

Overview

In this Unit you will need to demonstrate your competence to approve valuations and accounts of work in progress. You will also be required to review and analyse claims. You will also need to negotiate amendments with the people involved in the contract.

You will need to provide evidence that you have checked the valuation of work in progress and arranged for the preparation and submission of accurate valuations and accounts. This will involve making discussions about valuations and approving payments.

You will need to demonstrate that you are competent to review the basis of claims and check that calculations are accurate. You will also need to analyse the arguments and to negotiate and agree settlements with those involved in the contract.

Performance criteria

You must be able to: **Approve interim valuations and final accounts**

P1 check and determine the **valuation work in progress**, and approve the agreement of calculations with valuers who are acting for the people involved in the **contract**

P2 check that the work claimed for meets **contract** provisions

P3 approve the **valuation of variations** and items which do not have an agreed contract rate

P4 arrange for the preparation and submission of accurate **valuations and accounts**

Agree claims for reimbursement for loss and expense

You must be able to:

P5 review the basis of **claims** and criteria for recovery against the **contract** and relevant **expert opinion**

P6 check that claims are accurately calculated from relevant and verified **information sources**

P7 **analyse** the opposing grounds for the **claims**, structure the claims clearly and present them

P8 negotiate and agree amendments to the **claim** with the people involved in the **contract**

P9 conduct negotiations with the people involved in the **contract** in a manner which maintains their goodwill and trust

Knowledge and understanding

You need to know and understand: **Approve interim valuations and final accounts**

K1 how to check and determine the **valuation work in progress** (application)

K2 how and why to approve the agreement of calculations with valuers who are acting for the people involved in the **contract** (evaluation)

K3 how to check that the work claimed for meets contract provisions (application)

K4 how to approve the **valuation of variations** and items which do not have an agreed contract rate (evaluation)

K5 how to arrange for the preparation and submission of accurate **valuations and accounts** (application)

Agree claims for reimbursement for loss and expense

K6 how and why to review the basis of **claims** and criteria for recovery against the **contract** and relevant **expert opinion** (analysis)

K7 how to check that **claims** are accurately calculated from relevant and verified **information sources** (application)

K8 how and why to **analyse** the opposing grounds for the **claims** (analysis)

K9 how to structure and present the **claims** clearly (application)

K10 how and why to negotiate and agreeing amendments to the **claim** with the people involved in the **contract** (synthesis)

K11 how and why to agree amendments to the **claim** with the people involved in the **contract** (evaluation)

K12 how to conduct negotiations with the people involved in the **contract** in a manner which maintains their goodwill and trust (applications)

Agree contract accounts and claims

Scope/range

Approve interim valuations and final accounts

1 Value work in progress:

1.1 verified information sources

1.2 contract valuations

1.3 variations

1.4 adjustments and allowances made

2 Contracts - type:

2.1 main contract

2.2 sub-contract

2.3 lump sum

2.4 design and construct

2.5 schedule based

2.6 prime cost based

2.7 hybrid

2.8 firm price

2.9 fluctuating price

2.10 labour and materials

2.11 labour only

2.12 goods and material supply only

2.13 service contracts

2.14 design warranties

2.15 open book forms linked to outcomes

3 Valuations and accounts:

3.1 interim payment

3.2 final accounts

4 Variations:

4.1 costs

4.2 quantity

4.3 quality

Agree claims for reimbursement for loss and expense

5 Claims - resulting from:

5.1 measurement

5.2 valuation of variations

5.3 liability for costs

5.4 loss and expense arising from breaches of contract

5.5 extensions of time

5.6 damages arising from extra-contractual consideration

6 Contracts - type:

6.1 main contract

6.2 sub-contract

6.3 lump sum

6.4 design and construct

6.5 schedule based

6.6 prime cost based

6.7 hybrid

6.8 firm price

6.9 fluctuating price

6.10 labour and materials

6.11 labour only

6.12 goods and material supply only

6.13 service contract

6.14 design warranties

6.15 open book forms linked to outcomes

7 Expert opinion:

7.1 legal

7.2 technical

8 Information sources:

8.1 contract provisions

8.2 contract claims for payment

8.3 records of executed work

8.4 inspections of work in progress

8.5 agreed contract quantities

8.6 agreed methods of calculation

9 Analyse:

9.1 claimant's analysis

9.2 respondent's analysis

Agree contract accounts and claims

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