



Position Title: Roofing Estimator/Project Manager

Position Purpose and Objectives

A roofing estimator/project manager is responsible for bidding, selling and managing roofing projects.

- **Prepare accurate, timely estimates for potential jobs based on expertise**
- **Develop and maintain strategic relationships**
- **Manage projects for customer satisfaction, profitability and future process improvements**

Department: Sales

Department Supervisor: Director of sales

Direct Supervisor: Director of sales

Direct Reports: None

Employment Status: Exempt (salaried) or Nonexempt (hourly)

Specific Duties, Functions and Responsibilities

- **Know and stay abreast of design requirements, codes and materials; use expertise to prepare accurate and competitive proposals and contracts**
 - Review and understand scope of work and project specifications
 - Analyze blueprints, specifications, proposals and other documentation to prepare time, cost and labor estimates for products, projects or services
 - Review data to determine material and labor requirements and prepare itemized lists
 - Compute cost factors and prepare estimates used for management purposes such as planning, organizing and scheduling work; preparing bids; selecting vendors or subcontractors; and determining cost effectiveness
 - Organize product information, shop drawings and samples for submittals
 - Seek to constantly gain knowledge and improve ability to estimate all company products and systems
- **Develop labor estimates for potential jobs**
 - Work closely with drafting and project management in providing required estimating services
 - Use established labor and material markups for overhead and profit
 - Provide job packets to foreman to assist with job preparation for safety, HazCom, specifications and labor expectations
 - Interface with individuals in the organization to obtain support and commitment to the cost estimates
- **Develop and maintain relationships with manufacturers, distributors, suppliers and customers to strategically approach jobs and purchases**
 - Consult with clients, vendors or other individuals to discuss and formulate estimates and resolve issues
 - Secure required equipment/material process as required
 - Document customer feedback in job files
 - Identify material cost trends to assist management in cost reduction and process improvement
 - Identify and pursue potential business

- Be responsive to the needs of existing and potential customers
- **Track, manage and debrief all projects**
 - Purchase materials and equipment for all projects
 - Analyze completed projects to compare estimated costs to actual costs and determine reasons for discrepancies
 - Provide improvement recommendations to cost-estimating procedures to reduce future discrepancies between estimated and actual costs
 - Maintain accurate, complete and organized files
 - Maintain job communication for change-order management with field personnel
 - Follow up on outstanding estimates as required or assigned by the general manager
 - Assist the production department in scheduling and coordinating jobs
 - Act as project manager when required
 - Process manufacturer warranties
 - Review project assignments, plans procedures for construction on basis of starting and completion times, and analyze staffing and material requirements for each phase of construction
 - Confer with building owners / managers, direct supervisory personnel and subcontractors in interpreting specifications or blueprints, and coordinate various phases of construction to meet project and customer requirements and prevent delays
 - Confer with supervisors, vendors and inspectors to resolve problems and improve methods
 - Perform final walk-through with owner or building manager
 - Review jobs after close-out to determine overall job performance
 - Be responsible for communicating and coordinating with superintendents and/or foremen

Required Knowledge, Skills and Abilities

Work Skills – Estimators must exhibit technical and management skills necessary to bid, sell and manage roof system installations.

Effective communication – Ability to convey information, concepts and concerns to people with differing communication styles

Language skills – Ability to read, analyze and interpret:

- Written instructions
- Work related documents
- OSHA regulations
- Professional journals
- Legal documents

Oral communication – Speak in a clear and professional manner

- Participate in meetings
- Demonstrate group presentation skills

Written communication – Able to read and interpret written information

- Write legibly and informatively
- Write in a clear, professional manner

Math – Ability to work with mathematical concepts such as

- Add, subtract, multiply, divide in all units of measure using whole numbers, common fractions and decimals
- Basic algebra

- Draw and interpret bar graphs and pie charts
- Geometry
- Rates, ratios, proportions and percentages
- Statistics

Technology – Ability to use phones, tablets and other technology tools; knowledge of and ability to use the following software applications:

- Spreadsheet software
- Design software
- Database software
- Word processing software

Analysis – Ability to read and interpret blueprints and specifications; collect and research data, and use intuition and experience to complement information

Roof system knowledge – Knowledge of various roof systems, materials, construction processes and theories; ability to design a roof system; desire to stay abreast of codes and other necessary information

Project management – Coordinate projects, communicate changes and monitor progress

Roof system installation – Ability to teach others roof system installation skills

Safety and security – Ability to identify, correct and report unsafe conditions according to company and OSHA standards:

- Determine appropriate actions in addition to guidelines
- Report and/or correct potentially unsafe conditions
- Observe safety and security procedures

Quality – Knowledge to inspect and ensure attention to detail and quality

- Demonstrate accuracy, thoroughness and attention to detail
- Look for ways to improve and promote quality
- Look for ways to improve and promote quality
- Monitor work to ensure quality

Productivity – Demonstrate the ability to meet and exceed productivity standards; works quickly and accurately

Budgeting – Ability to understand implications of change orders and loss/gain production on job budgets

Cost consciousness – Understand budgeting and implications to jobs

- Work within approved budget
- Display orientation to profitability
- Develop and implement cost-saving measures

Relational Interaction – Estimators must be able to thrive in a dynamic, interactive company environment as well as develop and maintain relationships outside the company

Customer service – Seek to help customers even in difficult situations; seek to maintain customer relationships

Problem solving – Understand complex problems and make decisions to benefit everyone as much as possible

- Apply common sense understanding to carry out instructions furnished in written, oral or graphic form
- Display willingness to make decisions
- Gather and analyze information skillfully
- Develop alternative solutions

- Focus on solving conflict, in a non-blaming environment
- Identify and resolve problems in a timely manner
- Use reason even when dealing with emotional topics

Leadership, Management and Teamwork – Estimators must be able to work well with others within and outside of the company system.

Leadership – Exert informal leadership with individuals at all levels of a company as well as customers, vendors, manufacturers, suppliers and distributors

- Exhibit confidence in self and others
- Make self available to crews, staff and customers
- Develop subordinates’ skills and encourages growth
- Provide regular performance feedback

Management – Ability to juggle schedules, details and outcomes; prioritize and plan work activities; use time efficiently

- Prioritize and plan work activities
- Include appropriate people in decision-making process
- Appropriately delegate work assignments
- Make timely decisions
- Set expectations and monitors delegated activities

Teamwork – Ability to work with others to accomplish goals; balance team and individual responsibilities; give and welcome feedback

- Balance team and individual responsibilities
- Work well in group problem-solving situations
- Build morale and group commitments to goals and objectives
- Exhibit objectivity and openness to others’ views
- Share expertise with others

Education and Experience

Essential (The following items are essential for applicants to possess.)

- High-school diploma or equivalent
- English fluency
- OSHA 10-hour card
- Valid driver’s license
- Ability to use/learn business technology

Preferred

- Roofing industry experience
- Bilingual fluency
- OSHA 30-hour card
- Familiarity with local building codes
- Experience with estimating programs

Physical Requirements

These physical demands are representative of the physical requirements necessary for an employee to successfully perform the essential functions of the job. Reasonable accommodation can be made to enable people with disabilities to perform the described essential functions.

Activity	Never	Intermittently	Occasionally	Frequently	Constantly	Activity	Never	Intermittently	Occasionally	Frequently	Constantly
Bending			X			Lifting (lbs.)					
Kneeling			X			1-10			X		
Twisting/turning			X			11-20			X		
Crouching			X			21-50		X			
Crawling			X			51-75	X				
Walking on a level surface					X	76-100	X				
Walking on an uneven surface		X				Carrying (lbs.)					
Climbing stairs			X			1-10			X		
Climbing ladders			X			11-20			X		
Carrying ladders			X			21-50		X			
Reaching above			X			51-75	X				
Using arms					X	76-100	X				
Using wrists					X	Pushing (lbs.)					
Handling/fingering			X			1-10			X		
* Grasping			X			11-20		X			
* Squeezing			X			21-50	X				
Vision	Yes	No				51-75	X				
Close	X					76-100	X				
Distant	X					Pulling (lbs.)					
Color	X					1-10			X		
Peripheral	X					11-20		X			
Depth	X					21-50	X				
Endurance						51-75	X				
Repetitive foot motion		X				76-100	X				
Standing			X			Environment					
Walking				X		Inside				X	
Sitting				X		Outside		X			
Keyboarding				X		Heat		X			
Tool Use						Cold		X			
Hand tools		X				Dust		X			
Power		X				Noise		X			
Drivers		X				Drive					
Forceful grip		X				Automatic					X
Metal brake		X				Standard	X				
						Forklift			X		