

POLICY NAME: Job Estimating Procedure
Effective Date: January 1, 2018

Purpose

To insure uniformity in producing estimates for client services, and in providing estimates to the Client.

Definitions

Client is the person to whom services will be provided on an hourly or project basis.

Estimate is the amount in US dollars that will be expected in payment from Client to organization.

Services will be defined within the client contract, and can include sorting, packing, oversight of moving company, assistance in selection of subcontractors, floor planning, resettling, and other services that may be provided within the scope of the client contract.

Project Pricing is a total project estimate that includes hours, supplies, and travel time for services be needed

Procedure

Golden Bridges, Inc. uses project pricing in most instances. Occasionally a client will be quoted an hourly rate for services,; however that is a small portion of the contracts.

Our process involves two partners visiting with the client to assess the overall scope of the project.

- 1) The prospective client is asked to give the partners/estimators a tour of the home and any outbuildings if applicable. We also inquire about any off-site storage units.
- 2) Once the home has been toured and the client has expressed their goals the two partners/estimators excuse themselves from the home to meet in private and discuss the scope of the job and determine how to best provide the requested services.
- 3) The partners/estimators discuss the job scope, how to price the job, the hours, labor, and materials required and reach an agreement on the estimate that will be given to the client.
- 4) The lead partner proposed to the client an estimate based on the scope of work and agreed upon goals.
- 5) The only changes to an estimate initially provided to the client would be based on a change in project scope.