Bid Intake & Bid / No-Bid Checklist

A step-by-step walkthrough for deciding which jobs are worth our time to price, and which ones to pass on — before real hours get spent.

Project Details

Project name		**Estimator**	
Owner / Client		**Reviewer**	
GC / Construction Manager		**Decision date**	
Project address			
Job type		**Estimated job value**	
Bid due date & time		**Start date**	
How the bid must be sent	☐ Portal ☐ Email ☐ In person ☐ Other: ________	**Finish date**	

How This Checklist Works

Step 1	Quick Intake Check — a 5–10 minute pass to confirm the basics are in place before anyone spends real time on this bid.
Step 2	Stop Signs — hard gates. If any answer is "No," the job normally does not get bid unless the owner signs off in writing.
Step 3	Bid / No-Bid Scorecard — a 100-point score across six areas that decides how confident we are in this job.
Step 4	Final Score & Action List — what the score means, and what still needs fixing before we commit.
Step 5	Risks & Bid Plan, then a Final Check right before the bid goes out the door.

Golden rule: if you do not know the answer, do not mark "Yes." Mark **Needs Checking** and write down exactly what needs to be found out.

SECTION 1 · 10 ITEMS

Quick Intake Check

Run through this first. It should take 5–10 minutes, before any real pricing starts.

1.1

Do we have all the bid documents?

Make sure you have every drawing sheet, every spec section, the bid form itself, and any instructions to bidders. If even one page or one addendum is missing, we could price the job wrong without ever realizing it.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ____

1.2

Do we know exactly when and how to submit the bid?

Confirm the exact date and time the bid is due, and exactly how it must be delivered — through a bidding portal, by email, or dropped off in person. Late bids, or bids sent the wrong way, are usually thrown out no matter how good the price is.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ____

1.3

Are we using the latest plans and addenda?

Check the revision dates on every drawing and confirm every addendum that has been issued is actually in our set. Pricing off an old drawing is one of the easiest ways to miss scope or price something that has already changed.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ____

1.4

Do we understand what work we are supposed to price?

Read through the scope carefully and be clear on exactly where our work starts and stops. If something could be read two different ways, write it down now as a question — don't let it turn into a guess.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ____

Quick Intake Check

1.5 Do we know where the job is and what the site is like?

Look at truck and equipment access, where materials can be staged, crew parking, and any limits on delivery times or working hours. A tight or restricted site can quietly add cost that never shows up on the drawings.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________________

1.6 Do we know when the job starts and finishes?

Confirm the expected start date, the required finish date, and any major milestones or phases in between. This tells us whether the schedule is even realistic before we commit any pricing to it.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________________

1.7 Do we know what forms and bonds are needed?

Check the bid documents for required forms, a bid bond, license copies, and insurance certificates. Missing paperwork can get a strong bid rejected before the price is ever even compared.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________________

1.8 Do we need to attend a site visit or pre-bid meeting?

Some projects require attendance at a site visit or pre-bid meeting just to be allowed to submit a bid. Confirm whether that applies here, and if so, who needs to go and when.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________________

Quick Intake Check

1.9 **Do we have enough time to price the job properly?**

Count the working days left until the bid is due and compare that honestly to how long takeoff, subcontractor pricing, and a final review will actually take. Rushing a bid is one of the most common ways an estimate ends up wrong.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________

1.10 **Do we have the right person to price it and someone to check it?**

Confirm who is assigned to prepare this estimate and who will review it before it goes out. A second set of eyes catches mistakes the person who built the number is too close to see.

☐ YES ☐ NEEDS CHECKING ☐ NO

Notes: ______________________

Quick Intake Result

Total "Yes" answers	_____ / 10

9–10 · Good to Review
Move on to the Stop Signs and the Scorecard.

7–8 · Mostly Ready
Start reviewing, but fix the missing items quickly.

5–6 · Not Ready
Get the missing information before doing anything else.

Below 5 · Too Many Gaps
Do not spend real time on this bid yet.

QUICK INTAKE DECISION

- ☐ Go to the Stop Signs & Scorecard
- ☐ Hold and get more information
- ☐ Decline the bid

SECTION 2 · 10 ITEMS

Stop Signs

Hard gates. If any answer here is “No,” this job normally does not get bid — unless the owner approves it in writing.

2.1

Are we allowed to do this job?

Confirm we hold the correct contractor's license, any required registration, and the certifications this specific scope calls for. Bidding work we aren't legally licensed to perform can disqualify the bid, or create much bigger problems later.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________

2.2

Can we get the bond and insurance needed?

Check with our surety and insurance broker that we can actually secure the bond amount and coverage limits this project requires, and find out what that will cost. Assuming we can get bonded is not the same as confirming it.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________

2.3

Is this a client or GC we are comfortable working for?

Think about what we already know, or can find out, about how this client or GC treats their contractors — do they pay on time, are they fair about change orders, and would other contractors work with them again?

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________

2.4

Is there a real source of money for this job?

Confirm the owner actually has the funding, financing, or an approved budget to build this project, not just a wish list. Publicly funded jobs are usually easy to confirm; private jobs may take more digging.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________

Stop Signs

2.5

Is the job clear enough to price?

Step back and ask if we could explain the main scope of this job to someone else without guessing. Big gaps or conflicts in the documents are a sign we'd be pricing on assumptions instead of facts.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ____________________

2.6

Can we finish the bid properly before it is due?

Look honestly at the time remaining against everything still left to do — pricing, subcontractor quotes, review, and submission. It's better to know now that we're short on time than to rush a number out the door.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ____________________

2.7

Can we actually do the work if we win?

Confirm we have, or can realistically get, the crews, equipment, suppliers, and key subcontractors this job needs, on the timeline it needs them. Winning a job we can't actually staff creates bigger problems than not winning it.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ____________________

2.8

Can we make enough money on this job?

After counting every real cost and risk — not just labor and material — check that what's left still meets the minimum profit we need to take a job like this on.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ____________________

2.9

Can we live with the contract terms?

Read through how the contract handles payment timing, delay damages, warranty length, and change-order approval. A good price can still be a bad deal if the contract terms put too much risk on us.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________________

2.10

Do we understand the biggest risks on this job?

Name the two or three things most likely to go wrong on this specific job, and have at least a rough idea of how we'd handle each one if it actually happened.

☐ YES ☐ NO ☐ NEEDS OWNER APPROVAL

Notes: ______________________________

Stop-Sign Decision

RESULT	DECISION
All answers are Yes	Continue to the Scorecard.
One or more need owner approval	Continue only once that approval is in writing.
One or more answers are No	Normally, no-bid this one.

Bid / No-Bid Scorecard

Six areas, scored 1–5 each. This is what turns a gut feeling into a number leadership can actually act on.

How to score: pick one box per question, 1 to 5. **5** = very good, clear advantage · **3** = okay, normal risk · **1** = bad, major concern or no clear answer. A score of 1 or 2 must be explained in the Notes line and carried over to the Action List in Section 5.

A. Client & Payment — 20 POINTS

3A.1 Will this client or GC pay us properly and on time?

Reach out to other contractors, suppliers, or subs who've worked with this client or GC before and ask directly about their payment habits. A history of slow or disputed payments is a real cost, even if the contract price looks fine.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3A.2 Are the payment terms okay for us?

Look closely at how many days after invoicing we actually get paid, how much retainage is held back, and what has to happen before that retainage is finally released. These numbers affect our cash flow as much as the contract price does.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3A.3 Are the contract terms fair enough for us to accept?

Check who is responsible for delays, damages, and design errors under this contract, and whether risk is being pushed onto us for things outside our control. A fair price on an unfair contract can still be a losing job.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3A.4 Can we get answers from the right people?

Confirm there's a real point of contact — someone who can actually answer technical questions and approve decisions — not just a general inbox with slow replies. Projects move faster and safer when we can get real answers quickly.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

Client & Payment score ______ / 20

Bid / No-Bid Scorecard

B. Job Fit & Scope — 20 POINTS

3B.1 Have we done this kind of work before?

Think about how many similar projects we've completed in this trade, at this scale, using this construction method. The more directly comparable our experience, the more confidence we can have in both our price and our schedule.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3B.2 Is this the right size and location for us?

Check whether this job is too small to be worth the overhead, too large for our current capacity, or far enough away that travel, lodging, or local labor rules add real cost we might not have priced yet.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3B.3 Are the plans and scope clear enough?

Confirm we know exactly what we're pricing and where our scope ends and someone else's begins. Unclear trade interfaces are one of the most common places money quietly disappears from a bid.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3B.4 Is the site workable for us?

Consider access, existing conditions, utilities, safety requirements, and available work space. A site that looks fine on paper can turn out to be much harder, and more expensive, to actually work in.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

Job Fit & Scope score ________ / 20

Bid / No-Bid Scorecard

C. People, Materials & Schedule — 15 POINTS

3C.1 Do we have the right people available for this job?

Check our current workload and confirm we can actually assign a project manager, superintendent, and crews to this job without pulling them off something else that still needs them.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3C.2 Can we get the materials, equipment, and subcontractors we need?

Look at lead times for key materials and equipment, and check availability with the subcontractors this job depends on. A great price falls apart fast if a critical item can't show up when the schedule needs it.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

3C.3 Can we finish the job in the time given?

Build a rough schedule and see if it realistically allows for labor, deliveries, weather, and inspections — not just the ideal, best-case timeline. A schedule that only works if everything goes right is a real risk.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ______________________________

People, Materials & Schedule score ________ / 15

D. Money & Risk — 20 POINTS

3D.1 Do we trust our price?

Check that our numbers are built on real subcontractor and supplier quotes, accurate quantities from takeoff, and labor productivity that matches how this crew actually performs — not just rough guesses.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3D.2 Will this job make enough profit after risk is included?

Add contingency, escalation, and general conditions into the number and see if the profit still holds up. A bid that only looks profitable before those costs are added isn't actually profitable.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3D.3 Can our business afford to carry this job?

Think about payroll, material costs, and retainage that we'll have to cover before payment actually comes in. Even a profitable job can strain the business if the cash timing doesn't work.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3D.4 Have we covered the main risks in our price or plan?

Go through the biggest risks on this job one by one and check that each one is either priced in, clearly excluded, clarified with the client, or assigned to someone to manage.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

Money & Risk score ☐ / 20

Bid / No-Bid Scorecard

E. Chance of Winning — 15 POINTS

3E.1

Do we have a real reason to think we can win?

Name something specific working in our favor — an existing relationship, a past project with this client, a pricing advantage, or a skill few competitors have. Wanting the work isn't the same as having a real shot at it.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3E.2

Is the competition reasonable?

Try to get a sense of how many other contractors are likely bidding this job and how strong they are. A crowded field of well-qualified competitors changes how much effort this bid actually deserves.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3E.3

Do we know what matters most to the client?

Figure out whether this client is driven mainly by price, speed, quality, safety record, or relationship, and make sure our bid speaks directly to that priority.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

Chance of Winning score ______ / 15

F. Bid Effort & Business Value — 10 POINTS

3F.1

Is this job worth the time it will take to bid?

Weigh the hours this estimate will take against our realistic chance of winning and the profit if we do. Some jobs simply cost more in estimating time than they're likely to return.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

3F.2

Does this job help where we want to grow?

Consider whether this project fits the type of client, trade, or market we're actually trying to build more work in, even if it isn't the most profitable job on paper.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 (1 = weak → 5 = strong)

Notes: ____________________

Bid Effort & Business Value score ______ / 10

SECTION 4

Final Score & What To Do

Add up the six category scores, then match the total to the decision table below.

CATEGORY	MAX	YOUR SCORE
A · Client & Payment	20	______
B · Job Fit & Scope	20	______
C · People, Materials & Schedule	15	______
D · Money & Risk	20	______
E · Chance of Winning	15	______
F · Bid Effort & Business Value	10	______
TOTAL SCORE	**100**	______

What Your Score Means

SCORE	DECISION	WHAT TO DO
80–100	**BID IT**	A strong job for us. Start full estimating, collect quotes, build the bid plan, and prepare to submit.
70–79	**BID IT — FIX WEAK SPOTS**	Good overall, but resolve the low-score items before final approval. Do not ignore a weak payment, schedule, margin, or contract issue.
60–69	**NEEDS MANAGEMENT APPROVAL**	Real concerns exist. Leadership decides if the upside is worth the risk — write down exactly what must be fixed.
50–59	**HOLD FOR NOW**	Do not spend full estimating time yet. Get better information or wait for answers. No-bid it if nothing improves.
Below 50	**NO-BID**	Not a good use of the company's time, money, people, or bond capacity. Focus on a better job.

Override rule: even with a high total score, stop and get approval if any of the questions below scored a 1 or 2.

SECTION 4 · CONTINUED

Low-Score Override Rules

If any of these nine questions scores a 1 or 2, this is what has to happen before we bid.

IF THIS QUESTION SCORES 1 OR 2…	…THIS MUST HAPPEN BEFORE WE BID
Will the client / GC pay us properly and on time?	Get payment references, check credit, or no-bid it.
Are payment terms okay for us?	Get finance or owner approval.
Are the contract terms fair enough?	Review the bad clauses and decide what must be changed, priced, or qualified.
Are the plans and scope clear enough?	Send RFIs, write down assumptions, add contingency, or wait.
Do we have the right people available?	Confirm names and availability, or no-bid it.
Can we finish in the time given?	Rework the plan, price the risk, or decline.
Do we trust our price?	Get more quotes, double-check quantities, and have another estimator review it.
Will this job make enough profit?	Re-price it or no-bid it. Do not go below our minimum without written owner approval.
Can our business afford to carry this job?	Get finance and surety approval before bidding.

SECTION 5

Things To Fix Before Bidding

Every “Needs Checking,” every “No,” and every score of 1 or 2 from Sections 1–3 gets logged here, with an owner and a due date.

NO.	WHAT'S THE PROBLEM?	WHY IT MATTERS	WHAT NEEDS TO HAPPEN?	WHO OWNS IT?	DUE DATE	DONE
1		☐ Price ☐ Schedule ☐ Scope ☐ Contract ☐ Cash ☐ Compliance ☐ Win chance				☐
2		☐ Price ☐ Schedule ☐ Scope ☐ Contract ☐ Cash ☐ Compliance ☐ Win chance				☐
3		☐ Price ☐ Schedule ☐ Scope ☐ Contract ☐ Cash ☐ Compliance ☐ Win chance				☐
4		☐ Price ☐ Schedule ☐ Scope ☐ Contract ☐ Cash ☐ Compliance ☐ Win chance				☐
5		☐ Price ☐ Schedule ☐ Scope ☐ Contract ☐ Cash ☐ Compliance ☐ Win chance				☐

SECTION 6

Top Risks & Bid Plan

The two or three things most likely to hurt this job — and how we plan to answer them in the bid.

Biggest Risks

1. ______________________________
Proof: drawing · spec · site visit · quote · contract clause · client feedback | Response: ☐ Add cost ☐ Add contingency ☐ Ask RFI ☐ Exclude it ☐ Qualify it ☐ Negotiate it ☐ Make a plan

2. ______________________________
Proof: drawing · spec · site visit · quote · contract clause · client feedback | Response: ☐ Add cost ☐ Add contingency ☐ Ask RFI ☐ Exclude it ☐ Qualify it ☐ Negotiate it ☐ Make a plan

3. ______________________________
Proof: drawing · spec · site visit · quote · contract clause · client feedback | Response: ☐ Add cost ☐ Add contingency ☐ Ask RFI ☐ Exclude it ☐ Qualify it ☐ Negotiate it ☐ Make a plan

Bid Plan

Who are we most likely competing against?	
Why might the client choose them instead of us?	
Why should the client choose us?	
What is our strongest selling point on this job?	
What must we make clear in our bid?	
Target margin	
Lowest margin we will accept	
Biggest thing that could make us lose money	

Final Check Before Submitting

7.5

Has someone else checked our scope and final number?

Have a second person review the scope and the final price with fresh eyes before it goes out, and note what they checked, when, and any changes that came out of that review.

☐ YES ☐ NO

Notes: ____________________

7.6

Have we checked cash, bond, and profit one last time?

Take one more look at the final margin and how cash will flow through the job, and confirm the bond has actually been approved before we submit.

☐ YES ☐ NO

Notes: ____________________

7.7

Have we dealt with the main contract risks?

Confirm every problem clause flagged earlier has either been changed, qualified in our bid, approved by someone with authority, or priced into the number.

☐ YES ☐ NO

Notes: ____________________

7.8

Are all “Things to Fix” closed or approved?

Go back through the Action List from Section 5 and confirm every open item is either resolved or has been knowingly approved to move forward as-is.

☐ YES ☐ NO

Notes: ____________________

Final Check Before Submitting

The last pass, right before the bid goes out the door.

7.1 Have we filled out every form and signed everything needed?

Go through the bid documents one more time and confirm every required form, signature, addendum acknowledgment, bond, and certificate is actually included. A single missing signature can get an otherwise strong bid rejected.

☐ YES ☐ NO

Notes: ______________________________

7.2 Have we clearly said what is included and not included?

Make sure our exclusions, assumptions, alternates, and clarifications are written out plainly, not left for someone to assume. This protects us from disputes later about what we did or didn't agree to build.

☐ YES ☐ NO

Notes: ______________________________

7.3 Have we checked subcontractor and supplier prices?

Confirm which quote we're using from each subcontractor and supplier, what it excludes, and how long that price is valid. A quote that expired last week isn't a number we can safely build a bid on.

☐ YES ☐ NO

Notes: ______________________________

7.4 Have we included all job costs?

Walk through labor, materials, equipment, supervision, overhead, bond, insurance, permits, and contingency one more time to make sure nothing got missed in the rush to finish.

☐ YES ☐ NO

Notes: ______________________________

Final Check Before Submitting

7.9 **Has the final price been approved?**

Confirm the final number has been signed off by whoever has authority to approve it, and that everyone submitting the bid is working from that same, final number.

☐ YES ☐ NO

Notes: ______________________

7.10 **Do we know exactly how and when the bid will be submitted?**

Confirm who is responsible for actually submitting the bid, what time it needs to go in by, and how we'll get confirmation that it was received.

☐ YES ☐ NO

Notes: ______________________

Final Decision

- ☐ BID — ready to submit
- ☐ BID — only after the listed items are fixed
- ☐ NO-BID — do not submit
- ☐ BID WITH OWNER EXCEPTION — risk accepted by the owner

Why are we bidding or not bidding?

____

____

ESTIMATOR · DATE

REVIEWER · DATE

OWNER / MANAGER APPROVAL · DATE