



Phase 1 - Design

Every great movie begins with a great script! This is the work before the work. The time of the biggest remodeling mistakes, but also the biggest breakthroughs. Don't rush!

1. Discover what effect you want to achieve ... and why.

- This is not about you being a designer. It's about you being the end-user and knowing what you want to experience from the finished product. Only you can answer these all-important questions:

What do I want, or not want?

Why? "Why" is critical because "why" helps to understand what "what" really means.

- At this early stage, avoid these questions (we'll get there, don't worry):

What materials should I use?

How much will it cost?

- Don't get caught up with details too soon. Things are still evolving.

2. Assemble the Design Team

- Welcome outside perspectives. We all get "house blind" when it comes to our own spaces.
- Understand the nature of advice from those with a narrow specialty or vested interest.

Cabinet makers solve problems with cabinets. Plumbers with plumbing. Is your "Kitchen Designer" really a cabinet salesperson? Vested interests give vested advice.

- Your design team will consist of (as necessary):

- Architect/Designer
- Decorator
- Product Specialists
- Engineer
- Craftsmen/Tradesmen

- Give your team space for creativity. Young ideas are fragile. Withhold judgment.

Phase 2 - Planning

1. Scope of Work - Initial Estimates - Revised Scope

- Only when we've decided what we want to achieve, and have worked through the creative paths to those goals, can we determine whether we need to just renovate or fully remodel, and how extensive either needs to be.
 - Renovate - to restore to good condition; make new or as if new again; repair. to reinvigorate; refresh; revive.
 - Remodel - to alter a form or structure; change; reconstruct.
- Once we have an initial scope of work we can obtain rough estimates of costs. If the costs need to be adjusted then we either return to Phase 1 or we revise the scope of work.

2. Plans

- Once the rough budget is acceptable we then produce whatever plan documents are necessary to obtain accurate bids and/or satisfy governing agencies.
- The goal of plans is to adequately inform and dispel fear. Unknowns create fear in bidding and fear always results in more expensive bids.
- "Plans" can be anything from a detailed list, sketches, photorealistic renderings, basic building plans, permit-ready plans

Phase 3 - Bidding and Budget

- Unless we have implicit trust in a particular contractor, obtain 3 bids for every category.
- Enlist the help of your design team to reconcile estimate details into comparable bids.
- Take note of and investigate "outliers." They may simply have different pricing, or they missed something, or they caught something everyone else missed.

1. Assemble the Build Team

- DIY, General Contractor, Specialty Contractors, Handyman
- How to pick a contractor
 - References, references, references - friends, family, realtors, Home Advisor, NextDoor, Houzz, Porch.com
 - Contractor State License Board
 - Proof of Liability Insurance
 - Paper Contractor or hands-on? Who is supervising your project?
 - Don't ignore your subjective impressions

2. Contracts

- Deposits - California: 10% or \$1000, whichever is less.
- Preliminary Notices, Mechanics Liens, and Lien releases.
- Contractors should provide schedule estimates. Every bid should include a time estimate.
- Phrases like “with all diligence” and “without interruption” should appear in every contract.
- Turn-key vs. Time and Material contracts.
- Avoiding “Allowances” - another word for “over budget.”
- Daily clean-up and debris disposal.
- Contractors should never be ahead of the completed work in invoicing

3. Schedule

- Contractors should provide schedule estimates. Every bid should include a time estimate.
- Scheduling should address your ability to living accommodations and your ability to eat, escape, rest, and decompress.
- Scheduling should accommodate wait times for ordered items and the necessary lead times for decision making deadlines and purchases.

Phase 4 - Building

- Review site considerations
 - water
 - power
 - toilet
 - dig alert
 - Review the daily schedule
 - Change orders
 - Inspections - the city's, and YOURS (the Punch List)
 - Who's handling Final Clean Up?
 - Final payments come only after Punch List completion.
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