



# Home Improvement Project Planner

Define scope, compare bids, and control changes

## Project definition

Property address

Project name

Primary objective

Target start

Target completion

Maximum budget

## Written scope: included work, materials, finish level, and exclusions

## Due diligence

- ☐ Confirm applicable licensing, insurance, permits, and HOA / architectural rules.
- ☐ Request detailed written proposals using the same scope.
- ☐ Check references and complaint / enforcement resources appropriate to the trade.
- ☐ Document payment milestones, retainage, change-order controls, cleanup, and warranty.
- ☐ Identify lead-safe, asbestos, mold, structural, electrical, plumbing, or other specialist needs.



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## Proposal comparison

| Comparison item              | Bid A | Bid B | Bid C |
|------------------------------|-------|-------|-------|
| Company / contact            |       |       |       |
| Verified license / insurance |       |       |       |
| Base price                   |       |       |       |
| Allowances                   |       |       |       |
| Start / duration             |       |       |       |
| Payment schedule             |       |       |       |
| Warranty                     |       |       |       |
| Exclusions                   |       |       |       |
| Permit responsibility        |       |       |       |

## Change-order log

| Comparison item    | 1 | 2 | 3 |
|--------------------|---|---|---|
| Change / reason    |   |   |   |
| Price effect       |   |   |   |
| Time effect        |   |   |   |
| Approved by / date |   |   |   |

## Closeout documents and unresolved items