



Home Transformation Checklist

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Whose needs should be considered?

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?
Is this your forever home?				
How important is a return on your investment?				
How valuable is your emotional return on investment?				
Think about future homeowners - is your taste broad or specific? Do you care?				

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 repair? <ul style="list-style-type: none"> • Structural issues • Water leaks or ice dams • Moisture and poor ventilation • Roof, gutters, downspouts, drainage issues • Plumbing, heating and electrical • Concrete and sidewalks • Unwanted insects or critters 	
What areas cause inconvenience?	
What do you want to keep the same, up-cycle, or reuse?	
What areas/items do you NOT want to change?	

Functionality	What spaces in your home are unused?	
	What spaces in your home are overused?	
	Limiting space?	
Traffic flow	Where do you run into each other?	
	Narrow workspaces, doorways, halls	
	Location of doors, stairs, appliances	
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?	

What affects the timing of your transformation?

<p>Your needs:</p> <ul style="list-style-type: none"> • How important is cost vs. comfort? • Are you trying to set your home apart in the market to sell it? • Do you want to complete updates and functionality changes before you move into a property you've purchased? 	
<p>Scope</p>	
<p>Financial considerations:</p> <ul style="list-style-type: none"> • What is your budget? • Tax impact, rebates? • Interest rates? • Cost of materials? • Impact on homeowner's insurance? 	
<p>When do you want to start and finish?</p> <ul style="list-style-type: none"> • Do you want the transformation completed before a particular event? 	
<p>What is the contractor's schedule?</p>	
<p>Are you building time into your schedule for hidden problems and delays?</p>	
<p>Safety/code – is there:</p> <ul style="list-style-type: none"> • Asbestos • Lead paint • Mold • Radon 	
<p>Permits:</p> <ul style="list-style-type: none"> • Building, zoning, other • Constraints, setbacks, variance • Changes to ordinances 	
<p>Weather – is the transformation interior, exterior or both?</p>	

Where should you begin?

Check your finances. If you are borrowing, talk to a bank.

Check neighborhood home value comparisons:

- Talk to a local real estate agent
- Search Zillow.com for recently sold properties in your neighborhood
- Check Trulia.com's U.S. Assessor Records and Property Information database

Select a professional	Contractor #1	Contractor #2	Contractor #3
1. How long have they been in business?			
2. Are they licensed and insured?	Y / N	Y / N	Y / N
3. Are they members of industry associations? Call to confirm.			
• Madison Area Builders Association (608) 288-1134	Y / N	Y / N	Y / N
• National Association of the Remodeling Industry (608) 222-0670	Y / N	Y / N	Y / N
4. What services do they offer? <ul style="list-style-type: none"> • Design • Permits • Financing • Construction 			
5. Do they have a process in place? <ul style="list-style-type: none"> • Design • Communication • Production • Warranty issues/questions 	Y / N	Y / N	Y / N
6. Do they have experience in your type of project?	Y / N	Y / N	Y / N
7. What is their availability?			
8. How do they establish project schedules, and what schedule do they expect for your project? How do they handle delays?			
9. Do they offer a warranty?	Y / N	Y / N	Y / N
10. How do they handle allowances and change orders?			
11. Do they provide staff with regular training?	Y / N	Y / N	Y / N

Check online reviews:

- Better Business Bureau
- Facebook
- Google

Check references:

- Ask for a list of past customers

Work with a contractor to:

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

Ways to save

- Plan ahead - spend time planning and stick to the plan
- Be realistic from the start and be specific about what you want
- Keep an open mind about design, materials and scope of work
- Think about use and function above all else - efficiency, not size is most important - spaces can be dual-use
- Are there things you can update vs. replace?
- Are there things you can do yourself?
- Can you complete the project in phases?
- Consider lighting - utilize natural, limit recessed, maintain window size

Resources

- vivehometransformations.com
- narimadison.org
- nari.org
- houzz.com
- pinterest.com
- porch.com
- homeadvisor.com



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