

## Phase 1 – Budget Preparation Checklist

- 1. Receive drawings from GT Construction Manager** **DATE RECEIVED:** \_\_\_\_\_
- 2. Create “Bid Trade Analysis Sheets”**
  - 2.1 Columns required:
    - Category
    - Description
    - Quantity
    - Unit of Measure
    - Labor Unit Cost
    - Materials Unit Cost
    - Sub Unit Cost
    - Total
  - 2.2 Populate columns with project Scope Description & 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 Trade Analysis Sheet
- 3. Create “Estimate Summary Sheet” corresponding to Bid Trade Analysis Sheets**
  - 3.1 Columns required:
    - 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 Trade Analysis Sheet
  - 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:** \_\_\_\_\_

- 5.1 Include a completed Phase 1 Checklist Items 1 thru 5 above, checked as complete
- 5.2 Label each page (on top right corner) with:

G.C. Budget Estimate

Project Name

Building # - Building Name

Project Number: wxyz-20xx

Page x of y (total # of pages)

\*NOTE – Items in red will change for each job.

- 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)