

Soft Variables Revisited
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Estimate Presentation:
Time frame for estimate.
Time frame for job.
Number of phases.
Price by job only.
Breakdown price by each item.
Breakdown price by item, task, design, fabrication, finishing, delivery, and installation.
Is this a proposal, or a ballpark estimate?
Bid:
Which pieces of information are missing to complete the bid?
Will an educated guess on missing items be adequate or are hard numbers needed?
Is this bid "buying the plans", meaning everything must be fabricated as noted with no exclusions, whether or not the estimator actually see them and notes them as included, at the time of the bid?
Can you exclude items from your bid?
Does the bid need to be increased if the last payment may be "renegotiated" or not received at all?
What is considered "millwork"?
Cabinetry
Trim
Wainscoting, coffers, architectural millwork
Countertops (regardless of material)
HVAC grilles in the millwork
Structural metal as needed
Interior cabinet pull out items
Decorative hardware
Functional Hardware
Who is in charge of appliances, electronics, IT?
Purchase
Installation
Hook up
Application of millwork panels
Can hardware be substituted so that the shops standard production techniques can be used?
Is it a straight ahead job?
Is this job within the proven abilities of the shop?
Will overtime be needed at any part of the job?
Will we get (do we want) any assistance from others in this process?
How much engineering and specification research is needed before a bid can be put together?
Will this end up to be a design-build job?
Is this a fabricate only job, and a truck will pick it up on the loading dock?
Do building codes need to followed, even if others did not note them in the drawings? i.e.: tempered glass
Is there the need for fire rated materials?
Design:
Will the architect provide the drawings in a usable format?
Is the architect in charge of the whole job or are there other designers and engineers?
Are the architects drawings turnkey?
What are the interior decorator's responsibilities?
What is the interior decorator experience with this sort of job?
Is there an engineering firm involved?
Number of drawing revisions anticipated:
Create original shop drawings from the architect's concepts
First set of revisions based on the architect's mark up
Second set of revisions based on the interior decorator's mark up
Third set of revisions based on site conditions
SK drawings for missing on site details
As built final drawings
Requirements of the shop drawings:
Do the shop drawings need to specify:
Every piece of hardware by make, model, manufacturer, color, and location
Every electrical and IT component by make, model, manufacturer, color, and location
Every plumbing item by make, model, manufacturer, color, and location
Any HVAC item
Grain direction
Do the shop drawing material and finish code match that of the architect?
Are the shop drawings to specify items outside of the millwork contract?
Will other trades be using the millwork shop drawings as their production guidelines?
When can actual final measurements be taken in relationship to when the product is to be installed? Is this reasonable?
Can other tasks be completed prior to those measurements?
Can someone else take site measurements?
Permits:
Are permits necessary and who is providing them?
Are inspections necessary and how does that effect job sequencing, production, and timeline?
Is this an ADA job and who is to making the dimensional specifications?
Is the Health Department needed to sign off on this project?

Does the geographic jurisdiction require a local or state contractors license?
Project Management:
Is everything logged in some sort of project software?
What is the turn around time for RFI's?
Who is in charge of inputting all of the information?
Who is providing finish control samples?
How many finish samples will be provided before there is a charge per sample?
Are MSDS sheets needed for all materials?
Is paperwork needed for energy credits?
Is this a LEEDS or other certified type job?
Is this an AIA job?
Who will be filling out the forms?
Is this an AWI job?
Is the shop AWI certified?
Is the final product designed to meet AWI standards? Does it require certification?
Is the written contract enforceable?
Is the contract signed by all parties?
Is the person that signed it the person who is paying you?
Does it need to be signed by other than one person?
How important is the millwork package to the completion of the entire job?
Does this job have more "politics" than usual?
What are the chances of the millwork becoming damaged before the final sign off by client?
What is the punch list protocol?
How many times can they add to the punch list after all items are completed?
Are progress photos required weekly?
What is the time lag between applying for payment, and receiving the payment?
Are there provisional lien waivers?
Are there payment lien waivers?
Is this a government job with sealed bids?
Is this job bonded and will a bond be needed?
Is this a certified payroll job?
Is this a prevailing wage job?
Will an in house bookkeeper be needed for this job?
Will a dedicated project manager be needed for this job?
Will a copy of all material invoices need to be presented prior to receiving payment?
What are the insurance requirements of the job?
What are the time and material milestones?
Can the entire job be fabricated in house?
Are there production, finishing, delivery, or installation items that can be weather dependent?
If one of the main production machines go down, what is the backup plan?
How is job information processed and documented? Email, fax, face to face signatures, etc.
Is Dropbox, other internet service, or software needed to work on this job?
Is there an in house plotter or nearby service to print the drawings as needed?
Is there a specific file system set up to the keep a printed paperwork trail of the job?
Is there a hard copy back up of the server in case it goes down?
Are the drawings and production files located in more than one place?
Money Matters:
What is the payment schedule?
Is there a "you get paid when we get paid" clause?
Have you worked with this builder/client before?
Are they trustworthy?
Is this a "100% payment upon completion" job?
How will company cash flow be scheduled during this job?
Has the company/owner/contractor, been researched on Dunn and Bradstreet, or similar service?
Does the company/owner/contractor have a list of outstanding lawsuits?
Is it fiscally possible to go after the company/owner/contractor, if they choose not to pay?
Is the general contractor licensed to do work in the area the job is in?
Is this a cost plus job?
Will a separate checking/bank account be needed just for this job?
Will payment be made by wire or check?
Is the payment coming from this country?
Are progress payments possible?
Are you bartering for part of the job?
Are supplier house charge accounts up to date, prior to going into this job?
Are the supplier house charge limits enough to cover the job?
Is there any retainage? What are the terms?
How much are you willing to give up, dollar, percentage wise, or amount, to walk away from this job?
Will the job deposit cover enough of your expenses to make it to the first pay requisition?
Client Relations:
Is the client living or working on premises, during any or all of the construction?
Does the client stop by daily to check out the progress?
Will this job lead to others?
Should it to lead to others?
Is this the type of work we want to be doing and the type of clientele who want to be working for?
Is this a job requiring a certain level of security or secrecy?

Contractor Relations:
What is the ease of working with office staff?
How have the past interactions been with them?
What is the ease of working with in site supervisors and owners?
What is their past experience doing this sort of job?
What is the physical location and accessibility of the decision making individual?
Interactions with Other Trades:
Have we worked with this crew and company before?
Are they team players?
What is the ease of working with the other decision making individuals?
Manufacturing:
Are all products fully manufactured in the shop?
Does this included and interior trim work package?
Who is providing the trim?
Is the raw material something readily available?
Labor Force:
Is this a union job?
Are you a member?
Are other trades members of the union?
If the job is delayed in production, what will happen?
Is there any regular shop filler work?
Are there other sources of income?
Will the staff stay if things get slow?
How stable is the in house labor force?
Are there workforce options, should some of them leave?
Will holidays/ vacations affect the production schedule?
Can other shops be relied on to fill in the production gaps?
Does everyone have the necessary OSHA cards?
Job Specifications:
Does this job follow standard manufacturing processes and techniques?
Will any portion of the process need to be subbed out ?
Can the specified finish be purchased and applied in house?
Will the materials stain evenly?
Will it be necessary to bleach the entire job prior to finishing?
Account for on site touch ups after installation.
Is the hardware finish specified available on all items?
Can the specified hardware/material be obtained in this country?
Is all material stocked, or custom order only? What is the lead time?
Has any hardware/material been discontinued?
Has the specified materials (laminates) been discontinued?
Will the HVAC grilles be made in house or purchased?
Delivery:
Do the products need to get to the site?
How will the products get to site?
What are the delivery hours?
Will the product need to be in storage prior to delivery?
Does the storage need to be climate controlled?
What is the cost of storage?
Installation:
Who is doing the delivery/installation?
What are the delivery/installation hours?
If setting up outside, will weather be an issue?
Is the site heated or cooled as needed?
What is the access from parking to the site?
What is the route to deliver product into the final location: doorway sizes, window sizes?
Where can a working area be set up?
What sort of cleanliness is required, dust, drop cloths, complete walls erected?
Are there amenities: sanitary, water, lunch truck, access to town with hardware store?
What is the distance from the shop, travel time, traffic considerations?
Is a hotel stay advantageous?
What sequence will the millwork product be installed, when compared to other trades?
Will the finished floor be down, subfloor?
Will the wall painter come in after the job is installed?
Will the room already have expensive wall paper installed?
Is the sheetrock complete and taped?
What are the contractual clauses regarding site moisture, temperature, and other site conditions?
Is there an elevator? What size is it? What is the access?
Does one need to "tip" any person on this job, to facilitate getting it done?
What are the building rules and regulations?