

1. CLIENT CONTACT

CLIENT / COMPANY

PRIMARY CONTACT

EMAIL

PHONE

CLIENT REFERENCE / JOB #

2. PROJECT INFORMATION

PROJECT NAME

OWNER / GC

PROJECT ADDRESS

MARKET SECTOR

BID DUE DATE

BID DUE TIME

TIME ZONE

INTERNAL REVIEW DEADLINE

3. REQUESTED SERVICE

Quick Takeoff

Standard Estimate

Full Bid Package

Major / Complex Bid

Permit / Project Administration

Monthly Capacity / Retainer

Other / custom scope

4. TRADES AND SYSTEMS

REQUESTED SCOPE / SYSTEMS

KNOWN BY-OTHERS SCOPE / RESPONSIBILITY BOUNDARIES

5. REQUESTED DELIVERABLES

Marked drawings

Quantity takeoff

Labor-hours

Material / BOM

Scope matrix

Bid summary

Addenda / RFI log

Proposal support

6. DOCUMENTS PROVIDED

Plans

Specifications

Addenda

Bid form / RFP

Scope letter

Vendor quotes

DOCUMENT NOTES / MISSING ITEMS / CURRENT REVISION

7. COMMERCIAL INPUTS

LABOR COST / BILL RATE

LABOR BURDEN

SALES TAX

MATERIAL MARKUP

OH&P / MARGIN TARGET

CONTINGENCY

BOND / INSURANCE

PERMIT / FEES

8. ESTIMATING BASIS

PREFERRED MANUFACTURERS / APPROVED EQUALS

CLIENT LABOR UNITS / PRODUCTIVITY FACTORS

AVERAGE RUN / ROUTING / WASTE ASSUMPTIONS

KNOWN VENDOR / SUBCONTRACT QUOTES

OTHER PRICING RULES, BID ALTERNATES OR ESTIMATING INSTRUCTIONS

9. PROJECT CONDITIONS AND CONSTRAINTS

ACCESS, SHIFTS, PHASING, HEIGHTS, OCCUPANCY AND SPECIAL CONDITIONS

REQUIRED INCLUSIONS, EXCLUSIONS AND CLIENT BID RULES

10. CONFIDENTIALITY AND FILE HANDLING

CONFIDENTIALITY, RETENTION, DELETION OR PORTFOLIO RESTRICTIONS

11. FINAL NOTES AND CLIENT CONFIRMATION

QUESTIONS, OPEN ITEMS OR SPECIAL DELIVERY INSTRUCTIONS

I understand BidConduit will rely on the information and documents supplied here.

I retain final bid approval and contractual responsibility; unverified items may be listed as allowances.

PREPARED / APPROVED BY

DATE

INTAKE REVISION