Phase 1 – Budget Preparation Checklist

☐ 1. Receive drawings from GT Construction Manager
   DATE RECEIVED:  ________

☐ 2. Create “Bid Trade Analysis Sheets”
   o 2.1 Columns required:
     ▪ Category
     ▪ Description
     ▪ Quantity
     ▪ Unit of Measure
     ▪ Labor Unit Cost
     ▪ Materials Unit Cost
     ▪ Sub Unit Cost
     ▪ Total
   o 2.2 Populate columns with project Scope Description & Estimate
   o 2.3 Put the CSI Item Number in the upper left corner of each sheet
   o 2.4 Every trade must have an accompanying Bid Trade Analysis Sheet

☐ 3. Create “Estimate Summary Sheet” corresponding to Bid Trade Analysis Sheets
   o 3.1 Columns required:
     ▪ CSI Item Number (Use CSI 16 if Project Manual doesn’t specify)
     ▪ Category
     ▪ Total
     ▪ Square Foot Cost
   o 3.2 Populate columns with data from each Bid Trade Analysis Sheet
   o 3.3 Ensure that the costs on Estimate Summary Sheet match Bid Trade Analysis Sheets

☐ 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 (due 1 week from receipt of bid docs)
   DATE DUE:  _____________
   o 5.1 Include a completed Phase 1 Checklist Items 1 thru 5 above, checked as complete
   o 5.2 Label each page (on top right corner) with:
     G.C. Budget Estimate
     *NOTE – Items in red will change for each job.
     Project Name
     Building # - Building Name
     Project Number: wxyz-20xx
     Page x of y (total # of pages)

☐ 6. Coordinate construction site visit with GT CM for subcontractors
7. Receive Subcontractor/Vendor Quotes (due 2 weeks from the receipt of bid docs)
   - 7.1 Highlight columns H-P, right click, and select "unhide"
   - 7.2 Select columns E-G, right click, and select hide
   - 7.3 Three bids required per trade for scopes $5K or greater
   - 7.4 Place the selected bid in the Selected Price column
   - 7.5 Ensure that the selected price matches on the Estimate Summary and respective Bid Trade Analysis Sheet

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”

12. Forward Documents listed below to GT CM (due 2 weeks from receipt of bid docs) [DATE DUE: [___]___]
   - 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 on the above documents to read: (top right corner)

   G.C. Working Estimate
   Project Name
   Building # - Building Name
   Project Number: wxyz-20xx
   Page x of y (total # of pages)