

# CONCEPTUAL ESTIMATE PREPARATION

## Desktop Instructions

Identify Client need – Assemble all available information – PM is source

Review existing information – Plans of existing conditions, equipment specifications, general scope, schedule, clarifications

- Prepare questions to be addressed during job walk.

Job walk – Verify actual site conditions.

- Check access, existing systems, conditions not addressed by existing information.
- Note questions which cannot be resolved by job walk/visual inspection.

RFI/Clarifications

- Question PM regarding constraints which may affect pricing/cost.
  - Schedule?
  - Phasing?
  - Government supplied equipment?
- Complete list of unresolved questions remaining after review of existing documents, job walk, and review of job walk results with PM.
- Forward list to PM for action/resolution.

Identify Specialty Items

- List items which are of a specialty nature – historical pricing or budget data are not available.
- Secure budgets for specialty items.
  - PM gets quote from specialty suppliers, or supplier if proprietary equipment is required.
  - If not available an “allowance amount” will be assigned to these items and will be documented and shown as a stand alone line item in the 16 Division breakdown which will be included in information sent to NCI for approval.

Perform Overall Gross Square Footage Take Off

- Assign ROM dollar amounts or ratios per square foot to the 16 division breakdown spread sheet as appropriate. Use historical cost data, Means square foot data, and specialty item budgets to establish budget basis.

- Include all planning / engineering fees at the bottom of the 16 division breakdown – fees to be expressed as a percentage with corresponding dollar amount.
- Management Reserve will be included as a percentage of construction budget.
- Forward 16 division breakdown, specialty equipment budget back up (if applicable), list of clarifications/assumptions/exclusions/allowances to PM for review and incorporation into FME Conceptual Scope and Estimate form to be sent to NCI for funding approval.

Conceptual Estimate timeframe to develop.

- A CE should be developed within 2 to 3 days. In order to facilitate this, the Estimator and the DST PM will make the appropriate assumptions to unanswered areas of concern which serve as budget solutions to ensure rapid completion of the CE.