

## **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

**PROJECT**

**JOB NUMBER**

**LOCATION**

**ESTIMATOR**

**NOTES**

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.