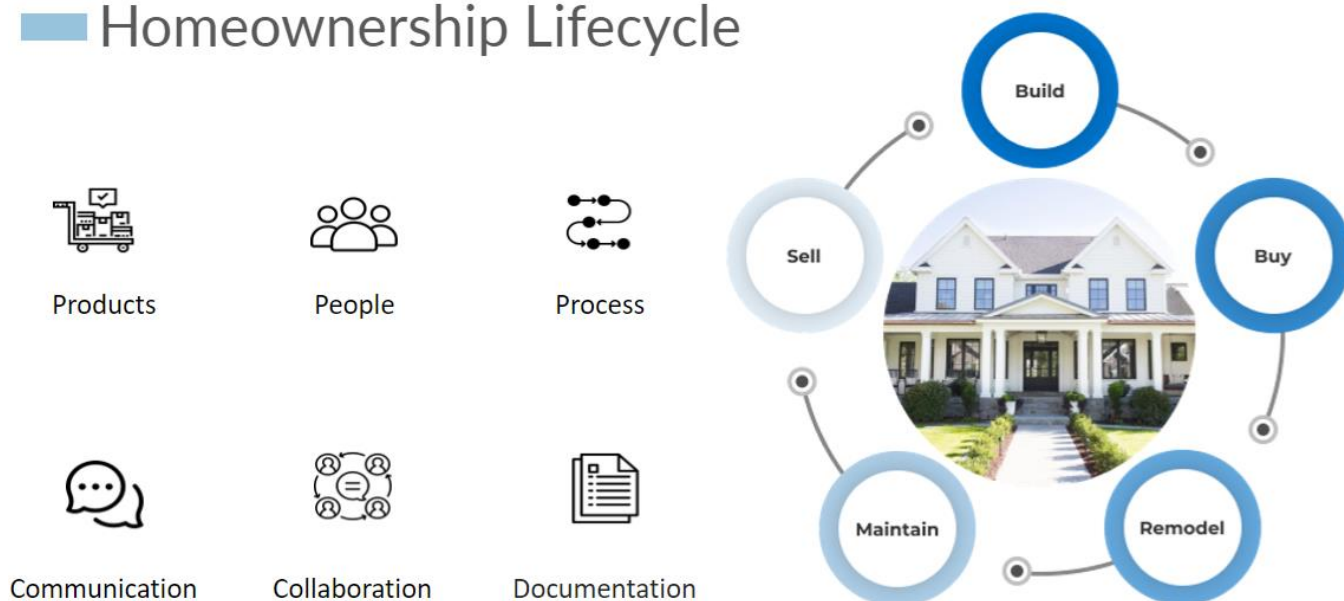


Remodel Checklist

This checklist is meant to identify and highlight the steps that you should take to help you save time, save money, reduce waste, and get the results you desire. Follow the [links](#) for additional information.

Homeownership Lifecycle



❑ The Steps to a Creating a Successful Project.

In this document, you will find a series of steps to help you create your pre-defined deliverables and expectations for completing a successful remodel project. By following these steps, you will be well on your way toward creating your dream remodel outcome. To maximize your success, we have added additional notes at the end of this document to help to clarify some of the questions you may have.

❑ How to Use this Information

If you are a Property Owner, the content in this Remodel Checklist is designed to give you an understanding of the overall workflow and a comprehensive understanding of your roll in the process.

It is not an exhaustive list of everything that needs to be done but it does identify the things that you need to do to create an achievable plan and convey what is most important to you to the people you work with. Most people begin with a selection of design inspirations and think they have what they need to get going and convey their desires and start a design process. Over 90% of all remodel projects, have numerous change orders, go over budget, experience significant time delays and generate a lot of waste.

Studies show that poor communication and lack of critical information (poor data management) cost the building industry over 177 Billion dollars annually. It may be difficult to understand how that affects you and me as individuals, but the same studies estimate that every construction worker spends over 14 hours or 35% of their time working on un-optimal tasks including, looking for information, fixing mistakes, and leaving a jobsite to go to their supplier multiple times during the day just to get a single day's work done, etc. For Property Owners like you and me, that means that 35% of the money we spend on labor is thrown away. Our time is wasted just the same. If you go forward without doing this work, you will spend an estimated 35% more time searching for the information needed to answer all the questions during construction. Like most property owners, you will also be babysitting the process during construction, and you will need to work much harder to get the desired results.

Tools for Getting Started

Required

- Instrument for documenting and taking notes.
 - Pen or pencil and notepad
 - Laptop or tablet computer
- Digital camera

Recommended

- VirtualHome** (project planning system, product selection tool, and communication hub).
- Measuring device** Tape measure, Laser measuring device, Smart Phone App
- Calculator**
- Pinterest** (design inspirations)

Optional

- Lined graph paper
- File Folders

Create a List of Team Members for Your Project

- Create a list of Internal Team members. (People you will consult for initial feedback)
- Create a list of External Team members. (People you will work with in steps 3 – 6).

- Step One: Planⁱ** (for more information, see the notes section at end of the checklist)
This is the Most Important Step. DO NOT overlook or rush this step. If you do it right, you will find planning to be informative, engaging, and empowering and it will help you control the project. This is your project's foundation stone, which brings us to the first rule for successful remodel projects.

Rule #1, never start building without a solid foundation. Each step is important, but this is your informational foundation. Architects, Designers, Contractors and Retailers will reference this information to help you achieve your goals (including staying within your budget). It is the most overlooked step in the process and a major cause for cost overruns, scheduling delays and material waste throughout most projects. You can always make changes later if you change your mind about something. Your selections do not need to be final, but you need an initial plan to get the best results.

Guidelines

- Select a Style for this project. [ii](#)
See a list of styles in notes section.
- When would you like this project to begin?
- Select a Price Range for this project. [iii](#)
 - 1\$ Economy
 - 2\$ Affordable
 - 3\$ Mid-Range
 - 4\$ High End
 - 5\$ Luxurious

Spaces

- Create a list of all the spaces that you want to remodel.
- Create a separate folder to organize information for each space.
- Collect and organize design inspirations for each space.
You can use platforms like Pinterest to source and **VirtualHome** to organize ideas.
- Describe your design and functional objective for each space.
 - Who will use the space?
 - What will the space be used for? [iv](#)
 - Are there any Special Requirements needed?
 - Are you planning on moving or removing any walls?
 - Do you plan to increase the size of any space on your list?
- Photo document each space [v](#).
The objective here is to provide a visual perspective for everyone you will share your ideas with and get feedback as you go through the planning process. If the space is large enough; it is best if your photos are taken from the center of each opposing wall. If you are not able to capture an entire wall section, take diagonal photos from each corner instead. [How to take space photographs](#).

Products

- Remember, for a remodel, the first step in planning is to document what you have before you detail what you want. This information creates a storyline and gets everyone on the same page.

 Identify the product types that are installed in each space.

Go to **VirtualHome** to see a comprehensive list of product types by category for each space.

- Flooring
- Wall Material
- Wall Finish *(list each if more than one)*
- Ceiling Material
- Ceiling Finish
- Cabinetry – Built-Ins
- Countertops
- Doors / Windows / Skylights
- Faucets & Fixtures
- Lighting & Electrical
- Furnishings & Accessories

Add or remove categories as needed to complete your list.

 Components

- Add a list of any Special Requirements [vi](#) for each space.
- Add a list of Features [vii](#) for each space.
- Add a list of Systems [viii](#) for each space.

 Create a preliminary Scope of Work (SOW) for each space. Using info from above.

- Next to each line item in your list enter Keep, Change, Add or Remove.
You will be able to update and define your list in the next step.

When complete, you will have a an initial Scope of Work for each space.

 Budget

- Enter a budget estimate for this project. \$ _____

*You can update your scope of work, budget, and price range as you work through the process. The individual line items will help you assess costs and help you make informed decisions. This may seem tedious, but, even on the smallest project the work you do here will help you get the best results and save you hundreds of dollars. On larger projects it can save you thousands of dollars, keep you in control and get you the best results. If you want to automate the process and get super organized, go to www.buildeffective.com and create your **VirtualHome**.*

❑ Step Two: Prioritize^{ix}

- ❑ On the product list you just created, place a 1 for top priority, 2 for medium priority and 3 for lower priority for each item on the list.
- ❑ This completes your initial Scope of Work (SOW).
 - ❑ Share your (SOW) with friends, family, and other close connections.
 - ❑ Ask them for their feedback and suggestions
- ❑ Refine your list based upon the feedback that you get.

Purpose Get initial feedback and revise accordingly to avoid changes during construction.

Process Without committing yourself to final decisions, this is the time to organize and prioritize your scope of work before you share information outside of your immediate circle. The things that are most important to you, may not be as important to other occupants. It is best to weigh each decision and come up with a vetted plan now before you start spending project funds with professionals.

Deliverable You now have an internally vetted “Scope of Work”. Each line item should be followed with a 1 for top priority, 2 for medium priority or 3 for lower priority. These lists will complete your preliminary Scope of Work and help everyone clearly understand what is important to you and other occupants as you begin to work with professionals.

It will be the job of everyone that works with you going forward to review, analyze, share their expertise, and work as many of the items into your design package based upon level of priority and your maximum budget. You have now completed all the Planning prep work and are ready to start working with professionals. Need financing, not a problem, we've partnered with several lenders to help you fund your remodel. To apply, login or create a virtual home and visit the lenders section of our service provider directory.

❑ Step Three: Design^x

*Purpose to create an approved design package that meets or exceeds your expectations and that can be constructed within your budget and desired timeframe. To create a comprehensive product specification package (**before you begin construction**). I cannot emphasize enough how important it is to go as far as possible in selecting the products you will use as you complete your design package. You will never know what the project is going to cost ~~you~~ until you have made these decisions. If you want more than a loose estimate from Contractors and trades, be sure to complete this work first. It will put you in control of the remainder of the project. Process Review and Finalize your Scope of Work with the professionals you are working with. There is a lot to consider. There is a cost associated with each item on your list. Products you want to keep may need to be protected during construction. It is typically less expensive to refinish or repair an item than it is to replace. As you make final design decisions, you can control costs by removing items, or moving items from a replace task list to a refinish or repair task list). If you want to reduce your effort and time commitment, you can hire and work with an Owner's Representative.*

An Owner's Representative can streamline the remodel process by coordinating and overseeing activities between Owners and Professionals. If you are looking to hire an Owner's Representative, you can hire one of our BuildEffective Experience Scholars, or one of our preferred providers to deliver this service at a discount.

Deliverable: By the time you are finished with the Design phase, you should have Construction (Working) Drawings, Plan Details, a comprehensive Product Specification Package and, Approvals lined up for Building Permits and your Homeowners Association (if applicable).

Notes: Remember, this is a step-by-step process. The steps in the process are designed to help you save time, save money, eliminate waste, and get the best results. The process before you is designed to solve the problems that are so widespread in construction and remodel projects. It puts more emphasis on upfront planning which is designed to eliminate the WASTE that is typical on almost every project. People avoid this work because they do not see or feel the value until the problems occur. If you want to save time, save money, eliminate waste, and get the best results, you will need to embrace and commit to this innovative process.

- Review your Scope of Work with Design and Construction professionals.
- Determine who you will work with to complete the Design work.

Note: Depending on the size of project and your individual expertise, you may decide to take on more of the "Professional" roles yourself. If you are going to DIY, be sure you have worked out all the details and are willing and able to handle the workload. I have nothing against DIY but there is a limit to the size and scope of project that should be considered. In either case, the most successful projects, are the ones where people take the time to do the upfront work, get a professional design, and work with quality trades. I speak from experience. I have worked on hundreds of remodels and observed many more. Make sure you review the work of the people you are considering. I would consider it a loss if you do the work and do not get a great design. Same applies to quality of workmanship.

The workflow that is laid out here is different than what you have seen or done in the past. It puts responsibility on the Property Owner to do the work that only the Property Owner can do well. (Property Owner + Owner's Representative can serve up the same result). If you do this work completely, you will create efficiencies that will help you control the process and create a system of accountability with other participants far above what is typical.

- Begin Design Process
 - Schematic Design (utilize schematic designs to refine your scope of work).
- Confirm Keep, Change, Add or Remove items in your SOW.
- Confirm Priorities for each item, 1 = High, 2 = Medium, 3 = Less Important
- Confirm Special Requirements, Features and Systems for each space.

You should now have a separate list for each Space that includes a list of Products, a list of Special Requirements, Features^{vii} and Systems^{viii} for each individual space.

Design continued

- Define your list of Change items by selecting the desired task for each.

- Replace
- Refinish
- Retrofit
- Add
- Repair

Allow an Owner's Representative and/or Professionals to guide you. They have years of experience and understand how your decisions will impact the project outcome.

- Request initial cost estimates for each line item.

You will want to consult a contractor or trades for this effort. To refine your list, you can change the priority or change the task. Remember, it is typically less expensive to refinish, retrofit or repair than it is to replace or add.

- Make final updates to your Scope of Work.

Your objective is to work on as many Top Priority items as possible. If you get through that list and there is still room to go, then start adding Medium Priority items. After you complete that list go on to the Lower Priority items until you reach a point where you are no longer comfortable adding any more. This is not an exact science, but you will be closer to success than over 90% of the people doing projects today. Remember to leave some funds in your budget unallocated.

Before you go on, think about the value of what you have created. The toughest design decisions are made. Your designers understand your dream objective, and possibly for the first time can focus on creating a design package that will answer your top priorities including the pre-established guidelines and project requirements.

- Produce a Detailed Scope of Work.

This will include a list of all the items you plan to keep, replace, refinish and/or add to each space.

- Develop Working Drawings (plan requirements will vary depending on the scope of work)

- Site Plan
- Elevations
- Floor Plans
- Foundation Plan
- Roof Framing Plan
- Sections
- Mechanical, Electrical, Plumbing Plans (MEPs)
- Architectural Details

Working Drawings continued

- Interior Details
- Landscape Plans etc.

Note about construction drawings and building permits: If your project requires building permits, you will need an Architect or a Draftsperson/Contractor with an Engineer to produce and submit a complete set of construction drawings for you. The drawings will go through several iterations as they work their way towards final approval. If you are looking to hire an Architect, Contractor or Engineer, you can one of our preferred providers to deliver this service for you.

Produce a comprehensive product specification package.

This is the most overlooked step in the design phase. It is so important that we have developed a complete workflow to help you complete this process. The upfront work you already did puts you and your team miles ahead of the people who wait until after they start construction to finish selecting products. This work is time consuming, but it needs to be done. You will never be able to finish your project until the last product or finish is selected. Contractors and Trades professionals will never be able to give you an accurate cost quote or installation schedule until all of these decisions have been made. If you do the product specification work upfront, (during design), your design will come together succinctly. The status quo is to make decisions one at a time which is more time consuming, less productive, more expensive, and leads to indecision and modifications. There is ample time to complete this work during the next 2 steps.

Step Four Submittals^{xi}

If your project requires approvals, you will need to submit plans and paperwork during the design process. Professionals know how to work with the approval bodies to keep the process moving forward while design development is underway. There can be a lot of paperwork and there is a defined process. Make sure this is done in a timely manner, so you can receive approvals by the time you are ready to start construction.

Step Five Approvals^{xii}

Make sure you have approvals prior to starting construction. You want to make sure your final working drawings are approved. Any revisions after approval will require you to resubmit taking additional time and more money. The work you did upfront should help you avoid resubmittals. Although a Property Owner can pull permits, in most cases, to avoid liability, the Owner will have the Contractor pull the building permits. In the case of an Owner run project, the Owner will pull the permits and work directly with Subcontractors. There are trade-offs, but, if you can work and make money in your profession, you are likely better off hiring a quality contractor. The work that you did upfront should streamline the entire construction process and make it, so you do not have to babysit the entire process. Most of the everyday questions that slow down the workers during construction have already been addressed, so you can feel more confident in being able to hold everyone accountable to the agreements that have been made.

❑ Step Six Build^{xiii}

- ❑ Information to follow. *If you have entered your email, we will update you when this information is available.*

Details and Notes:

ⁱ **Planning** is the first and most overlooked step in the process. The reason is easy to identify and easy to understand. Planning begins when we, as Property Owners have a desire, and determine that something needs to be done. We have never had anything to help us plan or organize our ideas. Our go-to tool has always been magazines and online platforms for design ideas and inspirations. There are so many questions and answers that we do not have. There are thousands of ideas, hundreds of products, thousands of product options and so many ways to make things work as well as make things fail. It is extremely difficult for professionals to guide us expertly and get us exactly what we want unless we give them enough information in advance of starting down a particular path. Everyone who has worked in the design and building industry long enough will tell you that Planning and Design are the only phases where you can save time and save money on your project. It is simple and inexpensive to move a wall or change out a product on paper. Changes in construction are frustrating and very costly.

A systematic approach to planning. As Property Owners, we need is a systematic approach with an easy-to-follow workflow to guide us through this process. Before we tell people what we want or where we want to go, they need to understand what we have and where we are at. Without a clear understanding, people will make assumptions. Sometimes they will be correct, many times, you will discover another option along the way and another change will occur.

In the Planning checklist above, the first thing we do for a remodel is to Document what we have. Once complete, we can systematically begin to consider and define what we want. After we have this information, it becomes easy to prioritize, get feedback, consider the options and make critical decisions.

If you do not have the time, or do not feel comfortable doing this work, go to buildeffective.com, schedule a 15-minute consultation and we will help guide you in the best direction.

ⁱⁱ List of Styles

Arts & Crafts, Asian, Cape Cod, Coastal, Contemporary, Cottage, Country, Craftsman, Farmhouse, Log Home, Mediterranean, Midcentury Modern, Mission, Modern, Modern Farmhouse, Prairie, Ranch, Rustic, Santa Fe, Shingle, Southwest, Traditional, Transitional, Tropical, Tudor, Tuscan

ⁱⁱⁱ Your Project Price Range

Refers to both design and product decisions. The Price Range you select will help the professionals and retailers you work with provide relevant design and product recommendations. It will help you stay on budget and will guide almost every decision you make throughout the entire process. If you ask yourself what the right answer is, you will know what to select. You can always go up or down even on a specific product or feature but for the most part you want to stay on track.

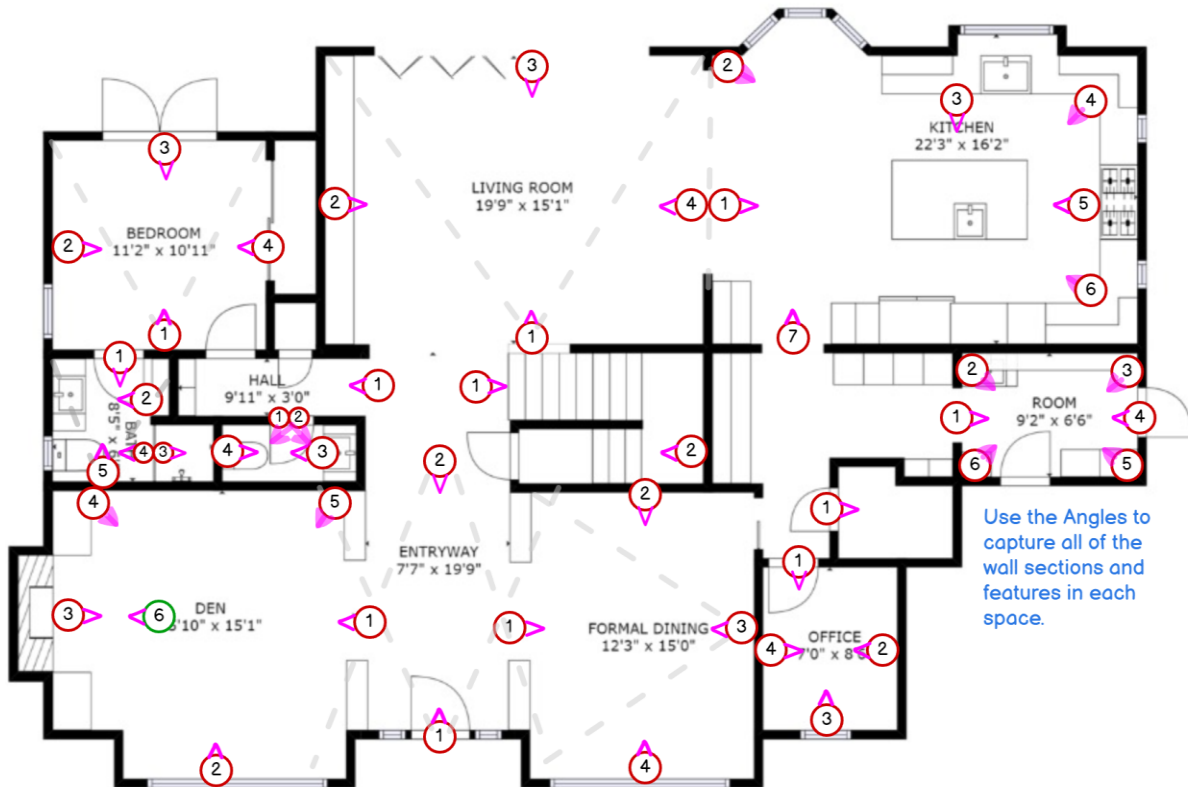
iv **Who will use the space? How will you use the space?**

For each space, it is helpful to identify **Who** will be the primary users of the space, either Children, Family, or Adults and **How** it will be used, Informal, Casual, or Formal use.

v **Space Photographs**

The purpose of these photos is to provide a visual understanding of what you have. If you start at the entry wall and go around each space in a clockwise rotation, it will be easy for people to follow your direction and understand what you have.

Begin at the entrance to each space and go around the room in a clockwise rotation.



For each space, use angles to capture full wall sections and as much detail as possible.

⑥ Capture detail photos of Features such as Fireplaces and Island Cabinets etc.

vi **Special Requirements**

Special Requirements include things that you must have to assist in the comfort and well being of the people who will occupy each space. If there are accessibility issues to consider or aging in place these would require specific design/installations that your team needs to be aware of.

vii **Features** can be complex or passive.

Complex features are separate components that require a set of individual products to construct. They can include a Kitchen Island, built-in seating, or banquette, a wet bar, coffee bar, etc. Passive features include access to exterior, scenic view, etc.

viii **Systems**

Systems include built-in components such as water filtration, air filtration, audio/video, security etc.

ix **Prioritize**x **Design**xi **Submittals** See page 7xii **Approvals** See page 7xii **Build** See page 8

The Remodel Checklist provides a solid overview and understanding of the things an Owner can do to save time, save money, and gain control of the remodel process.

I invite you to go to www.buildeffective.com to utilize the only patented Project Planning System and Communication Hub developed to serve the design and building industry and solve the problems that to this day, are costing the industry billions of dollars each year. BuildEffective's VirtualHome organizes all data, systematizes the workflow, provides in-platform communication and collaboration eliminating the disconnect between the people, products, and the property. Product selection and sourcing are built-in to each step.

I invite you to set up a free 15-minute consultation consultation@buildeffective.com. We will help you set up a property, answer any questions you have and get you started.

■ Homeownership Lifecycle Platform



We look forward to hearing from you. *David A. Scholar*, Founder, BuildEffective.com

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