



Estimating Coordinator Procedures

Department: Estimating

1. Prequalification to bid

- a. Issue prequalification to subcontractors through SmartBid.
 - i. Prequalification is issued to
 1. Subs who request to be added to our bid list.
 2. Subs who Kier Construction is considering awarding work to (if sub has not prequalified via SmartBid).
 3. Subs that Kier Construction would like to receive bid proposals from.
 4. Subs whose existing prequalification is near expiration.
 - a. Kier requires sub prequalification to be updated annually.
 - b. Review prequalification submission and send to the approval team.
 - c. Approval team will establish sub's prequalification status and their recommended contract limit.
 - d. Save PDF copy of Prequal and it's supporting documents (i.e. COI, W9, License, etc.) on Kier's O drive: *01 Insurance > 01 Vendor Compliance*

2. Bidding Projects

- a. Print plans, specs, and any other bidding documents per estimator's directive.
 - i. Estimator will notify Estimating Coordinator on new projects for bid and provide location of plans saved in OceScans or a link to download the bidding documents.
 - ii. Save all bidding documents in OceScans (I:).
- b. Set up project in SmartBid and Building Connected and send out invitation to bid to subcontractors.
 - i. Estimator will provide project information by completing a bid info sheet and a list of trades.
- c. Fill out bid forms that are provided by the architect/owner.
- d. Request Bid Bonds when applicable.
- e. As addenda become available, upload and send notice to subs via SmartBid and Building Connected.



- f. Send out bid due date reminder via SmartBid and Building Connected when the project is near its due date and/or the day before sub bids are due.
- g. Assist estimator during bid duration and on bid day.

3. Passing Projects

- a. Set up project in 1Projects (O drive) after a job number is assigned.
- b. Set up subcontractor folders (company name and vendor #) in the project job folder.
 - i. Estimator will provide the Estimating Coordinator with a sublist.
- c. Input project information in Procore.
- d. Set up subcontractors in Procore.
 - i. Add new users to project based off of the Sub Project Contact Sheet.
- e. Verify if the subcontractors are prequalified.
- f. Issue subcontractors that have not been prequalified a prequalification through SmartBid and a Notice of Intent.
- g. Issue Letter of Award to prequalified subcontractors and attach the Sub Project Contact Sheet and my COI introduction letter.
- h. Enter Commitments in Sage to generate Project Review Log.
 - i. Commitment number is the first four numbers of the job number then “-” then 3-digit number starting with “500” (i.e. 1234-500).
- i. Email Estimator and copy project team the subcontractors who are prequalified and are ready for Scope of Work and Subcontract agreement.
- j. Set up project in myCOI
- k. Set up subcontractors in myCOI.
- l. Register sub and upload insurance certificates in myCOI on behalf of the subcontractor as needed.

4. Administrative

- a. Set up Vendor Compliance in AP for new subcontractors.
- b. Create and dead file estimating books as needed.
- c. Maintain plan room in clean and organized manner.
- d. Order OCE paper rolls and toner as needed.
- e. Back up the receptionist on phones & lobby during lunch hours, vacations, or as required.
- f. Assist the Estimators as required.