

Major Project Planning & Oversight Checklist

For roofs, masonry, water intrusion, large mechanical work, special assessments, and other high-stakes projects.

A major project is not just a contractor appointment. It is a chain of technical advice, scope, bidding, funding, approvals, owner communication, access, schedule, change orders, documentation, and closeout.

1. DEFINE THE PROBLEM

- ☐ Document the condition with photos, reports, leak history, inspections, or prior repair records.
- ☐ Determine whether an engineer, architect, attorney, insurance professional, or other specialist should be involved before bidding.
- ☐ Separate emergency stabilization from permanent repair.
- ☐ Define what success looks like and what areas/components are included.

2. BUILD THE SCOPE

- ☐ Use one written scope for bidders whenever possible.
- ☐ Identify alternates or options separately so bids remain comparable.
- ☐ Include access, protection, cleanup, permits, testing, closeout, and warranty requirements.
- ☐ Confirm whether concealed conditions may create change orders.

3. PLAN THE MONEY

- ☐ Estimate total project cost, professional fees, contingencies, permits, financing, and communication/administrative costs.
- ☐ Confirm reserve availability and governing-document requirements.
- ☐ Determine whether a special assessment, loan, or phased project may be needed.
- ☐ Do not approve a contract before the funding path is understood.

4. APPROVE & CONTRACT

- ☐ Compare bids on scope, qualifications, insurance, schedule, warranty, exclusions, and price.
- ☐ Document board approvals and owner approvals if required.
- ☐ Have legal/technical professionals review documents when appropriate.
- ☐ Confirm payment schedule, retainage if applicable, change-order authority, and termination provisions.

5. RUN THE PROJECT

- ☐ Create one project calendar and one open-item log.
- ☐ Schedule owner notices, access, shutoffs, deliveries, staging, and parking impacts.

- ☐ Track meetings, decisions, submittals, change orders, invoices, and schedule changes.
- ☐ Require written approval before extras proceed, subject to emergency authority.
- ☐ Provide owners with concise progress updates rather than scattered rumors.

6. CLOSE IT OUT

- ☐ Confirm punch-list completion.
- ☐ Collect warranties, permits/inspection closeout, lien waivers where appropriate, manuals, photos, and final invoices.
- ☐ Update the association's maintenance history and reserve/capital plan.
- ☐ Document lessons learned for the next board.

PROJECT SNAPSHOT: OWNER / NEXT DECISION / DEADLINE

Facing a major repair? PRG can scope project-oversight work separately from routine monthly management so the board has dedicated coordination and documentation.

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