

SUCF PROJECT COST REPORTING GUIDE



State University Construction Fund
353 Broadway / ALBANY, NY 12246

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A. Preface

This PROJECT COST REPORTING GUIDE has been prepared expressly and solely for use in conjunction with the State University Construction Fund's (the "Fund") Consultant's Agreements.

The purpose of this Guide is to present and clarify the Fund's requirements under Article I for estimating and reporting project costs, outline acceptable cost estimation methods and establish reporting format for various scopes of work.

This guide should be used in conjunction with the Fund's Program Directives.

This Guide has been recently updated to coincide with the most current project cost estimating methods available and to more closely follow the format published by the Construction Specification Institute (CSI).

Below is a brief Summary of the major segments of this Guide:

Area Takeoff Methodology

Outlines definitions of particular area takeoffs at different stages of project design, as required by the Fund.

Phase Requirements

Establishes the acceptable level of detail and completeness for Concept, Schematic, Design Manual and Pre-Bid Phase submissions with respect to cost reporting. Scopes of work are classified as either New Building, Rehabilitation or Site Work. Responsibilities are delineated from inception of design to the end of the bidding process.

Estimate Format

Defines requirements for estimate content and layout. Standardized Project Estimate Summary Sheets have been developed to assist in preparing the appropriate format for the estimate presentation. Specific Divisions have been established to produce uniformity in estimates provided to the Fund, to facilitate the Fund's review of primary and check estimates. Content Descriptions are also included, which outline requirements of estimate detail at each phase, and sets maximum allowable mark-ups and contingencies.

Example: A 10,000 Gross Square Foot addition is to be added to a library. Required utilities are to be connected to existing site utilities along with some renovation work to the existing library. A Project Estimate Summary Sheet (NEW) is required for the addition. A Project Estimate Summary Sheet (REHAB) is required for renovation work in the existing building. Also, a Project Estimate Summary Sheet (SITE) is required for the grading, parking, site lighting, extension of site utilities, etc.

B. Area Takeoff Methodology

1. General

- a. The areas defined below are used to determine the Program Budget for projects that deal with new construction, and where applicable, major rehabilitations. The definitions and examples provided herein are intended to be comprehensive, however, situations may arise for which this guide is not inclusive. Questions regarding such situations should be directed to your Construction Fund Design Coordinator.

2. Net Assignable Area

- a. The Net Assignable Area of a building includes all interior floor space enclosed by walls, ceiling and/or roof, and a constructed floor. It is programmable space, assigned to a particular academic or support function. The Net Assignable Area for various types of space (i.e., laboratories, classrooms, offices, etc.) is subject to Facility Programming Standards established by the State University of New York (SUNY) in conjunction with the Fund.

3. Optimum Gross Area

- a. The Optimum Gross Area of a building is the net program area, plus all additional building space theoretically necessary to connect the space in an efficient design solution. The Optimum Gross Area is arrived at by multiplying the Net Assignable Area by a Grossing Factor. The Grossing Factor allows for the inclusion of the certain types of space, on an "as required" basis, but specifically excludes spaces such as porticos, atriums and architectural penthouses and overhangs. Grossing Factors vary with the type of space being constructed and have been generated from historical data compiled by the Fund.

4. Design Gross Area

- a. The Design Gross Area of a building is the total space enclosed by the exterior walls of a structure, as well as the space covered by projections, overhangs, canopies, penthouses, etc. For the purpose of establishing the Project Program Budget, the design gross area is calculated on a straight area basis as taken off design drawings. Projections, overhangs, canopies, larger than average loading docks and architectural penthouses shall be calculated at a grossing factor of 50% of their actual area. Extra high spaces such as lobbies and other spaces greater than one story in height will be increased by a grossing factor of 25% per floor of open area.

5. Areas To Be Included In Gross Area (Space not included in net program area)

- a. Building Components
 - Space occupied by columns, walls and partitions, furred space.
 - Toilet rooms (including vestibule and dressing rooms)
 - Locker space in public areas (Locker Room will be assigned Net Area).
 - Closet or Coat space (Cloak Rooms will be assigned Net Area).

B. Area Takeoff Methodology (continued)

b. Public Areas

- Lobby, entrance space and vestibule or foyer.
- Display space
- Anteroom to any Net Area space.
- Corridor or passage.
- Circulation space.
- Stair hall and stairway
- Elevator and escalator
- Book lifts and dumbwaiter.

c. Service Areas

- Janitor or utility closet.
- Electrical service and transformer room
- Steam and heat distribution room
- Air conditioning, mechanical and fan room
- Mechanical switch room.
- Excavated basement space.
- Loading dock

C. Phase Requirements - New Buildings and/or Additions

1. General

- a. Programs for new and/or additional square footage are usually developed by the campus or through a program study. These programs, as received, are the basis of the Fund's budget development. Realize optimum gross calculations are developed formulaically based on Fund standards and are used to develop initial budgets. The cost for sitework is often derived in a similar fashion and normally includes basic site utilities, exterior pedestrian walkways, minimal vehicular circulation, normal plantings and related landscaping.
- b. The Fund requires that unusual or extraordinary conditions be identified as soon as possible, the extent and nature of any budgetary impact must be assessed. Examples would include foundation abnormalities, extraneous sitework such as parking and additional net square footage, that is to say **any** additions to the original program.
- c. A project initiation meeting between the selected Consultant, the Campus and the Construction Fund Representative takes place. The Consultant is required to examine the scope of work and corresponding budget and to confirm that the scope as presented can be accomplished within the corresponding budget. Consequently, any change to the program must be tracked, at each phase of design, to determine if budget requirements have changed.

2. Program Verification / Concept Phase

- a. As stated in the Consultant's Agreement, Article I, Section B, Part (2) g., a Concept Phase Cost Estimate verifying that the project can be completed within the Program Budget is required.

3. Schematic Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Schematic Phase Submission.
- b. In the Schematic Phase, the objective, as it relates to budgeting, is to match the program scope, after preliminary investigation by the Consultant, with proposed costs. Bear in mind, any substantial change in scope needs to be approved **before** formal submission of the final Schematic Phase Report. In addition, we recommend that you keep, cost estimates for program changes separate from the original scope, for ease of review. Whenever possible, break the estimate into the most finite CSI format. It is recommended that all markups be included on the Project Estimate Summary Sheet (New).

C. Phase Requirements - New Buildings and/or Additions (continued)

- c. At this stage of design, a maximum of 5% bidding contingency and a 10% design contingency is allowed. The cost estimate should coincide with the time frame of the projected award date, as agreed to at the start of design. Major projects that have extended design lengths may include a factor for escalation to price the estimate in the projected time frame, based on the schedule. Identify the rate and source for escalation factor. In developing estimates, items such as availability of potential bidders, as well as the need to adjust the projected bid date due to seasonal factors, need to be considered.

4. Design Manual Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Design Manual Phase Submission.
- b. As design development becomes more complete, estimates shall be takenoff as finitely as possible with separate Labor, Material and Total columns for each line item. Market condition research should be ongoing, which includes the availability of potential bidders. All markups shall be separately displayed on the Project Estimate Summary Sheet (New). Any change in scope should be approved **before** the formal submission of the final Design Manual Phase Report. Also, approved changes are to be segregated in the estimate for ease of review.
- c. Please note, that on projects in excess of one million dollars, the Fund may elect to have an independent check estimate performed. A maximum bidding contingency of 5% and design contingency of 5% are allowed in this submission. Any escalation factors should be adjusted based on project schedule changes. At this time, material quotes for major equipment should also be included as back-up to the estimate.

5. Pre-Bid Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Pre-Bid Phase Submission.
- b. At the Pre-Bid Phase, design development is essentially complete and the Fund's comments from the Design Manual Phase have been incorporated into the design. Accordingly, the estimate shall reflect the full scope of work, in line item fashion, including separate Labor, Material and Total columns for each line item. No lump sums or square foot allowances will be permitted. Manufacturer's quotations for major equipment should be supplied as back-up. Market conditions research should be complete and corresponding adjustments incorporated, if necessary. Escalation factors, if any, should be adjusted based on approved project schedule changes. The Project Estimate Summary Sheet (New) should be used to summarize like work areas in CSI format. A more finite breakdown should be provided if the bulk of the work is within one section. A maximum bidding contingency of 5% and no design contingency is allowed at this time. Any phasing plan or premium time should also be included at this time.

C. Phase Requirements - New Buildings and/or Additions (continued)

- c. A completed Appendix "A" as it is to appear in the construction contract bid documents should accompany the final Pre-Bid Phase Report. The format of the Appendix "A" should be in such a manner that it is logical for bidders to complete it. Select areas that would normally be subcontracted or completed by different trades as a basis for the breakdown. Please note, if the project scope impacts more than one building, a separate breakdown for each building is required. Total on Appendix "A" should equal the total in the Estimate Summary Sheet.

6. Post Pre-Bid Through Bidding

- a. The costs identified with any change to the scope, as a result of Fund comments after the Pre-Bid submission and/or the inclusion of addenda, should be estimated and forwarded for consideration. Marketing should be actively pursued to identify the maximum number of possible bidders. Should bid results vary considerably from the budget (guidelines vary depending on the size of a project), a post-bid evaluation will be required, from the Consultant, to explain the variance. This requirement must be completed in a timely fashion, as a determination on whether to award the construction contract takes place within a week of the receipt of bids by the Fund.

D. Phase Requirements – Rehabilitation

1. General

- a. Rehabilitation projects cover a wide range of work. Larger projects have a common denominator in that multiple trades will be involved. Generally, a large portion, if not all of the gross area of a building needs to be updated or includes programmed space within it that the original space was not built to support. At project initiation, during a meeting between the Consultant, the Campus and a Construction Fund Representative, the Consultant is requested to examine the area and scope of the rehabilitation, as it relates to the budget, and to make a determination as to whether the project scope, as presented, can be accomplished within the established budget.

2. Program Verification / Concept Phase

- a. As stated in the Consultant's Agreement, Article I, Section B, Part (2) g., a Concept Phase Cost Estimate verifying that the project can be completed within the Program Budget is required.

3. Schematic Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Schematic Phase Submission.
- b. In the Schematic Phase, the objective, as it relates to budgeting, is to match the program scope, after preliminary investigation by the Consultant, with proposed costs. Bear in mind, any substantial change in scope needs to be approved **before** formal submission of the final Schematic Phase Report. In addition, we recommend that you keep, cost estimates for program changes separate from the original scope, for ease of review. Whenever possible, break the estimate into the most finite CSI format. It is recommended that all markups be included on the Project Estimate Summary Sheet (Rehab).
- c. At this stage of design, a maximum of 5% bidding contingency and a 10% design contingency is allowed. The cost estimate should coincide with the time frame of the projected award date, as agreed to at the start of design. Major projects that have extended design lengths, may include a factor for escalation to price the estimate in the projected time frame, based on the schedule. Identify the rate and source for escalation factor. In developing estimates, items such as availability of potential bidders, as well as the need to adjust the projected bid date due to seasonal factors, need to be considered.
- d. Any observations on the nature and extent of potential specialized work such as asbestos removal or lead paint contamination should be noted as early in the design process as practical.

D. Phase Requirements – Rehabilitation (continued)

4. Design Manual Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Design Manual Phase Submission.
- b. As design development becomes more complete, estimates shall be takenoff as finitely as possible with separate Labor, Material and Total columns for each line item. The Design Manual Phase Submission should include few, if any, lump sums. Market condition research should be ongoing, which includes the availability of potential bidders. All markups should be separately displayed on the Project Estimate Summary Sheet (New). Any change in scope should be approved **before** the formal submission of the final Design Manual Phase Report. Also, approved changes are to be segregated in the estimate for ease of review.
- c. Please note, that on projects in excess of one million dollars, the Fund may elect to have an independent check estimate performed. A maximum bidding contingency of 5% and design contingency of 5% are allowed in this submission. Any escalation factors should be adjusted based on project schedule changes. At this time, material quotes for major equipment should also be included as back-up to the estimate.

5. Pre-Bid Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Pre-Bid Phase Submission.
- b. At the Pre-Bid Phase, design development is essentially complete and the Fund's comments from the Design Manual Phase have been incorporated into the design. Accordingly, the estimate shall reflect the full scope of work, in line item fashion, including separate Labor, Material and Total columns for each line item. No lump sums or square foot allowances will be permitted. Manufacturer's quotations for major equipment should be supplied as back-up. Market conditions research should be complete and corresponding adjustments incorporated, if necessary. Escalation factors, if any, should be adjusted based on approved project schedule changes. The Project Estimate Summary Sheet (New) should be used to summarize like work areas in CSI format. A more finite breakdown should be provided if the bulk of the work is within one section. A maximum bidding contingency of 5% and no design contingency is allowed at this time. Any phasing plan or premium time should also be included at this time.

D. Phase Requirements – Rehabilitation (continued)

- c. A completed Appendix “A” as it is to appear in the construction contract bid documents should accompany the final Pre-Bid Phase Report. The format of the Appendix “A” should be in such a manner that it is logical for bidders to complete it. Select areas that would normally be subcontracted or completed by different trades as a basis for the breakdown. Please note, if the project scope impacts more than one building, a separate breakdown for each building is required. Total on Appendix “A” should equal the total in the Estimate Summary Sheet.

6. Post Pre-Bid Through Bidding

- a. The costs identified with any change to the scope, as a result of Fund comments after the Pre-Bid submission and/or the inclusion of addenda, should be estimated and forwarded for consideration. Marketing should be actively pursued to identify the maximum number of possible bidders. Should bid results vary considerably from the budget (guidelines vary depending on the size of a project), a post-bid evaluation will be required, from the Consultant, to explain the variance. This requirement must be completed in a timely fashion, as a determination on whether to award the construction contract takes place within a week of the receipt of bids by the Fund.

E. Phase Requirements - Site Work

1. General

- a. Sitework includes all aspects of the project outside of the building envelope. Sitework is costed as a separate component of the project to ensure accurate building only costs. All other work such as roads, site utilities, athletic fields, site lighting, etc. shall be grouped into site. Note that building demolition (either whole buildings or select interior demolition) is typically building related, these cost shall be included as part of the building estimate.

2. Program Verification / Concept Phase

- a. As stated in the Consultant's Agreement, Article I, Section B, Part (2)g., a Concept Phase Cost Estimate verifying the project can be completed within the Program Budget is required.

3. Schematic Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Schematic Phase Submission.
- b. In the Schematic Phase, the objective, as it relates to budgeting, is to match the program scope, after preliminary investigation by the Consultant, with proposed costs. Bear in mind, that any substantial change in scope needs to be approved **before** formal submission of the final Schematic Phase Report. In addition, we recommend that you keep cost estimates for program changes separate from the original scope, for ease of review. Whenever possible, break the estimate into the most finite CSI format. It is recommended that all markups be included on the Project Estimate Summary Sheet (Site).
- c. At this stage of design, a maximum of 5% bidding contingency and a 10% design contingency is allowed. The cost estimate should coincide with the time frame of the projected award date, as agreed to at the start of design. Major projects that have extended design lengths, may include a factor for escalation to price the estimate in the projected time frame, based on the schedule. Identify the rate and source for escalation factor. In developing estimates, items such as availability of potential bidders, as well as the need to adjust the projected bid date due to seasonal factors, need to be considered.
- d. An indication of the extent of potential specialized work such as asbestos removal or contaminated soil removal should be noted as early in the design process as practicable. The total site shall be added to the total building cost to provide a complete project estimate total. The site estimate shall be an independent estimate from the building with separate mark-ups and contingencies.

E. Phase Requirements - Site Work (continued)

4. Design Manual Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Design Manual Phase Submission.
- b. As design development becomes more complete, estimates shall be takenoff as finitely as possible with separate Labor, Material and Total columns for each line item. At Design Manual, few, if any, lump sums should be included. Detail takeoffs of cubic yards of excavation, backfill, pavement, etc. and linear feet of curbing, underground ductbank, piping, etc. shall be expressed. Obscure measurement units are not permitted (square foot of pavement, linear foot of excavation/backfill, etc). Market condition research should be ongoing, which includes the availability of potential bidders. All markups should be separately displayed on the Project Estimate Summary Sheet (Site). Any changes in scope should be approved **before** the formal submission of the final Design Manual Phase Report. Also, approved changes are to be segregated in the estimate for ease of review.
- c. Please note, on projects in excess of one million dollars, the Fund, may elect to have an independent check estimate performed. A maximum bidding contingency of 5% and design contingency of 5% are allowed in this submission. Any escalation factors should be adjusted based on project schedule changes. At this time, material quotes for major equipment should also be included as back-up to the estimate.

5. Pre-Bid Phase

- a. Completion of an Estimate Summary Sheet(s) is/are required as part of the Pre-Bid Phase Submission.
- b. At the Pre-Bid Phase, design development is essentially complete and the Fund's comments from the Design Manual Phase have been incorporated into the design. Accordingly, the estimate shall reflect the full scope of work, in line item fashion, including separate Labor, Material and Total columns for each line item. No lump sums or square foot allowances will be permitted. Manufacturer's quotations for major equipment should be supplied as back-up. Market conditions research should be complete and corresponding adjustments incorporated, if necessary. Escalation factors, if any, should be adjusted based on approved project schedule changes. The Project Estimate Summary Sheet (Site) should be used to summarize like work areas in CSI format. A more finite breakdown should be provided if the bulk of the work is within one section. A maximum bidding contingency of 5% is allowed at this time. Any phasing plan or premium time should also be included at this time.

E. Phase Requirements - Site Work (continued)

- c. A completed Appendix "A" as it is to appear in the construction contract bid documents should accompany the final Pre-Bid Phase Report. The format of the Appendix "A" should be in such a manner that it is logical for bidders to complete it. Select areas that would normally be subcontracted or completed by different trades as a basis for the breakdown. Total on Appendix "A" should equal the total in the Estimate Summary Sheet.

6. Post Pre-Bid Through Bidding

- a. The costs identified with any change to the scope, as a result of Fund comments after the Pre-Bid submission and/or the inclusion of addenda, should be estimated and forwarded for consideration. Marketing should be actively pursued to identify the maximum number of possible bidders. Should bid results vary considerably from the budget (guidelines vary depending on the size of a project), a post-bid evaluation will be required, from the Consultant, to explain the variance. This requirement must be completed in a timely fashion, as a determination on whether to award the construction contract takes place within a week of the receipt of bids by the Fund.

F. Division Descriptions

- 2A. Site Construction (Building Demo Only)**
 - Whole Building Demo / Relocation
 - Select Building Interior Demolition

- 2B. Site Construction (Excluding Building Demo)**
 - Site Clearing
 - Earthwork
 - Site Improvements
 - Athletic Fields
 - Planting
 - Lawns
 - Pavements
 - Concrete Walks
 - Utility Services
 - Heating / Cooling Piping Systems
 - Water Systems
 - Sewer Systems
 - Electrical Distribution Systems
 - Site and Field Lighting
 - Drainage Systems

- 3. Concrete**
 - Concrete Forms
 - Cast-In-Place Concrete
 - Pre-Cast Concrete
 - Grouts
 - Concrete Restoration and Cleaning

- 4. Masonry**
 - Masonry Units
 - Stone
 - Refractories
 - Simulated Masonry
 - Masonry Restoration and Cleaning

- 5. Metals**
 - Structural Metal Framing
 - Metal Joists
 - Metal Decking
 - Metal Fabrications
 - Ornamental Metals

- 6. Wood and Plastics**
 - Rough Carpentry
 - Finish Carpentry
 - Architectural Woodwork
 - Structural Plastics

- 7. Thermal and Moisture Protection**
 - Dampproofing
 - Waterproofing
 - Thermal Protection
 - Membrane Roofing
 - Flashing and Sheetmetal
 - Roof Specialties and Accessories
 - Fire and Smoke Protection
 - Joint Sealers

- 8. Doors and Windows**
 - Metal and Wood Doors
 - Windows and Glazing
 - Glazed Curtain Wall

- 9. Finishes**
 - Plaster and Gypsum Board
 - Tile
 - Terrazzo
 - Ceilings
 - Flooring
 - Wall Finishes
 - Painting and Coatings

- 10. Specialties**
 - Louvers and Vents
 - Access Flooring
 - Lockers
 - Fire Protection Specialties
 - Partitions
 - Storage Shelving
 - Toilet, Bath and Laundry Access

- 11. Equipment**
 - Library Equipment
 - Theater and Stage Equipment
 - Audio / Visual Equipment
 - Vehicle Service Equipment
 - Parking Control Equipment
 - Loading Dock Equipment
 - Food Service Equipment
 - Darkroom Equipment
 - Athletic Equipment
 - Theatrical Equipment
 - Industrial and Process Equipment
 - Laboratory Equipment
 - Medical Equipment

- 12. Furnishings**
 - Manufactured Casework
 - Multiple Seating
 - Interior Plants and Planters

- 13. Special Construction**
 - Air Supported Structures
 - Radiation Protection
 - Swimming Pools
 - Tubs and Pools
 - Ice Rinks
 - Storage Tanks
 - Hazardous Mat Remediation
 - Security Access and Surveillance
 - Detection and Alarm
 - Fire Suppression
 - Greenhouse Structures

- 14. Conveying Systems**
 - Dumbwaiters
 - Elevators
 - Lifts
 - Permanent Hoists and Cranes

- 15. Mechanical**
 - Sprinkler Systems
 - Plumbing Fixtures and Equip.
 - Heat Generation Equipment
 - Refrigeration Equipment
 - Heat, Vent and A/C Equip
 - Air Distribution
 - Testing / Adjusting / Balancing

- 16. Electrical**
 - Wiring and Conduit
 - Electrical Power
 - Low Voltage Distribution
 - Lighting
 - Communication
 - Sound and Video
 - Fire Alarm Systems

G. Project Estimate Summary Sheet (NEW)

PHASE REPORT _____ DATE _____ PROJECT NO. _____

CAMPUS _____ TITLE _____

*COST CONSULTANT _____ START CONSTRUCTION _____

(responsible for preparation or review of total estimate) BLDG NAME & NUMBER _____

DESIGNED GROSS AREA _____ COMPLETE CONSTRUCTION _____

DIVISION NO.	DIVISION TITLE	TOTAL COST	\$/G.S.F.	% TOTAL
2A	SITE CONSTRUCTION (Building Demolition Only)			
3	CONCRETE			
4	MASONRY			
5	METALS			
6	WOOD AND PLASTICS			
7	THERMAL AND MOISTURE PROTECTION			
8	DOORS AND WINDOWS			
9	FINISHES			
10	SPECIALTIES			
11	EQUIPMENT			
12	FURNISHINGS			
13.1	SPECIAL CONS. (EXCL HAZ MAT REMEDIATION)			
13.2	SPECIAL CONS. (HAZ MATERIAL REMEDIATION)			
14	CONVEYING SYSTEMS			
15.1	MECHANICAL (HVAC)			
15.2	MECHANICAL (PLUMBING)			
15.3	MECHANICAL (FIRE PROTECTION)			
16	ELECTRICAL			
	SUBTOTAL BUILDING ESTIMATE (NEW)			
	GENERAL CONDITIONS (must be reported here)			
	OVERHEAD AND PROFIT (must be reported here)			
	DESIGN AND BIDDING CONTINGENCIES (must be reported here)			
	SPECIAL CONSIDERATIONS (Budgeted at \$			
	TOTAL BUILDING CONSTRUCTION ESTIMATE (NEW)			
2B	SITE CONSTRUCTION (Excluding Building Demolition)			
	TOTAL PROJECT ESTIMATE (NEW)			

* If systems are estimated by others, please name

H. Project Estimate Summary Sheet (REHAB)

PHASE REPORT _____ DATE _____ PROJECT NO. _____

CAMPUS _____ TITLE _____

*COST CONSULTANT _____ START CONSTRUCTION _____

(responsible for preparation or review of total estimate) BLDG NAME & NUMBER _____

DESIGNED GROSS AREA _____ COMPLETE CONSTRUCTION _____

DIVISION NO.	DIVISION TITLE	TOTAL COST	\$/G.S.F.	% TOTAL
2A	SITE CONSTRUCTION (Building Demolition Only)			
3	CONCRETE			
4	MASONRY			
5	METALS			
6	WOOD AND PLASTICS			
7	THERMAL AND MOISTURE PROTECTION			
8	DOORS AND WINDOWS			
9	FINISHES			
10	SPECIALTIES			
11	EQUIPMENT			
12	FURNISHINGS			
13.1	SPECIAL CONS (EXCL HAZ MAT REMEDIATION)			
13.2	SPECIAL CONS. (HAZ MATERIAL REMEDIATION)			
14	CONVEYING SYSTEMS			
15.1	MECHANICAL (HVAC)			
15.2	MECHANICAL (PLUMBING)			
15.3	MECHANICAL (FIRE PROTECTION)			
16	ELECTRICAL			
	SUBTOTAL BUILDING ESTIMATE (REHAB)			
	GENERAL CONDITIONS (must be reported here)			
	OVERHEAD AND PROFIT (must be reported here)			
	DESIGN AND BIDDING CONTINGENCIES (must be reported here)			
	SPECIAL CONSIDERATIONS (Budgeted at \$			
	TOTAL BUILDING CONSTRUCTION ESTIMATE (REHAB)			
2B	SITE CONSTRUCTION (Excluding Building Demolition)			
	TOTAL PROJECT ESTIMATE (REHAB)			

* If systems are estimated by others, please name

I. Project Estimate Summary Sheet (SITE)

PHASE REPORT _____ DATE _____ PROJECT NO. _____

CAMPUS _____ TITLE _____

*COST CONSULTANT _____ START CONSTRUCTION _____

(responsible for preparation or review of total estimate) BLDG NAME & NUMBER _____

COMPLETE CONSTRUCTION _____

DIVISION NO.	DIVISION TITLE	TOTAL COST
2.1	SITE CLEARING	
2.2	EARTHWORK	
2.3	PAVEMENTS	
2.4	SITE FEATURES	
2.5	CONCRETE WALKS	
2.6	ATHLETIC FIELDS	
2.7	LAWN	
2.8	UTILITIES-PLUMBING	
2.9	UTILITIES-HEATING / COOLING	
2.10	UTILITIES-ELECTRICAL	
2.11	PLANTING	
	SUBTOTAL SITE ESTIMATE	
GENERAL CONDITIONS (must be reported here)		
OVERHEAD AND PROFIT (must be reported here)		
DESIGN AND BIDDING CONTINGENCIES (must be reported here)		
TOTAL SITE ESTIMATE		

* If systems are estimated by others, please name

J. Estimate Content Descriptions - Schematic Phase

Format	Provide estimate backup in CSI Format. Utilize separate Project Estimate Summary Sheet for each new building, each rehabilitation and site work.
Lump Sum Pricing	Lump sums shall represent complete systems and be inclusive of all anticipated ancillary work for that system. The actual labor rates and equipment cost shall be incorporated into lump sums. Pricing shall represent labor, material, tools, shipping, equipment rental, rigging, hoisting, etc. as required
Quantity Takeoff	Quantity take off shall include take off as reasonable from drawings / schematic plans. Anticipate work not yet shown, but required for a complete system.
Unit Pricing	Provide unit pricing as deemed necessary. Unit pricing shall be all inclusive of labor, material, tools, shipping, equipment rental, rigging, hoisting, etc. Material and labor costs shall represent typical market conditions for the project location.
Material Pricing	Indicate pricing for components in individual divisions. Material pricing shall represent typical market conditions at the location of the project. Material pricing for each line item shall be in a discrete column.
Labor Pricing	Labor cost shall be based on actual prevailing wage rates at the project location. Labor rates shall be representative of the trade being estimated. Labor pricing for each line item shall be in a discrete column.
General Conditions	Apply reasonable markup for General Conditions for bonds, permits, job trailer, project management, coordination, meetings, submittals, shop drawings, CPM schedules, construction photographs, administrative work, temporary facilities, temporary utilities and fencing. Project requirements shall vary, but shall not exceed 5%. Markup shall occur on the Summary Sheet
Overhead	Apply reasonable markup for overhead to include contractor's home office operation, insurances, administration payroll, etc. not to exceed 10%. Markup shall occur on the Summary Sheet.
Profit	Apply reasonable markup for profit not to exceed 5%. Markup shall occur on the Summary Sheet.
Design Contingency	Apply design contingency to accommodate anticipated refinements in drawings, specifications and scope of work no more than 10%. Markup shall occur on the Summary Sheet.
Bidding Contingency	Apply bidding contingency to accommodate variations in contractor bids not to exceed 5%. Markup shall occur on the Summary Sheet.
Abnormal Market Conditions	Abnormal market conditions are not typically forecastable at this phase.
Escalation	Incorporate escalation in accordance with project schedule into estimate. Identify as additional line item / markup at end of estimate.
Addendum	Not applicable at this phase
Alternates	Not applicable at this phase

K. Estimate Content Descriptions - Design Manual Phase

Format	Provide estimate backup in CSI Format. Utilize separate Project Estimate Summary Sheet for each new building, each rehabilitation and site work.
Lump Sum Pricing	Lump sum pricing shall be kept to a minimum at this phase.
Quantity Takeoff	Takeoff shall indicate square feet, linear feet, cubic yards, etc. and counts for individual pieces of equipment as reasonable from drawings. Lumps sums shall be kept to a minimum. Detailed takeoffs shall be provided for all divisions.
Unit Pricing	Provide unit pricing as deemed necessary. Unit pricing shall be all inclusive of labor, material, tools, shipping, equipment rental, rigging, hoisting, etc. Material and labor costs shall conform to prevailing wage rates and material cost for the <u>specific project location</u> .
Material Pricing	Pricing for materials and equipment shall be adjusted for anticipated market conditions and actual quotations from vendors. Include vendor quotations for major equipment / subcontracts with phase submission. Material pricing for each line item shall be in a discrete column.
Labor Pricing	Confirm that labor rates are current and verify rates for different divisions. Labor hours shall be indicative of the work represented on drawings and anticipate work not yet shown on drawings. Labor pricing for each line item shall be in a discrete column.
General Conditions	Apply reasonable markup for General Conditions for bonds, permits, job trailer, project management, coordination, meetings, submittals, shop drawings, CPM schedules, construction photographs, administrative work, temporary facilities. Project requirements shall vary, but shall not exceed 5%. Markup shall occur on the Summary Sheet.
Overhead	Apply reasonable markup for overhead to include contractor's home office operation, insurances, administration payroll, etc. not to exceed 10%. Markup shall occur on the Summary Sheet.
Profit	Apply reasonable markup for profit not to exceed 5%. Markup shall occur on the Summary Sheet.
Design Contingency	Reduce contingency in accordance with completeness of drawings and specifications to maximum of 5%. Markup shall occur on the Summary Sheet.
Bidding Contingency	Apply bidding contingency to accommodate variations in contractor bids not to exceed 5%. Markup shall occur on the Summary Sheet.
Abnormal Market Conditions	Extraneous market conditions for material, labor and equipment may be evident at this time. Project schedule must be considered to adjust for market conditions. Equipment, material and labor costs should be adjusted to compensate for market conditions.
Escalation	Re-evaluate escalation in accordance with project schedule. Identify as additional line item / markup at end of estimate.
Addendum	Not applicable at this phase
Alternates	Usually not applicable at this phase

L. Estimate Content Descriptions - Pre-Bid Phase

Format	Provide estimate backup in CSI Format. Utilize separate Project Estimate Summary Sheet for each new building, each rehabilitation and site work.
Lump Sum Pricing	Lump sum pricing is unacceptable at this phase unless substantiated by subcontractor quote. Quotes shall be all inclusive of labor, material, etc.
Quantity Takeoff	A detailed takeoff shall be provided showing all quantities for work included on project. Lumps sums are unacceptable unless substantiated by vendor quote. The takeoff shall be as detailed as possible to provide as true a representation of the scope of work.
Unit Pricing	Provide unit pricing as deemed necessary. Unit pricing shall be all inclusive of labor, material, tools, shipping, equipment rental, rigging, hoisting, etc. Material and labor costs shall conform to prevailing wage rates and material cost for the specific project location.
Material Pricing	Update material and equipment pricing as necessary do to refinements in design. Provide updated manufacturer's / subcontractor's quotes to verify major equipment / system pricing. Material pricing for each line item shall be in a discrete column.
Labor Pricing	Verify labor rates and scope of work for labor takeoff. Adjust labor hours to compensate for refinements in scope and job conditions. Labor pricing for each line item shall be in a discrete column.
General Conditions	Apply reasonable markup for General Conditions for bonds, permits, job trailer, project management, coordination, meetings, submittals, shop drawings, CPM schedules, construction photographs, administrative work, temporary facilities. Project requirements shall vary, but shall not exceed 5%. Markup shall occur on the Summary Sheet.
Overhead	Apply reasonable markup for overhead to include contractor's home office operation, insurances, administration payroll, etc. not to exceed 10%. Markup shall occur on the Summary Sheet.
Profit	Apply reasonable markup for profit not to exceed 5%. Markup shall occur on the Summary Sheet.
Design Contingency	Eliminate design contingency at this phase as estimate shall be complete and in compliance with completed drawings.
Bidding Contingency	Apply bidding contingency to accommodate variations in contractor bids not to exceed 5%. Markup shall occur on the Summary Sheet.
Abnormal Market Conditions	Verify local market conditions for the project, verify quantity of available and willing bidders for project. Compensate for heavy competition or lack thereof for project. Identify as additional line item / markup at end of estimate.
Escalation	Re-evaluate escalation in accordance with project schedule. Identify as additional line item / markup at end of estimate.
Addendum	Provide complete breakdown of any addendum items after submission of Pre-Bid Phase. Lump sums are not acceptable.
Alternates	If directed to incorporate Alternates into project, they shall be priced separately from the base estimate. Alternates shall be "ADD ALTERNATES" to the base estimate.

M. Definition of Group II and III Equipment

Group II Equipment

Equipment that is permanently connected to a facility with design characteristics that must be coordinated with various trades is classified as Group II and typically identified in CSI Divisions 10 and 11. Some examples include laundry machines, sterilizers, dishwashers, scoreboards, permanent basketball backboards, etc.

Group III Equipment

Equipment that requires floor space but does not require a permanent connection to a utility is classified as Group III. Some examples include desks, chairs, A/V Equipment, computers, etc. This equipment is not included as part of the Project Program Budget.