PROPOSAL CHECK LIST

Besides direct cost items which effect the total price of construction work, certain indirect costs resulting from specification provisions often result in an increase to the total cost of the work. Often, costs for these indirect items should be included in project estimates. Identifying the areas of the specification can accurately determine costs for these items and their effect on total job price which produce unusual general and special conditions for a project.

The following proposal checklist of indirect costs will help you identify and evaluate areas of special cost. You may have other items to add. This checklist is an administrative control to be used by management to ensure that estimators have not overlooked any area of potential hidden costs which would reduce your profit on the job.
## INDIRECT COSTS CHECKLIST

<table>
<thead>
<tr>
<th>ITEM</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PROJECT</strong></td>
<td><strong>JOB NUMBER</strong></td>
</tr>
<tr>
<td>LOCATION</td>
<td></td>
</tr>
<tr>
<td>ESTIMATOR</td>
<td></td>
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<tr>
<td>NOTES</td>
<td></td>
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</tbody>
</table>

If cost of an item is elsewhere in the takeoff, write page number in box instead of check ( ). If an item does not apply to this project, place a line in the box ●.

### ITEM

1. **ACCES TO JOB SITE**
   - Condition of access road during life of job
   - Continuity – are we required to leave job while another trade proceeds?
   - Special requirements for delivery & receipt of material due to traffic
   - Truck waiting time
   - Availability of yard area for storage

2. **CLEAN UP TRASH AND DEBRIS**
   - Removal from building (regular time/overtime)
   - Stockpiling
   - Trucking
   - Waiting on hoists or elevators
   - Broom clean

3. **CODE REQUIREMENTS**
   - Not shown or specified
   - Specified but not shown
4. COFFEE BREAKS
- Will general contractor or owner prohibit coffee vendors from coming on jobs except during lunch period?
- Are coffee breaks in labour agreement?

5. CONCRETE
- Bases – housekeeping pads
- Curbs__ Roofs__ Equipment__ Floor Openings__
- Formed concrete
- Grouting equipment
- Inertia pads
- Stack supports
- Structural supports
- Duct casing and/or envelope

6. CONTRACT ITEMS
- Holdback rate
- Will holdback be reduced?
- Payment date for progress payments
- Payment date for final payment
- Are payments conditional on general contractor being paid?
- Rules for change orders (re: bulletins on change orders)
- Ownership of leftover material
- Jurisdictional assignments
- Design
- Job meetings
- Field engineer
- Field office and utility hookup
- Back charges - at what rate of markup and when will they be settled?
- Price
- Bid items
- Addenda
- Alternates
- Work description
- Murder clauses
  "In the opinion of the General Contractor"
  “Unable to perform because of strikes, picketing...“
  “Agrees to pay any and all liquidated damages“
  “Which are attributable to or caused by the Subcontractor“
  “All mechanical work, including but not limited…”
- Detailing and shop drawings
- Operation and maintenance manual
- As-built drawings
• Payment for stored materials
• Who is authorized by the client to sign for extra work and daily T & M Reports?

7. CRANE FACILITIES AND PERSONNEL HOISTS
• Available for: __ Hoisting__ Lowering__ Unloading
• Handling__ Equipment__ Material__ Pipe Risers
• Scheduled availability
• Type__ Capacity__
• When Provided___________________________
• Regular time or overtime

8. CUTTING AND PATCHING
• Existing walls, floors, ceilings
• On changes

9. DELAYS
• Excusable
• Claims
• Time extensions
• Extended overhead

10. DEMOLITION
• Building - duct work
• Haul-off on equipment
• Removal of equipment from building

11. ELECTRICAL EQUIPMENT
• Starters, AUX contacts, push buttons and pilots
• Transformers
• Controllers
• Disconnects
• Separate motors
  1. Handles
  2. Aligns
  3. Installs Drives

12. ELECTRIC HEATING EQUIPMENT
• Furnish
• Install
• Which trade handles?
• Contractors
• Who takes permits?
13. ELECTRICAL WIRING
- Temperature control, indicating and sensing
- Normal control wiring (alarms, sewage ejectors, etc.)
- Interlocks
- Power wiring

14. FIREPROOFING ON STEEL
- Patching material knocked off by sheet metal installation
- Protecting mechanical work & cleaning fireproofing material from material and equipment
- Sequence of fireproofing: __before sheet metal work__after sheet metal work

15. GUARANTEE AND WARRANTY
- One year from __ beneficial occupancy__ acceptance
- Other
- Special guarantee
- Service contracts during or after guarantee
- Will guarantee start as owner accepts increments of project?

16. HOISTS (see item 8)
- Personnel
- Material
- Signaling system, manual roving, etc.
- Schedule

17. HOLD HARMLESS CLAUSE
- Is this clause insurable?

18. INSURANCE
- Builders’ risk
- Special
- Hold harmless
- For equipment furnished by others
- Temporary boiler operation
- Re: bulletins on insurance

19. LIQUIDATED DAMAGES
- Completion date
- Who is responsible for damages?
- Amount
• Are time extensions allowed?

20. MOTORS, SEPARATE (see item 13)
  • Align to equipment
  • Install
  • Unload and store

21. OFF SITE STORAGE & INSURANCE OF MATERIAL & EQUIPMENT
  • Billing for material stored off-site

22. OVERTIME
  • Subcontractor request to get ahead of general contractor
  • Owner or general contractor request to expedite completion
  • Required to attract workers to work job
  • Required to meet contract completion date
  • Required to assist another contractor

23. PERFORMANCE AND PAYMENT BOND
  • Included in bid
  • Paid for by others
  • Bid bond
  • Holdback bond

24. PERMITS & FEES
  • Building
  • Heating and air conditioning
  • Plumbing, gas, sprinklers
  • Connection fee for water

25. PLANS
  • Number of sets
  • Extra sets

26. PRO-RATA CHARGES
  • Toilets
  • Temporary power
  • Hoists

27. REDESIGN (WHO PAYS FOR) OR DESIGN
  • Architectural drawing
  • Electrical, drawing, and coordination
• Structural, drawing
• Mechanical, drawing, and coordination

28. SCHEDULE
• CPM or other
• Updating
• Delay due to changes

29. STRUCTURAL BLOCKOUTS
• Heating and air conditioning – furnish
• Heating and air conditioning – install

30. TAXES, SALES OR OTHER
• Include in bid
• Tax exempt number

31. TEMPORARY DRINKING WATER
• Location
• Cups
• Ice

32. TEMPORARY FACILITIES
• Barricades
• Construction office
• Duct closures
• Flares or lights
• Prefabricated building
• Storage building
• Temporary partitions
• Enclosure for weather

33. TEMPORARY HEAT
• Furnish: ___ Permanent System ___ Other
• Is a specified dollar allowance included in bid?
• New filters
• Operate (standby)
• Manpower
• Pro-rate costs

34. TEMPORARY LIGHTS AND POWER
• To be supplied for ___ hours per day
35. TEMPORARY PROTECTION OF SITE, FACILITIES AND BUILDING

- Watchman

36. TEMPORARY TOILETS

- Provided by others

37. TIE-INS TO EXISTING SYSTEMS

- Overtime
- Regular
- By whom

38. TOOLS AND EQUIPMENT

- Rental charges to job
- Hand tool percentage
- Trucks & deliveries
- Teamster on job site

39. TRAVEL

- Administrative
- Air fares
- Corporate officers

40. OTHER

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Summary

Using this checklist as a guide, develop one that meets your requirements. By getting the relevant employees involved in developing the checklist, they will learn a great deal about profitability.