Course Description
The ability to effectively prepare for a project is vital to the success of any business. Project preparation consists of multiple processes that work together and, when performed effectively, enable you to increase your efficiency, achieve greater client satisfaction, enhance team and vendor relationships, and protect profitability. This course provides you with the knowledge base and skills to perform two of the critical processes in project preparation: estimating costs and creating the schedule to complete the project.

Audience
The intended audience for this course is small volume builders, custom builders, remodelers, production builders, project managers and lead carpenters.

Course Objectives
By completing this course, participants will be able to:

• Illustrate how estimating and scheduling work together to effectively set up the project.
• Identify the fundamentals of estimating to identify the costs (not the selling price).
• Use spreadsheets and packaged estimating systems.
• Identify the fundamentals of scheduling.
• Illustrate the schedule as a key communication tool.

Topics Outline
Section 1: Introduction to Estimating
• Learning Objectives
• Introduction
• The Role of Estimating
• Important Factors
• Estimating Methods
• Activity 1 – 1: Estimating Methods
• Summary of Key Points

Section 2: Estimating Process
• Learning Objectives
• Introduction
• Define the Work
• Prepare the Estimating Documents
• Perform the Take-off
Section 3: Take-off and Cost Breakdown
- Learning Objectives
- Introduction
- The Cost Breakdown
- The Estimate
- Activity 3 – 1: Scope of Work
- Activity 3 – 2: Project Information and Key Dimensions
- Activity 3 – 3: Foundation and Concrete
- Activity 3 – 4: Lumber Take-off
- Activity 3 – 5: Framing
- Next Steps
- Summary of Key Points

Section 4: Computer Estimating
- Learning Objectives
- Introduction
- Automating Take-offs
- Estimating Spreadsheets
- Activity 4 – 1: Calculate Roof Materials and Labor
- Estimating Programs
- Summary of Key Points

Section 5: Introduction to Scheduling
- Learning Objectives
- Introduction
- Schedule Components
- Activity 5 – 1: Schedule Components
- Activity 5 – 2: Dependencies in Action
- Types of Schedules
- Selection Considerations
- Summary of Key Points

Section 6: Creating the Schedule
- Learning Objectives
- Introduction
- Step 1 – List the Tasks
- Activity 6 – 1: Listing Tasks
- Step 2 – Assign Dependencies
- Step 3 – Assign Durations
- Step 4 – Assign Lag and Lead Times
- Activity 6 – 2: Creating a Schedule
- Summary of Key Points

Section 7: Scheduling as a Communication Tool
- Learning Objectives
- Introduction
• Activity 7 – 1: Rain, Rain, Go Away!
• How a Schedule Contributes to Communication
• Communication Challenges
• Considerations for All Builders and Remodelers
• Additional Considerations for Custom Builders and Remodelers
• Activity 7 – 2: Making Plan B Happen
• Summary of Key Points

CE Information
• Required for NAHB Designations: CGB, CGR
• 6 CE for NAHB Designations: CAPS, CGA, CGB, CGR, GMB, CSP, Master CSP, CGP, Master CGP
• 6.0 AIBD CE
• 6 AIA/CES LU

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