



Home Transformation Checklist

The 5 Ws of Remodeling

The "5 Ws" – Who, What, When, Where, Why – is an age-old tool used in journalism, police and research investigations. It's a set of questions that cannot be answered with a simple "yes" or "no" and helps discover the whole story, or solve the central problem.

Vive's Home Transformation Checklist is our 5 Ws – of remodeling. It will ensure you're considering everything you should, and help you define and prioritize your goals. Think of it as a construction investigation – a tool intended to help you write the beginning of your home's transformation story and visualize how it ends.

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Who – Whose needs need to be met?

Who uses your home now? Who will use your home in the future? How has usage changed since 5 years ago? Think about each group in terms of accessibility, usability, comfort and safety.

	Accessibility	Usability	Comfort	Safety
You	For example, do you want to age in place?	For example, is this your primary, secondary or vacation home?		
Family members			For example, are you an empty nester, with children visiting but with guests?	

	Accessibility	Usability	Comfort	Safety
Guests			For example, who visits for what holidays and events?	
Pets				For example, what is the ideal environment?

- Also think about future owners
 - Are your needs and desires
 - Extremely specific
 - Universal
 - Do you care?
 - Yes
 - No
 - Is this your forever home?
 - Yes
 - No
 - How important is a return on your investment? _____
 - How valuable is your emotional return on investment? _____

What – What problems need to be solved?

Think comprehensively. Consider all exterior areas and finishes, interior rooms/areas and finishes. Think about what is “between the walls,” as well as appliances.

What areas are in need of maintenance or updating?	
What areas cause inconvenience?	
What areas are in need of repair?	
What areas/items do you want to save or reuse?	
What areas/items do you NOT want to change?	

Problems often relate to functionality, traffic flow, storage and lighting. Consider this:

Functionality	What spaces in your home are unused?	
	Overused?	
	Limiting?	
Traffic flow	Where do you run into each other?	
Storage	What can't you find space for?	
	What's always lying around, and where?	
	What do you hide when you have guests?	
Lighting	Does poor lighting make any rooms or areas unusable or uninviting?	

When – What affects the timing of your transformation?

- Your needs
 - How important is cost vs. comfort? _____
 - Do you want the transformation completed before a particular event? _____
 - Are you trying to set your home apart in the market to sell it?
 - Yes
 - No
 - Do you want to complete updates and functionality changes before you move into a property you've purchased?
 - Yes
 - No
- Scope
- Financial considerations

What is the budget?	
Tax impact, rebates?	
Interest rates?	
Cost of materials?	
Impact on homeowner's insurance?	

- Weather – is the transformation:
 - Interior
 - Exterior
 - Both

- Zoning

Are there constraints, setbacks, and/or variance?	
Are there recent or expected changes to ordinances?	

- Safety/code – is there:
 - Asbestos
 - Lead paint
 - Mold
 - Radon
- What is the contractor's schedule? _____
- Are you building time into your schedule for hidden problems and delays?

Where – Where to begin?

- Check your finances
 - If you are borrowing, talk to a bank
- Check neighborhood home value comparisons
- Select a professional
 - How long have they been in business? _____
 - Do they have experience with your type of project? _____
 - Are they licensed and insured? _____
 - Are they members of industry associations? Call to confirm.
 - MABA
 - NARI of Madison
 - Other _____
 - Do they provide staff with regular training? _____
 - Do they offer a warranty? _____
 - What is their availability? _____
 - How do they handle allowances and change orders? _____
 - What services do they offer?
 - Design
 - Permits
 - Financing
 - Construction
 - Check references
 - Check online reviews (BBB, Angie's List, Facebook, Google)

- Work with a contractor to
 - Investigate zoning and building permits
 - Develop a preliminary scope
 - Understand how design and product selection affect cost
 - Establish a control estimate to monitor the project during construction and product selection

Where – Ways to save

- Plan ahead
- Think about use and function above all else – efficiency, not size, is most important – spaces can be dual-use
- Keep an open mind about design, materials and scope of work
- Consider lighting – utilize natural, limit recessed, maintain window size

Why – Why are you REALLY considering a project?

- Think through the Who? and What? again
- Prioritize your reasons
- Narrow your scope by eliminating the least important reasons
- Fill in the blanks
 - _____ is what we wanted
 - _____ is why
 - _____ is what we did
 - _____ is why we're so much happier now
- Keep the “why” in mind throughout the process
- Don't get lost in the details