

**Appendix D – SAMPLE BASIS OF ESTIMATE FORM**

<b>BoE Summary</b>	
<b>Investment Title</b>	
<b>Date</b>	
<b>BoE Author</b>	
<b>BoE Reviewer(s)</b>	
<b>BoE Approved by</b>	
<b>Department</b>	
<b>Business Case ID</b>	
<b>Project Scope Description</b>	
<b>Estimate Classification</b>	
<b>Key Scope Elements or Requirements</b>	
<b>Assumptions</b>	
<b>Out of Scope</b>	
<b>Risks and Opportunities</b>	
<b>Contingencies</b>	
<b>Operating Budget Impact</b>	
<b>Estimating Team</b>	
<b>Reference Documents</b>	
<b>Major Changes from Previous Estimate</b>	
<b>General Comments</b>	



Class of Estimate							
Investment	0	Date	0	Description		BC ID	0
Legend							
Blank	Development of the deliverable has not begun.			C	Deliverable has been reviewed and approved as appropriate.		
S	Rough work on the deliverable has begun.			n/a	Not applicable. The deliverable does not apply to the project.		
P	Work on the deliverable is advanced and may be complete, excepting final review and approvals.				BoE Author's Determination (highlighted selection)		
Table 1 - Classification of Estimate Analysis							
Characteristic	Weighting	Class 1	Class 2	Class 3	Class 4	Class 5	Comments
1 Project Definition	Primary	65% to 100%	30% to 75%	10% to 40%	1% to 15%	0% to 2%	
2 End Usage	Secondary	Tender Check	Semi-Tender	Budget	Study	Screening	
3 Methodology	Secondary	Detailed Unit Cost with Detailed Take-off Cost	Detailed Unit Costs with Forced Detailed Take-off Cost	Semi-detailed Unit Cost with Assembly Level Line Items	Parametric Models, Assembly-Driven Models	SF (sq.ft.) Factoring, Parametric Modeling, Judgment, Analogy	
4 Expected Accuracy (from Appendix 2 - Cap Bug)	Secondary	High: +3% to +10% Low: -3% to -5%	High: +10% to +20% Low: -5% to -10%	High: +20% to +30% Low: -10% to -20%	High: +30% to +60% Low: -20% to -30%	High: +60% to +100% Low: -30% to -50%	
Table 2 - Supporting Class of Estimate Rationale							
The following table is used to provide the supporting rationale for selecting the above characteristics.							
General Project Data							
1	General Scope Description	Defined	Defined	Defined	Preliminary	Assumed	n/a
2	Project Location	Specific	Specific	Specific	Approximate	General	n/a
3	Functional Space Req (m2)	Specific	Specific	Defined	Preliminary	Started	n/a
4	Standards Requirements	Defined	Defined	Defined	Preliminary	Assumed	n/a
5	Total Capacity	Defined	Defined	Defined	Defined	Preliminary	n/a
6	Electrical Capacity	Defined	Defined	Defined	Defined	Preliminary	n/a
7	Soils / Hydrology Report	Defined	Defined	Defined	Preliminary	None	n/a
8	Integrated Project Plan	Defined	Defined	Defined	Preliminary	None	n/a
9	Project Master Schedule	Defined	Defined	Defined	Defined	Approximate	n/a
10	Work Breakdown Structure	Defined	Defined	Defined	Defined	Preliminary	n/a
11	Project Code of Accounts	Defined	Defined	Defined	Defined	Preliminary	n/a
12	Contracting Strategy	Defined	Defined	Defined	Preliminary	Assumed	n/a
13	Escalation Strategy / Basis	Defined	Defined	Defined	Preliminary	Assumed	n/a
Design Deliverables							
14	Standards Drawings	C	C	C	S/P		n/a
15	Site Plan	C	C	C	S/P	S	n/a
16	Existing Site Plan	C	C	C	S/P	S	n/a
21	Demolition Plan and Drawings	C	C	P	S/P		n/a
22	Utility Plan and Drawing	C	C	P	S/P		n/a
23	Site Electrical Plan / Drawing	C	C	P	S/P		n/a
24	Site Lighting Plan / Drawing	C	C	P	S/P		n/a
25	Site Comm Plan / Drawing	C	C	P	S/P		n/a
26	Erosion Control Plan / Drawing	C	C	P	S/P		n/a
27	Stormwater Plan / Drawing	C	C	P	S/P		n/a
28	Landscaping Plan / Drawing	C	C	P	S/P		n/a
29	External Elevations (Structure)	C	C	P	S/P		n/a
30	Interior Elevations (Structure)	C	P	S			n/a
31	Interior Section Views	C	C	P	S/P		n/a
32	Partition or Wall Types	C	C	S/P	S/P		n/a
33	Finish Schedule	C	C	P	S/P		n/a
34	Door Schedules	C	P	P	S/P		n/a
35	Window Schedules	C	P	P	S/P		n/a
36	Restroom Schedules	C	P	P	S/P		n/a
37	Furniture Plans / Schedules / Drawings	C	C	P	S/P		n/a
38	Signage Drawings / Schedules	C	P	P	S/P		n/a
39	Fire Protection Plan / Drawings	C	C	P	S/P		n/a
40	Room Layout Plan / Drawings	C	C	P	S/P		n/a
41	Foundation Plan / Drawings	C	C	P	S/P		n/a
42	Foundation Section / Details	C	C	P	S/P		n/a
43	Structural Plan / Drawings	C	C	P	S/P		n/a
44	Structural Section / Details	C	C	P	S/P		n/a
45	Roof Plan Drawings / Details	C	C	P	S/P		n/a
46	Material / Equipment Specs	C	C	P	S/P		n/a
47	Building Envelope / Moisture Protection / Flashing Details	C	C	P	S/P		n/a
48	Mechanical / HVAC Plan / Drawings	C	C	P	S/P		n/a
49	Mechanical / HVAC Details	C	P	S/P			n/a
50	Mechanical / HVAC Schedules	C	P	S/P			n/a
51	Flow Control Designs	C	P	P	S/P		n/a
52	Plumbing Plan / Drawings	C	C	P	S/P		n/a
53	Plumbing Details	C	P	S/P			n/a
54	Plumbing Riser Diagram	C	P	S/P			n/a
55	One-Line Electrical Diagram	C	C	P	S/P		n/a
56	Electrical Power Plan	C	C	P	S/P		n/a
57	Interior Lighting Plan / Drawings	C	P	S/P			n/a
58	Security Plan / Drawings	C	P	S/P			n/a
59	Emergency Communication Plan / Drawings	C	P	S/P			n/a
60	Life Safety Plan / Drawings	C	C	S/P	S		n/a
61	Lightning Protection Plan	C	P	S/P			n/a
62	Motor Control Diagram	C	P	S/P			n/a
63	Lighting Control Drawings	C	P	S/P			n/a
64	Lighting Schedules	C	P	S/P			n/a
65	Electrical / Panel Drawings	C	P	S/P			n/a
66	Equipment Schedule	C	P	S/P	S		n/a
67	Info Systems / Telecom Plan	C	P	S/P			n/a
68	Info Systems / Telecom Details	C	P	S/P			n/a
						<b>Overall</b>	<b>Class 3</b>