Renovation Planning Checklist: Scope Budget and Permits

Blank copy

Property and project

PLAN DATE

PROPERTY ADDRESS

YEAR BUILT

HOW THE HOUSE IS USED

PROJECT TYPE

OCCUPANCY DURING WORK

LEAD-PAINT / RRP STATUS

HUD HOUSING ASSISTANCE ON THIS UNIT

BUILDING PERMIT STATUS

GENERAL CONTRACTOR OR LEAD FIRM

COMPLETED BY

PLANNED START

PLANNED FINISH

TARGET BUDGET (OWNER FIGURE)

PROJECT NOTES

Scope and sequence

Item	Done	Skip	N/A	Notes
Whole-home walk of envelope, HVAC, water heater, windows, and attic	☐	☐	☐	
Written scope: rooms in, rooms out, trades, and exclusions	☐	☐	☐	
Envelope and attic air-seal and insulation sequenced before new HVAC	☐	☐	☐	
Energy upgrades considered as one plan, not isolated gadgets	☐	☐	☐	
Occupant living plan if bedrooms, baths, or the kitchen will close	☐	☐	☐	
Pets, furniture, and a separate contractor path planned	☐	☐	☐	
Forced-air HVAC shutoff during containment planned	☐	☐	☐	
Kitchen, bath, and punch lists identified for later, not copied here	☐	☐	☐	
Hidden-condition plan: rot, knob-and-tube, lead, asbestos	☐	☐	☐	
Current tax credits and utility rebates researched for this address	☐	☐	☐	

Budget and payments

Item	Done	Skip	N/A	Notes
Written budget: labor, materials, permits, testing, and contingency	☐	☐	☐	

Allowances listed and minimized	☐	☐	☐	
Reserve for lead-safe work, asbestos, and clearance if needed	☐	☐	☐	
Several written estimates compared, not auto-lowest	☐	☐	☐	
Down payment is not the full price, and the state cap is checked	☐	☐	☐	
Payments tied to work, final withheld until you are satisfied	☐	☐	☐	
Change-order rule: written price before extra work	☐	☐	☐	
Incentive dollars treated as optional, not as the budget	☐	☐	☐	

Permits and inspections

Item	Done	Skip	N/A	Notes
Building official or adopted code asked what this scope needs	☐	☐	☐	
Building, electrical, plumbing, mechanical, and demolition listed if needed	☐	☐	☐	
Who pulls permits named in writing	☐	☐	☐	
Required inspection hold points on the schedule	☐	☐	☐	
Zoning, setback, and HOA rules checked if the footprint or use changes	☐	☐	☐	
Confirmed this checklist is not the permit application	☐	☐	☐	
Which residential code edition the city adopted is confirmed	☐	☐	☐	

Lead RRP and other hazards

Item	Done	Skip	N/A	Notes
Pre-1978 paint treated as lead unless a certified determination exists	☐	☐	☐	
Paid work: EPA or authorized-state lead-safe certified firm verified	☐	☐	☐	
Renovate Right pamphlet received before work, receipt kept	☐	☐	☐	
Minor-repair exemption checked: 6 sq ft interior or 20 sq ft exterior	☐	☐	☐	
Owner DIY exemption checked against rental, childcare, and flips	☐	☐	☐	
HUD-assisted unit: Lead Safe Housing Rule plus RRP	☐	☐	☐	
Abatement vs renovation: permanent hazard removal uses abatement credentials	☐	☐	☐	
Suspect asbestos sampled by an accredited inspector before disturbance	☐	☐	☐	
Children and pregnant occupants kept out until cleanup is done	☐	☐	☐	
Prohibited methods banned in the work plan: flame, heat gun over 1100 F, unshrouded tools	☐	☐	☐	
Cleanup, cleaning verification, and optional dust wipes named	☐	☐	☐	
Paint strippers and high-VOC products planned with ventilation	☐	☐	☐	

Contractor and written agreement

Item	Done	Skip	N/A	Notes
At least three remodelers interviewed	☐	☐	☐	
License confirmed with the state or county, not only a card in hand	☐	☐	☐	
Liability insurance (and workers' compensation if they have employees) verified active	☐	☐	☐	
Written estimate includes work, materials, date, and price	☐	☐	☐	
Firm certification and renovator training certificate copied for pre-1978 work	☐	☐	☐	
Three recent pre-1978 jobs called	☐	☐	☐	
Who will be on site: employees or subcontractors	☐	☐	☐	
Permit responsibility is in the bid, not pushed onto you as a dodge	☐	☐	☐	
Written agreement reviewed: name, address, license, dates, scope, blanks filled	☐	☐	☐	
Three-business-day cancel right checked if signed away from their office	☐	☐	☐	
Door-knock, leftover-materials, cash-only, and contractor-picked loans refused	☐	☐	☐	

Schedule and close-out plan

Item	Done	Skip	N/A	Notes
Start and completion dates written on the plan	☐	☐	☐	
Long-lead materials ordered or dated before demolition	☐	☐	☐	
Relocation or room-closure dates match containment	☐	☐	☐	
Attic air-seal and insulation dated before HVAC change-out	☐	☐	☐	
Permit inspection days blocked so finishes wait	☐	☐	☐	
Pamphlet receipt, firm certs, photos, and change orders filed	☐	☐	☐	
Final leftover work assigned to a punch list, not this planner	☐	☐	☐	
Final payment held until work, cleanup, and required inspections are done	☐	☐	☐	

Open items and sign-off

OPEN PLANNING ITEMS

PLANNING COMPLETED

NEXT BID, TEST, OR PERMIT DATE

PERMIT OR FILE REFERENCE

PLANNING RESULT

DATE SIGNED

OWNER SIGNATURE

CONTRACTOR SIGNATURE

TIME SIGNED

Reference only. Verify against local codes, a licensed inspector or a qualified contractor.