



Canadian Construction
Association
Gold Seal Certification

Estimator occupational profile



RELATED SKILLS

Competency	Supporting competency/skill/knowledge/task
Communicate clearly and ethically	Produce correspondence and reports
	Record written and oral queries
	Make presentations
	Create free-hand sketches
	Maintain good relationships with stakeholders
	Understand the roles and responsibilities of the project team
	Follow company policies and procedures and understand the level of authority
	Conduct activities in a professional and ethical manner
	Participate in project meetings
Understand contracts and supplementary conditions	Understand principles of law of contract between owners (or their agents), contractors, subcontractors and suppliers
	Understand different types of construction contracts
	Understand local tax implications
	Understand insurance, bonding and sub-trade security requirements
	Understand labour agreements and applicable legislation
	Understand supplementary conditions and impact on contract terms and conditions
Manage a database of information	Maintain a database of materials, trades and suppliers
	Establish database of information
	Maintain records of tender documents
Analyze current changes in the industry and the impact on costs	Monitor industry practices, codes and regulations, construction methodology, and new construction technology and materials
	Review industry publications
	Attend trade and industry seminars
	Maintain liaison with manufactures and suppliers
	Share information internally and with the field
Maintain relationships with subcontractors, suppliers and owners	Maintain contact data base
	Know key contacts for all subcontractors, suppliers, and owners

PRE-BID/PRE-PROPOSAL

Competency	Supporting competency/skill/knowledge/task
Participate in business development	Provide information on prospective work
	Report on competitor bidding histories
	Develop business relationships
	Assemble pre-qualification documents
	Respond to expressions of interest
	Respond to pre-qualification and/or design build requests
	Meet with potential clients to discuss options for proposed services
Determine, in consultation with senior management, which jobs to tender	Identify major risks and opportunities
	Evaluate owner and/or prime contractor
	Identify unclear documentation and onerous conditions
	Express a level of confidence for award
	Assess schedule
	Identify and assess required resources
	Identify bonding and insurance requirements
	Identify consequential or liquidated damages
	Budget the value of the project
	Understand types of bid
	Participate in development of a bid strategy
	Understand impacts of project location
	Compile list of competitors
	Brief senior management on major bid assumptions
Identify and communicate major bid risks and opportunities	Identify the risks associated with the project
	Identify unclear documentation
	Express a confidence factor for subcontract pricing
	Communicate the schedule
	Communicate the resources required to complete the project
Understand plans, specifications, addenda and all construction conditions set by owner/consultant	Detect early and determine any discrepancies, ambiguities and omissions in contract documents
	Interpret drawings, and specifications
	Knowledge of local bid depository
	Understand tender form breakdown including cash allowances, separate, alternate, and unit prices
	Know performance requirements
	Analyze impact of contract type and supplementary conditions on project costs
	Know the environmental conditions of the contract
	Understand safety requirements

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Competency	Supporting competency/skill/knowledge/task
	Understand the liability associated with the errors or omissions in drawings and communicate to management and owner/consultant
	Know document hierarchy
	Understand the impact of codes and regulatory agencies have on the project
Design-build	Participate as a partner in a multi-disciplinary design/build team
	Interpret client needs
Develop preliminary project budget	Understand what is required for pricing
	Understand different types of budgets
	Review documents at stages to ensure required information is identified for pricing
	Review scope of work and documents for risk and adjust/price contingency accordingly
	Present budget/price in a format so inclusions/exclusions are clearly identified
Determine scope of work	Know the contractor scope of work
	Know the sub-contractor requirements
	Know the supplier requirements
	Prepare scope analysis sheets
	Identify gaps in scope
Perform a site analysis	Attend site meetings
	Assess existing conditions
	Identify operation requirements
	Identify other bidders
	Document with relevant notes, pictures, and reports
	Participate in a pre-construction site inspection and/or pre-tender meeting
	Assess project location
	Follow up in writing with any questions or comments from site review
Solicit quotations	Create invitation to bid with project specific requirements
	Obtain intent to quote
	Provide and keep a record of contract document distribution

PREPARE ESTIMATE

Competency	Supporting competency/skill/knowledge/task
Prepare a quantity take-off	Maintain standard procedures for all estimating work
	Measure quantities from bid documents
	Clarify with consultant all discrepancies, ambiguities, omissions, etc.
	Co-ordinate and communicate with subcontractors/suppliers on scope of work
	Prepare a take-off summary
	Double check to verify quantities
Identify and calculate all direct and indirect costs associated with project	Understand difference between direct and indirect costs
	Determine labour and staffing costs
	Determine material costs
	Determine equipment costs
	Determine subcontract costs
	Identify cash allowances
Assess labour impacts	Determine other costs
	Assess manpower requirements, availability, rates, and expenses and apply adjustments
	Apply labour factors
	Understand cost implications related to project safety
Analyze quotations submitted by subcontractors and suppliers	Apply productivity factors utilizing the historical data base of information of jobs and/or estimates completed
	Evaluate quotations submitted by subcontractors and suppliers
Prepare summary of costs	Verify scope qualifications and the cost impact submitted by subcontractors
	Prepare final estimate
	Identify taxes, bonding and insurance
	Update budget to include design updates and clarifications
	Compile summary in conformance with company standard
	Include overhead and profit requirements

BID/PROPOSAL

Competency	Supporting competency/skill/knowledge/task
Analyze project for potential cost savings pre or post tender	Prepare cost impacts of alternative design methods of constructions
	Prepare cost impacts of alternative products and materials
	Address any changes in scope
	Apply value engineering principles
Complete and submit bid/proposal	Prepare tender forms and attachments
	Clarify and qualify bids
	Deliver and or amend the bid as per contract documents
	Review and finalize bid submissions in consultation with senior management

POST AWARD

Competency	Supporting competency/skill/knowledge/task
Execute contract documents	Address any discrepancies, ambiguities, omissions or onerous conditions in contract documents
	Manage the liability of errors or omissions in drawings and noting such to management and owner/consultant
	Assist in the processing of construction claims
Communicate the scope of the estimate to the construction team	Convey the special conditions about the project
	Convey the estimated plan of construction
	Review any large price variances in one scope of work that may need more verification
	Share all identified potential risk items and mitigation strategies
	Provide opinion on site access, logistics, and laydown
	Participate as a team member
	Assist in preparation of construction schedule by providing the estimate breakdown
	Lead estimating hand-over meeting
Participate in post tender negotiations	Participate in sub-contractor pre-award meetings
	Assist in pricing and negotiating changes
	Review scope of work of sub-contractor for completeness
	Understand costs associated with changes
	Know the company and contract procedures in processing change orders
Participate in a post-construction review	Evaluate strengths and short falls in estimating, planning or implementation of contract
	Evaluate performance of subcontractors, suppliers and personnel
	Maintain a library of assemblies
	Review project production rates and associated variables
	Determine overall company performance and estimating accuracy in the market
	Provide input to lessons learned