



W.E.DAVIES + SONS

REMODELING, INC.

5-STEP CHECKLIST FOR A SUCCESSFUL RENOVATION

THE ADAGE, "A GOAL WITHOUT A PLAN IS A WISH" IS CERTAINLY TRUE OF HOME RENOVATION.

So, you're ready to begin a renovation journey.

Whether you're tackling some upgrades or creating your dream space, pre-planning is critical. The adage, "a goal without a plan is a wish" is certainly true of home renovation. Mapping out a plan, identifying the right contractor, and defining clear expectations are critical to keeping your project on track and on budget.



STEP 1: PRE-PLANNING PHASE

IDENTIFY WHAT'S IMPORTANT.

Begin at your keyboard or with paper and pen. List every idea you have. Then organize that information into columns such as floor plan, finishes, look, needs, wants, etc. From there, select the top three in each category, with the most important first. Note your priorities, which features are must-haves, and what could be negotiable. This will give you clarity on how to proceed.

COLLECT IDEAS.

Think through exactly how you intend to use your new space. Define your style. Visit stores to look at options. Create an account on Pinterest or Houzz.com (or their app) to start saving ideas and photos of what you like for your priority features, such as floor plans; interior finishes like cabinets, flooring, counter tops, tile back splashes, shower surrounds; or storage solutions. This will give your contractor an idea of what you envision.

START CRAFTING YOUR BUDGET.

With your narrowed preferences, begin researching reasonable pricing. Know your price range and identify your upper limit. It helps to pad your budget by 10-25 percent to cover unexpected surprises and plan changes, such as rethinking where you want outlets or whether you want to upgrade a window mid-plan. Remember to earmark some of the budget for lighting fixtures!

□ STEP 2: PLANNING PHASE

IDENTIFY REPUTABLE CONTRACTORS.

This may be the most important decision you make. Request referrals from your circle of friends and acquaintances and ask about their contractor experiences. Did the contractor deliver as promised on the project? Did they stay on budget? Did they stick to a timeline? Was the quality what was expected?

RESEARCH REFERRALS.

Review websites and look for similar jobs in the portfolio samples. Read testimonials. Verify trade organization memberships like NARI or the National Association of Home Builders. Determine if the contractor is licensed for the scope of your project.

□ STEP 3: CONTRACTOR SELECTION PHASE

INTERVIEW.

Now you can narrow your list and interview two or three contractors. A thorough job on this step can make a big difference in the outcome of your project! Use these interview topics as a guide:



BUSINESS BASICS.

- What are the contractor's strong suits and weaknesses?
 - What is the warranty on their work and products used (e.g., appliances, siding, flooring, plumbing, and light fixtures)?
 - Do they have insurance, including liability and worker's comp insurance? Do they ask their vendors for certificates of insurance and can you be named on your contractor's certificate of insurance?
 - Will they provide a list of the last five clients they did work for so you can call them (have the contractor get contact permission)?
- Who does the contractor have on staff to do the work and manage the project and how many of the trades are outsourced (e.g., electrician, plumber, wood flooring installer or refinisher, painter)?
 - Will the contractor handle getting all the appropriate permits?

COMMUNICATION.

- How does the contractor handle daily, weekly, and monthly communication? Will you be updated weekly on timeline changes?
- Is there one person in charge of the job who will always be available to you (within reason)?

RENOVATION PROCESS.

- How will the contractor handle you living in the house while the work is done (or even whether that's possible based on the scope of the renovation)?
- What can you expect regarding job-site cleanliness (interior or exterior, or sometimes both)?
- Do you tent off the area/s being remodeled to avoid the spread of dust and debris?
- How do employees or subcontractors handle themselves every day: What days do they work?
- What times can you expect someone to start and end each day?
- Will there be a dumpster or some other means to handle trash removal, etc.?
- When the project is nearly complete, how does the contractor handle your final punch list of finishing details?



STEP 4: CONTRACTING PHASE

READY TO HIRE.

Once you've finalized the design, have a complete list of materials, and an estimate that fits your budget, you are ready to select your contractor. Verify all the details carefully: timeline, payment plan, and process for issues communication and resolution.

HAVE PLANS DRAWN.

Expect your contractor to spend time at your house measuring and remeasuring for accuracy and factoring everything into the cost. This may include things like ease of venting a new range hood, any required electrical or plumbing changes, and upgrades to existing mechanicals to accommodate the new plan, as well as local municipal building and permitting requirements. If you're reusing appliances, the contractor must fit them into the new plan. The plan should be specific, addressing details such as how the thickness of new flooring or back splashes, or tile surrounds impacts the plan and the existing layout.

TWEAK THE PLANS.

Be sure you clearly understand the plans. Ideally, you will see 3D versions set in your pre-measured space.



UNDERSTAND WHAT IS AND IS NOT INCLUDED IN THE PRICING.

A General Contractor is typically in charge of every aspect of a project. However, a kitchen remodeler may only include basics like cabinets and counter tops. Any other changes such as electrical upgrades, installation of tile back splash, new appliances, could be yours to organize and supervise.

SUBCONTRACTORS.

Learn if the contractor will allow you to use your own subcontractors since that can affect timelines, permits, quality, and costs the primary contractor cannot control.

REVIEW EVERYTHING BEFORE YOU SIGN ANYTHING!

Be sure you ask questions and document the responses in writing for your protection.

If you're working on a specific deadline, be clear when interviewing contractors to be sure they can fit you in their schedule. Key questions:



- **Scheduling.**
How far is this contractor booked out?
- **Resources.**
How is the contractor handling supply availability?
- **Start date.**
What is the timeline for beginning work?
- **Completion.**
What is a reasonable completion date?

Delays happen despite the best plans and intentions. There can be unusual weather, supply chain issues, unexpected crew absences. Expect delays and roll with them when they occur. It will make the whole process more enjoyable for all!

COSTS AND PAYMENT.

Be clear up front when payments are due so there are no surprises. Key questions:

- **Cost.** Can the contractor work within your budget?
- **Budgeting.** How does the contractor handle budgeting?
- **Changes.** How do they handle cost overages and change orders? Change orders should be priced and signed prior to work on the change being done.
- **Payment.** How do they handle payments (when am I billed, when is my payment expected)? Note: don't make your final payment until everything on your final punch list is checked off.



STEP 5: ENJOY AND SHARE!

Once you are settled into your new space, share photos of your finished project with friends and on social media. That way, when they are ready to begin a renovation journey, they can tap your experience as they make their own plans.

STILL HAVE QUESTIONS? GIVE US A CALL!

Call 608-222-6609