



PHASE 1

Budget Preparation Checklist

1. Receive Drawings from GT Construction Manager

2. Create Bid Trade Analysis Sheets

- 2.1 Columns required:

<i>Category</i>	<i>Description</i>	<i>Qty.</i>	<i>Unit</i>	<i>Labor Unit Cost</i>	<i>Materials Unit Cost</i>	<i>Sub Unit Cost</i>	<i>Total</i>
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2. Create Bid Trade Analysis Sheets

- 2.2 Populate columns with project scope description & estimate

<i>tion</i>	<i>Qty.</i>	<i>Unit</i>	<i>Labor Unit Cost</i>	<i>Materials Unit Cost</i>	<i>Sub Unit Cost</i>	<i>Total</i>
	1	ls				
	2	ea	\$ 50.00	\$ 50.00	\$ -	\$ 200.00
	3	ea	\$ 50.00	\$ 50.00	\$ -	\$ 300.00
	1,404	sf	\$ 0.50	\$ 0.50	\$ -	\$ 1,404.00

2. Create Bid Trade Analysis Sheets

- 2.3 Put the CSI Item Number in the upper left corner of each sheet

<i>Category</i>	<i>Description</i>	<i>Qty.</i>
Paint	Bids	1
	Stain Doors	2
	Paint	2

2. Create Bid Trade Analysis Sheets

- 2.4 Every trade must have an accompanying Bid Trade Analysis Sheet

		New Sidelight
5	Framing & Drywall	
		New Partition
		Acoustical Ceilings
9	Paint	
		Stain Doors
		Paint Door Frames
		Paint Walls

5	
<i>Category</i>	<i>Description</i>
Framing & Drywall	Bids

9		
<i>Category</i>	<i>Description</i>	<i>Qty.</i>
Paint	Bids	1
	Stain Doors	2

3. Create Estimate Summary Sheet

- 3.1 Columns required:

<i>CSI Item Number</i>	<i>Category</i>	<i>TOTAL AMOUNT</i>	<i>S.F. Cost</i>
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3. Create Estimate Summary Sheet

- 3.2 Populate Columns with data from each Bid Trade Analysis Sheet

<i>CSI Item Number</i>	<i>Category</i>	<i>TOTAL AMOUNT</i>	<i>S.F. Cost</i>
1	General Conditions	\$778.00	\$0.35
2	Demolition	\$789.00	\$0.36
3	Flooring	\$233.00	\$0.11
7	Fire Protection	\$113.00	\$0.05
8	Doors/Frames/Hardware	\$2,434.00	\$1.11
8	Glass/Glazing	\$221.00	\$0.10
8	Framing & Drywall	\$978.00	\$0.44
9	Paint	\$353.32	\$0.16
15	HVAC	\$778.00	\$0.35
16	Electrical	\$1,020.00	\$0.46
Total Cost:		\$7,697.32	\$3.50

3. Create Estimate Summary Sheet

- 3.3 Ensure that the costs on the Estimate Summary Sheet match Bid Trade Analysis Sheets

5	New Sidelight
Framing & Drywall	
	New Partition
	Acoustical Ceilings
9	Paint
	Stain Doors
	Paint Door Frames
	Paint Walls

5	
<i>Category</i>	<i>Description</i>
Framing & Drywall	Bids

9		
<i>Category</i>	<i>Description</i>	<i>Qty.</i>
Paint	Bids	1
	Stain Doors	2

3. Create Estimate Summary Sheet

- 3.3 Cost matching (continued)

8	Framing & Drywall	\$078.00	\$0.44
9	Paint	\$353.32	\$0.16

<i>Labor</i>			<i>Materials</i>			<i>Tax</i>	<i>Total</i>
<i>Qty.</i>	<i>Unit</i>	<i>Unit Cost</i>	<i>Qty.</i>	<i>Unit</i>	<i>Unit Cost</i>		
1	ls		1	ls			
2	ea	\$ 50.00	2	ea	\$ 50.00	\$ 16.00	\$ 116.00
3	ea	\$ 50.00	3	ea	\$ 50.00	\$ 24.00	\$ 124.00
1,404	sf	\$ 0.50	1,404	sf	\$ 0.50	\$ 112.32	\$ 113.32
							\$ 353.32

3. Create Estimate Summary Sheet

- Estimate Summary Sheet sample thus far

<i>CSI Item Number</i>	<i>Category</i>	<i>TOTAL AMOUNT</i>	<i>S.F. Cost</i>
1	General Conditions	\$778.00	\$0.35
2	Demolition	\$789.00	\$0.36
3	Flooring	\$233.00	\$0.11
7	Fire Protection	\$113.00	\$0.05
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9	Paint	\$353.32	\$0.16
15	HVAC	\$778.00	\$0.35
16	Electrical	\$1,020.00	\$0.46
Total Cost:		\$7,697.32	\$3.50

4. Verify minimum required bid participation is confirmed for Subcontractors & Vendors

*NOTE – Obtain approval from GT CM for less than 3 bids on scope value of \$5K or greater and provide justification. Ideally 3 bids are received for all trades regardless of dollar value.

5. Forward completed G.C. Budget Estimate including, Phase I Checklist, Estimate Summary, Bid Trade Analysis Sheets, and Subcontractor/Vendor minimum participation verification to GT CM

5.1 Include a completed Phase I Checklist Item 1 thru 5, checked as complete

5.2 Label each page (on top right corner) with:

G.C. Budget Estimate

Project Name

Building # - Building Name

Project Number: wxyz-20xx

Page x of y (total # of pages)

*****DUE 1 WEEK FROM
RECEIPT OF BID DOCS*****

*NOTE – Items in red will change for each job.

6. Coordinate construction site visit with GT Construction Manager for subcontractors

7. Receive Subcontractor/Vendor Quotes

- 7.1 Highlight Columns H-P, right click, select unhide

D	E	F	G	H	P	Q	R
<i>Unit</i>	<i>Labor Unit Cost</i>	<i>Materials Unit Cost</i>	<i>Sub Unit Cost</i>	<i>Total</i>			
ls		1	ls				

7. Receive Subcontractor/Vendor Quotes

- 7.3 Three bids required per trade

	I	J	K	L	M	N	
	<i>Subcontractor 1</i>		<i>Subcontractor 2</i>		<i>Subcontractor 3</i>		
	<i>Included (x)</i>	<i>Price</i>	<i>Included (x)</i>	<i>Price</i>	<i>Included (x)</i>	<i>Price</i>	

8. Obtain GT CM approval for exceptions to minimum bids required

9. Inquire about OIT/telecom proposal with GT CM – direction on whether it should be included in G.C. cost (if applicable)

10. Prepare Preliminary Schedule

11. Prepare “Statement of Constructability and Qualifications”



Project Name:
Project Number:
Building Name:
Building Number

Statement of Constructability and Qualifications

We hereby certify that we have looked over the appropriate documents related to the project listed above, including, but not limited to: drawings, specifications, notes, plans, surveys, and estimates; and deem this project to be constructible.

Name
Estimator

Name
Project Manager

Name
Superintendent

12. Forward Documents below to GT CM

- 12.1 Proposal Cover Letter
- 12.2 Estimate Summary
- 12.3 Bid Trade Analysis Sheets
- 12.4 Preliminary Construction Schedule
- 12.5 Statement of Constructability and Qualifications
- 12.6 Change the heading in top right corner to

read:

G.C. Working Estimate

Project Name

Building # - Building Name

Project Number: wxyz-20xx

Page x of y (total # of pages)

*****DUE 2 WEEKS FROM
RECEIPT OF BID DOCS*****