



PROJECT TOOLKIT

Practical forms for clients and contractors

Before You Start Building

A practical collection of project-management forms designed to help homeowners and professional contractors communicate clearly, record key decisions and reduce avoidable disputes throughout a building project.

Included in this toolkit

- 01 Client Readiness Checklist**
FOR / COMPLETED BY: HOMEOWNER / CLIENT
Completed by the homeowner to check they and the project are ready to proceed.
- 02 Client & Project Readiness Checklist**
FOR / COMPLETED BY: BUILDER / CONTRACTOR
Completed by the builder to assess whether there is enough information to quote and proceed fairly.
- 03 Builder Comparison Checklist**
FOR / COMPLETED BY: HOMEOWNER / CLIENT
Completed by the homeowner to compare up to three builders using the same criteria.
- 04 Stage Payment Schedule & Record**
FOR / COMPLETED BY: CLIENT + CONTRACTOR
Completed jointly to agree payment stages and keep a clear payment record.
- 05 Project Variation Agreement**
FOR / COMPLETED BY: CLIENT + CONTRACTOR
Completed jointly to record and approve changes to scope, price and programme.

GUIDANCE ONLY

These templates are provided as practical project administration tools.

They do not replace a suitable building contract or professional legal, contractual, financial, technical or health and safety advice. Use them consistently with the terms of your project.



CLIENT READINESS CHECKLIST

For homeowners preparing to obtain quotations or appoint a builder

Use this checklist before asking builders to quote and again before appointing a contractor. It helps you check whether the project information, budget, approvals and expectations are sufficiently clear for a fair quotation and a well-managed start on site.

1. CLIENT & PROJECT DETAILS

Client Name

Project Address

Telephone

Email

Brief Project Description

2. PROJECT INFORMATION & DESIGN

1	Do I have a clear written description of the work I want carried out?	Yes	No	N/A
2	Are the drawings and specifications sufficiently developed for builders to price the same scope?	Yes	No	N/A
3	Have structural calculations or specialist design requirements been identified where needed?	Yes	No	N/A
4	Have important finishes, fixtures, products and client-supplied items been identified or allowed for?	Yes	No	N/A
5	Have I identified any known defects, access restrictions or existing property issues that may affect the work?	Yes	No	N/A
6	Am I prepared to answer builder queries and make decisions within reasonable timescales?	Yes	No	N/A

3. APPROVALS, BUDGET & PROGRAMME

1	Have I checked what planning permission, Building Regulations approval or other consents may be required?	Yes	No	N/A
2	Do I have a realistic budget for the project, including contingency for unforeseen work and changes?	Yes	No	N/A
3	Is the funding for the project available or reasonably secured before I commit to the works?	Yes	No	N/A
4	Is my preferred start date and completion expectation realistic for the scope of work?	Yes	No	N/A



CLIENT READINESS CHECKLIST

Contract, payments and variations

4. BEFORE APPOINTING A BUILDER

1	Do I know exactly who I will be contracting with and have I carried out reasonable checks on the builder?	Yes	No	N/A
2	Have I compared quotations on scope, exclusions, assumptions and quality - not price alone?	Yes	No	N/A
3	Do I have an appropriate written building contract or clear written agreement ready to use?	Yes	No	N/A
4	Is the scope of work clearly defined and are exclusions and assumptions recorded?	Yes	No	N/A
5	Is there an agreed or proposed programme for the work?	Yes	No	N/A
6	Do I understand what any requested deposit is for and when it becomes due?	Yes	No	N/A
7	Is there a clear stage payment or valuation procedure?	Yes	No	N/A
8	Is there a written process for recording and agreeing variations?	Yes	No	N/A
9	Have CDM responsibilities and any required project appointments been considered?	Yes	No	N/A
10	Would a Contract Administrator, Quantity Surveyor or other independent professional be appropriate for this project?	Yes	No	N/A

5. MY RESPONSIBILITIES AS CLIENT

1	Am I willing to pay properly due sums in accordance with the agreed contract and payment process?	Yes	No	N/A
2	Do I understand that changes may affect both the project price and completion date?	Yes	No	N/A
3	Will I confirm important instructions, selections and approvals in writing?	Yes	No	N/A
4	Can I provide agreed access and avoid disrupting the contractor's site management arrangements?	Yes	No	N/A
5	Will I give the contractor a reasonable opportunity to address genuine defects or concerns?	Yes	No	N/A



CLIENT READINESS CHECKLIST

Final readiness review and action points

6. READINESS DECISION

Ready to obtain quotations

Ready to appoint a builder

More information needed

Items to Resolve Before Proceeding

Questions to Ask Builders / Professionals

Client Name

Date

Project / Quote Ref.

7. FINAL CHECK BEFORE COMMITTING

1	Have I resolved the key items marked No on this checklist?	Yes	No	N/A
2	Do I understand the price, scope, exclusions, payment process and variation procedure?	Yes	No	N/A
3	Am I comfortable that both I and the builder understand our respective responsibilities?	Yes	No	N/A

Guidance only

This checklist is provided as general guidance only. It does not replace legal, contractual, financial, design or health and safety advice. A 'No' answer does not necessarily mean the project should not proceed, but may identify an issue worth resolving before requesting quotations, signing a contract or starting work.



CLIENT & PROJECT READINESS CHECKLIST

A fair pre-quote check for builders and contractors

Use this checklist before committing significant estimating time or issuing a quotation. It helps determine whether the project information, client expectations and commercial arrangements are sufficiently clear to price the work fairly. It is a project-readiness tool, not a credit check or personal assessment.

1. CLIENT & PROJECT DETAILS

Client / Organisation

Main Contact

Project Address

Telephone

Email

Project Description

2. PRE-QUOTE PROJECT READINESS

1	Is the client clear about the work they want priced?	Yes	No	N/A
2	Are drawings, specifications and schedules sufficiently developed to prepare a meaningful quotation?	Yes	No	N/A
3	Have structural, architectural and specialist design requirements been identified where applicable?	Yes	No	N/A
4	Are planning permission, Building Regulations and other required approvals understood or progressing?	Yes	No	N/A
5	Are important client selections, finishes and product expectations identified or appropriately allowed for?	Yes	No	N/A
6	Is there a clear process for clarifications, assumptions and exclusions within the quotation?	Yes	No	N/A
7	Has the client explained the target programme and is it realistic for the proposed scope?	Yes	No	N/A



CLIENT & PROJECT READINESS CHECKLIST

Project constraints, commercial terms and client expectations

2. PRE-QUOTE PROJECT READINESS - CONTINUED

8	Is access to the property/site understood, including parking, deliveries, working hours and restrictions?	Yes	No	N/A
9	Has the client identified whether the property will remain occupied during the works?	Yes	No	N/A
10	Are known site constraints, existing defects, asbestos information or other relevant property information available?	Yes	No	N/A

3. COMMERCIAL & CONTRACT EXPECTATIONS

1	Has the client confirmed that a realistic project budget or funding arrangement is in place?	Yes	No	N/A
2	Is the client willing to discuss a written building contract before work starts?	Yes	No	N/A
3	Are deposit, stage payment or valuation arrangements understood in principle?	Yes	No	N/A
4	Does the client understand that additional or changed work may affect both price and programme?	Yes	No	N/A
5	Is the client willing to record significant variations in writing before work proceeds where reasonably possible?	Yes	No	N/A
6	Does the client understand that quotations rely on the information available and stated assumptions/exclusions?	Yes	No	N/A
7	Is there a clear decision-maker with authority to approve selections, variations and payments?	Yes	No	N/A
8	Are expectations around provisional sums, allowances and client-supplied items understood?	Yes	No	N/A
9	Does the client appear prepared to make required decisions and provide information by agreed dates?	Yes	No	N/A
10	Are expectations around defects, snagging, practical completion and access for remedial work reasonable?	Yes	No	N/A



CLIENT & PROJECT READINESS CHECKLIST

Communication, working relationship and contractor decision

4. COMMUNICATION & WORKING RELATIONSHIP

1	Are communication channels and key contacts clear?	Yes	No	N/A
2	Is the client willing to keep important instructions and approvals in writing?	Yes	No	N/A
3	Does the client understand that direct instruction of subcontractors can create confusion and contractual risk?	Yes	No	N/A
4	Are expectations for site visits, progress updates and meetings reasonable and practical?	Yes	No	N/A
5	Is there mutual understanding that both parties should act fairly, communicate promptly and follow the agreed contract?	Yes	No	N/A

5. CONTRACTOR DECISION

Proceed to quotation

Request further information first

Do not quote

Key Clarifications / Information Required

Commercial / Programme Concerns

Estimator / Reviewer

Review Date

Quote Ref.

6. NOTES FOR FAIR PROJECT QUALIFICATION

A 'No' answer does not automatically mean the project should be rejected. It may simply identify information, decisions or commercial arrangements that need to be resolved before a reliable quotation can be prepared. Apply the checklist consistently and only to factors relevant to the project, contract and ability to deliver the work fairly.

Important

Do not use this checklist to assess a client based on protected or irrelevant personal characteristics. If financial assurance is genuinely necessary for a substantial project, use proportionate and lawful commercial checks and apply them consistently.



BUILDER COMPARISON CHECKLIST

Compare up to three builders before making an appointment

Project / Client

Project Address

Project Description

AT-A-GLANCE COMPARISON

Detail	Builder 1	Builder 2	Builder 3	Notes
Business / Trading Name				
Contact Name				
Phone / Email				
Quoted Price				
VAT Included?				
Deposit Requested				
Estimated Duration				
Earliest Start				
Quote / Ref No.				

OVERALL NOTES / QUESTIONS TO FOLLOW UP

Important

Do not compare price alone. Compare scope, exclusions, programme, payment terms, experience and how clearly each builder documents the project.



BUILDER 1 - DETAILED CHECKLIST

Complete before appointment / before construction begins

Business / Trading Name

Contact Name

Company No. (if applicable)

Phone

Email

Website

Quote / Ref No.

Quoted Price

VAT Included?

Deposit Requested

Estimated Duration

Earliest Start

BEFORE CONSTRUCTION STARTS - ASK YOURSELF

CHECK	YES	NO	N/A
1. Do I know exactly who I am contracting with?			
2. Have I carried out reasonable checks on the builder?			
3. Is the design sufficiently developed?			
4. Do we have an appropriate written building contract?			
5. Is the scope of work clearly defined?			
6. Are exclusions and assumptions recorded?			
7. Is there an agreed programme?			
8. Do I understand the payment procedure?			
9. Do I understand what any deposit is for?			
10. Is there a written variation procedure?			
11. Have CDM responsibilities been considered?			
12. Have the necessary project appointments been made?			
13. Would a Contract Administrator or Quantity Surveyor be appropriate?			
14. Do both parties understand their responsibilities?			

Builder-specific notes / concerns

Overall impression

Shortlist

Clarify further

Do not proceed



BUILDER 2 - DETAILED CHECKLIST

Complete before appointment / before construction begins

Business / Trading Name

Contact Name

Company No. (if applicable)

Phone

Email

Website

Quote / Ref No.

Quoted Price

VAT Included?

Deposit Requested

Estimated Duration

Earliest Start

BEFORE CONSTRUCTION STARTS - ASK YOURSELF

CHECK	YES	NO	N/A
1. Do I know exactly who I am contracting with?			
2. Have I carried out reasonable checks on the builder?			
3. Is the design sufficiently developed?			
4. Do we have an appropriate written building contract?			
5. Is the scope of work clearly defined?			
6. Are exclusions and assumptions recorded?			
7. Is there an agreed programme?			
8. Do I understand the payment procedure?			
9. Do I understand what any deposit is for?			
10. Is there a written variation procedure?			
11. Have CDM responsibilities been considered?			
12. Have the necessary project appointments been made?			
13. Would a Contract Administrator or Quantity Surveyor be appropriate?			
14. Do both parties understand their responsibilities?			

Builder-specific notes / concerns

Overall impression

Shortlist

Clarify further

Do not proceed



BUILDER 3 - DETAILED CHECKLIST

Complete before appointment / before construction begins

Business / Trading Name

Contact Name

Company No. (if applicable)

Phone

Email

Website

Quote / Ref No.

Quoted Price

VAT Included?

Deposit Requested

Estimated Duration

Earliest Start

BEFORE CONSTRUCTION STARTS - ASK YOURSELF

CHECK	YES	NO	N/A
1. Do I know exactly who I am contracting with?			
2. Have I carried out reasonable checks on the builder?			
3. Is the design sufficiently developed?			
4. Do we have an appropriate written building contract?			
5. Is the scope of work clearly defined?			
6. Are exclusions and assumptions recorded?			
7. Is there an agreed programme?			
8. Do I understand the payment procedure?			
9. Do I understand what any deposit is for?			
10. Is there a written variation procedure?			
11. Have CDM responsibilities been considered?			
12. Have the necessary project appointments been made?			
13. Would a Contract Administrator or Quantity Surveyor be appropriate?			
14. Do both parties understand their responsibilities?			

Builder-specific notes / concerns

Overall impression

Shortlist

Clarify further

Do not proceed



STAGE PAYMENT SCHEDULE

Agree the payment structure before work begins

Use this schedule to record how the contract sum is intended to be paid during the project. The stages should reflect the agreed contract and a sensible relationship to progress, value of work, materials and project commitments. Do not use this form to override the payment provisions of the main building contract.

1. PROJECT & CONTRACT DETAILS

Client

Contractor

Project Address

Contract / Quote Reference

Contract Date

Original Contract Sum incl. VAT

2. AGREED STAGE PAYMENT SCHEDULE

No.	Stage / Milestone	Target / Due	Amount	Paid
1				
2				
3				
4				
5				
6				

Deposit / Advance Payment Notes (if applicable)

3. AGREEMENT

The Client and Contractor confirm that this schedule records the intended stage payment structure for project administration. Payments remain subject to the terms of the main contract, including any agreed valuation, certification, notice, due-date or final-date-for-payment procedures. Approved variations may change the contract sum and later payment amounts.

Client Name

Client Signature

Date

Contractor Name

Contractor Signature

Date



STAGE PAYMENT RECORD

Record each payment application, valuation and amount paid

1. PAYMENT DETAILS

Client

Contractor

Project Address

Payment / Stage No.

Valuation Date

Payment Due Date

Final Date for Payment

2. CURRENT VALUATION / PAYMENT CALCULATION

Original Contract Sum incl. VAT
Approved Variations to Date (+ / -)
Current Revised Contract Sum
Value of Work / Agreed Stage to Date
Materials / Other Agreed Amounts
Less Previous Payments / Agreed Deductions
AMOUNT NOW DUE
Balance Remaining After This Payment

3. WHAT THIS PAYMENT RELATES TO

Stage / Milestone / Work Included

Stage / valuation checked

Variations included

Supporting documents attached

4. PAYMENT STATUS

Requested	Agreed	Part paid	Paid in full
Amount Actually Paid	Payment Date	Payment Reference	

5. COMMENTS / DIFFERENCES

Reason for any difference between amount requested and amount paid / relevant notice or certificate reference

6. ACKNOWLEDGEMENT

Client / Contract Administrator Signature

Contractor Signature

Date



PROJECT VARIATION AGREEMENT

Project / Client

Variation No.

Date

Project Address

Contract / Quote Ref.

1. DESCRIPTION OF VARIATION

Describe the addition, omission, substitution or other change. Attach supporting documents where relevant.

Reason / Origin of Change

☐ Client request ☐ Contractor proposal ☐ Unforeseen works ☐ Design change

☐ Other

Supporting Information / Drawing / Quote / Photo Ref.

2. PRICE ADJUSTMENT

☐ Fixed price agreed ☐ Estimated / subject to final measurement ☐ Price to be confirmed before work proceeds

☐ No financial adjustment

Net adjustment (excl. VAT)

VAT

Total variation (incl. VAT)

Revised contract sum

£

£

£

£

3. PROGRAMME IMPACT

☐ No change ☐ Additional time required ☐ Time saving

Adjustment

working / calendar days

Previous completion date

Revised completion date

Programme notes

4. PAYMENT TREATMENT

☐ Include in next valuation / stage payment ☐ Separate invoice ☐ Other

Payment due / stage / valuation reference

5. AGREEMENT

By signing this document, the Client and Contractor confirm their agreement to the variation described above, including the stated adjustment to the contract price and any identified effect on the construction programme. This variation forms part of the project record and should be read alongside the main building contract, quotation, drawings and specification. Except where expressly amended by this variation, the remaining terms of the original agreement remain unchanged.

DO NOT SIGN UNTIL THE SCOPE, COST AND PROGRAMME IMPLICATIONS ABOVE ARE UNDERSTOOD AND AGREED.

CLIENT

Name:

Signature:

Date:

FOR THE CONTRACTOR

Name:

Signature:

Date: