

Title: Estimator	Full-Time Hours: 8:00 – 5:00
Objective	FLSA Status: Exempt
<p>An estimator for Pan-Pacific is responsible for the accurate material and labor cost estimation of potential projects for the company. This person reports to the Chief of Estimating and has no subordinates. The estimator will work closely with all senior personnel in establishing the bid proposal, and with project management, once a job is awarded.</p> <p>In addition to the bid price establishment, the estimator is responsible for marketing the projects he or she is working on at the time. They are expected to attend project job walks if required.</p> <p>The estimator shall also be responsible for the pricing of change bulletins issued to existing projects if required by project management.</p>	
Responsibilities	
<p>The estimator must have substantial knowledge of the project he or she is working on at the time. This includes all material specifications, project schedule, and building layout.</p> <p>Responsible for material cost estimation of potential projects</p> <p>Responsible for labor cost estimation for potential projects</p> <p>Responsible for the subcontractor and other miscellaneous cost associated with the potential projects.</p> <p>Responsible for the preparation of bid proposal documents including Pan-Pacific proposal form letter, bid form if required, and bid bonds if required.</p> <p>Responsible for the timely submission of proposals.</p> <p>Responsible of the scope review of new project contracts.</p> <p>Responsible for adherence to Standard procedures of Estimating (see attached)</p> <p>Responsible for learning the operation of estimating software.</p>	
Qualifications/requirements:	
<p>High school diploma</p> <p>10 years mechanical experience</p> <p><i>The above noted job description is not intended to describe, in detail, the multitude of tasks that may be assigned but rather to give the associate a general sense of the responsibilities and expectations of his/her position. As the nature of business demands change so, too, may the essential functions of this position.</i></p>	

STANDARD PROCEDURES FOR ESTIMATING

I. PRE TAKE-OFF PROCEDURES:

1. Read “Instructions to Bidders” if provided
2. Read Specifications
3. Fill out “Project Information Form”
4. Create a job file.

A. JOB FILE

1. The job file shall be a six tab binder folder
 - Tab #1 - General Contractor Correspondence
 - Tab #2 – Pan-Pacific Correspondence / Written Proposal
 - Tab #3 – Material Quotes
 - Tab #4 – Project Take-off
 - Tab #5 / #6 – Project Addenda / Specs / Soils Report / Etc.
5. Set up Estimation job file

B. CREATION OF AN ESTIMATION JOB FILE

1. Trade Power Suite, select the NEW JOB option under the JOBS tab
2. Assign a Job ID (Job I.D. should be your Initials followed by the Bid date. IE RM 5/11/04)
3. Assign a Job Name
4. Click OK
5. You must now create your take-off levels. (i.e. sheet number, area. Etc.)

1. ESTIMATION TAKE-OFF LEVELS

Estimation allows you to breakdown your take-offs a variety of ways. The default breakdowns available are:

Installation Codes (AG, BG)
Floor (basement, 1-10, Roof are default)
Page Number

You may customize these levels as necessary. You will need to customize the page numbers to fit your project.

a. Customizing Take-Off Levels

1. Form TradePower suite, click on the JOBS tab
2. Under the Jobs tab select JOB FILES, and then select LEVELS

3. Highlight you Job Name from the top window, followed by the level you wish to edit in the bottom window. You will then be taken to the Level Editor.
 4. Double click on a line number, and enter an ID and description for that line
 5. Repeat above for additional breakdowns
6. Proceed to Estimation Take-off

C. ESTIMATION TAKE-OFF

1. Select TAKE-OFF button from TradePower Suite
2. Select System
3. Enter material type
4. Enter scale
5. Assign appropriate level
6. Set installation code (Hanging, below grade, none etc)
7. Digitize material

II. TAKE-OFF PROCEDURES

A. ORDER OF SYSTEM TAKE-OFF

1. Fixtures / Equipment
2. Waste & Vents
3. Storm Drain
4. Domestic Water
5. Natural Gas
6. Medical Gas / Special systems
7. Condensates
8. Other Systems

B. FINISH / EQUIPMENT TAKE-OFF METHODS

1. List fixture designation down the left hand side of fixture take-off sheet
2. List page numbers across top of the take-off matrix
3. List floor numbers under related page number column
4. Count fixtures and equipment in appropriate column and color in once counted
5. Once all fixtures and equipment are counted, immediately deliver a copy of this take-off and related specification sections to purchasing department for quotations.

C. PIPING TAKE-OFF METHODS

1. Start with largest pipe size on the sheet and digitize the pipe to size change on the main. (bottom up on waste, top down on water)
2. Count fittings off of previously digitized pipe
3. Repeat with next size on main

4. Once main is digitized, color code with related color pencil and proceed to branch lines and repeat as above.

1. COLOR CODE

Waste, sewer.....	CRIMSON RED
Vents.....	GREEN
Storm Drain / Site Storm Drain.....	PURPLE
Cold Water / Site Domestic Water.....	ORANGE
Hot Water / Site Fire Line.....	TRUE BLUE
Natural Gas.....	CANARY YELLOW
Condensates / Acid Waste.....	PINK
Vacuum.....	LIGHT GREEN
Oxygen.....	LIGHT CURELLIAN BLUE
Medical Air / Compressed Air.....	LAVENDER
Nitrous Oxide.....	BROWN
N2.....	YELLOW ORANGE
CO2 / Subsoil Drainage.....	BLACK

Remember to keep written notes of assumptions you have made

III. TAKE-OFF SUMMARY

A. TAKE-OFF PRICING AND LABORING

1. From TradePower Suite Select the SUMMARY BUTTON
2. To perform a new summary, select the NEW button. This will take you to the Summary Report Options Menu

a. SUMMARY REPORT OPTIONS MENU

1. This is where you set the parameters for your take-off pricing and laboring
2. Under the REPORT TYPE tab, highlight the Summary Report Option
3. Under the PRICING tab check DISCOUNTED Material Price, and PRIMARY Labor Type.
4. Under LEVELS tab, Highlight SECTION under the top level, and NONE under the second level
5. Under the LEVEL ADJUSTMETNS tab check mark Section, and Subtotal
6. Once all these options are selected, click the RUN button on the bottom right of the menu. This will send you to the Edit Summary Window

b. EDIT SUMMARY WINDOW

1. The Edit Summary window will allow you to Name your report, as well as supply notes for the report. If this is applicable to your report run, sill out the columns as necessary, and click OK

2. This will send you take-off to the server for material pricing and laboring

c. SUMMARY WINDOW

1. Once the take-off is priced and labored, you will be taken to a summarized breakdown of your takeoff
2. Under the FILE tab, select PRINT to print out your take-off

You are now ready for the final phase of your estimate, the Bid Summary

IV. BID SUMMARY

The Bid Summary is a multi-level Excel spreadsheet that will be used to evaluate and determine the “selling price” of your estimate

A. BID SUMMARY DATA INPUT

1. Your Estimation pricing report is totaled by system. Your Bid Summary workbook is to have separate sheets for each system. Input the total system dollars, MCA labor, total lineal feet of pipe, and total underground lineal pipe footage, in the appropriate columns of the system sheet.
2. Input the total finish list in the Finish workbook sheet. Input the fixture designation (i.e. WC-1) the total quantity, the unit cost, and the labor hours in the appropriate columns.
3. Input the equipment in the same fashion as the finish.
4. Proceed to the SUBS and MISC worksheet. Input the estimated costs in the appropriate sections.
5. Once all of the numbers are entered into the spreadsheet, return to the master summary sheet, any miscellaneous systems (i.e. shoring,), and your MCA labor factors for each system.
6. Determine the duration of the project and assign the appropriate percentage breakup of the labor rates under the Labor Recap section of the master sheet.
7. Finally, complete the Material Litmus Test. On this tab, enter the estimated material costs for 2” No-Hub, and ¾” copper L. Forward this to the Purchasing Agent. The Purchasing Agent will provide you with the current pricing we as a company are paying for these items.

B. BID APPROVAL

1. Present the bid summary sheet, and the material litmus test to the Chief Estimator for pricing approval
2. Be prepared for a meeting with to discuss the conditions of the project.

V. BID PRESENTATION

The proposal letter is the final step in the completion of your bid.

A. PROPOSAL LETTER

1. Open the form letter from in Word.

2. Proceed down the form letter and input the appropriate information
3. Remove any exclusions that does not apply to the project
4. Add any clarifications that you feel are necessary. (all clarifications must be approved)

Remember, the completion of the bid is not the conclusion of the sale. Keep in touch with the general contractor. Make sure they fully understand your proposal. Do not “close the book” on the proposal until you have a definitive determination of award.