

# Phase 1

Budget Preparation Checklist

1. Receive drawings from construction manager

## 2. Create Bid Analysis

### 2.1 Columns

<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 Analysis

### 2.2 Populate columns with general contractor 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 Analysis

### 2.3 CSI Item Number Location

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

## 2. Create Bid Analysis

### 2.4 Every trade must have an accompanying Bid Analysis

5	New Sidelight
5	<b>Framing &amp; Drywall</b>
	New Partition
	Acoustical Ceilings
9	<b>Paint</b>
	Stain Doors
	Paint Door Frames
	Paint Walls

  

Category	Description
5	<b>Framing &amp; Drywall</b>
Framing & Drywall	Bids

  

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



# 3. Create Estimate Summary

## 3.1 Columns:

<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

## 3.2 Populate Columns with data from each bid analysis

<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
<b>Total Cost:</b>		\$7,697.32	\$3.50

# 3. Create Estimate Summary

## 3.3 Every trade must have an accompanying Bid Analysis

5	New Sidelight
5	<b>Framing &amp; Drywall</b>
	New Partition
	Acoustical Ceilings
9	<b>Paint</b>
	Stain Doors
	Paint Door Frames
	Paint Walls

  

Category	Description
5	<b>Framing &amp; Drywall Bids</b>

  

Category	Description	Qty.
9	Paint Bids	1
	Stain Doors	2



### 3. Create Estimate Summary

Estimate Summary 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
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16	Electrical	\$1,020.00	\$0.46
		<b>Total Cost:</b>	
		\$7,697.32	\$3.50

4. Verify minimum participation w/  
Subcontractors/Vendors

# 5. Forward Bid Analyses and Estimate Summary to construction manager

## 5.1 Label each page with

Initial Budget  
Project Name  
Building # - Building Name  
Project Number: xyz-20xx  
Page x of y (total #)

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

in the top left corner

6. Coordinate Pre-Bid with construction manager







# 7. Solicit 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. Conduct Pre-Bid

9. Obtain construction manager approval to minimum required exceptions

10. Solicit OIT/telecom proposal (if required)

# 11. Prepare Preliminary Schedule

# 12. Prepare “Statement of Constructability and Qualifications Listing”



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.

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*Name*  
Estimator

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*Name*  
Project Manager

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*Name*  
Superintendent



# 13. Forward Documents to construction manager

13.1 Description Analysis Summary

13.2 Estimate Summary

13.3 Statement of Constructability and Qualifications Listing

13.4 Preliminary Schedule

Label each page with

Project Estimate

Project Name

Building # - Building Name

Project Number: xyz-20xx

Page x of y (total #)

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RECEIPT OF BID DOCS\*\*\***