

## **1.0 INTRODUCTION**

- 1.1 The purpose of this Operating Procedure is to define the duties, authority, responsibilities, reporting relationship and measure of accomplishment for the functional position of Estimator, as assigned to that function by the Vice President of Pre-Construction Services of the Trapani Construction Company

## **2.0 REQUIREMENTS**

### 2.1 Education

- 2.1.1 Required: High School diploma or GED from an accredited school system or program.
- 2.1.2 Preferred: BS or BA degree in Engineering or some field related to the commercial construction industry from an accredited four-year institution.

### 2.2 Licensing / Registration / Certification

- 2.2.1 Required: Drivers License.

### 2.3 Experience

- 2.3.1 Required: Three years estimating related experience in a high quality commercial construction environment
- 2.3.2 Preferred: Seven years of similar experience.

### 2.4 Skills / Knowledge / Abilities

All items listed should be taken to read that the individual already has these skills, etc., or has the ability to rapidly acquire them.

- 2.4.1 Ability to estimate all types of commercial construction projects. In addition, must be able to work with and lead people, negotiate, speak publicly, analyze problems and translate company goals into actions necessary to achieve the goals.
- 2.4.2 Knowledge of various subcontractors and / or suppliers, their reliability, delivery capabilities, quality, and terms of sale.
- 2.4.3 Extensive knowledge of all codes and regulations regarding the General Contracting industry in the State of Illinois.

- 2.4.4 Excellent negotiating skills.
  - 2.4.5 Extensive knowledge of all commercial construction related activities performed in general and by Trapani Construction Company in particular.
  - 2.4.6 Extensive knowledge of various suppliers and their products and services, including the advantages and disadvantages of such, and the terms offered by the suppliers and / or manufacturers
  - 2.4.7 Extensive knowledge of the sub contractors in the area, their strengths, and their reliability.
  - 2.4.8 Knowledge of competitors and their prices, strengths and weaknesses.
  - 2.4.9 Ability to work closely with diverse groups of people, including Company employees at all levels, customers/clients, suppliers, and other outside professionals with whom the Company deals with on a regular basis.
  - 2.4.10 Ability to perform multiple tasks simultaneously
  - 2.4.11 Good problem solving skills.
  - 2.4.12 Excellent listening, inter-personal, and organization skills.
  - 2.4.13 Ability to read, dissect, and thoroughly understand blueprints, plans and schedules in order to determine the completeness of plans presented to Trapani.
  - 2.4.14 Ability to recognize and follow priorities with little direct supervision.
- 2.4 Physical
- 2.5.1 Body Positions
    - 2.5.1.1 This position requires the ability to sit for prolonged periods of time.
  - 2.5.2 Body Movements

2.5.2.1 This position requires the ability to operate a motor vehicle in order to visit customers, actual and prospective, as well as suppliers, subcontractors and/or manufacturers.

2.5.2.3 This position requires the physical ability and dexterity to operate telephones, computers and computer software, fax machines, and adding machines / calculators.

## 2.6 Mental

2.6.1 Mathematics: Knowledge of advanced math, heavy Estimating and technical issues is required. In addition this position requires excellent general math skills and accuracy for ordering, generating and tracking purchase orders and tracking the actual costs versus estimated costs. This position requires excellent math skills and accuracy for detailing and possesses basic geometry and related mathematical skills, and for preparing required reports.

2.6.2 Language: This position requires the ability to read, write, and speak English in order to identify various material items, to examine correspondence, inventory reports, to read and understand pricing and various discounts available on purchases, to read reports, and to read correspondence from customers, suppliers, manufacturers, and outside professionals.

## 2.7 Working Conditions

2.7.1 the Trapani Construction Company makes every effort to provide a pleasant, environmentally controlled office atmosphere.

2.7.1.1 However, the Estimator will be required to spend some time in the outdoors in all types of weather, and will be exposed to dust, dirt, fumes, etc.

2.7.2 The Estimator will be required to visit current and potential customers and/or suppliers on a regular basis at their locations and/or job sites, over which the company has no control, and in various types of conditions over which the company has no control.

2.7.3 The Estimator will also visit outside professionals with whom the Company does business, in various types of conditions over which the company has no control.

## 3.0 BASIC FUNCTION

- 3.1 The basic function of the Estimator is to take all the actions necessary to maintain a schedule of upcoming bids, be aware and involved in the development of all bids, develop and maintain a unit cost database, and establish estimates on all potential projects that meet or exceed the Trapani Construction Company profit margin goals.

#### **4.0 REPORTING RELATIONSHIPS**

- 4.1 The Estimator reports directly to the Vice President of Pre-Construction Services, and works with the various Project Managers

#### **5.0 AUTHORITY**

- 5.1 The Estimator receives sufficient authority from, and is accountable to, the Vice President of Pre-Construction Services for the accomplishment of all assigned duties and responsibilities. The Estimator has exclusive jurisdiction over all decisions relative to the estimating and bidding process subject to the Vice President of Pre-Construction Services approval. All of the duties and responsibilities that are established for this position, to include, but not limited to, setting the approved net profit goal per project.

#### **PERFORMANCE EVALUATION**

The performance of the Estimator of the Trapani Construction Co. Relative to the responsibilities and duties assigned, on a consistent basis is of utmost importance to the success of the organization. The Vice President of Pre-Construction Services will make specific evaluations of performance of the Estimator of the Trapani Construction Company, relative to the following responsibilities on a periodic basis. The scoring of performance evaluations is determined on a scale of 1 through 10, with 1 representing poorest performance and 10 representing excellent performance. Each responsibility to be evaluated is classified by importance to the Company's success; thus the score associated with the most important responsibilities will be subject to a "multiplier" in determining total overall performance. A tally and total performance score will be provided at the end of the evaluation.

#### **6.0 ESSENTIAL FUNCTIONS**

The essential functions of this position will include, but are not limited to, the following:

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6.1 DUTIES AND RESPONSIBILITIES

PERFORMANCE RATING

- \_\_\_\_\_ 6.1.1 Is aware and involved in the estimating of all projects that Trapani Construction Company bids.
- \_\_\_\_\_ 6.1.2 Assists in maintaining a bid schedule or log of upcoming bids. Determines how schedule will be met.
- \_\_\_\_\_ 6.1.3 Establishes, updates, and maintains a unit cost database for budgetary pricing of all types of projects.
- \_\_\_\_\_ 6.1.4 Reviews plans to be bid, establishes scopes and in house budget.
- \_\_\_\_\_ 6.1.5 Identifies trades involved in a project with Project Manager; qualifies and selects subs to be invited to bid with Project Manager.
- \_\_\_\_\_ 6.1.6 Ensures the accurate development of material take offs from the prints and specifications or design. Develop specifications from data supplied by the Customer/Senior V.P. of Preconstruction Services.
- \_\_\_\_\_ 6.1.7 Answers all questions from the subs regarding the project and asks clarifying questions of the owner and/or architect regarding the bid scope.
- \_\_\_\_\_ 6.1.8 Reviews and handles all addendums as required.
- \_\_\_\_\_ 6.1.9 Follows up with bidding subs to ensure broad participation.
- \_\_\_\_\_ 6.1.10 Receives bid from the subs, analyzes and reviews bids, and decides on which bids to use for compiling the TCC bid.
- \_\_\_\_\_ 6.1.11 Completes all TCC bids (all Take-offs) at least one-day prior to the due date.
- \_\_\_\_\_ 6.1.12 Reviews all bids with the Vice President of Pre-Construction Services.
- \_\_\_\_\_ 6.1.13 Identifies holes in the scope of work and pays appropriate attention to them, based on dollar priorities.
- \_\_\_\_\_ 6.1.14 Solicit in house assistance as appropriate.
- \_\_\_\_\_ 6.1.15 Ensuring that all estimates for work provided are done completely and

accurately, and contain the appropriate charges and the minimum profit percentages to be obtained.

- \_\_\_\_\_ 6.1.16 Completes bid analysis and finalize. Draft bid letter and qualifications of the bid at least one day prior to due date.
- \_\_\_\_\_ 6.1.17 Submits bid on time
- \_\_\_\_\_ 6.1.18 Fields any questions from the owner and/or architect in reference to the bid.
- \_\_\_\_\_ 6.1.19 On all awarded bids, prepares job file and transfers to Project Manager.
- \_\_\_\_\_ 6.1.20 Enhances the image and reputation of Trapani Construction Company by exercising sound and ethical business practices in all relations with customers, employees, suppliers, and other third parties.
- \_\_\_\_\_ 6.1.21 Keeps abreast of new products, materials, and vendors
- \_\_\_\_\_ 6.1.22 Keeps abreast of competitors in the area and their strengths and weaknesses.
- \_\_\_\_\_ 6.1.23 Develops full knowledge of company estimating and job costing computer systems.
- \_\_\_\_\_ 6.1.24 Ensures the follow up on bids as necessary to include following up with customers on bids that were not accepted.
- \_\_\_\_\_ 6.1.25 Instruct and train others on the company systems as required

**SECTION "6. 1" TOTAL (6. 1. 1 through 6. 1. 25)**  
**X 1.5**

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**Total Weighted Value of SECTION "6.1"**  
"375" is Maximum for this Section

**6.2 OTHER JOB CRITERIA**

- \_\_\_\_\_ 6.2.1 Seeks guidance and direction as necessary.
- \_\_\_\_\_ 6.2.2 Demonstrates good judgement in investigating and resolving problems.

- \_\_\_\_\_ 6.2.3 Respects the confidentiality of company, customers, and personnel information.
- \_\_\_\_\_ 6.2.4 Maintains cooperative working relationships with all company employees and in dealing with customers, suppliers, etc.
- \_\_\_\_\_ 6.2.5 Demonstrates ability to tactfully handle difficult situations.
- \_\_\_\_\_ 6.2.6 Keeps the Vice President of Pre-Construction Services abreast of progress, problems.
- \_\_\_\_\_ 6.2.7 Makes the best use of time during the course of the workday.
- \_\_\_\_\_ 6.2.8 Consistently shows the ability to recognize and deal with priorities.
- \_\_\_\_\_ 6.2.9 Always provides proper notification and advance notice of absences.
- \_\_\_\_\_ 6.2.10 Reports to work on time consistently.
- \_\_\_\_\_ 6.2.11 Maintains work area in a neat and orderly manner.
- \_\_\_\_\_ 6.2.12 Maintains a well groomed, presentable appearance in accordance with their job duties and the "Policies and Procedures Manuals."
- \_\_\_\_\_ 6.2.13 Maintains all work-related documentation neatly, legibly, and accurately.
- \_\_\_\_\_ 6.2.14 Performs any other duties as may be assigned by the Vice President of Pre-Construction Services

**SECTION "6. 2" TOTAL (6. 2. 1 through 6. 2. 14)**

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**Total Value of SECTION "6.2"**  
"140" is Maximum for this Section

**7.0 MEASURES OF PERFORMANCE**

7.1 The Estimator shall be deemed to be performing in a satisfactory manner when the following has been met and/or exceeded:

\_\_\_\_\_ 7.1.1 The ratio of bids to awards is maintained at an acceptable level as determined by the Vice President of Pre-Construction Services.

\_\_\_\_\_ 7.1.2 The projects that have been awarded to Trapani Construction Company are priced to produce the desired gross Margins and Profits.

\_\_\_\_\_ 7.1.3 Activities of the department are performed on time and in a satisfactory manner.

\_\_\_\_\_ 7.1.4 Maintains an active and updated unit cost database.

**SECTION "7.0" TOTAL ( 7.1. 1 through 7 1.4 )**

**Total Value of SECTION "7.0"**  
"40" is Maximum for this Section

  
  

**TOTAL EVALUATION SCORE** (Sections 6.1+ Section 6.2+ Section 7.0)

**"555" is Maximum**

I acknowledge that I will be evaluated on an annual (once every 12-month minimum) basis with respect to my overall performance. I also acknowledge the following criteria for evaluation:

90% - 100%	=	Superior
80% - 89%	=	Very Good
70% - 79%	=	Average
60% - 69%	=	Sub Standard
0% - 59%	=	Unsatisfactory

**8.0 REVIEW AND ACCEPTANCE**

8.1 This Job Description is intended to serve as a listing of the requirements for this position, the authority for action that the individual occupying this position has,



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and the responsibilities and duties to be performed. It is not intended as a contract for employment, nor does it guarantee employment for any period of time.

- 8.2 The Management of Trapani Construction Company retains the right to change any portion of this job description at any time.
  
- 8.3 "I have reviewed the contents of this job description and believe it to be accurate."

\_\_\_\_\_  
Estimator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Vice President of Pre-Construction Services

\_\_\_\_\_  
Date

### EVALUATION REPORT

Greatest consideration in establishing an evaluation has been developed by way of evaluating task performance on a line item basis. This is where specific performance highlights or concerns can best be located and addressed, and where future performance can be benchmarked and tracked against prior performance.

**TOTAL SCORE** ----- =                      %  
**TOTAL POSSIBLE**                      **880**                      **Performance Rating**

**Areas of Achievement:**

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**Areas For “Growth” and Recommended Plan of Action:**

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**Areas of “Concern” and Required Plan of Action:**

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Trapani Construction Company  
 Operating Procedure  
 Subject: **Position Description - Estimator**  
 Status: Exempt  X  Non-Exempt \_\_\_\_\_

No 1.230  
 Rev 10/26/04  
 Supercedes: None

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**Employee Comments:**

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Estimator: \_\_\_\_\_ Vice President: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_