

DESIGNED & BUILT

An owner's worksheet for planning, design, permitting, bidding, construction, and closeout.

PROJECT PLANNING CHECKLIST

Use this checklist at project startup and again at each major milestone. Check items as decisions are made; use the notes fields for unresolved issues, responsible parties, and next actions.

Project Name:	<input type="text"/>	Project Address:	<input type="text"/>
Owner / Organization:	<input type="text"/>	Primary Contact:	<input type="text"/>
Target Completion Date:	<input type="text"/>	Estimated Project Budget:	<input type="text"/>

1. Define the Project

- ☐ Confirm whether the project is new construction, renovation, addition, tenant improvement, repair, or another project type.
- ☐ Define the problem the project is intended to solve.
- ☐ Identify must-have spaces, functions, and outcomes.
- ☐ Identify nice-to-have items that can be adjusted if budget or schedule requires it.
- ☐ Establish a target completion date.
- ☐ Identify phasing, temporary occupancy, or operational constraints.

Project type / scope

What problem is this project intended to solve?

Must-have spaces / functions

Nice-to-have items

Phasing or occupancy constraints

2. Establish the Budget

- ☐ Set an overall project budget.

- ☐ Separate construction cost from soft costs.
- ☐ Include design and engineering fees.
- ☐ Include permit and review fees.
- ☐ Include testing and inspection costs.
- ☐ Include furniture, fixtures, and equipment when applicable.
- ☐ Include owner contingency.
- ☐ Include construction contingency when appropriate.
- ☐ Confirm financing or funding limits.
- ☐ Decide what will happen if bids exceed budget.

Overall project budget**Construction budget****Contingency amount / percentage****If bids exceed budget, what is the plan?**

3. Understand the Property

- ☐ Confirm property ownership.
- ☐ Obtain a current survey.
- ☐ Confirm property lines and easements.
- ☐ Review zoning requirements.
- ☐ Review setbacks, height limits, and lot coverage.
- ☐ Identify utility locations and available capacity.
- ☐ Review floodplain, wetland, or environmental concerns.
- ☐ Confirm site access and construction access.
- ☐ Identify unusual soil, drainage, or topographic conditions.

Property / site notes

4. Define the Project Team

- ☐ Identify the owner decision-maker.
- ☐ Select the architect.
- ☐ Identify structural engineering needs.
- ☐ Identify mechanical, electrical, and plumbing engineering needs.
- ☐ Identify civil engineering needs.
- ☐ Identify landscape architecture or interior design needs.
- ☐ Identify surveyor and geotechnical consultant needs.
- ☐ Establish the construction manager / general contractor delivery strategy.

Owner decision-maker

Design / consultant team notes

5. Develop the Program

- ☐ List required rooms and spaces.
- ☐ Establish approximate room sizes.
- ☐ Identify adjacency requirements.
- ☐ Define expected occupancy levels.
- ☐ Identify special equipment.
- ☐ Identify storage needs.
- ☐ Identify technology and AV requirements.
- ☐ Identify accessibility requirements.
- ☐ Identify security requirements.
- ☐ Identify future expansion or flexibility needs.

Program / space notes

6. Review Codes and Approvals

- ☐ Confirm the applicable building code and local amendments.

- ☐ Confirm occupancy classification.
- ☐ Confirm construction type.
- ☐ Review allowable area and height.
- ☐ Review means of egress.
- ☐ Review accessibility requirements.
- ☐ Review fire protection requirements.
- ☐ Review energy code requirements.
- ☐ Confirm zoning approvals.
- ☐ Identify special permits, variances, health department reviews, or other agency approvals.

Required approvals / agencies

7. Schematic Design

- ☐ Confirm site layout.
- ☐ Confirm overall floor plan.
- ☐ Confirm primary circulation.
- ☐ Confirm major room sizes.
- ☐ Confirm exterior massing and major entrances.
- ☐ Establish preliminary structural approach.
- ☐ Establish preliminary MEP approach.
- ☐ Review preliminary code strategy.
- ☐ Prepare a preliminary cost check.
- ☐ Confirm the design still aligns with budget.

Schematic design decisions / open items

8. Design Development

- ☐ Refine floor plans and exterior elevations.
- ☐ Develop building sections.
- ☐ Select major materials.

- ☐ Coordinate structure.
- ☐ Coordinate HVAC, electrical, plumbing, and fire protection.
- ☐ Refine accessibility details.
- ☐ Update the cost estimate.
- ☐ Resolve major owner decisions.

Design development decisions / open items

9. Construction Documents

- ☐ Complete architectural drawings.
- ☐ Complete structural drawings.
- ☐ Complete MEP drawings.
- ☐ Complete civil drawings when required.
- ☐ Coordinate all disciplines.
- ☐ Complete schedules, details, and specifications as applicable.
- ☐ Perform code review and drawing coordination review.
- ☐ Confirm owner scope and contractor scope.
- ☐ Confirm permit submission requirements.

Construction document notes

10. Permitting

- ☐ Submit the permit application and required documents.
- ☐ Track plan review comments.
- ☐ Respond to code comments.
- ☐ Issue revised drawings as required.
- ☐ Confirm permit approval.
- ☐ Confirm required inspections.
- ☐ Confirm permit fees.

Permit status / comments

11. Bidding and Contractor Selection

- ☐ Prepare the bid package.
- ☐ Identify qualified bidders.
- ☐ Conduct a pre-bid meeting when appropriate.
- ☐ Respond to bidder questions and issue addenda.
- ☐ Receive and compare bids.
- ☐ Review alternates, allowances, exclusions, and qualifications.
- ☐ Review proposed schedule.
- ☐ Check references.
- ☐ Select the contractor based on scope, capability, schedule, and price.

Bidding / contractor selection notes

12. Preconstruction

- ☐ Execute the construction contract.
- ☐ Confirm insurance and bonds when required.
- ☐ Confirm permit issuance.
- ☐ Confirm project schedule.
- ☐ Confirm site logistics and temporary facilities.
- ☐ Confirm long-lead items.
- ☐ Establish RFI, submittal, change-order, and payment application processes.
- ☐ Hold the preconstruction meeting.

Preconstruction notes

13. Construction

- ☐ Track schedule and budget.

- ☐ Review RFIs and submittals.
- ☐ Review change proposals.
- ☐ Document owner decisions.
- ☐ Conduct site observations.
- ☐ Track inspections and deficiencies.
- ☐ Monitor long-lead items.
- ☐ Review payment applications.
- ☐ Maintain a contingency / change log.

Construction notes / action items

14. Project Closeout

- ☐ Prepare and complete the punch list.
- ☐ Obtain final inspections.
- ☐ Obtain the certificate of occupancy when required.
- ☐ Receive record drawings.
- ☐ Receive warranties and O&M manuals.
- ☐ Complete equipment training.
- ☐ Confirm final cleaning.
- ☐ Confirm final payment requirements.
- ☐ Close permits.
- ☐ Archive project documents.

Closeout notes / outstanding items

OWNER REVIEW / FINAL CHECK

PROJECT READINESS SUMMARY

Before moving forward, make sure the owner and project team can clearly answer these five questions.

What are we building?

What is the real budget?

Who is making final decisions?

What approvals are required?

What is the target completion date?

Overall project readiness

☐ Early planning	☐ Ready for design	☐ Ready for permitting / bidding
☐ Ready for construction	☐ Construction underway	☐ Closeout / complete

Priority action items

Next review date

Additional notes

Planning note: Use this checklist as a project-planning aid. Requirements vary by project and jurisdiction; confirm code, permit, contract, and professional-service requirements with the appropriate project team.