

What I need from you

Records & Monthly Check

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. Access to the project record itself, not a summary **ESSENTIAL**

Why I need it. The check has to be against the real record.

Where you'll find it. Wherever the project record actually lives: the document management system, the shared drive, or the folder on site

Without it. There is nothing to check the record against, so the check cannot start

2. Site diaries for the period **IMPORTANT**

Why I need it. The primary record of what happened.

Where you'll find it. The site manager's diary, the day sheets in the site office, the photo folders on the team's phones and the planner's programme files

Without it. The month's events are pieced together from correspondence and photographs alone, with nothing to confirm the day to day picture

3. Photographs for the period, with dates **IMPORTANT**

Why I need it. Evidence that needs no explanation later.

Where you'll find it. The site manager's diary, the day sheets in the site office, the photo folders on the team's phones and the planner's programme files

Without it. There is no dated record of site conditions, so events for the period rest on diaries and correspondence alone

4. Correspondence for the period **IMPORTANT**

Why I need it. Where instructions and admissions hide.

Where you'll find it. A few weeks of the project inbox, forwarded as it stands, is enough

Without it. Notices cannot be checked against what was actually served, and instructions are checked against the diary alone

5. The registers as they stand: variations, notices, RFIs, delays **IMPORTANT**

Why I need it. What is being maintained against what should be.

Where you'll find it. Wherever your team already keeps them: the commercial register file, a spreadsheet on the shared drive, or your QS's own working file, sent as it stands

Without it. The check cannot say whether your registers have drifted from the real position

6. The contract and every amendment **ESSENTIAL**

Why I need it. What the contract itself requires to be recorded.

Where you'll find it. The job's commercial folder or the order email normally holds the signed copy

Without it. There is nothing to check the records against, so the check cannot run at all

7. The rates the work is bought at: the priced subcontract or order for each trade on site, the payroll rate for the period where the labour is your own, and any daywork or schedule of rates in the contract **IMPORTANT**

Why I need it. The review values a permanent gap as a quantity multiplied by a rate, and the rate has to come off a document held on the project rather than out of your own knowledge of the market.

Where you'll find it. The commercial folder holding the trade packages, the payment file where those rates were applied, or the payroll run for the period

Without it. A permanent gap can be described but not valued, so the report says what is missing and cannot say what it puts at risk

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.