

Project Checklist

A checklist to help you stay organized throughout the custom home building process.

Getting Started

- Determine your 'Why'.
- Define your project goals and objectives.
- Determine which project type is best for you.

1. Prepare

- Get generally familiar with the home creation process.
- Determine your time and financial commitment capabilities.
- Create a rough project budget.
- Determine if there are any looming deadlines or timeframe issues that may impact your project's schedule.
- Understand what to expect throughout the whole process.

2. Learn

- Determine your preferred project delivery method.
- Determine your design needs.
- Hire your design team and/or construction team (depending on the delivery method you choose).

3. Brainstorm

- Create your project Project Brief.
- Compile a collection of inspirational images of styles, colors, materials, and ideas that you like and don't like.

4. Acquire Land

- Determine your requirements for the property.
- Select property.
- Purchase or acquire property.

5. Pre-Design

- Get a site survey.
- Gather property information (surveys, drawings, site photos, deed information).
- Perform code and zoning analysis on your property (or have your design team do it).
- Confirm your program requirements, budget, and timeframe align.

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6. Design

- Ask your architect/designer to explain their design process and ask for a schedule for the design process.
- Review conceptual design options and approve the conceptual design.
- Make decisions on design options, building systems, products, materials, and any other information your architect/designer request from you in a timely manner.
- Review, make comments, and approve design drawings throughout the process.

7. Approvals & Permitting

- Review the approvals process for your specific project.
- Submit the necessary drawings and information to the various governmental departments for approval at the appropriate time. *(If you're using an architect, he or she will assist you in doing this.)*
- Pay application or permit fees as required by your local building department and get building permit.
- Secure financing for construction.

8. Construction Financing

- Review your financial situation before committing to the project.
- Meet with your banker to review your borrowing power and what you can get pre-approved for.
- Decide which financing option is best for you.
- If getting a construction loan: Start the loan application process about 60 days before you anticipate the start of construction. Submit all necessary paperwork and design drawings for the loan application.
- If getting a home improvement loan or line of credit, check with your lender to see how long the process takes and what paperwork is involved. Start getting paperwork together at the appropriate time.
- Receive financing for construction.

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9. Award of Construction Contract

- Find suitable contractors/builders.
- Research and interview each qualified contractor. Visit their projects and speak with past clients of each
- Discuss the construction cost (or the method for determining the cost) with each qualified contractors.
- Select your chosen contractor and define the how the construction cost will be defined in your contract.
- Determine which construction contract template to use.
- Review the construction contract thoroughly and with legal council.
- Sign the construction contract with your chosen contractor.

10. Construction

- Set up a pre-construction meeting with contractor (and design team if applicable).
- Attend scheduled site meetings.
- Communicate often.
- Make decisions when requested.
- Pay the contractor on time.

11. Project Completion

- Schedule final inspection by the building inspector.
- Receive your Certificate of Occupancy.
- Conduct a final walk-through of the project with your contractor and architect/designer (if applicable).
- Receive final documentation from the contractor including warranties, product cut sheets, etc.
- Make sure any utilities are transferred into your name.
- Receive keys to the house.
- Make final payment to the contractor.
- Obtain lien releases from all subcontractors, suppliers, and your general contractor.
- Get written verification from the title company that the property is still in your name and that no liens exist.
- Get or update your homeowner's insurance.
- Finalize the mortgage or loan arrangements.
- Move in!

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12. Post-Occupancy

- Enjoy your dream home! You've worked so hard on it.
- If you notice construction defects, have your contractor fix them within the correction period.
- If your design team requests a post-occupancy review, indulge them.