

What I need from you

Snagging & Closeout Tracking

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. Every snag list, from every source ESSENTIAL

Why I need it. What has to be closed out.

Where you'll find it. The site manager's folders, the inspectors' sheets and the team's phones and inboxes.

Without it. The snag register cannot be built or tracked, so nothing gets closed out and nothing gets chased.

2. The practical completion certificate IMPORTANT

Why I need it. The date that starts the defects period.

Where you'll find it. Whoever issued it, usually the contract administrator or the employer's agent. Check the job's commercial folder first, and ask them directly if none was ever issued.

Without it. The defects expiry date and the retention release dates cannot be diarised, so nothing tells you when money should come back.

3. The defects period dates OPTIONAL

Why I need it. What decides when retention falls due.

Where you'll find it. The job's commercial folder for the contract; the specification usually sits with the tender or design information.

Without it. The dates are simply checked against the contract alone, without your own understanding of them tested first.

4. The operation and maintenance and health and safety file requirements IMPORTANT

Why I need it. Completion often depends on documents, not on building work.

Where you'll find it. The job's commercial folder for the contract; the specification usually sits with the tender or design information.

Without it. Every document on the tracker shows as status unknown, so you cannot see what has actually been submitted or rejected.

5. The retention terms ESSENTIAL

Why I need it. What the closeout releases.

Where you'll find it. The job's commercial folder for the contract; the specification usually sits with the tender or design information.

Without it. There is nothing to calculate the retention release against, so the closeout cannot say what should be released or when.

6. The priced subcontract, with the labour rate for the trade ESSENTIAL

Why I need it. Every item is priced at rates taken from the job's own documents, never assumed.

Where you'll find it. The executed subcontract and its priced schedule or bill of quantities, in the job's commercial folder. Usually the same document as the retention and defects clauses at rows 3 and 5.

Without it. The items cannot be priced, so their value, the cost of your own items and the comparison with retention held cannot be established.

7. Your own quotations, invoices and hire rates for materials, access and plant on this job
IMPORTANT

Why I need it. Materials, access and plant are priced from what this job actually pays, not from a published rate.

Where you'll find it. Your own purchase ledger, the material invoices for the trade, and the hire desk's rates for the plant already on this job.

Without it. Items carrying materials, access or plant cannot be priced and drop out of the category totals, so the totals understate the position by an unknown amount.

8. Any priced response the other side has already given on the snag list OPTIONAL

Why I need it. It is what the difference between the two positions is measured against.

Where you'll find it. The correspondence on the snag list, and any deduction or contra-charge notice already issued.

Without it. There is no other side's figure to record, so the report states your value alone and the gap between the parties is not visible.

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.