

Quantity Surveying (QS) Checklist

Pre-Contract & Post-Contract Duties for Delivering Projects On Budget

A Quantity Surveyor is the financial backbone of a construction project — the bridge between the design team's ambition and the client's budget. This checklist translates that role into two working phases: Pre-Contract (planning and pricing before signature) and Post-Contract (controlling cost and risk on a live site).

PHASE 1 — Pre-Contract Checklist (The Foundation)

Focus: planning & numbers | Goal: establish the pricing foundation and flag risks early.

1. Feasibility & Initial Cost Advice

- ☐ Confirm project brief, scope and client budget ceiling
- ☐ Carry out feasibility study and assess financial viability
- ☐ Prepare order-of-magnitude / budget cost estimate
- ☐ Review alternative design or massing options for cost efficiency

2. Cost Planning & Estimation

- ☐ Develop elemental cost plan at each design stage (concept, scheme, detailed)
- ☐ Benchmark against similar projects and current market rates
- ☐ Reconcile cost plan against client's approved budget at every stage gate
- ☐ Flag and report any emerging cost risks to the client immediately

3. Bill of Quantities (BOQ) & Tender Documentation

- ☐ Take off quantities from drawings/BIM model accurately
- ☐ Compile Bill of Quantities (materials, labour, plant/equipment)
- ☐ Assemble full tender package: drawings, specifications, conditions of contract, invitation to tender
- ☐ Ensure documents are complete and unambiguous to avoid later disputes

4. Procurement Strategy & Value Engineering

- ☐ Advise client on procurement route (Traditional, Design-and-Build, Target Cost, EPC, etc.)
- ☐ Select and recommend appropriate standard form of contract (e.g. FIDIC, NEC, JCT)
- ☐ Run value engineering — same performance for less cost, not just cost-cutting
- ☐ Identify and register project risks with allocation strategy

5. Tendering & Contractor Selection

- ☐ Issue invitation to tender and manage the submission process
- ☐ Evaluate bids for compliance, pricing accuracy and commercial risk
- ☐ Prepare tender analysis/report with a recommendation to the client
- ☐ Draft and finalize the construction contract for signature

PHASE 2 — Post-Contract Checklist (Cost Control)

Focus: execution & reality | Goal: keep cash flowing and prevent disputes.

6. Contract Administration

- ☐ Interpret and enforce the signed contract's terms and clauses
- ☐ Set up cost reporting structure (spent / committed / forecast)
- ☐ Establish communication protocol between client, contractor and consultants
- ☐ Monitor contractor compliance with programme and contractual obligations

7. Interim Valuations & Payment Certification

- ☐ Conduct site inspections to verify physical progress
- ☐ Value work completed to date against the BOQ / schedule of rates
- ☐ Issue Interim Payment Certificates (IPCs) in line with the payment schedule
- ☐ Reconcile certified payments against cash flow forecast

8. Variation Management

- ☐ Log every design change, client request or unforeseen site condition as it arises
- ☐ Maintain an active Variation Register to track scope alterations
- ☐ Price (value) each variation and negotiate with the contractor
- ☐ Obtain sign-off and issue a documented Variation Order before work proceeds

Untracked variations are the leading cause of scope creep destroying the baseline budget.

9. Cost Control & Reporting

- ☐ Update the cost report at each period: actual spend, committed funds, forecast final cost
- ☐ Identify potential overruns early and recommend corrective action
- ☐ Track cash flow to ensure payments (and therefore site progress) do not stall
- ☐ Assess contractor claims for extra time or money against contract entitlement

10. Claims, Disputes & Close-Out

- ☐ Handle claims for time extensions, loss and expense, or unforeseen ground conditions
- ☐ Support negotiation, mediation or adjudication where disputes arise
- ☐ Measure and agree the final value of works executed
- ☐ Prepare and obtain client sign-off on the Final Account
- ☐ Archive all records: certificates, variations, correspondence and drawings

The Hybrid Skillset — Four Pillars to Maintain Throughout

- ☐ Numerical precision — *a misplaced decimal is a catastrophe, not a typo*
- ☐ Contract law fluency — *know which clause in FIDIC / NEC / JCT governs which situation*
- ☐ Negotiation — *know when to hold firm and when to compromise with clients, engineers and suppliers*
- ☐ Technology fluency — *estimating software, BIM 5D and digital cost tools linking cost directly to the model*

Reference Sources Consulted

Verified against the following industry sources on the pre-contract / post-contract QS lifecycle.

Source	Link	Primary Focus
RICS — Professional Standards	rics.org/surveyor-careers/surveying/what-surveyors-do	Industry-standard definition of QS role, both phases
QSC Engineer	qscengineer.com/pre-contract-and-post-contract-in-quantity-surveying	Detailed process breakdown, BOQ, IPCs, final accounts
Pryco Global	prycoglobal.com — QS roles pre/post construction	Real-world tendering & variation register practice
ST1 Group	st1group.com — Pre-Contract vs Post-Contract QS	Cash flow forecasting & subcontractor negotiation
LinkedIn (M. Sharafath & industry experts)	linkedin.com — Pre vs Post-Contract QS roles	Side-by-side task comparison, progress billing

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