QUICK-START HOMEOWNER TOOLKIT

An Eight-Page Practical Companion for Comparing Quotes and Preparing to Sign

Printable Companion Worksheets for

PROTECT YOUR MONEY BEFORE YOU SIGN

W.J. Choi

HOW TO USE THIS QUICK-START TOOLKIT

These pages help you apply the book’s key principles before requesting quotes, comparing proposals, or signing.

Complete only what you can confirm. Mark uncertain items for discussion with the appropriate contractor, designer, engineer, permit authority, insurer, attorney, or other qualified professional.

Use the pages to organize scope before quotes, compare proposals after they arrive, confirm inclusions and exclusions before signing, and keep a written record of changes.

These worksheets do not replace project-specific legal, design, engineering, permitting, financial, insurance, or construction advice.

1. PRE-QUOTE READINESS CHECKLIST

A. Project definition

- ☐ Rooms or areas included are identified.
- ☐ Main problems to be solved are written down.
- ☐ Must-have work is separated from optional work.
- ☐ Items to remain are identified.
- ☐ Items that may require removal or demolition are identified.

B. Existing conditions

- ☐ Visible conditions have been photographed.
- ☐ Known leaks, cracks, moisture, damage, or previous repairs are noted.
- ☐ Conditions requiring professional evaluation are marked.
- ☐ Concealed conditions are recognized as a possible cost risk.

C. Budget and priorities

- ☐ A working budget range has been established.
- ☐ Highest-priority spending areas are identified.
- ☐ Acceptable substitution areas are identified.
- ☐ A contingency has been considered.

D. Logistics

- ☐ Access, parking, storage, protection, and cleanup are considered.
- ☐ Occupancy during construction is considered.
- ☐ Children, pets, neighbors, noise, and work hours are considered.
- ☐ Timing restrictions are identified.

E. Quote preparation

- ☐ Competing contractors will receive substantially the same information.
- ☐ Assumptions, exclusions, and allowances will be requested.
- ☐ Scope will be compared before total price.
- ☐ Incomplete quotes will not be treated as directly comparable.

Items I still need to confirm:

2. PROJECT SCOPE SNAPSHOT

Project name

General property location

Areas included

Main renovation goal

Problems to solve

Must-have work

Optional work

Items to remain

Items to remove

Preferred material or finish level

Known existing conditions

Items requiring professional confirmation

Target start period

Target completion period

Working budget range

Top three priorities

This page is a starting summary, not a complete construction scope. Use it to give contractors a consistent overview of the project.

3. INCLUDED, EXCLUDED, AND OWNER-SUPPLIED ITEMS

A. Included in Contractor Scope

Item or work	Location	Detail to confirm

B. Excluded from Contractor Scope

Item or work	Responsible party or reason	Cost or schedule risk

C. Owner-Supplied Items

Product or material	Required delivery date	Responsibility for quantity and condition

Confirm whether each item is addressed:

- ☐ Demolition
- ☐ Hauling and disposal
- ☐ Protection of existing finishes
- ☐ Temporary protection
- ☐ Permits
- ☐ Inspection fees
- ☐ Design or engineering
- ☐ Material delivery
- ☐ Material storage
- ☐ Installation accessories
- ☐ Patching and repairs
- ☐ Final cleaning
- ☐ Warranty documents

An item is not safely assumed to be included merely because it appears necessary to complete the project.

4. THREE-QUOTE QUICK COMPARISON — SCOPE

Comparison item	Contractor A	Contractor B	Contractor C
Quoted price			
Scope description provided			
Demolition included			
Hauling and disposal included			
Site protection included			
Existing-condition repairs addressed			
Permit responsibility stated			
Inspection fees stated			
Labor included			
Materials included			
Material brands or standards stated			
Allowances identified			
Owner-supplied items identified			
Cleanup included			
Warranty stated			
Major exclusions stated			

Do not select a quote based only on the first price shown. Compare what each price actually includes.

5. THREE-QUOTE QUICK COMPARISON — COST AND CONTRACT RISK

Risk item	Contractor A	Contractor B	Contractor C
Allowance amount			
Allowance basis explained			
Unpriced work			
Optional work			
Unit prices			
Taxes stated			
Permit or inspection costs			
Payment schedule			
Deposit amount			
Change-order markup			
Schedule duration			
Start-date assumption			
Delay responsibility			
Proposal expiration date			
Insurance verification			
License or registration verification, where applicable			
Comparable adjusted total			
Questions still unanswered			

A comparable adjusted total is a working comparison after identifying obvious omissions, allowances, exclusions, and separately priced work. It is not a guaranteed final project cost.

6. CONTRACTOR CLARIFICATION QUESTIONS

1. **Is this item included in the quoted price?**
2. **What work is specifically excluded?**
3. **What assumptions were used to prepare this proposal?**
4. **Which quantities, products, or finishes are allowances?**
5. **Does the price include demolition, hauling, disposal, protection, and cleanup?**
6. **Who is responsible for permits, inspections, and related fees?**
7. **Which materials or products must the homeowner supply?**
8. **What conditions could result in a change order, and how is markup calculated?**
9. **What schedule assumptions were used, and how long is the proposal valid?**
10. **What warranty, insurance, licensing, or registration information applies?**

Additional questions or unanswered items:

Ask for material clarifications in writing and keep them with the proposal.

7. CHANGE-ORDER MINI LOG

No.	Date	Requested change	Reason	Cost impact	Time impact	Approved by	Written approval reference

Before approving a change, confirm:

- ☐ The changed work is clearly described.
- ☐ Cost impact is stated.
- ☐ Allowance credits are accounted for.
- ☐ Approval is documented before work proceeds.
- ☐ Added and deleted work are both identified.
- ☐ Schedule impact is stated.
- ☐ Related work is included.