

What I need from you

Interim Valuations

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

Why I need it. The clauses that fix the dates, the valuation rules, the materials conditions and the retention percentage.

Where you'll find it. The job's commercial folder, or the order email, which normally holds the executed copy with its schedules and its schedule of amendments.

Without it. The valuation date, rules for items without bill rates, conditions for materials and retention percentage cannot be verified against the contract. Previous habits or spreadsheet settings do not establish those terms.

2. The measure **OPTIONAL**

Why I need it. What is being valued.

Where you'll find it. Whoever manages the account holds any measure already done. Ask for it as it stands, and say plainly if none exists yet.

Without it. There is nothing to check the new measure against, so any drift only shows up later.

3. Drawings, at the current revision **ESSENTIAL**

Why I need it. What was built against what was drawn.

Where you'll find it. The design team's shared folder or your own drawings register, whichever holds the current issue sheet and the revision numbers.

Without it. Progress cannot be measured against what was actually built, so the valuation cannot start.

4. The programme **IMPORTANT**

Why I need it. What the valuation date relates to.

Where you'll find it. Your planner if you have one, or the programme as last issued to you by the main contractor.

Without it. There is no planned position to test the measure against, so a valuation that is actually behind programme is not flagged as such.

5. Contract rates or the bill of quantities **ESSENTIAL**

Why I need it. The basis of valuation.

Where you'll find it. The tender folder, or an appendix bound into the contract itself.

Without it. There is nothing to value the work against, so no sum can be put on progress at all.

6. Variations, with status IMPORTANT

Why I need it. What is earned outside the measure.

Where you'll find it. The job's payment folder and whatever register or email trail holds the variations.

Without it. Any instructed change is valued at nil until the register arrives, even where the work has clearly been done.

7. Materials on site records IMPORTANT

Why I need it. Value earned but not yet incorporated.

Where you'll find it. The site team's phones and folders, the site diary and the supplier invoices file.

Without it. Materials already bought and delivered are valued at nil, even though they have been paid for.

8. Previous valuations ESSENTIAL

Why I need it. The base this valuation moves from.

Where you'll find it. The job's payment folder, and the sent items of whoever issued the applications, which is also where the certificates received back will be.

Without it. There is no base for this valuation to move from, so the cumulative position cannot be checked or continued.

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.