Purpose:

The purpose of this Standard Operating Procedure is to be prepared prior to Bid Day such that time on Bid Day is best spent posting bids and analyzing bids.

Procedure:

1) Create Estimate
   A) Setup the estimate information in Timberline
      i. Name of Estimate
      ii. Folder it is to be created in
      iii. Main information page to include:
         1. Name of Project
         2. Project Address
         3. Bid Date and Time
         4. Estimator
         5. Square Footage
         6. Duration
      iv. Main Cover Page Headings
   B) Determine "Add-ons.
      i.
      ii. Sales Tax (for appropriate city and county)
      iii. Labor Burden (for appropriate state as determined by accounting)
      iv. Builder's Risk Insurance (if required as noted in Bid Document Review)
      v. Business Tax (for appropriate city and county)
      vi. Bond (if required as noted in Bid Document Review)
      vii. Overhead and Profit (to be determined with input from the President and/or CEO)
   C) Determine building permits and plan review fees.
   D) Determine any other required fees (i.e., tap, impact, utility, etc.) if they are to be included in the project cost.

2) Setup Bid Form
   A) Give Bid Form to Executive Assistant or Estimating Coordinator for input into computer.
   B) Bid Form to be set up on "P" drive under the Preliminary Folder for the specific project.
   C) Fill in as many items as possible on Bid Form prior to Bid Day
      i. Project name and address
      ii. Contractor name and address
      iii. Owner and/or Architect name (as required)
      iv. Addenda numbers and dates

3) Create Bid Proposal Transmittals
   A) Prepare fax or mail transmittals for all required parties (Owner, Architect, etc.)
   B) Determine number of pages to be sent with transmittal.

4) Create a drawing list to be included in bid package proposal.
   A) To be prepared by Executive Assistant in Timberline
5) Create Bid Tab Sheets
   A) Set up Bid Tabulation in Microsoft Excel
   B) Similar projects may be located on the “P” drive under Shared/Estimating/Bid Tab Sheets for copying.
   C) Trade requirements to be noted across top of each CSI division for determining low bidder.

6) Prepare Bid Clarifications
   A) Continue or complete clarifications (refer to Bid Document Review)

7) Determine square footage cost based on historical data.

   A) Look up costs on similar projects to have a preliminary idea of what the project should cost.