PICKFACTS

Know Before You Commit.

PROJECT REVIEW CHECKLIST

A clearer starting point for your next project.

Complete what you know. Select Unsure where information is missing. This overview helps identify areas for a focused PickFacts review.

Association / property: _____

Project: _____ **Date:** _____

01 Scope & project documents	Yes	No	Unsure
Are the project purpose, work areas and exclusions clearly described?	☐	☐	☐
Are current proposals, plans and specifications available and consistent?	☐	☐	☐
Are unresolved site conditions and owner responsibilities identified?	☐	☐	☐

02 Contractor & company	Yes	No	Unsure
Is the contractor identified, with relevant experience and references?	☐	☐	☐
Are company credentials and insurance information available for review?	☐	☐	☐
Are the project supervisor, key subcontractors and staffing confirmed?	☐	☐	☐

03 Materials & quality	Yes	No	Unsure
Are the proposed materials and installation requirements specified?	☐	☐	☐
Are quality checks and any specialist input or testing identified?	☐	☐	☐
Are warranties, maintenance needs and property protection addressed?	☐	☐	☐

04 Bids & total cost	Yes	No	Unsure
Can competing bids be compared using the same scope of work?	☐	☐	☐
Are allowances, exclusions and potential extra costs clearly stated?	☐	☐	☐
Is the total budget clear, including funding for unexpected costs?	☐	☐	☐

From agreement to completion

Continue marking Yes, No or Unsure for each checkpoint.

05 Agreement & changes	Yes	No	Unsure
Does the written agreement reflect the agreed scope, price and schedule?	☐	☐	☐
Is there a written process to approve changes and their cost impacts?	☐	☐	☐
Are warranty, cancellation and dispute terms ready for adviser review?	☐	☐	☐

06 Insurance & board decisions	Yes	No	Unsure
Has the association's adviser reviewed project insurance requirements?	☐	☐	☐
Are board authority, required decisions and funding documented?	☐	☐	☐
Are responsibilities for damage, emergencies and resident notices clear?	☐	☐	☐

07 Schedule & resident impact	Yes	No	Unsure
Are the start date, work phases and completion expectations documented?	☐	☐	☐
Are material lead times, possible delays and access needs addressed?	☐	☐	☐
Is there a plan for resident disruption, communication and site protection?	☐	☐	☐

08 Payments & completion	Yes	No	Unsure
Are payment milestones and approval responsibilities clearly defined?	☐	☐	☐
Are progress checks, outstanding items and completion criteria agreed?	☐	☐	☐
Are final records, warranties and follow-up responsibilities identified?	☐	☐	☐

Your main concern or next decision

Next step: Share this checklist with PickFacts, along with available proposals and project documents, to discuss the review you need.

This checklist is a starting point. Technical, legal and insurance questions should be reviewed by the appropriate qualified adviser.