Rimkus Estimating Guidelines for Property Matters

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When a Property matter needs a cost estimate, these guidelines should be followed:

1. The Billing Timekeeper (BTK) for the matter prepares a scope of work for the Estimate (Conceptual Repair Protocol). A graphical (drawing/sketch) depiction of the scope is great way to further explain the scope when providing it to the estimator.

2. The BTK solicits an estimator by sending an email to **estimating@rimkus.com**. The email should include a general description of what is needed to be estimated. This email group is monitored by the Director of Estimating (and appropriate backups), who will review all estimating requests and will assign work to estimators as appropriate to ensure the most qualified estimator for the subject matter is engaged, workloads managed, and delivery timeframes minimized. The BTK should contact their Regional Property Practice Leader, followed by their District Manager, if necessary, to obtain assistance enlisting an estimator if a response is not promptly received.

3. The BTK communicates with the estimator, and the estimator provides a budget and timeframe to complete the estimating work to the BTK.

4. The BTK incorporates the estimating budget into the overall matter budget and also incorporates the time the BTK will spend coordinating, providing a technical review of the scope of work, and reporting the estimate to the client.

5. The BTK communicates the budget and timeframe to the client. The BTK may involve the estimator in this communication with the client, if necessary, to ensure a firm understanding of the client's estimating needs. If the client requests a meeting with the estimator and the BTK is not involved in the meeting, the estimator and BTK should get together following the meeting to review what was asked for/agreed to in the meeting.

    a. If a previously completed matter is reopened, or a client calls back after receiving our **Report of Findings** to then request a cost estimate, the BTK must still follow steps 1 – 5 above. It is not acceptable to drop the estimate request to **estimating@rimkus.com** and move on with other work. The BTK will reengage and be the main point of contact with their client and facilitate steps 1 – 5.

6. Upon client approval, the estimator will complete the estimate once the BTK has determined the scope of repairs, with guidance and direction from the BTK as necessary.

7. The estimator submits the estimate to the BTK for a detailed review of the scope of work included within the estimate. The BTK is responsible to ensure that the estimate incorporates the entire scope of work and addresses the necessary items pertinent to the matter.

a. The BTK should have a working knowledge of Xactimate in order to technically review the estimate for material types, quantities, labor assumptions, etc. If the BTK does not have a working knowledge of Xactimate, they should reach out to Matt Stevens for training. It is also recommended to have the estimator print the estimate with the detailed line-item information for each line item for the BTK to review. This allows the BTK to fully understand what labor, tools, equipment, and/or material is included in each line item.

8. Upon approval from the BTK that the entire scope is included within the estimate, the estimator sends the estimate to an approved technical reviewer within the estimating group by submitting a Technical Review request to:

   estimatingtechreviews@rimkus.com. Currently Matt, Justin, Ryan

   Note that the estimating technical reviewer does not have the full background or knowledge of the matter to confirm that the scope of work in the estimate is complete. The estimator and/or the BTK may need to discuss the details of the estimate with the TR if necessary. The technical review is to ensure proper estimating best practices, efficiencies, appropriate/best repair means and methods are utilized, as well as verifying that the proper estimate format and software has been utilized. **Verification of the scope of work (including estimated material quantities and types) is the responsibility of the BTK as stated above in step 7.**

9. Following the technical review process, the estimator provides the Rimkus Cost of Repair Estimate to the BTK.

   a. ESTIMATORS: The estimating work must be saved to the matter folder. ESX files, excel files, item cost quotes, any back up cost data, etc. should all be in the matter folder, clearly identified and organized. It is not acceptable to leave estimates or pricing verifications in the cloud at RS Means, Xactimate, etc., no matter the size or scope of the estimating request.

10. The BTK delivers the estimate to the client via verbal report.

    If the client requests a copy of the estimate, the estimate may be included as an attachment to the **Report of Findings**, however, this is **NOT** the preferred delivery method for the estimate. (See #11)

11. The preferred delivery method for the estimate is to transmit the estimate under the appropriate, CPC-reviewed, cover letter. **It is against Rimkus policy to email the estimate PDF to the client.** Approved cover letter templates are maintained by the Director of Estimating and are readily available through your estimator.

12. Estimate cover letters:

    a. The estimator will discuss with the BTK to confirm whether the estimator or the BTK will be signing the cover letter.

b. Regardless of whom will be signing the cover letter, the estimator on the matter will produce the cover letter for the estimate and place it in the matter folder for technical review by an approved technical reviewer within the estimating group.

c. Following the technical review process, the estimator will place the cover letter in the matter folder for final review by the BTK.

d. If there are any changes or additional verbiage requested by the BTK, send the cover letter back to an estimating Practice Leader or Director for final approval.

e. The cover letter should be processed through CPC to ensure compliance with Rimkus standards, e-signature formatting, etc. Following the CPC review process, the estimator (or the BTK if applicable) will apply their e-signature.

f. The estimate will be added to the signed cover letter as an attachment and issued to the client by CPC following standard Rimkus report issuance procedures.

Regarding the use of an engineering seal, one should consult state rules and laws where the work is being performed. Typically, an estimate is not considered “engineering” work, so it would not necessarily need a seal, but one must consider how it fits with the rest of the project and the engineer’s role in it.