Bids \& Estimating - Portfolio

## Staff Experience \& Education

- Principle - $381 / 2$ years - NYC \& Long Island
- Estimating - Commercial
- Estimating - Residential
- Architecture
- Engineering
- Construction Management
- General Contracting
- Design-Build
- New Construction
- Renovation
- Restoration
- Data \& Analytics (Masters)
- Software

Excel
PlanSwift
Bluebeam
Power Bi
AutoCad
Revit

Fair
Accurate
Comprehensive
Thorough

## PROFESSIONALLY PREPARED BIDS \& ESTIMATING

Fair, Accurate, Comprehensive, \& Thorough - that's a FACT.
Getting it right is not easy. It takes time and focus to be accurate, comprehensive, and thorough. Our system provides a cat-scan or MRI of the plans to uncover all the project requirements. Every line letter and number equates to a task and FACT quantifies them all. Every scope of work is carefully examined, all labor and materials are accounted for, and a full FACT Report is produced with all the information you need to successfully complete construction.


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## 0

## PROJECT FEASIBILITY STUDIES

tis always difficult to decide early on whether or 0 projects are financially feasible．Studies can be done using our offices historical data and／or an Architects Schematic Design Development．While nothing takes the place of fully completed Architectural Construction Documents and Specifications，with proper review a Conceptual Estimate see sample）can be executed．

## โ

## bid Leveung

Finding the right company at the right price is not easy． Comparing multiple bids is time consuming and difficult given the numerous ways bids and estimates are submitted．FACT has created easy to read and coherent templates that guide you through the information and help make an informed decision．

## 用

## PROJECT SPECIFIC SPREAD SHEETS \＆MATERIAL

 TAKE OFFSEvery line，letter，and number on a set of plans equates to a task These tasks need to be properly compiled and accounted for With a proper review，costs are covered， projects are successful．

## ［8）

SUBCONTRACTOR（SCOPE）／SUPPLIER（CONTENT） REVIEW

Bids are procured for each division of construction Returned submittals are examined to ensure the projects needs are being met and the FACT Bid Reports will be Accurate，Comprehensive，and Thorough

## 围

INSURANCE（ADJUSTER SPREAD SHEET COMPARISONS）

Some Insurance claims simply require our professional estimates while other insurance claims require a cost comparison done．Our software and estimating format mirrors those used by insurance companies and have been effective tools in recuperating additional funds for damages．

## FACT Report - Cover Letter

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\&AMMNITrative searices

July 5, 2022

| Client: | Sample |
| :--- | :--- |
| Address: | 63 Main Street <br> Southampton, NY 11968 |
|  |  |
| Architects: | Sample Architect |
| Plans: | Sample Pages |

Hello,
Thank you for the opportunity to work with you on this project. Very Exciting! Please let us know a convenient time to discuss and review. Hopefully we can move forward together.

Thank you!

PS.
Due to the volatility of the market this proposal is currently a budget allowance for all scopes of work.

## Summary




## Details



| Div 04 | concrete - masonry |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | foundations \& slabs |  |  | 1 | \$284,300.00 | \$284,300.00 |  |  |
|  | option a | sandblast finish |  |  | 1 | \$167,800.00 | \$167,800.00 |  |  |
|  | option b | board form finish |  |  | 0 | \$149,600.00 | \$0.00 |  |  |
|  | option c | pre-cast roof panels |  |  | 0 | \$9,200.00 | \$0.00 |  |  |
|  | optiond | cip concrete fireplace \& hearth |  |  | 0 | \$48,600.00 | \$0.00 |  |  |
|  | option e | board form finish - non sandblasted |  |  | 0 | \$44,800.00 | \$0.00 |  |  |
|  |  | foundation waterproofing | 10 | 316.1 | 3161 | \$2.05 | \$6,480.05 |  |  |
|  |  | entry patio |  |  | 1.15 | \$29,935.99 | \$34,426.39 |  |  |
|  |  | back patio |  |  | 1.15 | \$64,016.96 | \$73,619.50 |  |  |
|  |  | steel lintels |  |  | 0 | \$0.00 | \$0.00 |  |  |
|  |  |  |  |  |  |  |  | \$566,625.94 | conc-mas. |
| Div 05 | framing - steel |  |  |  |  |  |  |  |  |
| supply \& install |  |  |  |  |  |  |  |  |  |
|  |  | structural steel |  |  | 1 | \$225,950.00 | \$225,950.00 |  |  |
|  |  | galvanized steel grates |  |  | 1 | \$26,150.00 | \$26,150.00 |  |  |
| materials | *****budget allowance***** |  |  |  |  |  |  |  |  |
|  |  | garage |  |  | 1.15 | \$16,522.58 | \$19,000.97 |  |  |
|  |  | main house |  |  | 1.15 | \$254,217.12 | \$292,349.69 |  |  |
|  |  | wall furring |  |  | 301.3 | \$28.40 | \$8,556.92 |  |  |
|  |  | wall mounted toilet re-inforcements |  |  | 8 | \$100.00 | \$800.00 |  |  |
|  |  | cabinetry blocking |  |  | 438.16 | \$2.50 | \$1,095.40 |  |  |
|  |  | column blocking | 12 | 15 | 4 | \$2.50 | \$1,800.00 |  |  |
|  |  | base blocking |  |  | 1200 | \$2.50 | \$3,000.00 |  |  |
|  |  | window hurricane plywood - TBD |  |  | 0 | \$2.95 | \$0.00 |  |  |
|  |  | fastening |  |  | 1 | \$8,500.00 | \$8,500.00 |  |  |
| labor |  |  |  |  |  |  |  |  |  |
|  |  | framing - main house \& garage |  |  | 1 | \$125,200.00 | \$125,200.00 |  |  |
|  |  | exterior columns blocking |  |  | 1 | \$7,440.00 | \$7,440.00 |  |  |
|  |  | exterior soffit blocking / furring |  |  | 1 | \$4,960.00 | \$4,960.00 |  |  |
|  |  | wall mounted toilet re- inforcements |  |  | 1 | \$2,480.00 | \$2,480.00 |  |  |
|  |  |  |  |  |  |  |  | \$727,282.98 | materials |
| Div 06 | roofing \& flashing |  |  |  |  |  |  |  |  |
|  |  | main roof |  |  | 1 | \$255,000.00 | \$255,000.00 |  |  |
|  | *****budget allowance ${ }^{* * * * *}$ | protection mat \& grass tray system |  |  | 1 | \$120,000.00 | \$120,000.00 |  |  |
|  |  | metals - drips, pans, flashing |  |  | 1 | \$103,300.00 | \$103,300.00 |  |  |
|  | *****by others**** | liveroof greenroof |  |  | 0 | \$0.00 | \$0.00 |  |  |
|  |  |  |  |  |  |  |  | \$478,300.00 | roofing \& flashing |
| Div 07 | windows \& exterior doors |  |  |  |  |  |  |  |  |
| supply \& install |  |  |  |  |  |  |  |  |  |
|  |  | carriage house door co. garage door |  |  | 1 | \$19,900.00 | \$19,900.00 |  |  |
| materials |  |  |  |  |  |  |  |  |  |
|  |  | windows \& exterior doors |  |  | 1 | \$442,184.00 | \$442,184.00 |  |  |
|  |  | skylight |  |  | 1 | \$7,500.00 | \$7,500.00 |  |  |
|  | *****budget allowance ${ }^{* * * * *}$ | garage door - d4 |  |  | 1 | \$5,500.00 | \$5,500.00 |  |  |
|  | *****budget allowance**** | ext rated door - d4 @ upper vest. |  |  | 1 | \$7,500.00 | \$7,500.00 |  |  |
| labor |  |  |  |  |  |  |  |  |  |
|  |  | windows \& exterior doors |  |  | 1 | \$115,496.00 | \$115,496.00 |  |  |
|  |  | skylight |  |  | 1 | \$1,220.00 | \$1,220.00 |  |  |
|  |  | 2 month telehandler rental |  |  | 1 | \$20,635.00 | \$20,635.00 |  |  |
|  |  |  |  |  |  |  | \$619,935.00 | win.\& drs. |



| Div 17 | electrical |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | main house wiring | , | \$148,675.00 | \$148,675.00 |  |  |
|  |  | branch circuit lighting \& homerun/appliance circuits | 1 | \$24,400.00 | \$24,400.00 |  |  |
|  |  | garage wiring | 1 | \$10,000.00 | \$10,000.00 |  |  |
|  |  | pool wiring | 1 | \$15,000.00 | \$15,000.00 |  |  |
|  |  | temp power \& lighting on site | 1 | \$4,800.00 | \$4,800.00 |  |  |
|  | 60 kw kohler/block heater/400 amp auto transfer | generator | 1 | \$38,840.00 | \$38,840.00 |  |  |
|  |  | lutron wiring system/media room/shades/equipment racks | 1 | \$46,950.00 | \$46,950.00 |  |  |
|  |  | mechanical equipment | 1 | \$7,400.00 | \$7,400.00 |  |  |
|  |  | underground electrical services- 400 Amp | 1 | \$18,500.00 | \$18,500.00 |  |  |
|  |  | patio heater allowance | 1 | \$8,000.00 | \$8,000.00 |  |  |
|  |  | light fixtures as per schedule | 1 | \$102,460.90 | \$102,460.90 |  |  |
|  |  | display devices - tv, mounts, ip power controll | 1 | \$30,630.04 | \$30,630.04 |  |  |
|  |  | media room | 1 | \$31,774.28 | \$31,774.28 |  |  |
|  |  | audio distribution | 1 | \$30,438.13 | \$30,438.13 |  |  |
|  |  | equipmentroom | 1 | \$7,737.32 | \$7,737.32 |  |  |
|  |  | network - switch, router, access points | 1 | \$18,380.06 | \$18,380.06 |  |  |
|  |  | lighting control - lutron keypads \& switches | 1 | \$136,650.42 | \$136,650.42 |  |  |
|  |  | window treatments - wired motorized shades | 1 | \$117,939.10 | \$117,939.10 |  |  |
|  |  | bulk wire \& interconnects | 1 | \$23,400.00 | \$23,400.00 |  |  |
|  |  | sales tax | 1 | \$25,138.97 | \$25,138.97 |  |  |
|  |  |  |  |  |  | \$847,114.22 | electrical |
| Div 12 | insulation |  |  |  |  |  |  |
|  |  | insulation | 1 | \$32,350.00 | \$32,350.00 |  |  |
| material |  | rigid insulation under slabs | 2873.8 | \$2.55 | \$7,328.19 |  |  |
| labor |  | rigid insulation under slabs | 1 | \$4,288.00 | \$4,288.00 |  |  |
|  |  |  |  |  |  | \$43,966.19 | insulation |





|  | Preliminary Exclusion List: litems currently not included) |
| :---: | :---: |
| 1 | Material Price Guarantees |
| 2 | Underground Obstructions |
| 3 | Landscape / Hardscape |
| 4 | Retaining walls |
| 5 | Permits \& Processing |
| 6 | Funrishings |
| 7 | Liveroof - Green roof |
| 8 | Crown moldings |
| 9 | Excess fill removal / site grading |
| 10 | Solar panels |
| 11 | Dropped Ceiling @ Garage \& Storage |
| 12 | Roof gravel |
| 13 | Int Elevation \& Details for Guest bath,Pool bath, Child bath \#3 |
| 14 | Driveway |
| 15 | Pool / Equipment |
| 16 | Pool patio |
| 17 | Field glazing |
| 18 | Inteior glass doors (master bath, gym, wine cellar) by others |
| 19 | Steel lintels - tbd |
| 20 | C5 finish - tbd |
| 21 | Travel / lodging |
| 22 | Gym equipment |
|  |  |

Labor Matrix


| Electrical | Qły | Cost | Total | Notes/Specifications: |  | Qty | Cost | Total |  | Notes/Specifications: |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Panels - tbd |  |  |  |  | Kitchens |  |  |  |  |  |
| 50 | 0 | \$0.00 | \$0.00 |  | Refrigerator | 2 | \$900.00 | \$1,800.00 |  |  |
| 100 | 1 | \$2,345.00 | \$2,345.00 |  | Dishwasher | 0 | \$0.00 | \$0.00 |  |  |
| 200 | 0 | \$0.00 | \$0.00 |  | Stove | 2 | \$475.00 | \$950.00 |  |  |
| 300 | 2 | \$3,456.00 | \$6,912.00 |  | Wall ovens | 0 | \$0.00 | \$0.00 |  |  |
| 400 | 0 | \$0.00 | \$0.00 |  | Hood | 5 | \$685.00 | \$3,425.00 |  | - |
| 600 | 0 | \$0.00 | \$0.00 |  | Microwave | 2 | \$256.00 | \$512.00 |  |  |
| High Hats - LED |  |  |  |  | Freezer | 0 | \$0.00 | \$0.00 |  |  |
| 2 " | 1 | \$234.00 | \$234.00 |  | Fixtures |  |  |  |  |  |
| 3 " | 0 | \$0.00 | \$0.00 |  | Light boxes | 2 | \$586.00 | \$1,172.00 |  |  |
| 4" | 3 | \$3,456.00 | \$10,368.00 |  | Fan | 2 | \$0.00 | \$0.00 |  |  |
| 5 " | 0 | \$0.00 | \$0.00 |  | Sconces | 6 | \$455.00 | \$2,730.00 |  |  |
| Under cabinet | 230 | \$150.00 | \$34,500.00 |  | Motorized box | 1 | \$1,475.00 | \$1,475.00 |  |  |
| Outlets |  |  |  |  | Mechanical |  |  |  |  |  |
| Standard | 1 | \$87.00 | \$87.00 |  | AC (per zone) | 2 | \$1,500.00 | \$3,000.00 |  |  |
| GFCl | 0 | \$0.00 | \$0.00 |  | Boiler - (specify) | 1 | \$5,500.00 | \$5,500.00 |  |  |
| Exterior | 5 | \$222.00 | \$1,110.00 |  | Tankless - wall hung boiler | 0 | \$0.00 | \$0.00 |  |  |
| Wire molding | 0 | \$1.00 | \$0.00 |  | Hot water tank (wiring) | 1 | \$453.00 | \$453.00 |  |  |
| Switches |  |  |  |  | Tankless - Wall hung hw |  |  |  |  |  |
| Single-pole | 23 | \$85.00 | \$1,955.00 |  | ERV/HRV | 0 | \$0.00 | \$0.00 |  |  |
| Three Way | 1 | \$789.00 | \$789.00 |  | Misc. 2 |  |  |  |  |  |
| Four Way | 3 | \$385.00 | \$1,155.00 |  | Temporary Elec w/ pole | 1 | \$5,555.00 | \$5,555.00 |  |  |
| Dimmers | 0 | \$0.00 | \$0.00 |  | Temporary lighting/Ft | 0 | \$0.00 | \$0.00 |  |  |
| Laundry |  |  |  |  | H Frame S +1 | 0 | \$0.00 | \$0.00 |  |  |
| Washer | 0 | \$0.00 | \$0.00 |  | 15 amp circuit | 5 | \$450.00 | \$2,250.00 |  |  |
| Dryer (gas) | 2 | \$475.00 | \$950.00 |  | 20 amp circuit | 0 | \$0.00 | \$0.00 |  |  |
| Dryer (Electric) | 0 | \$0.00 | \$0.00 |  | 30 amp circuit | 0 | \$0.00 | \$0.00 |  |  |
| Pool |  |  |  |  | 50 amp circuit | 3 | \$875.00 | \$2,625.00 |  |  |
| Pool | 1 | \$2,222.00 | \$2,222.00 |  | Arc fault | 0 | \$0.00 | \$0.00 |  |  |
| Pool heater | 0 | \$0.00 | \$0.00 |  | Exhaust fan (wiring) | 2 | \$675.00 | \$1,350.00 |  |  |
| Pool cover | 1 | \$4,500.00 | \$4,500.00 |  | Bathroom steam | 3 | \$6,500.00 | \$19,500.00 |  |  |
| Misc. 1 |  |  |  |  | Smoke-Carbon | 0 | \$0.00 | \$0.00 |  |  |
| Central vacuum | 1 | \$1,245.00 | \$1,245.00 |  | Fl. Warm. (per/sq ft) | 1500 | \$12.00 | \$18,000.00 |  |  |
| Wine cooler | 0 | \$0.00 | \$0.00 |  | TV outlet | 0 | \$0.00 | \$0.00 |  |  |
| Landscape - tbd | 1 | \$256.00 | \$256.00 |  | Electric Car | 1 | \$1,230.00 | \$1,230.00 |  |  |
| Garbage Disposal | 1 | \$235.00 | \$235.00 |  | Generator (Whole House) | 0 | \$0.00 | \$0.00 |  |  |
| I/A System | 0 | \$0.00 | \$0.00 |  | Ejector Pump (wiring) | 1 | \$985.00 | \$985.00 |  |  |
| Sump pump | 1 | \$3,455.00 | \$3,455.00 |  | Doorbell | 0 | \$0.00 | \$0.00 |  |  |
| Radon Det. S+1 | 0 | \$0.00 | \$0.00 |  | Low votage / AV - tbd | 1 | \$34,567.00 | \$34,567.00 |  |  |
| Inline exhaust fans | 1 | \$372.00 | \$372.00 |  | Floor Warming | 0 | \$0.00 | \$0.00 |  | A + B |
|  |  |  | \$68,863.00 | A |  |  |  | \$107,079.00 | B | \$175,942.00 |



Every
Line
Letter
Number
On a set of plans equates to a Task

Every Task contains Scopes of work requiring Labor \& Materials FACT Quantifies it All.

Project Examination










