

SCOPE OF WORK PLANNING TOOL

What's included? How to stay on budget and avoid surprises in your new build.

There are so many details in a build job, it can be easy to miss important details and end up with budget overruns and regrets. While the lion's share of the responsibility is on the builder to ensure communication is rock-solid, there are some things you can do as an owner to make sure you're getting what you expect.

THERE ARE 3 KEY PARTS TO THE EQUATION:

1

SCOPE OF WORK (WHAT IS BEING BUILT)

The scope lists out the work needed to build the project - from start to finish. Use a big-picture list that starts with your raw land, and runs all the way through the end of construction. On the next pages, we've provided you with a checklist so you can do exactly this.

2

WORK ASSIGNMENT (WHO IS DOING THE WORK)

Once you know the scope, talk with your builder and verify which parts of the work they do, and which parts you will need to complete. The included form will have a spot for you to check in order to note this detail.

3

SPECIFICATIONS (HOW THE WORK WILL BE DONE)

If the scope is the big picture, the specifications are the detail. For example: how is the foundation engineered; which flooring types are included, what type of structural sheathing is used? Your builder should provide you with a list of these items. Use the Notes section to jot down your desires and questions so you can begin discussing these with your builder and getting an idea of which details are most important to you.

ACTION PLAN

Before you commit, make sure you have a clear outline of what is included in your build proposal.

→ [Watch the video](#) to learn more about how to use the planning tool.



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SCOPE OF WORK PLANNING TOOL



Name _____

Date _____

Address _____

Builder _____

	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
SITE				
Lot Clearing/Demolition				
Haul Off				
Pad Site Grading/Excavation				
Fill Dirt for Pad Site				
Soils Testing – Engineering				
Soils Testing – Compaction				
Gravel Drive/Temp or Base				
Retaining Wall(s)				
Electric Service Line & Trench				
Water Well				
Temp Power to Well/Incl Trenching				
Well House				
Relocate Pressure Tank				
Water Service & Trenching to House				
Septic/Aerobic System				
Waste Line & Trenching to House				
Grinder Pump Required?				
Backup Overflow				
Malfunction Alarm				
Water Filtration				
Water Softener				
Gas Propane Tank				
Excavation & Burial				
Above-ground Set				
Gas Line, Regulator & Trench to House				
Irrigation System				
Sod or Hydryseed				
Landscaping Beds/Plantings				

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	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
Trees				
Paving				
Culvert Pipe				
Approach				
Concrete Drive & Sidewalks				
Curb Cut				
Fencing				
Pipe Rail				
Privacy Fence				
Walk Gate				
Motor Gate				
PRE-CONSTRUCTION				
Building Permits				
Utility Connections				
Water Tap				
Sewer Tap				
Impact Fees				
Temp Power Meter & Usage				
Water Usage (Metered only)				
Planning & Zoning				
Replat				
Deed Restrictions				
Building Ordinance				
Foundation Engineering				
Base Specs				
Piers				
Site-Specific Enhancements				
Structural Engineering				
Wind Bracing Plans				

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	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
Surveying				
Uncover Pins				
Stake Out/Elevation Set				
Form Survey				
Slab Height Survey				
CONSTRUCTION				
Portable Toilet				
Exterior Cleans				
Rough Clean				
Pre-paint Clean				
Masonry Clean				
Final Clean				
Interior Cleans				
Clean 1				
Clean 2/Final				
Construction Grading & Drainage				
Rough Grade				
Final Grade				
Add Topsoil				
French Drains				
Pest Control				
Mechanical/Pre-pour				
Spray Treatment				
Frame Labor & Material				
Walls				
Roof				
Subfloor				
Cornice & Sheathing				
Hardie Siding Labor & Material				

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	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
Decks/Porches/Handrails				
Deck/Patio Flooring				
Railings/Screens				
Screened Doors				
Windows – Material & Labor				
Exterior Doors				
Front Door				
Patio Door				
Garage House Door				
Overhead Garage Door				
Door Opener				
Plumbing				
Fixtures				
Tub/Shower Material				
Gas Piping & Valves				
HVAC				
Electrical Wiring				
Lighting Fixtures				
Low Voltage				
Security System				
Rough Wire				
Trim & Service				
Roofing				
Insulation				
Walls				
Attic				
Floor Trusses				
Including Garage				

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	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
Masonry				
Brick				
Stone				
Mortar & Sand Color				
Mailbox				
Gutters				
In-ground Drains				
Fireplace				
Woodburning or Gas				
Set Height				
Surround				
Mantel				
Drywall/TBT				
Garage Finish				
Trim & Interior Doors				
Base & Casing – Material & Labor				
Closet Shelving – Material & Labor				
Interior Doors				
Stair Rail – Material & Labor				
Painting				
Exterior				
Interior				
Walls & Ceiling				
Trim & Doors				
Cabinetry				
Counter Tops				
Kitchen				
Bathroom Vanities				
Sinks				
Backsplashes				

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	INCLUDED IN SCOPE?	BUILDER	OWNER	NOTES
Hardware				
Interior Doors				
Exterior Doors				
Cabinet Hardware				
Bath Hardware				
Glass & Mirror				
Vanity Mirrors				
Shower Glass				
Cabinet Glass				
Floor Coverings				
Tile				
Wood				
Luxury Vinyl Plank				
Carpet				
Tile				
Tub/Shower Walls				
Shower Base				
Backsplash				
Tub Surround				
Appliances				
Range				
Dishwasher				
Microwave				
Vent Hood				
Other				
SOFT COSTS				
Builders Risk Insurance				
Third Party Warranty				