope of Work
2. Deliverables: your expectations
3. Conditions: policies that cannot be violated
4. Terms: timelines, payments, penalties
5. Requested Qualifications: is the contractor insured? Licensed? Legal age (19)? Do they have a W-9?
6. The parameters of an acceptable guarantee

Be sure to inform contractors of the post-project satisfaction report card.

# THE SECRET TOOL FOR SELECTING THE CORRECT CONTRACTOR

**THE RFP SHOULD INTRODUCE** a project-planning process for infallible proposal comparisons. The project plan each contractor submits is often the biggest difference between two comparable proposals. The clear front-runner will surface almost magically by the quality of their project plan. In the RFP, provide a template for the contractor to fill out that includes the details of their execution strategy. Commit them to a specific process that:

1. Reveals their understanding of the project objectives.
2. Describes their understanding of the objective both in terms of ROI and the project's intrinsic needs.
3. States all conditions must be met and not violated.

4. Lists the obstacles that will likely be encountered.
5. Proposes strategies to overcome any obstacles.  
(This step very clearly reveals the contractor's familiarity with the objective and their experience.)
6. Defines the tactics necessary to execute the strategy.
7. Includes benchmarks that indicate progress against the objectives.
8. Sets timelines for the benchmarks.
9. Describes the desired results.
10. Estimates the final cost.

There is a good chance your candidates have never been asked to submit a project plan and it will prove interesting if they balk at the request, either out of fear or the notion that it is too much work. The request for a project plan is part of the winnowing process: it is better to know their reluctance to comply before the contract is awarded. And, at the risk of repeating myself, if the homeowner has the opportunity to compare two proposals, the better project plan will automatically reveal itself, making the final decision an easy matter.



It is not an unreasonable request to have proposals submitted within five days of receiving the RFP. In fact, the submittal date serves as a screening tool. If the contractor is late delivering his proposal, you have good reason to think twice about giving him any kind of preferential consideration.



# THE PROPOSAL REVIEW

**YOU, AS THE HOMEOWNER,** are somewhat obligated to review and rank the contending proposals within five days of the proposal's arrival (the same amount of time you assigned to the contractors to respond to the RFP). The initial selection and ranking usually occurs within minutes of assessing the competing proposals. The items you will want to focus on are:

1. Is the proposal compliant with the RFP? If it is not in complete compliance, that is a red flag.
2. Does their project plan make sense and distinguish them from the other contenders?
3. Is there added value that you didn't anticipate that differentiates one contractor over another?
4. What is their proposed price?

It is worth considering how proposed prices are typically deduced. Accurate painting estimates are a blend of five components:

**QUALITY:** This is dictated by the homeowner on a scale of seven to ten

**MATERIALS:** Do you want to pay a premium for top shelf paint?

**PRODUCTION:** What method is the most efficient?

**TIME:** Surface face multiplied by the production rate.

**RATE:** The hourly labor rate charged to the client.

The pricing formula starts with intelligence about the standard of quality the owner is willing to purchase. It ranges from acceptable to perfect and can produce a wide range of project costs.

For instance, in the case of repairing and painting an interior plaster wall, will the owner be satisfied with just moderate patching of obvious holes, or will they insist on the remediation of all blemishes and plaster imperfections? These details can mean the difference in submitting a relatively cheap proposal or a realistic proposal that sensibly accounts for the true scope of work.

Accordingly, once the quality standard of the surface prep has been determined by knowledgeable probing, material purchases will be aligned with customer expectations. Finer finishes are achieved with better quality paint products, and the pricing of paint products swing wildly from bargain brands to established professional coatings.

Naturally, an estimate of project materials will depend upon whether a contractor marks up his purchases (to offset acquisition costs of time and deliberation) or if they customarily pass on their volume discount pricing. The choice of paint can be a significant factor in estimating: a nine-gallon project (two gallons of primer, four gallons for the walls, one for the ceiling, two for trim) can be as low as \$265, or as high as \$450. Again, the cost depends upon a clear understanding of customer expectations.

Production is contractor specific and is dependent upon skill, strategy, equipment, and ethic. Two comparably experienced contractors can differ dramatically in terms of the time it takes to do the same project. This factor takes vetting to assure the estimate is realistic according to the contractor's ability to expeditiously produce results, and it is best

witnessed first-hand. Most homeowners can judge productivity within the first few hours of a project; a trial period of observation is preferable to a large commitment.

Regardless of productivity, it takes time to do a job correctly. From the project management, tarping set up, tools and materials staging, dust containment, thorough prep, and neatness, to the finishing act: quality scrutiny, pre-emptive punch lists, general clean-up, customer work surveys, and accurate accounting. By far, project time-to-completion is the most impactful consideration when arriving at an accurate estimate.

Hourly rate is not a factor in fixed-price work. Estimating hourly rates can be deceptive, in that productivity is more important. It is not uncommon for a lower cost estimate to have a higher hourly rate; a \$60/hour contractor who is productive can do a ten-hour project more cheaply than a less productive \$50/hour contractor who takes an extra three hours to complete the same task with the same quality.

It is important to consider the relationship of price to value. Savvy buyers consider the whole picture rather than focusing on the price only. Presumably, all

the contractors you've contacted to submit estimates are responding to identical RFPs. You would think that price would be the key differentiator. However, you'll find leading contenders bring more to the table besides simply responding to RFP criteria and price. They bring additional aspects to the execution that add value to their proposal. In the end, it may not be so much what the higher priced contractor adds to the proposal, but rather what the contenders omit. It's a judgement call. Think of it this way: Why do you buy a BMW over a Fiat? They both accomplish the same task. The contenders may all accomplish the same task, but to what level of quality is the question you have to answer.

The bottom-line to all this estimating arithmetic is that the cheapest proposal is not necessarily the wisest option for homeowners who have high standards for satisfaction and care about quality deliverables.





# DOWN TO THE KICK-OFF

**ASSUMING THE SUBMITTED** and reviewed proposals produced at least one contractor worth considering, there are still a few simple, yet critical, steps to take before awarding the contract. The first exercise is to personally interview the finalist, even though you may have met during the initial walk through. Most buyers agree that a contractor's expertise is best determined by the questions they ask, not necessarily the answers they give. When you meet, have about five questions you want to present so that all contenders are treated equally. Inquire about availability, concerns they may have regarding the job, and how you can best assist in the process.

The interview is one of the final steps in determining if the right chemistry exists: Do you connect?

Personality counts. This project is indeed a partnership of sorts and if one party doesn't jive with the other, it usually makes sense to take a pass and move on to the next candidate. Other red flags could be the contractor's attire, his vehicle, whether he appears organized and professional, etc. Have your antennae up to avoid the perils of a bad match. If the number one contractor doesn't meld with your personality, go to the next one; a good match is important for making the process a pleasurable one.

Let's say the leading contractor has passed the interview, it's easy to capitulate and just award the project. Don't jump the gun. Verify all your assumptions and instincts by taking the time to vet the contender by checking references.

Reference checking is not rocket science, but few people know how to do it effectively. Don't ask the contractor for references; ask them where they worked last, and before that, and before that. Your interest should be directed to *successive* recent references (not hand-selected good reports from their mother). Be aware of any obvious gaps in employment. Are they omitting a bad reference?

When you're checking references, keep in mind that you're encroaching on a former customer's private

time, so be respectful of that fact. You may only get enough time to ask one critical question. If you had just one question you could ask, what would it be? The simple, tell-all question is this: “If you had to do it over again, would you rehire this contractor?”

After asking, you might want to repeat their answer so that they hear what they said and can modify it if necessary. Don’t be timid about digging for an explanation to this yes/no question. See if the reference can remember why they selected the contractor in the first place. Who else did they consider? If you have the time, inquire about what they saw as the contractor’s strengths. Better yet, ask about what they thought the contractor should improve.

It is likely that the reference will confirm your inclinations but remain sensitive to their answers so that you don’t miss a telling clue. If all goes well, you should be able to make a decision and extend an offer. Before you do, however, ask the contractor if there is any room to discount his price—their response can be very telling. A contractor who is unwilling to budge doesn’t necessarily mean he is inflexible; he may simply be confident that he has estimated the job correctly. If his estimate is correct, there is no reason

to discount the work to deliver a quality product. A contractor might indicate his desire to please by throwing in another item at a reduced price to gain favor and win the job. This is a tough call that will require all your reasoning capabilities.

Be prepared with a personalized contract that spells out the Scope of Work, the project plan promises, material specifications, timeline, the guarantee, and any other deliverables for the project, for the winning contractor to review and sign. It is a good idea to include a sample of the contract, without the particulars, in the RFP so that it doesn't come as a surprise. The contract should mention performance standards and what is considered terminable. Let the contractor know there is a Plan B should you need to exercise the termination clause and what are the causes to act. Make two copies that you will both sign and retain for perusal.

Notify the other contenders simultaneously regarding your decision. Remind them that they are in queue should the need for Plan B occur. Let them know you are grateful for their time and input, and that you may refer them or contact them in the future.

# PROJECT COMMENCEMENT

**THE SMART HOMEOWNER** can ensure project success by preparing for a flawlessly smooth project launch. Don't just expect the contractor to show up and immediately become productive. You are paying for his time, and if time is spent dealing with homeowner chores, you're effectively paying trade wages for work you can do better and cheaper.

Anticipate chores that need to be tended to before the crew starts prepping. You'll want to make sure all lawn furniture, patio furniture, and planters are moved out of harm's way.

The contractor will probably start the project by assigning one of the crew to power wash the house so that it has a clean surface to bond with the paint. Consequently, you will want to make sure all your

windows and doors are properly are closed and sealed to avoid any damaging overspray or moisture.

Arrange for contractor access to the garage or basement. Inform the contractor of any security measures he should be aware of including the security code for entrance and how to arm it upon departure. While you're at it, make sure everyone is aware of interior access imperatives: set boundaries where they can go, where they are not allowed. Specify toilet facilities, clean up restrictions (only the slop sink downstairs, etc.) and any other rules you wish to impose in order to have safety, privacy, and security.

On the subject of safety, be proactive about special arrangements with children, pets, or any elderly inhabitants while the project is underway. Again, make sure windows are closed. Insist on restraining noise levels, behavior, conduct, and agree on the time the contractor will start and end his workday. (For example, Contractor will begin work at \_\_\_\_\_ AM and finish no later than \_\_\_\_\_ PM.) Most clients insist on no smoking on the premises (drugs and alcohol are also not tolerated) and vulgarity is not allowed: it's all about respect for the homeowner.

Make sure the contractor has a specific spot for the secure storage of his equipment, paint, and tools.

Consider hose usage and a designated spot for outdoor paint cleanup. Indicate where vehicles may be parked and give any precautions regarding landscaping and the gardens.

The start of a project is a good time to review safety precautions: how will they deal with dust containment when sanding, what measures will they take regarding high work, and what is the disposal protocol for hazardous materials and waste? Reiterate the need to keep the property neat, the daily collection of waste, and disposal of trash at the end of the project.





# EXECUTION— FINALLY!

**THIS IS ADMITTEDLY** a short section of this process because, at this point the job of the homeowner is, for the most part, complete. From here on out your role should be nothing more than brief, daily monitoring of progress and performance. Any deviation from the plan or house rules should be addressed immediately with the project leader.

It's a good idea to periodically oversee and grade performance, as detailed in the contract both parties agreed to. Corrections can be made with the project leader before they become cause for concern. The homeowner's job is not to manage the project—you're paying the contractor to do that. Make sure they are measuring daily performance by tracking and reporting pertinent metrics such as expenses, hours, benchmarks achieved, quality scores, etc.



# ISSUE RESOLUTION

**IF REPORTED PROGRESS** appears satisfactory, you may want to be sure by occasionally observing the work. If there are issues, come to an agreement about how best to deal with the issues and return to the baseline promises. The severity of the deviation or defection from the contract, which was detailed in the RFP and the contract, may decide if a review is in jeopardy (or can be enhanced with a concerted response). If the infraction is severe enough to merit a warning, don't hesitate to remind the contractor that termination is an option as described in the contract. A second warning may be grounds for termination and installation of "Plan B."

In the rare case that these unpleasant circumstances occur, insist that the contractor and his crew vacate the premises immediately. Enforcement should

come as no surprise—the contractor was warned repeatedly, and termination criteria are clearly spelled out in the contract.

Before the project is completed, ask the contractor to be preemptive and process his own punch list before you do the same. Instruct the contractor to process his list *before* packing up. Seek the ideal: no punch items. The punch list should indicate that there are no “paint holidays” that need to be touched up, that litter is picked up, that the trash is removed and disposed of, and that any detected overspray is cleaned up. Further inspection should reveal that the landscape and gardens are restored to initial condition, the hoses are recoiled, and any shutters, drainpipes, and house ornaments are re-attached. Ideally, a subsequent walk-through by the homeowner should produce no additions to the punch list.

At the end of the project, process a fair satisfaction survey for the contractor for review publication. Again, as mentioned in the RFP, the survey will grade professionalism, performance, dependability, work quality, and problem resolution.

Inform the contractor whether you agree to have your house photographed and whether you agree to

be included as a reference. Be sure to specify how frequently you agree to cooperate: three references is generally considered gracious. If it is warranted, as I suspect it would be at this point, this is the time to offer a written testimonial, or agree to submit any specified reviews.

Make sure the contractor knows that he needs to submit an invoice in order to receive final payment. Remind the contractor the day before the project is completed that the invoice and a W9 is a condition of payment as spelled out in the RFP and the contract.

The project is complete: your house is painted and beautiful! By all rights it should have been a non-event during your summer, as long as you adhered to the basics of this guide. You secured the services of a competent contractor, he knew the rules of the game, you held him accountable on a daily basis, and there should have been relatively few surprises.

Your personal involvement in the actual execution of this project can be significantly minimized if you've been clear and comprehensive with your expectations. In fact, there is no need to be present during the project if there are daily reports and photographs to substantiate progress.

To help you facilitate the DIFM process, I've included a sample SOW, an RFP template, a brief guide to project planning, a project report card, a satisfaction survey, and a sample contract. Don't let these lengthy instructions dissuade you from taking on this house painting project. By adhering to these few fundamentals, you have every reason to expect the results will be exactly as planned.

Good luck!

## ABOUT THE AUTHOR



**SPUNK BURKE** is the senior paintwright at the contracting firm Burke and Crew Paintwrights. As a painting contractor, he caps off a 50-year career in the contracting industry, of which three decades involved honing his contracting skills by providing all manner of technical contractors to the intensely competitive business community.

Spunk declares that it is irrelevant whether one purchases the services of computer programmers, or residential house painters—contracting is still contracting; identify a suitable project and achieve the desired objective by assigning appropriate talent. Spunk knows contracting. His companies have booked over 370 million dollars in aggregate sales of contract services.

Spunk has shifted his focus from staffing the commercial sector to addressing the project needs of the residential homeowner. Every long-term homeowner is occasionally confronted with the need to call upon the trades to contract for a major repair or renovation in order to maintain or enhance the value of their property.

The investment nature of these transactions generally includes decision factors such as quality, process, funding, and value to name just a few. Make the wrong purchase decision, and the project outcome inevitably finds multiple ways to disappoint . . . and worse.

There is no reason why contracting should be fraught with “gotchas” or an unpleasant experience if the project is managed correctly. Spunk created this book to help homeowners follow a detailed project execution process which will result in a predictable, satisfying outcome.



# THIS IS NOT A BOOK ON **HOW TO PAINT A HOUSE**

It is a process you can rely on for selecting the right contractor to do the house painting project perfectly. *Follow these instructions and **CONSIDER IT DONE!***

A house that is professionally painted is, for most homeowners, a vision to behold, but it's an experience few are equipped to manage. In fact, most homeowners would just as soon do without projects of this sort; it's not an experience one looks forward to. It doesn't have to be that way any longer.

## **NEVER SELECT THE WRONG PAINTING CONTRACTOR AGAIN**

*Inside This Book You'll Discover:*

- ▶ The one knock-out question to get to the absolute truth when fielding a seemingly glowing reference check.
- ▶ Using a simple request for proposal which will assure project success and homeowner protection.
- ▶ How to identify professional "wannabees" from the real deal at 20 paces or less than 60 seconds.
- ▶ How to confidently evaluate competitive vendor proposals to make the correct award decision without fail.



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