The contents of this training course reflect the views of the author who is responsible for the facts and the accuracy of the data presented herein. The contents do not necessarily reflect the official views or policies of the State of California or the Federal Highway Administration. This course does not constitute a standard, specification, or regulation.
COURSE OBJECTIVES:

• RECAP SESSION #1

• WORK TASK COST COVERAGE

• UNDERSTANDING THE CALTRANS BID FORMAT

• BUILDING THE UNIT PRICE SPREADSHEET
CONTRACTUAL REQUIREMENTS AND GENERAL CONDITIONS

• Contractual requirements and general conditions
  *(Please Refer to Attachment #1 Generals & Subcontractors: Contractual - Working Relationships)*

• Bonding and insurance requirements
  – As a Prime
  – As a Sub

• The Pre-Bid Conference / Job Walk

• Checklist procedure for Site Analysis *(#8)*

• Union / Non-Union Issues during bidding

• General Contractor outreach to Subcontractors

• Subcontractor outreach to General Contractors
CONTRACTUAL REQUIREMENTS AND GENERAL CONDITIONS (CONT’D.)

• The Scope Letter

  – Please see the following:

  • Attachment #3: “Submitting Your Scope Letter Bid”

  • Attachment #4: “Scope Letter Template”

  • Attachment #5: “Sample Scope Letters”
ESTIMATING THE PROJECT (1)

OBJECTIVES:

• EFFICIENTLY ESTIMATING THE JOB IN A TIMELY MANNER

• UNDERSTANDING BID CONCEPTS & STRATEGIES
Basic Cost Parameters - Part 1

• Definition & Cost of General Conditions
  a. Insurance requirements
  b. Schedule requirements
  c. Staffing requirements

• Deciding on what work to do in-house

• Cost of Sub Bonds - “Who Pays”? 
ESTIMATING THE PROJECT (2)

• Unit Pricing - Definition of Pay Quantities

• Distribution & Cost of General Conditions

• Determining overhead costs

• Determining labor and equipment costs (Please refer to Attachment #6: “Typical Wage Rate-Cost Breakdown”)

• Engineer’s Estimate vs. Your price - ???

• Unit Pricing Spreadsheet Format (Please refer to Attachment #7: “Unit Price Bids Spreadsheet”)

• Time Schedule for Working on the Bid
ESTIMATING THE PROJECT (2)

• Quantity Take-offs & Pricing

• Effect / Impact of the Schedule on Price

• How to Bid in Price Increases - Strategies

• Bundling & Breakout of Bid Items

• Bid Day Logistics

• Your Subcontract as Compared to your Scope Letter
COST CONTROL PRACTICES

OBJECTIVES:

Setting up a Jobsite Budget
Tracking Costs & Input to Bookkeeping
Monitoring Progress & Troubleshooting

TOPICS:

• Setting up the Budget – Software
• Cost Code Assignments for the budget
• Purchase Orders & Subcontracts
• Time Sheets
• Percentage Complete vs. Field Measured Quantity
• Management Options for Cure
Questions?

Thank You.