

Estimate Turnover Meeting

Meeting Minutes by Estimating Team

Job Name: _____ Date: _____

Attendees: _____

Required Attendees: Estimating, Sales Person & OpsTeam

A. Tangibles Items Required For Project Turnover Meeting

1. Review New Job Information Sheet <i>(Ops Team to fill out and bring to meeting)</i>	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
a. Contract Type: <i>circle:</i> Lump Sum / GMP / Design Assist / Design Build	
2. Review Key Contact List <i>(Ops Team to fill out and bring to meeting)</i>	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
3. Plans (stamped Bid Documents)	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
4. Specifications	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
5. General Contractors General Conditions	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
6. General Contractor or Owner Construction Schedule	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
7. Addenda(s)	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
8. List of Alternates / Allowances / Cost Saving Alternatives	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
9. Bid Binder	
a. Proposal Letter	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
b. Scope Letter / Bid Form	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
c. Estimate – Summary by Subtotal Report	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
d. Estimate – Bid Overview Report	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
e. Estimate – Bid Summary Report	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
f. Quotes – Tab Sheet (along with all quotes for all packages)	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
g. Estimate Deliverables – Basis of Takeoff, Feeder SLD, Takeoff Report	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
h. Miscellaneous Information	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
10. Companies Specification Review Notes AND Installation Matrix	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
11. List of Pre-purchased Materials	Provided <input type="checkbox"/> N/A <input type="checkbox"/>
12. Contract / Letter of Intent	Provided <input type="checkbox"/> N/A <input type="checkbox"/>

B. Discussion Items

1. ESTIMATE REVIEW

Proposal Letter / Bid Form	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Electrical Installation Matrix	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Milestone Schedule	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Estimate Review	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Plan Review	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Temporary (Allowance or Defined Scope)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Unusual Warranty Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Testing Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Undocumented Sales Promises	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

2. JOB CONDITIONS

Wage Rates (Non, Davis/Bacon, etc.)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Excavation / Backfill (Soil Conditions)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Working Hours (Standard, Shift Work, Weekends, etc.)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
High Risk Components of Job as viewed by Est/Precon	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
MBE/WBE/HUB Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Employee Parking Access Issues	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Local Codes and Ordinances	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Work Restrictions (Noise/Vibration/Power Interruption)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Project Special Considerations (Owner, Client, Etc.)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Marketing & Client Entertainment Guidelines	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Partnering or Team Building Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Pre-Purchased Material	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Protocol - Design Assist, Design/Build, GMP	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Communication (Radios, ISDN, Modem, Phone, Phone/FAX)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
History of Project (Budgets Previous Bids, etc.)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Unusual Change Order Procedures	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Unusual Warranty Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Seismic Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Acoustic Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Travel/Per Diem Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

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3. PRE-FAB OPPORTUNITIES

Outsource	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Pre-Fab Shop	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

4. DESIGN ISSUES

Cost Savings Alternatives	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
LEED Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Design Responsibilities (DB/DA)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

5. SUBMITTALS/SHOP DRAWINGS/BIM

Submittals	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Other Trade Submittals	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Owner Furnished Submittals	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Shop Drawing & BIM Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

6. PURCHASING REQUIREMENTS

Procurement Plan	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Material Storage, Staging, and Handling	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Material Delivery Schedule (Long Lead Items)	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Direct Ship Opportunities	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Spare Materials/Parts Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Materials Furnished by others	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Sales Tax Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

7. MANPOWER

Special Skills	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Availability	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Self-Perform vs. Sub vs. PreFab	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Man-loading Schedule	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Quality Control	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
NECA Modifier Rate	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

8. TOOLING & EQUIPMENT

Mobilization	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Job Truck	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
List/Schedule of Rented Equipment	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

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9. SAFETY

Job Setup	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Badge & Background Check	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Drug Testing Required	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Employee Certification/Training Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

10. LIABILITY, INSURANCE RISK & BONDING

CRITICAL SERVICES, HOT TAPS, POWER OUTAGE	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
PROTECTION OF EXISTING SYSTEM	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
Liquidated Damages	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>
OCIP/CCIP Requirements	Discussed <input type="checkbox"/> N/A <input type="checkbox"/>

C. Preconstruction Action Items

Action Items / Meetings	Who's Responsible	Target Date	Actual Date
Schedule a Contract Review Meeting			
Schedule a Conformed Set Review Meeting			
Schedule a Cost Code Budget Review Meeting			
Schedule a Field Document Turn-over Meeting.			
Schedule a Pre-Planning Meeting with Pre-Fab			
Schedule a Pre-Planning Meeting with CAD			
Schedule a Construction Planning Meeting			
Schedule a Change Order Review Meeting			
Schedule a QA/QC Review Meeting			
Schedule a Job Planner Review Meeting			
Schedule a Construction Estimate Budget Reload Meeting			
Forward Job Setup Sheet and Job Information Sheet to accounting			
Notify IT (for onsite setup if required)			

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