

Property Information

- Property name:
- Parcel number(s):
- Property type:
- Address:
- Owner:
- Current use:

Project Setup

___ **1.** Define the project goal and business need.

___ **2.** Confirm whether the project is a remodel, expansion, or both.

___ **3.** Identify the project sponsor and decision-maker.

___ **4.** Set target dates, milestones, and opening requirements.

___ **5.** Establish the project scope, assumptions, and constraints.

Due Diligence*

___ **1.** Review existing drawings, surveys, and utility information.

___ **2.** Inspect current site and building conditions.

___ **3.** Identify code issues, ADA gaps, and life-safety concerns.

___ **4.** Check zoning, occupancy, and permit requirements.

___ **5.** Confirm whether hazardous materials testing is needed.

*See separate site due diligence checklist for additional details.

Budget / Funding

___ 1. Set the total budget, including design, permits, construction, FF&E, and contingency.

___ 2. Include temporary relocation or downtime costs if applicable.

___ 3. Confirm funding approval and spending limits.

___ 4. Track allowances, contingencies, and owner reserves.

Team / Design

___ 1. Hire architect, engineer, contractor, and specialty consultants as needed.

___ 2. Define roles, responsibilities, and approval paths.

___ 3. Develop the space program and workflow needs.

___ 4. Complete schematic design, design development & then construction documents.

___ 5. Coordinate architectural, structural, MEP, fire protection, & low-voltage systems.

Permits / Approvals

___ 1. Prepare permit drawings and application forms.

___ 2. Submit for city, county, fire marshal, and other required reviews.

___ 3. Respond to plan review comments and resubmit as needed.

___ 4. Confirm inspections required before occupancy.

___ 5. Track all approval dates and permit conditions.

Procurement and Schedule

___ 1. Build the master schedule from design through closeout.

___ 2. Identify long-lead items early.

___ 3. Decide what the owner will buy versus the contractor.

___ 4. Plan phasing if the business stays open during construction.

___ 5. Confirm delivery dates for equipment, fixtures, and materials.

Construction and Operations

___ **1.** Set site logistics, access routes, and staging areas.

___ **2.** Protect existing operations, staff, customers, and adjacent tenants.

___ **3.** Establish safety, dust control, noise control, and housekeeping rules.

___ **4.** Hold regular progress meetings and track RFIs, submittals, and change orders.

___ **5** Monitor schedule, budget, and field quality weekly.

Closeout

___ **1.** Complete punch list items.

___ **2.** Test all systems and equipment.

___ **3.** Obtain final inspections and occupancy approval.

___ **4.** Collect warranties, manuals, as-builts, and lien waivers.

___ **5.** Train staff on new systems and procedures.