

## Phase 1 – Budget Preparation Checklist

- 1. Receive drawings from construction manager
- 2. Create "Bid Analysis Summary" Sheet from "phase 1 template"
  - 2.1 Ensure only these columns are showing:
    - Category
    - Description
    - Quantity
    - Unit of Measure
    - Labor Unit Cost
    - Materials Unit Cost
    - Sub Unit Cost
    - Total
  - 2.2 Populate columns with General Contractor estimate
  - 2.3 Put the CSI Item Number in the upper left corner of each sheet
  - 2.4 Every trade must have an accompanying Bid Analysis Sheet.
- 3. Create "Estimate Summary" Sheet from "phase 1 template"
  - 3.1 Has columns:
    - CSI Item Number (Use CSI 16 if Project Manual doesn't specify)
    - Category
    - Total
    - Square Foot Cost
  - 3.2 Populate columns with data from each bid analysis
  - 3.3 Ensure that every trade has an accompanying Bid Analysis
  - 3.4 Ensure that the costs on each sheet match
- 4. Verify Subcontractors, Vendors/Vendor minimum participation with Subcontractors and forward to construction manager
- **5. Forward Bid Analyses, Estimate Summary, and Subcontractor Minimum Participation to construction manager (due 1 week from receipt of bid docs)**
  - 5.1 Include a completed phase 1 checklist up through item 5
  - 5.2 Put this heading in the top right corner. Everything in red must be changed

Initial Budget

Project Name

Building # - Building Name

Project Number: wxyz-20xx

Page x of y (total # of pages)

- 6. Coordinate pre-bid with construction manager
- 7. Solicit Subcontractor/Vendor Quotes (due 2 weeks from the receipt of bid docs)
  - 7.1 Highlight columns H-P, right click, and select "unhide" (do for each bid analysis)
  - 7.2 Select columns E-G, right click, and select hide (do for each bid analysis)
  - 7.3 Three bids required per trade
  - 7.4 Place the selected bid in the Selected Price column

- 7.5 Ensure that the selected price matches on the Estimate Summary and Bid Analysis
- **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"
- **13. Forward Documents listed below to construction manager (due 2 weeks from receipt of bid docs)**
  - 13.1 Bid Analyses
  - 13.2 Estimate Summary
  - 13.3 Statement of Constructability and Qualifications
  - 13.4 Preliminary Schedule
  
  - 13.5 Change the heading on the above documents to read

Project Estimate

Project Name

Building # - Building Name

Project Number: wxyz-20xx

Page x of y (total # of pages)