

## HOME IMPROVEMENT PRE-PROJECT CHECKLIST

Purpose: Use this checklist before any project (interior or exterior) to make sure key decisions, logistics, and expectations are in place.

### I. BASIC PROJECT INFO

- Homeowner Name(s): \_\_\_\_\_
  - Property Address: \_\_\_\_\_
  - Best Phone / Email: \_\_\_\_\_
  - Project Type (circle):  
Kitchen | Bathroom | Basement | Masonry | Concrete | Exterior | Painting | Other: \_\_\_\_\_
  - Approximate Start Date: \_\_\_\_\_
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### II. SCOPE & PRIORITIES

- Main Goals
  - What do you want most from this project?
    - Better function / layout
    - Updated finishes
    - Safety or repair
    - Curb appeal
    - Added value for resale

- “Must-Haves” (non-negotiable)

- \_\_\_\_\_
- \_\_\_\_\_

- “Nice-to-Haves” (if budget allows)

- \_\_\_\_\_
- \_\_\_\_\_

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### III. BUDGET & CONTINGENCY

- Planned Budget Range: \$\_\_\_\_\_ to \$\_\_\_\_\_
  - Contingency (10–15% for surprises): \$\_\_\_\_\_
  - Ask your contractor:
    - Is this budget realistic for the scope?
    - What factors can push the cost up or down?
    - How are changes (change orders) handled and approved?
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#### IV. ACCESS, PARKING & LOGISTICS

- Building or HOA Rules
  - Work hours allowed: \_\_\_\_\_
  - Noise restrictions: \_\_\_\_\_
  - Elevator use / scheduling (if applicable): \_\_\_\_\_
- Access
  - Entry door code / buzzer: \_\_\_\_\_
  - Lockbox location / key plan: \_\_\_\_\_
- Parking
  - Driveway available? Yes / No
  - Street parking limitations (street cleaning, meters, etc.): \_\_\_\_\_

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#### V. HOME PREP & FAMILY PLANNING

- Rooms to Clear
  - Have you cleared or planned to clear the work area?
  - Have you moved special or fragile items out of the way?
- Kids & Pets
  - Plan for kids to avoid work areas and tools.
  - Plan where pets will stay during noisy or dusty work.
- Temporary Setups (if kitchen or bath work)
  - Temporary kitchen / cooking plan? Yes / No
  - Temporary bathroom or alternative? Yes / No

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#### VI. MATERIALS & DECISIONS

- Have you selected or discussed:
  - Tile, flooring, or pavers?
  - Countertops or fixtures?
  - Paint colors and sheens?
  - Hardware and trim details?
- Lead Times
  - Ask your contractor:
    - Are any items special-order or long lead?
    - Do we need to pick certain items first to avoid delays?

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#### VII. SAFETY & SPECIAL CONDITIONS

- Older Home / Pre-1978?
- Discuss lead-safe practices if applicable.

- Health Concerns
  - Inform your contractor if anyone in the home:
    - Is pregnant
    - Has asthma or respiratory sensitivities
    - Works from home and needs quiet hours.
- Structural or Moisture Issues
  - Known leaks, cracks, or past water damage?
  - Any areas that feel soft underfoot or out of level?

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## VIII. COMMUNICATION & EXPECTATIONS

- Point of Contact on Your Side:  
Name: \_\_\_\_\_ Phone: \_\_\_\_\_
- Point of Contact on Contractor Side:  
Name: \_\_\_\_\_ Phone: \_\_\_\_\_
- How often do you want updates?
  - Daily | Every few days | Weekly | As needed
- What is the best way to reach you?
  - Text | Call | Email | Other: \_\_\_\_\_

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## IX. FINAL PRE-START CHECK

- Do you understand the written scope and estimate?
- Do you know the approximate start window and work hours?
- Do you know how to request changes if you change your mind?
- Do you understand what is included vs. not included?

If you can answer “yes” to most of these, you are in a good position for a smooth project.

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Disclaimer: This checklist is a planning tool only. It does not replace your written estimate or contract. Always refer to signed documents for exact scope, pricing, and legal terms.