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CANVAS, ESTIMATE AND BID PROCEDURE

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Abstract:

This document describes the canvas, estimate and bid procedure.

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REVISION LOG

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DOCUMENT CHANGE RECORD

Issue	Item	Reason for Change

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Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

TABLE OF CONTENTS

1.0	PURPOSE.....	4
2.0	THEORY	4
3.0	PROCEDURE.....	4
Section 1:	Canvas / Identify Potential Projects	4
Section 2:	Evaluating Potential Projects	9
Section 3:	Preliminary Matters.....	11
Section 4:	Prepare the Cost Estimate	20
Section 5:	Prepare the Bid.....	24
Section 6:	Turn-in Procedures.....	30
Section 7:	Estimate Turn-over.....	30

(This procedure presumes the use of services that may not be used by your Company; if so, delete all references...)

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Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

1.0 PURPOSE

This document defines the Estimating process including or making reference to procedures for the various activities within the process.

2.0 THEORY

The Company can only meet Client requirements by ensuring that all such requirements are obtained then reviewed and understood. This process ensures the suitable capture of requirements and ensures that the Company's understanding of those requirements is communicated to the Client prior to and through contract acceptance.

3.0 PROCEDURE

Section 1: Canvas / Identify Potential Projects

Sifting through Invitations To Bid (ITB's), Requests For Quotes (RFQ's) and Requests For Proposals (RFP's) is a tedious and time consuming process. It is however,

There are a lot of places to find projects to bid. The Company has taken a lot of time to qualify for and build the following list of locations to find projects with the potential to fit into the Company's market. As the electronic market evolves, there will be

1.1 Subscriptions—The print media has a place in this process. Hard copies of printed material usually show

1.1.1 The Daily Journal—The Daily Journal is a publication of McGraw Hill. It is printed daily and mailed to the Company's office. It is divided into two general sections. One being General Building and the other being Engineering. It also has a section called

1.1.2 Magazines and Other Periodicals—Other periodicals offer additional sources for bidding information. Periodicals such as

1.2 Internet Sources—Most bidding opportunities come from the internet, which is usually a timely method to find bidding opportunities - check them

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		Rev: Orig



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		Rev: Orig

1.2.1 Federal Work & FedBizOps—Federal work is bid, by law, through its website FedBizOps. There are a lot of conditions to be met to maintain access to this site. Do not attempt to [REDACTED]

FedBizOps is short for Federal Business Opportunities. It is the main location to bid all federally funded projects and all federal agencies. Due to parameters that have been previously set up, we can access bids [REDACTED]

Search for bid opportunities by either clicking on Opportunities after log on or [REDACTED]

Once in FedBizOps, the User can use a “Keyword” search such as “program management”, “technical staffing and outsourcing services” to search for bids of those types. After the User uses a “Keyword” search, a list of projects appears sorted as desired. If the User clicks on a job that is listed, the Solicitation page usually [REDACTED]

The government is mandated to set aside various projects for disadvantaged companies. The Company does not qualify for any of these classifications; so, if the User sees HubZone Set Aside, Small Business Enterprise (SBE), Woman in Business Enterprise (WBE), Minority in Business Enterprise (MBE) or other classifications, [REDACTED]

To access FedBizOps use www.fbo.gov, the user name is TBD and the password is TBD. Note that all passwords are case sensitive.

1.2.2 National Business Center (NBC)—Most of the time a Solicitation on the FedBizOps site will [REDACTED]

To access the site use <http://ideasec.nbc.gov>. This site asks for [REDACTED]

Please note that it is very important to accurately enter the password for the FedBizOps site (above) and the MPIN for this site. Failure to correctly type in three times will [REDACTED]

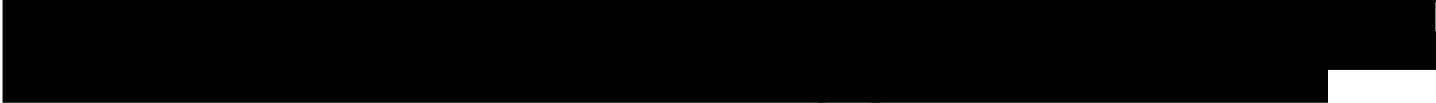
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		Rev: Orig



1.2.3 Subscription Based Internet Search Providers—There are numerous electronic websites that find projects that are in the bidding process. They charge a fee for this service. The Company uses the two services below to find and track projects in the bidding phase. Due to the cost of these services, they must



1.2.3.1 Reed Construction Data (Reed Connect)—To access Reed Construction Data, use <https://secure.reedconnect.com> The user name is TBD and the password is TBD. If the User incorrectly types in the password three times, we will have to reset the password. This website does not provide



Again, this website includes

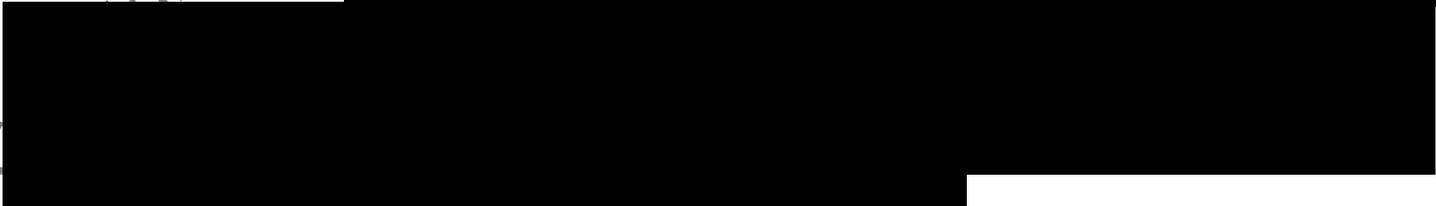
Once a project is deleted from a list it is gone forever. It may, however, show up on another list. For example:



The target list is set up to sort by bid date. The closest bid date is first and the farthest out is last. This helps the User see at a glance what is coming up soonest. Other lists do not use this option. Therefore,



If the User sees a project to track, click on the “Make Active” tab and it will highlight the project in red. This will allow the User to



Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

The User may have to make a phone call to the Owner and/or Engineer to find out the engineer's estimate, material quantities and any other information to help the Company make an informed decision to [REDACTED]

Also, this page will usually show [REDACTED]

1.2.3.2 McGraw Hill Construction—McGraw Hill Construction provides more timely information through a sort titled "Planning and Preplanning". This provides the Company with [REDACTED]

1.2.4 Regional—The Company uses regional websites to find projects to bid in various regions of the country. As we develop more sites, they will be updated here.

1.2.5 Local—More and more local entities are developing their own websites to provide bidding opportunities. Several clients that we work with have [REDACTED]

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		Rev: Orig

1.3 Networking—The User never knows where they might run across the next bidding opportunity. Company employees meet industry leaders every day. We have Owners and Engineers that we work with on a project-by-project basis and we have [REDACTED]

1.4 Trade Shows—Trade shows offer an excellent opportunity to [REDACTED]

1.5 Word of Mouth—Just because we come to know of a project by word of mouth does not mean we should [REDACTED]

Utilize the Company's Website at every opportunity to send all interested people to our website. It is a great place to show potential clients what we have done and what we can do.

1.6 "Cold Calls" from Outside—We get a lot of calls from Owners and Engineers requesting information concerning [REDACTED]

Section 2: Evaluating Potential Projects

A key part to evaluating potential projects comes from [REDACTED]

2.1 Evaluation [REDACTED]

2.1.1 Location—In general, the Company prefers to work (list your preferred USA work zones). We do not pursue work (list your non-preferred USA work zones).

Generally, we want to work in all of the States we have licenses in (State licenses may not be applicable for management business). There are some Midwestern states that do not require a license that we will also pursue work in. Chances are, [REDACTED]

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

There are exceptions to the rule above. Federal projects do not require [REDACTED]

2.1.2 Business Authorization—The Company is currently authorized to do business in all States identified as [REDACTED]

2.1.3 State Contractors License—The Company is a licensed contractor in all states identified as [REDACTED]

Federal projects do not require a State license.

2.1.4 Estimated Value—It is usually difficult for the Company to be competitive on projects less than \$TBD. Unless there is a reason the Company can be competitive on a project of this nature, we will [REDACTED]

2.1.5 Scope of Work—The Company provides program management, technical staffing, and [REDACTED]

2.1.6 Market—Sometimes a market will lend itself to our business. The [your USA region(s)] are good markets for the Company.

2.2 Storing and Communicating the Information

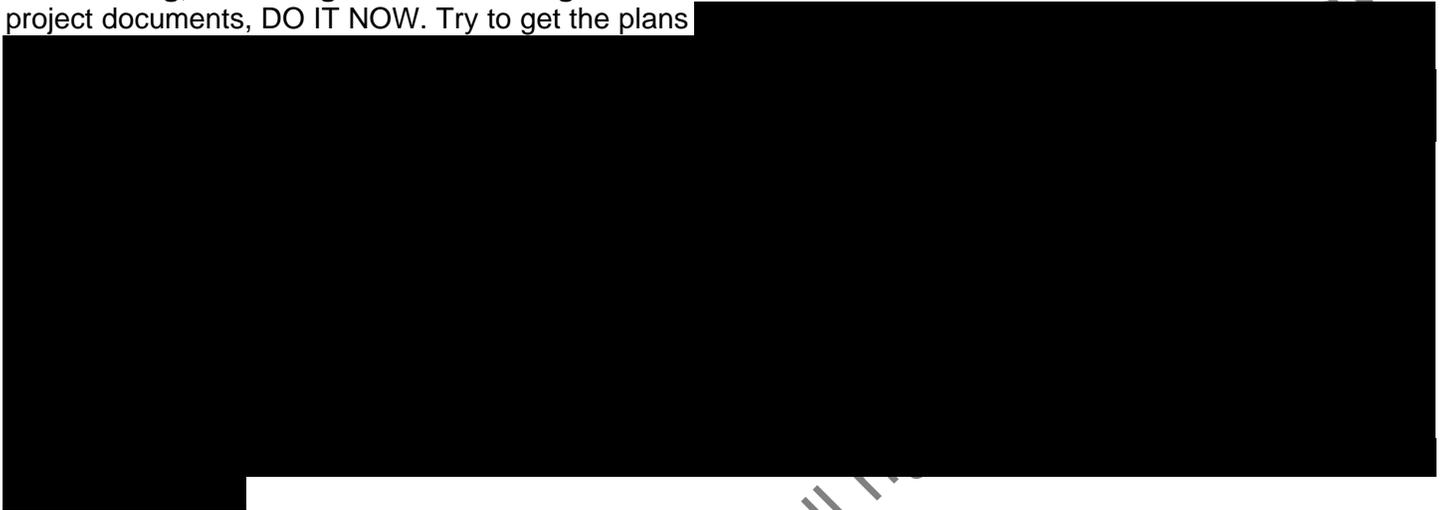
Information gathered should be stored on the “Bird Dog List” or Bidding Pipeline List, which is on [REDACTED]

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		Rev: Orig

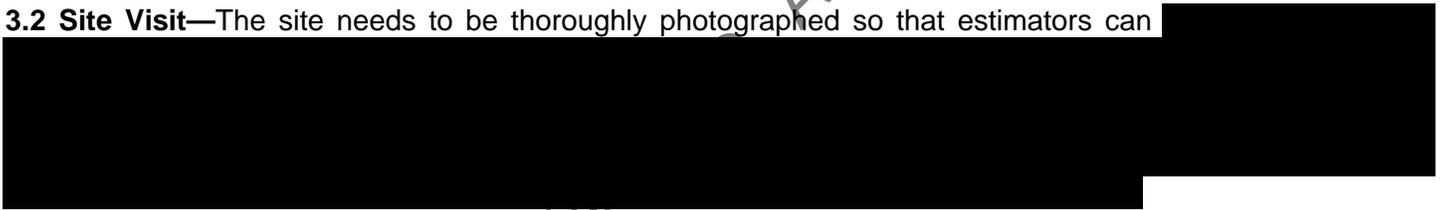
Section 3: Preliminary Matters

There are some preliminary matters that need to be addressed before an Estimate or Bid can begin.

3.1 Ordering, Receiving and Distributing Bid Documents—If the User has not been directed to order the project documents, DO IT NOW. Try to get the plans



3.2 Site Visit—The site needs to be thoroughly photographed so that estimators can

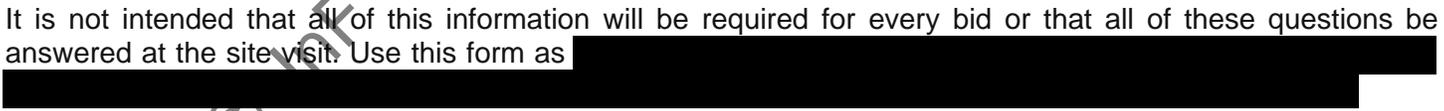


3.2.1 Site Visit/Pre-Bid Checklist

The purpose of this document is to



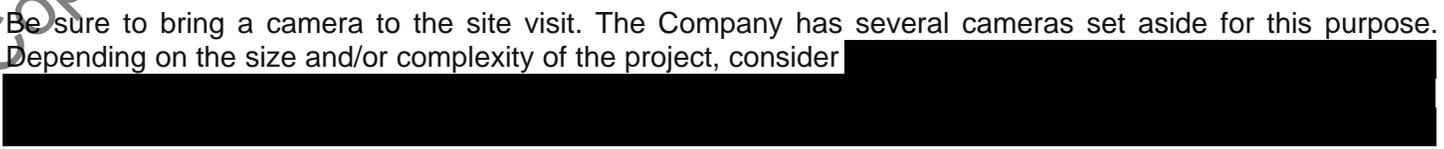
It is not intended that all of this information will be required for every bid or that all of these questions be answered at the site visit. Use this form as



A pre-bid site visit should



Be sure to bring a camera to the site visit. The Company has several cameras set aside for this purpose. Depending on the size and/or complexity of the project, consider



Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig



This completed form and any additional site notes or estimator notes must



GUIDELINES & REQUIREMENTS

1. All jobs bid will have
2. All underground pipe jobs, treatment plants and major excavation bids will have
3. Arrange for site visit through the client and transportation through the operations secretary.
4. Try to schedule site visits with any other trip to utilize equipment and personnel efficiently.
5. If the job is large or in a new area, plan on staying more than one day.
6. The pre-bid job site analysis and site visit check list
7. Study the plans and specifications prior to the site visit.
8. Know the scope of work prior to the site visit.
9. Build the job in the mind and make notes about
10. Look at
11. Look at
12. Read the local newspaper for
13. Determine who our competitors are and
14. Visit the job service center - obtain
15. Visit local
16. Visit local
17. Obtain
18. Check local
19. Check the status of unions.

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

20. If the project is a multi-contractor job and our work interfaces with others, find out [REDACTED]
[REDACTED]

21. Observe [REDACTED]

3.2.2 Site Visit/Pre-Bid Checklist

The following sheet can be used to [REDACTED]
[REDACTED]

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		Rev: Orig

(Your Company)
Estimating Site Visit Report and Pre-Bid Check List

[Redacted]

Site Information

1. Access:

[Redacted]

2. Laydown Area:

[Redacted]

3. Temporary Utilities:

[Redacted]

4. Site Information:

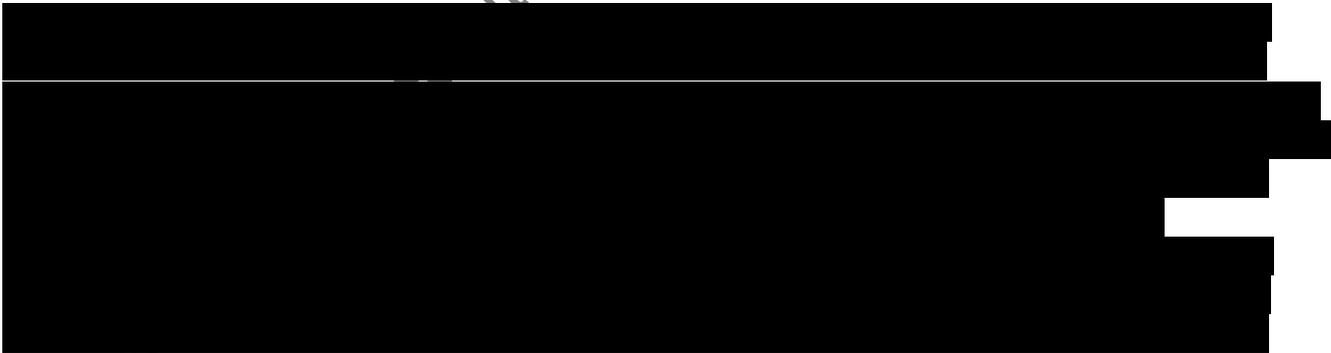
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		Rev: Orig



Work Conditions:



5. License/Permits/Taxes:



6. Vendor/Subcontractors:



7. Labor/Housing:

[Redacted]

8. Discipline Concerns & Questions:

- a. [Redacted]
- b. [Redacted]
- c. [Redacted]

Staging Area

d. [Redacted]

[Redacted]

e. [Redacted]

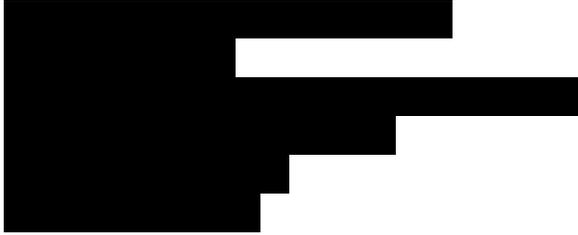
[Redacted]

f. [Redacted]

[Redacted]

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		Rev: Orig



3.3 Bid Bond Request Form—Complete the Bid Bond Request Form. It is important to complete this quickly to [redacted]

3.4 Opening of a Cost Code—Ask the Accounting Department to open a cost code to charge the estimating costs to. The cost of [redacted]

3.5 Create a Bid Book—Set up a bid book. The bid book is [redacted]

3.6 Set Dates, Delegate Tasks—Coordinate with Principals and Operations to [redacted]

Section 4: Prepare the Cost Estimate

4.1 Setup the Estimate

Open the latest Company Master Estimate Template in HeavyBid to setup a new estimate in HeavyBid. (<http://www.hcss.com/Products/HeavyBid/Overview.aspx>)
(delete references to HeavyBid if it is not used - refer to applicable software program)

4.2 Glossary of Common Estimating Terms at the Company—The following is a list of common terms that may be used and heard at the Company and (correct or not) their “(Your Company) Meaning”.

1. Direct Labor

[redacted]

2. Direct Material

[redacted]

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

3. Equipment

4. Direct Subcontractors

5. Plant Equipment

6. Indirect Labor

7. Indirect Material

8. Indirect Subcontractors

9. Direct Man-Hours

10. Indirect Man-Hours

11. Safety Expense

12. Expendables

13. Small Tools

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

14. Fuel and Oil

15. Payroll Taxes: Regular

16. General Liability Insurance

17. Premium Time

18. Payroll Taxes: Premium

19. Fringe Benefits

20. Subsistence

21. Sales Tax

22. Use Tax

23. Contingency

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

24. Overhead & Profit

25. Other

26. Permits

27. Auto & Builders' Risk Insurance

28. Bond

29. Gross Receipts Tax

4.3 Standard Cost Code List—SEE COST MANAGEMENT PROCEDURE FOR COST CODE LIST

4.4 Soliciting for Suppliers / Subcontractors— Procurement of vendors and subcontractors can

The Lead Estimator makes a thorough review of

The Lead Estimator develops a Scope of Work for Subcontractors and a Scope of Supply for Vendors. They then develop

After the User has the outline of scopes of work and supply, write up an Invitation to Bid for the subcontractors and vendors. It will include

Your Logo	(Your Company) Enterprises, Inc.	Estimating Procedure
		Rev: Orig

This is a fast way to distribute the bid documents and it is [REDACTED]

Subcontractors and suppliers may be found in the Company Subcontractor and Supplier Master List at:
(your resource)

Make use of the phone book library, the internet and [REDACTED]

The Estimating Technician maintains the Subcontractor and Supplier Master List, if the User needs to make any changes to the contents of this list, see them before making those changes.

As subcontractor and vendor quotes come in, make sure [REDACTED]

4.5 FINALIZE THE ESTIMATE

Make sure that the (your manager) has all of the most current subcontractor and vendor quotes. Make sure that the entire bid team has all of the Addendums. Make sure that all of the Addendums are [REDACTED]

Section 5: Prepare the Bid

5.1 Bid Documents—Make sure that bid documents are [REDACTED]

5.2 Contract Review—Most of the Company's contracts are very similar to each other; however, [REDACTED]

INSERT CONTRACT/RISK REVIEW WORKSHEET HERE

5.3 Specification Review [REDACTED]

5.4 Joint Venture Bid Checklist [REDACTED]

JOINT VENTURE BID CHECKLIST

1. [Redacted]
2. [Redacted]
3. [Redacted]
4. [Redacted]
5. [Redacted]
6. [Redacted]
7. [Redacted]
8. Set up a pre-bid kick off-meeting
 - a. [Redacted]
 - b. [Redacted]
 - c. [Redacted]
 - d. [Redacted]
 - e. [Redacted]
 - f. [Redacted]
 - g. Make a bid schedule and define data for certain activities such as:
 - [Redacted]
 - [Redacted]
 - [Redacted]
 - [Redacted]
 - [Redacted]
9. [Redacted]
10. [Redacted]

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		Rev: Orig

11. [Redacted]

12. [Redacted]

13. Develop the following:

- a. [Redacted]
- b. [Redacted]
- c. [Redacted]
- d. [Redacted]
- e. [Redacted]
- f. [Redacted]
- g. [Redacted]

14. Research the following:

- a. [Redacted]
- b. [Redacted]
- c. [Redacted]

15. [Redacted]

16. Perform final review:

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

17. [Redacted]

5.5 Design Build Bid Checklist [Redacted]

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		Rev: Orig

DESIGN-BUILD CHECKLIST

1. Licensing

a. 

b. Include the following contract provision regarding the Company "furnishing" design through a licensed architect or engineer, as applicable:

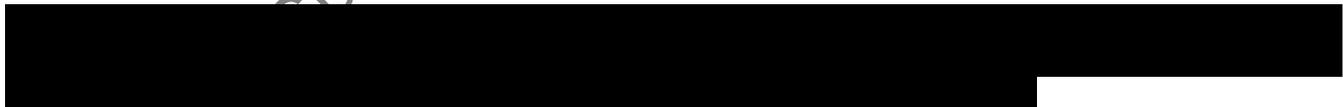


c. 

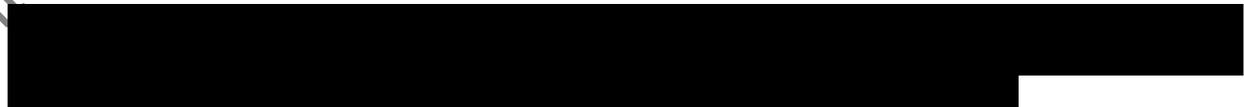
2. Severability

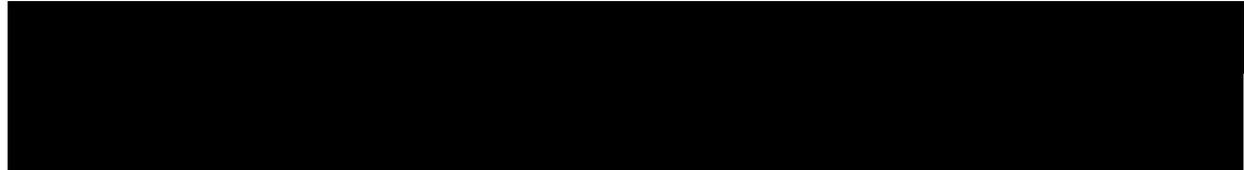
Include in the Contract a severability clause as follows:





3. Limitations on Liability

a. 



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[Redacted]

[Redacted]

b. [Redacted]

[Redacted]

4. E&O Insurance

Possibilities include the following:

a. [Redacted]

b. [Redacted]

b. [Redacted]

c. [Redacted]

e. [Redacted]

[Redacted]

6. Bonding

[Redacted]

7. Indemnification from Design Subcontractors

- a. [Redacted]
 - b. [Redacted]
 - c. [Redacted]
- [Redacted]

8. Scope of Work, Warranties and Performance Guarantees

- a. [Redacted]
- b. [Redacted]
- c. Always add the following clause in bold face type at the end of the warranty section:
[Redacted]

9. Liability for Underground/Differing Site Conditions

[Redacted]

CLAIMS FOR CONCEALED OR UNKNOWN CONDITIONS: [Redacted]

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		Rev: Orig



Section 6: Turn-in Procedures

6.1 Deliver The Bid

Review the bid documents before leaving for the turn-in. Be aware of



Handle calls from subs and suppliers. Tell callers that no decisions will be made until the Company receives



Update the sub/vendor master list by



Section 7: Estimate Turn-over

Turnover the Project to Operations

- a. 
- b. 
- c. **Provide Additional On-Going Project Support**

