



Owner's Project Checklist

Dan Schmidt, Remdal Painting & Restoration Inc

1. Establish scope of work:

- Professional survey or by owners

- Review of surfaces:

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Wood siding | <input type="checkbox"/> Soffits | <input type="checkbox"/> Light standards | <input type="checkbox"/> Privacy fencing |
| <input type="checkbox"/> Composite siding | <input type="checkbox"/> Fascia & trim | <input type="checkbox"/> Pillars | <input type="checkbox"/> Perimeter fencing |
| <input type="checkbox"/> Vinyl siding | <input type="checkbox"/> Wood windows | <input type="checkbox"/> Shakes | <input type="checkbox"/> Decorative features |
| <input type="checkbox"/> Stucco | <input type="checkbox"/> Decks/patios | <input type="checkbox"/> Doors/frames | <input type="checkbox"/> Other |
| <input type="checkbox"/> Concrete | <input type="checkbox"/> Railings | <input type="checkbox"/> Garage doors | |
| <input type="checkbox"/> Brick | <input type="checkbox"/> Metal surfaces | <input type="checkbox"/> Metal Cladding | |

- Visible repairs required: *Notes*

- Concrete _____
- Stucco _____
- Cracking _____
- Siding _____
- Wood trim _____
- Decks _____
- Railings & Stairs _____

- Caulking & Sealants: *Notes*

- Existing Leak _____
- Balconies _____
- Window Perimeter _____
- Wood miter joints _____
- Wood trim _____
- Roof flashings _____
- Attachment points _____
- Penetration Points _____

2. Sort out the money issue early:

- Get a budget figure for the scope of work first
- Special levy, ¾ vote resolution

- Contingency reserve fund (CRF), majority vote if recommended in a depreciation report
- Contingency reserve fund (CRF), ¾ vote
- A combination of the above?

3. Create a business case to present to owners:

- Engage the owners – survey with options
Try an information meeting, invite input, send summary
- Form a non-council advisory group

- Appoint or invite a credible spokesperson for questions
- Allow the process to build momentum

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4. Don't get stuck on colour:
 - Have a color samples or display boards done
 - Decide on the process of color approval
 - Form a color committee to oversee the process
 - A major color change may require city approval
 - Is a designer or architect needed?
 - Significant change in use or appearance requires $\frac{3}{4}$ vote
 5. Establish one specification for all bidders:
 - Use a specifier / inspection service for this
 - Or choose a contractor you trust and rely on their specification
 - Include bid documents, scope of work, bid closing date
 - Choose the right time of year to ask for bids (off-season)
 6. Pre-qualify bidders:
 - Sources: strata manager, CHOA, Inspector
 - Ensure Contractor has:
 - WorkSafe BC clearance
www.worksafebc.com
 - Valid \$5,000,000.00 liability insurance minimum
 - Bonding for warranty and performance
 - Better Business Bureau accredited
www.bbb.org
 - Professional memberships
 - Employee company or sub-contractor?
 7. Invite 3 – 5 Qualified bidders:
 - Arrange suitable time for all parties & confirm attendance
 - Set reasonable time for bids to be returned (e.g. 2 weeks)
 - Ensure a strata representative is available
 - Have a comprehensive site meeting reviewing scope & specification with all the contractors
 - Send out addendum if changes arise from site meeting
 8. Evaluate proposals for:
 - Track record of the company
 - Company culture & reputation
 - References – call & check with the people
 - Local reference jobs, and work done over 2 years ago
 - Project management personnel to run the job
 - Systems to coordinate the work
 - Communication processes
 - Qualifications, experience, and training of employees
 - Policy on sub-contracting of work
 - Manpower and capacity of company to do the work
 - Commitment to completing the job without gaps or delays
 - Safety policies & documentation
 - Proposed materials & quality products
 - PDCA/MPDA standards, manufacturer's licensing
 - Warranty & guarantees (labor & materials)
 - Do we **trust** this company?
 9. Choose company and sign contract that clarifies:
 - Full scope of work and inclusions/exclusions
 - Colours and color approval process
 - Tentative start date and duration of work
 - Payment terms, schedule & approvals
 - Completion process
 - Items of special concern

10. Pre-job setup meeting:

- Meet with contractor, foreman, strata agent & strata contact
- Review job scope: everyone on same page?
- Site details: garbage/parking/security/storage/washrooms
- Establish noticing procedures to owners & strata agent
- Establish a realistic schedule & post it for owner's review
- Review landscaping challenges with contractor
- Walk the site with contractor to prepare a written record of existing damage (gutters, existing overspray or drips, cracked roof tiles, etc.)
- Ensure commitment to daily clean-up: safe & tidy worksite

11. Making the job go smoothly

- Ongoing project management by contractor
- Communication of process and progress
- Daily communication with site foreman
- Review of finished work, communication of deficiencies
- Invoicing trigger points
- Weekly meeting for larger projects
- Change-order or extra work authorization

12. Post Job:

- Walk-through with strata council at substantial completion
- Deficiency notices to owners with return/completion times
- Identify and alert other work to follow (e.g. window washing)
- Obtain final documentation:
 - Warranty documents
 - Color schedule
 - Materials technical documentation
 - WorkSafe compliance letter
 - Statutory declaration
 - Maintenance documentation