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## Section 7, Resources

**Key Contacts and Associations:**

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## The Project Plan

**Blank Plan Template:**

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## Section 1 Getting Started

*"In preparing for battle I have always found that plans are useless, but planning is indispensable" ~Dwight D. Eisenhower~*



Where do I start?

What part of the renovation can I do and what shouldn't I do?

How do I choose a contractor?

What is the best way to approach this project?

How long should this job take?

Who, what, why, where, when and how? The "Renovation & Home Improvement Project Planner" will answer all of these questions and much more. The educated consumer always gets the best value for every dollar spent and that will be you. This guide will not only educate you, but equip you with a proven organization tool that will build confidence and excitement for your project at hand. The "Renovation & Home Improvement Project Planner" teaches principles of project management. Once you have applied the principles you will understand the basics and be able to tackle any job. These skills are principles that you can transfer to other areas of life. The "Renovation & Home Improvement Project Planner" will provide you the essential information to ensure your success leaving you a well organized and documented project for future consideration or information.

### Benefits To You

**You will start your project with an organizer book that carries all the information you need to succeed.**

**You will learn the basics of project management to stay on top of this job like a professional.**

**You will have created a clear plan to achieving your goal.**

**You will look and feel professional and organized, ready to deal with the many challenges renovation and projects have.** (You know Murphy's law: what ever can go wrong will go wrong at the worst possible time!)

**You will have more confidence in dealing with contractors and sales people.**

**You will have a clear path to follow.**

**You have forms and contracts for hiring professionals or negotiating deals with suppliers.**

**Your planner documents all important information for future consideration like paint codes, parts sheets, warranty information, etc.**

### What You Can Expect

Scenario 1; What you should expect is that your dream or vision for your home is about to come true. You are going to have a wonderful experience in making this dream a reality. Your house will be improved upon, adding to its overall value. You will be making better use of its space, making it more appealing. You will develop new skills and have fun as you bring the family together to work on a home improvement project.

Scenario 2; What could happen is Murphy's Law will kick in. The worst possible things will go wrong at the worst possible time, costing you the most amount of money and leaving you frustrated wondering why you ever started this project. If you are ill-prepared this can certainly happen but if you are wiser than the average person and apply the principles in the Renovation & Home Improvement Project Planner, you will avoid the common pitfalls. You will have a plan second to none, leaving you excited and confident that you will easily be able to deal with the unexpected in a calm and professional manner

You should have the first scenario expectation. Renovations can and should be an enjoyable experience reaping all the benefits of a remodeled home. It's the planning that makes the difference. Take the time to think through each aspect of the renovation, applying ideas, principles and techniques learned in this guide and you are sure to have great success.

Most common things overlooked or unexpected:

The inconvenience of not being able to use that room. It is usually underestimated what it is like to live without a certain room in the home. Especially the bathroom! If you are going to be remodeling a main room like the bathroom then make sure you think through some alternative showering and hygiene places. Consider the fitness club, a neighbor's or best friend's.

The inconvenience of people working in your house. Having a stranger working in your most private space like your ensuite bathroom.

The dust, dirt & noise. A good tradesman will seal the room the best they can using poly taped from the floor to the ceiling but you would be surprised at how dust carries through a house. Expect to have dust on things for a while and take extra care to put things away and wrap them in plastic, etc. Underestimating how long it will take, especially if you are inexperienced and doing it yourself. Plan on it taking twice as long as your best, educated guess. Don't overestimate your abilities or the time you have available.

Underestimating the cost. Renovations always uncover things you would never expect. You open up a wall to find rotten studs and supports. You remove your carpet to find rotten sub floor. You find things out of code that have to be brought up to code. You find certain things inadequate that need to be improved upon.

Realizing the difference in taste of color, type, style desired.

Underestimating the frustration that can occur with the hundreds of choices and opinions that are available, and the time necessary to research products

### **The principles and management of the renovation project:**

*When you're prepared, you're more confident. When you have a strategy, you're more comfortable.*

*~ Fred Couples ~*

It is advisable that you apply this material to your project. It really will make all the difference in the world to you. In this planner you will be applying the principles of project management to reap all the benefits listed in the beginning, get the results you desire and enjoy the process of making another dream a reality.

Consider this story:

Could you imagine building a house without a blueprint? Take two equally competent carpenters and two building lots. Have the local lumber store drop off the identical, necessary building materials to construct the home. Give one of the builders a blueprint and nothing to the other. Now, begin to imagine the difference. The one with the blueprint will complete the job much sooner

(statistics suggest about five times sooner). The carpenter with the blueprint will have a lot less stress because of the detailed plan. That professional will be able to better handle the variety of challenges that come up through a project and will certainly be better able to budget both time and finances than one without a plan. Even if the carpenter, without a blue print, had a clear picture in his mind of the house, it still wouldn't be enough to be efficient and effective. As you probably know, it would be ridiculous to attempt to build a house without a plan. It would be as serious not to have a plan for your home renovation or house/yard project -- regardless of the size of the project

### The Basic Principles of Project Management

Clearly defining the project

Develop the specifications

Plan the project

Set your goals

Manage your time

Documentation

#### 1) Defining your project:

The principle here is to "begin with the end in mind". It is the vision you have for the project. What do you see in your mind? Do you have a good mental picture? Start on a blank piece of note paper or the back of these pages and jot down the details of the picture in your mind. If you don't have a clear mental picture you will have by the time you have gone through the different stages. The main thing here is that you define your purpose and clarify your vision for the job.

Detail the general scope of the project (i.e.; renovation bathroom, renovation basement, landscape back yard, etc.)

- what colors do you see

- what fixtures, materials do you vision (i.e.; taps, sinks, cabinets, flowers, bricks, windows, etc.)

- jot down any other details you can think of and keep the list growing through out the whole project. This is a dynamic list so just let the ideas flow as you develop your plan!

#### 2) Develop the specifications sheet:

Choosing materials is a big part of the renovation. The type of materials will affect the scope of the work. Some materials need more preparation than others. You will also want to consider the availability, maintenance, warranty and user friendliness of materials. Take time in your selection and be fair to the contractors/suppliers quoting on the materials, that they are quoting on exactly the same thing.

#### 3) Planning:

All professionals will advise you on planning and if they don't, walk out as quickly as you can.

"Failing to plan is like planning to fail". This tool gives you a professional and organized plan.

Section 2 has the details of planning along with a sample plan ready for you to create your plan in the last section. A good plan will ensure the highest possibility of success and satisfaction with your project. That is the main purpose of the *Renovation & Home Improvement Project Planner*

#### 4) Goal Setting:

Setting a goal is much more involved than the average person realizes. Goals are knowing exactly what you want, writing them down, then developing a plan to get there. Listing obstacles in your way, identifying information, skills, people that you will need to reach the goal and then

setting a deadline. When you apply this planner to your project you will have set a true goal, something tangible that clearly guides you.

**5) Time management:**

Using section 5, (Month-at-a-glance-chart) will enable you to plan out when you will do the actual work in relation to everything else you have to do in life. Plan out around your work life, vacation time, or your family activities. For example, you may want to be away if you are going to have painters come in and smell up the house for a few days or even a week if you use oil paints. Consider being away especially if you have infants in the home. When you have worked through section 5 you will have a good idea of how much time it will take and then you can set your goals for when to start and when you can expect to finish.

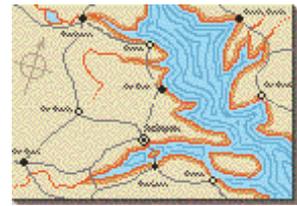
**6) Documentation:**

Having accurate records can be the most valuable aspect of the project. The information gathered will give all companies quoting, the same specifications to quote you accurately. It will help you deal with suppliers, negotiate contracts and assist you with the banker if you want to borrow money for the job. Good documentation will also help you to deal with any warranties or deficiencies you may need to deal with at the end of the job. Finally with the Renovation & Home Improvement Project Planner you will have all the details like paint codes for future matching, product names, all in one handy work book that easily files away.

*"You win not by chance, but by preparation" ~ Roger Maris ~*

## Section 2 Planning the Project

*•A good plan is like a road map: it shows the final destination and usually the best way to get therea*  
~ H. Stanley Judd ~



### **The Importance of Planning:**

The plan is your road map to success. Planning is the principle of principles. It's the best way to avoid the common pitfalls and keep you on track toward your goal. Plans are not fool-proof and there will be the unexpected, but a plan will give you the best return on energy. A good plan keeps you on track, building confidence, reducing stress and anxiety. Excellent time management and a sense of security are benefits of a good plan. Just the fact that you purchased this planner demonstrates you understand the importance of planning.

An article titled "Remodeling - 14 Houses Later" helps illustrate the fact that we need to learn to be better planners Quote "We started working on our first house, a "handy man special", in 1966. We did everything ourselves. With the clearest of hindsight, we can see the mistakes we've made and how they have changed how we work on a house today. Where we used to plunge head first into a task and learn by doing, today we are likely to spend almost as much time planning a project as we do working on it" End Quote.

It can not be emphasized enough to take the time to make a good plan even though you can't plan for the unexpected things a renovation reveals. If you surf the web you will quickly see that everybody advises you to plan and I congratulate you for using this tool to ensure your success.

### **Pre-planning Work Stages:**

#### **Planning:**

The idea is to plan the work and work the plan. Being thorough on the plan will be sure to save time, money and all kinds of stress that can come from home improvements. Part of the planning may be to contact several of the key associations from the resource section. (Sec. 7) Find out well in advance if there are any work shops, seminars or trade shows taking place for you to get new information about products, services and meet professional people. Reading through magazines, articles and web sites can give you valuable ideas in choosing colors, styles and fixtures you may want to use.

#### **Goal Setting:**

Begin with the end in mind. You want to develop a clear picture in your mind of your project and then start gathering information to feed into your plan. You should be able to answer the basic questions, who, what, when, why, where and how. The specifications sheet (sample in Sec. 3 and blank sheet in last section) helps you to list exactly what materials or fixtures that you want to use. Then you will take the specification sheet and get a few quotes from pre-qualified contractors if you intend to hire professionals or the sales persons of the companies whose products you wish to use. In choosing materials and especially contractors use the decision making process to make solid choices. (see 1-2-3 steps in making wise decisions section 4) When setting the goals, you will also determine who gets what permits for the work to be done which is also mentioned in the next choosing a contractor. Licensing and permit guidelines are briefly mentioned in section seven.

**Advice:**

At this stage, you may want to seek counsel on the plan up to this point. If you are not certain that everything is to your liking then visit some experts. Call a radio program or two. Talk to as many professionals as it takes until you are completely satisfied with your choice of materials and contractors that you are going to purchase and or hire. Remember you get advice from professionals. Avoid getting advice from Joe handy man down the street who is probably not up to date on the latest materials and processes.

**Choosing a contractor:** (Section 4)

Once you have decided to hire be sure to fill out the contract with as much information is necessary so that all parties are clear on who is doing what, when and for how much. Most renovation companies will have their own contract with good detail, don't be shy to take the contract away for a day or two to think through it and check that it has everything as you want it. If you hire a contractor it is usually best to let them take over at this point to get necessary permits, plan, materials, etc. If you are doing most or all of the coordinating then you will want to pick up the necessary permits, materials and move to the next stages. Licensing and permit guidelines are briefly mentioned in section seven.

**Time Management:** (Section 5)

What stages are going to be done when? Plan out the project in the stages. Project at a glance shows the basic stages in a chart and below the stages are described in a little more detail. I suggest to post or give a copy of the schedule to each of the trades so they can be best prepared for the job. Make sure to confirm their scheduled appointment a day or two in advance. Sometimes a trade may have some requests for the trade before them, to have things left a certain way. Example: The electrician or plumber may need to do some work before the dry wall work is complete. You may want to paint before the kitchen cabinets go in, etc.

**Delegation:**

Who is going to be doing what at what stage? Don't forget that you are the client and they are there to serve you but you don't want to be a tyrant. Make things as clear as possible and it is often a good idea to get them to repeat back to you what you said to be sure they understood you correctly. (Refer to the part in section 3 "How to get the most from your trades persons")

**Work Stages:****Demolition:**

This is the first stage of the work. Be sure to make room for fixtures that will be removed. If you live in an apartment you may have to haul things to the dump right away. If you live in a house you may want to make room in the back yard or garage. Be sure to allow unobstructed access to the areas needing demolition. Empty cabinets, fridges, shelves if access or removal is necessary. If a contractor is doing the demolition be aware of anything that you want to keep or the contractor may assume that it will go to the dump with the rest which is a typical misunderstanding.

**Preparation:**

This is the stage that all rough in work is done. Alterations of walls, sub floor work, framing, preparation, repairs, stripping, priming for paint, etc. Although some work is hidden by cabinets or dry wall the general rule is that the finished product is only as good as the quality of the foundation. So take extra time to make sure that things are square, level and as smooth as can be expected. Once work is prepared you will be ready for new materials and fixtures to be installed. Inspect and approve

work up to this point. If any work is permitted then the building inspector will have to approve that work.

**Repairs or rebuilding:**

At this stage repair or rebuild anything that you are not changing but want to bring up to building code or the standard of the rest of the project. Inspect and approve work up to this point. If any work is permitted then the building inspector will have to approve that work.

**Paint:**

At this point you can paint all surfaces. Inspect and approve work up to this point.

**Installation:**

Install new fixtures, chrome pieces, appliances, wood work etc. Inspect and approve work up to this point. If any work is permitted then the building inspector will have to approve that work.

**Finishing:**

Apply the finishing touches, caulking, trim, etc...

**Clean up:**

Be aware of the costs in hauling away salvage and the items that can not be dumped like drywall and paint cans. There are additional costs for these items and it must be clarified in the contract who is responsible for the costs.

**Inspection & quality control:**

I suggest that you inspect every stage of the renovation and proceed when you are satisfied with the results. It is much easier to make changes at each stage than it is at the end of the job. Take time to inspect and ask if you are unsure of what it should be. You may want to consult with a local city inspector or building association representative. If any work is permitted then the building inspector will have to approve that work. When the project is complete and you can enjoy your new surrounding. Use each piece of new equipment to ensure that, 1) you know how to work it. 2) It is functioning properly and you are satisfied with the workmanship.

**Billing/payment:**

It is common practice for contractors to ask for 10% of the project up front and to have installments made at various dates through out the job. Make sure this is clearly stated in the contract. The "Builders Lien Act" (see section 7 for details) allows you to "Hold back" a percentage of the job costs up to 55 days or more depending on the province or state. The "Hold back" funds are to be held in a "Hold back" or Trust account for more consumer protection.

**Filing documents:**

You may have some products to register and warranty cards to send away. It is important to register for the purpose that if there is a recall or an upgrade for that product the manufacturers can contact you right away with pertinent information.

Congratulations, you are an efficient and effective project coordinator!

**Apartment Remodel Sample Plan:**

Project Name: Apartment Remodel	
Project Address: 123 Plan Street, Vancouver	
Contact Person: John Doe	
Telephone: Day, 222-1234 Evening, 333-1234	Fax: 222-2345
Project Start Date: May 15, 2000	
Completion Date: June 15, 2000	

<b>Idea</b>
Remodel apartment to turn into a positive cash flow investment. Renovation goal is to completely remodel using the most inexpensive but durable materials for a renting situation . Chose a neutral color scheme to accommodate the widest variety of furniture.

<b>Goal</b>
Move out of apartment April 31, 2000 and begin renovation. We (family) will do the demolition, prepare the walls and paint it. Then hire a plumber, electrician, flooring company and cabinet company to install new materials and fixtures and we will put on the finishing touches and clean up the apartment and rent out for July 1, 2000.

<b>Specification</b>
<ul style="list-style-type: none"> <li>-Visit local trade show with idea and goal and seek out the kinds of materials that meet goal.</li> <li>-Read about latest materials in trade publication and seek out counsel from the local builders association.</li> <li>-Developed specification sheet from information gathered. (see Sec. 2 Sourcing Materials)</li> </ul>

### Specifications:

Project Name: Apartment Remodel	
Project Address: 123 Plan Street, Vancouver	
Contact Person: John Doe	
Telephone: Day, 222-1234 Evening, 333-1234	Fax: 222-2345
Project Start Date: May 15, 2000	
Completion Date: June 15, 2000	

Paint		
Room or Item	Type of Paint	Color & Code
Ceilings:	Ceiling latex	Flat white

Walls:	Super Eggshell	Pink Fizz 987
Bathroom:	Semi gloss	Pink Fizz 704
Kitchen:	Semi gloss	Pink Fizz 704
Door Jambs:	High gloss	Rose Fragrance 990
Doors:	Semi gloss	Rose Fragrance 987
Window Sill and valance:	High gloss	Rose Fragrance 990
Primer:	Latex primer	Rosco, Tough Coat

<b>Kitchen Cabinets</b>		
Cabinet type: EuroRight	Plain white	As per diagram
Door style:	Raised white panel	
Door knob:	Porcelain Knob with pattern	Part #
<b>Counter Top</b>		
Make:	Color:	Type:
Wilson Art	Caldera Rose	Back splash with D wrap
<b>Miscellaneous Cabinets</b>		
Bathroom Vanity:	Raised white panel	36"x20", 1 door, 2 drawer
Bathroom Medicine Cabinet:	White wood trim/mirror	30"x30"x4 1/2"

<b>Electrical Fixtures</b>		
Kitchen:	Noma 3 light mini-swirl	BG-43 White
Bathroom:	4 Light strip	Chrome
Dining room:	Noma Chandelier	SH-1463 White
Front Entry:	Noma 12 <sub>1</sub> ± swirl	CF-270 White
Hall way:	Noma 12 <sub>1</sub> ± swirl	CF-270 White
Above Stove Hood Fan:	Nutone	Model #RL6200F
Miscellaneous:	Decor plugs & switches	

Insert - Spec Sheet Chart

<b>Choosing Contractor</b>
<ul style="list-style-type: none"> <li>-Decide what work I would do and what I would hire out.</li> <li>-Call and discuss idea, goal and spec sheet with several contractors for quotations.</li> <li>-Interview contractors a second time and then apply decision making process in making final choice. (Section 3)</li> </ul> <p>ABC Electrical to do all electrical related work as per/spec. and contract.  XYZ Improvement Center will install flooring and kitchen cabinets as per/spec. and contract.  PPP Plumbing to do plumbing as per/spec. and contract.</p>

Insert - Pro/Con Chart

<b>Time Management</b>
------------------------

- Decide who is going to do what when.
- Plot out activities on Productivity Planner
- Make copies of schedule so that family and contractors are all aware of when and what will be done.

April 1, 2000, move out and begin project	
<b>Demolition:</b>	
(Remember to turn off breakers before removing electrical units)	
<ul style="list-style-type: none"> <li>-remove &amp; dispose, carpeting and base boards</li> <li>-remove &amp; dispose cabinets and countertops</li> <li>-remove and wash drapery &amp; remove drape tracks</li> <li>-remove all doors (except apartment front door) and put all hardware in marked storage box</li> <li>-strip and remove any nails, hooks, screws in walls</li> <li>-remove all electrical switch and receptacle covers and dispose</li> </ul>	
(Electrician will remove and install new switches and plugs)	

<b>Preparation:</b>	
Be professional & thorough, things only look as good as the foundation is prepared.	
<ul style="list-style-type: none"> <li>-lightly brush down ceiling to remove loose stipple, webs, etc..</li> <li>-wash all grease build up, nicotine and dirt off all walls with T.S.P. Solution and rinse</li> <li>-scrap all caulking from around bath tub and sink</li> <li>-fill and repair all holes</li> <li>-sand all surfaces to be painted smooth (walls, doors, trims, etc...)</li> <li>-clean up work site, sweep and shop vac up all debris, dirt and dust</li> </ul>	

<b>Repairs:</b>	
<ul style="list-style-type: none"> <li>-rebuild toilet with new ball cock assembly, flush valve, handle and toilet seat</li> <li>-repair broken handle on bedroom window</li> </ul>	


<b>Painting:</b>
<p><b>Ceiling</b> -paint ceiling with 2 coats specified paint</p>
<p><b>Walls</b> -paint walls with 2 coat specified wall paint</p>
<p><b>Kitchen &amp; Bathroom</b> -paint kitchen and bathroom with 2 coats as per/spec</p>
<p><b>Window Sill and Casing</b> -prime sill, casing and valance with one coat of oil primer -paint sill, casing and valance with 2 coats as per/spec</p>
<p><b>Door trim/jamb</b> -prime door trim/jamb oil primer -paint door trim/jamb with 2 coats as per/spec</p>
<p><b>Miscellaneous Painting</b> -spray paint beaker panel cover &amp; base board heaters, prime with a spray primer then give 2 coats of a semi-gloss white spray paint.</p>

<b>Installations</b>
<p>June 13th &amp; 14th, 2000 XYZ Improvement Center will install cabinets as per/spec. and contract</p>
<p>June 15th, 2000 ABC Electrical will do all electrical as per/spec. and contract</p>
<p>June 17, 2000 (3pm-5pm) PPP Plumbing will do all plumbing as per/spec. and contract</p>
<p>June 19th install linoleum, June 20th completing carpet and base boards XYZ Improvement Center will do final installations of all flooring as per/spec</p>

<b>Quality Control</b>
Inspect all work and operate all new equipment to insure working properly

<b>Finishing</b>
<ul style="list-style-type: none"> <li>-clean up fridge and stove and place back level</li> <li>-caulk around bath tub, toilet and sink</li> <li>-install white plastic shelf cap on shelves</li> <li>-install new brass towel rack and soap dish in bath room</li> <li>-install door handles and door stops</li> <li>-put back drape tracks and install washed drapes</li> </ul>

<b>Clean up</b>
<ul style="list-style-type: none"> <li>-haul away all remaining garbage</li> <li>-wipe down all shelves, cabinets, etc.</li> <li>-clean all windows and mirrors</li> <li>-vacuum carpet and wash and wax floors</li> </ul>

<b>Documentation</b>
<ul style="list-style-type: none"> <li>-mail in registration for any new appliances</li> <li>-3 hole punch any warranty or parts brochures and place in planner</li> <li>❖ -make sure all receipts are stored in receipt pouch and all other related material are placed in appropriate section of planner for future consideration</li> </ul>

**Section 2 Check list:**

Decide which aspects of the project you will do yourself. (Be careful not to take on too much or jobs that require expertise. Example, drywall mudding is an art and if it is not done properly then you will be looking at bad walls for ever. They will be noticeable in different lights)

Are you clear when the job will be done and who will be doing what.

Have you given each trade enough time in case there is a problem or two.

Do you have a good plan.

Enjoy the project and think of all the experience and benefits you will enjoy.

## Section 3 Sourcing Materials

*Thoroughness characterizes all successful men. Genius is the art of taking infinite pains. All great achievement has been characterized by extreme care, infinite painstaking, even to the minutest detail.*  
~ Elbert Hubbard ~



### How to find the products you want to use:

Choosing the right material for the job is an important part of your project. This is where your preparation and this Renovation & Home Improvement Project Planner will come in handy. As a great general once said, "Making decisions is as easy when you have all the facts. Seeking advice is a wise thing but it can also be a little frustrating. When speaking with trades and salespersons look for someone that listens well. Someone who really wants to understand your project to help you find the right products that meet your needs. Ask them questions about the products and take good notes. Jot down thoughts and ideas on the back side of these pages.

There are many factors to consider when sourcing materials:

The latest technology in products and materials available

The availability of environmentally friendly materials

Manufacturers' warranties

Parts and service availability

The right material for the job - adequate, not overkill

There are several ways you can gather information, ideas, technical tips and recommendations for the materials that you may want to use:

Visit local retailers and their showrooms. The display at your local home improvement store is a great place to start. Pick up brochures and literature on products.

Visit trade shows, there are usually two or three per year in any major city. If you can afford to you may enjoy some travel. You can find a home show going on every month somewhere in North America. (See Section 7, Resources for organizations that can give you details)

Call local Home Improvement or Gardening radio programs. Ask their experts questions about your plans. Most national or international talk format programs have toll free numbers. Check your local talk radio station for programming details.

Watch home improvement TV shows for tips and ideas. Just remember to check your local building codes before implementing any of the ideas broadcast from outside your Province or State.

Every province or state has a local *Home Builders Association*. Call them for information, tips, advice and a list of potential contractors and/or trades-people for your project. (See section 8, Resources)

National organizations like CMHC - Canada Mortgage and Housing Corporation and NAHB - the National Association of Home Builders (US) and CHBA Canadian Home Builders Association have excellent ideas and lists of upcoming seminars and trade shows on their websites. (See Section 8, Resources for a list with some really great website addresses)

Magazines are an excellent resource. There are lots of home-related publications available at your local home improvement center or newsstand. You will find them full of useful tips and ideas on home improvements. They contain pictures and just might feature exactly what you're looking for in the way of finishing touches. Tear out (or photocopy) the images and articles that relate to your

project. Add them to your planner for easy reference (you could tape or paste the pictures or diagrams on the back side of pages). Often these publications give shopping information too. If you like it, you'll want to know where to buy it

**Sample Specifications Sheet:**

Once you have a clear picture of what you want to do, it's time to develop a specifications sheet to enable you to get the necessary quotes from the various suppliers of products and services you will need to complete your project. Remember that you generally want to get 3 quotes for each product or service you intend to use. Make sure that each contributor is given the same details so that they are competing on the same terms and that the resultant quotes can be balanced against each other. Apples to apples!

Below is a sample of a specification sheet I use for a large apartment remodel. This is here to give you some ideas on materials. In section 9 there will be some blank tables for you to develop your own specification sheet for you to send out for quotes on the materials you are considering using.

Project Name: Apartment Remodel	
Project Address: 123 Plan Street, Vancouver	
Contact Person: John Doe	
Telephone: Day, 222-1234 Evening, 333-1234	Fax: 222-2345
Project Start Date: May 15, 2000	
Completion Date: June 15, 2000	

<b>Paint</b>		
Room or Item	Type of Paint	Color & Code
Ceilings:	Ceiling latex	Flat white
Walls:	Super Eggshell	Pink Fizz 987
Bathroom:	Semi gloss	Pink Fizz 704
Kitchen:	Semi gloss	Pink Fizz 704
Door Jambs:	High gloss	Rose Fragrance 990
Doors:	Semi gloss	Rose Fragrance 987
Window Sill and valance:	High gloss	Rose Fragrance 990
Primer:	Latex primer	Rosco, Tough Coat

<b>Kitchen Cabinets</b>		
Cabinet type: EuroRight	Plain white	As per diagram
Door style:	Raised white panel	
Door knob:	Porcelain Knob with pattern	Part #
<b>Counter Top</b>		
Make:	Color:	Type:
Wilson Art	Caldera Rose	Back splash with D wrap
<b>Miscellaneous Cabinets</b>		
Bathroom Vanity:	Raised white panel	36"x20", 1 door, 2 drawer
Bathroom Medicine Cabinet:	White wood trim/mirror	30"x30"x4 1/2"

--	--	--

<b>Electrical Fixtures</b>		
Kitchen:	Noma 3 light mini-swirl	BG-43 White
Bathroom:	4 Light strip	Chrome
Dining room:	Noma Chandelier	SH-1463 White
Front Entry:	Noma 12 <sub>1</sub> ± swirl	CF-270 White
Hall way:	Noma 12 <sub>1</sub> ± swirl	CF-270 White
Above Stove Hood Fan:	Nutone	Model #RL6200F
Miscellaneous:	Decor plugs & switches	

<b>Plumbing Fixtures</b>		
Kitchen Faucet:	Moen, chrome single lever	with hose spray
Kitchen Sink:	Stainless steel	1 1/2 bowl
Bathroom Faucet:	Moen, chrome single lever	with mechanical pull
Bathroom Sink:	Crane "Sonnet"	Oval "China" basin
Toilet:	Crane, Cranada	13 L, one piece
Toilet Seat:	Molded wood with raised swirl	
Shower valve:	Moen, chrome Posi-Temp	Single lever, pressure balance

<b>Flooring</b>		
<b>Room or Area</b>	<b>Type</b>	<b>Color/Spec</b>
Kitchen Flooring:	12x12 floor tile	Texas Grigio
Bathroom Flooring:	Armstrong Prevail	#64300
Front Entrance:	12x12 floor tile	Texas Grigio
Living Room:	100% BCF Nylon carpet	570 Silver
Bedroom:	100% BCF Nylon carpet	570 Silver
Carpet Under Lay:	7/16 x 4 lb.	
Base Board: Johnsonite	2.5 <sub>1</sub> ± Cove Bas	Color: #38 Putor

Once you have chosen your materials you can save some time by faxing your spec. sheet to the quoting parties and have them fax back the prices and product availability. Some of the suppliers will have to come to your project to measure or have a closer look at the job to give an accurate quote.

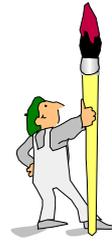
### Section 3 Check list:

If married have both spouses agreed upon the materials/style/colors. (Especially colors).  
 Have you got advice from professionals and others.  
 Did you check out several of the points listed at the start of this section.

Time savers: Fax specification sheet around for quotes.  
Consider sales people who are really interested in your wants and needs.  
Make sure you are having fun with the process.

## Section 4 Choosing a Contractor

*•Look for your choices, pick the best one, then go with it.  
~ Pat Riley ~*



This section will discuss some tips on how to choose a reliable contractor. It will guide you on how to make a wise decision and leave you with some tips as to how to get the most from your contractors. We will also supply you with a contract form for you to detail the work order and have the contractor sign if you choose to use one.

### **What work to do and what not to do:**

You may not want to hire a general contractor or sub contractor if you feel confident that you can do most of the repairs or renovation yourself.

Products have become user friendly with detailed descriptions of how to use it.

You can probably find a "how to" seminar, book or work shop on every aspect of home renovation if you plan things in advance. (This planner is ideal for that)

You can find free advice and support and technical advice through manufacturer's web sites and most of the major home improvement centers. (Check the resource guide in section 10 of this planner)

With the "Project Planner" you can be sure of a successful job if you take the time necessary for planning and ask when you are not sure. There is a lot of joy in doing a project yourself so I encourage you to seriously consider going for it.

It can save you some money. I stress "can save" because if you screw up once or twice you may have to hire a professional to fix it and then it will have cost you more. You will have gained an experience though!

*It was once said when a man with money meets up with a man with experience, the man with the experience walks away with the money and the man with the money walks away with the experience!*

There are many reasons for you to choose hiring a professional to do a part or even all of the project.

You may want to have a professional job done right the first time. You will need to be diligent in applying strategies for choosing a good contractor.

You may not have the time to do it yourself.

You may need to get a professional. Example: if it is highly technical like wiring to your main electrical panel, altering bearing walls or the hooking up of natural gas lines that require a certified professional.

Dangerous jobs like roofing or high exterior repairs are probably best left to the equipped professional.

If you decide to have a contractor do some or all of your project here are some things to consider.

### **Contractor:**

The general contractor coordinates all work that you have instructed him to do. After you have described clearly what you want done you should turn the job over to him/her. He will be responsible for proper permits, proper liability insurance for the public and his employees. He should supervise the job through to the end and ensure you are satisfied with the work before he collects his full payment.

### **Sub Contractor:**

The sub-trade is a tradesperson such as the plumber or the carpenter. The general contractor sometimes hires a sub-trade which is called a subcontractor at this point. If you choose to hire a plumber and give him a specific task then you are acting as the general contractor and responsible for the above. The tradesperson is only responsible for himself and any helper or employee and his work. You may need to ensure that you have the proper permits and liability for the task at hand. Permits are not that complicated when you are clear on what you are doing and show up at city hall with this planner. They will actually be quite impressed with your organization and preparedness and be happy to permit your project.

(See Section 7 Resources for Permits and Licensing)

### **Choosing a contractor:**

Ask friends and neighbors if they have had good service from a contractor.

Your local home improvement center may be able to do the work or recommend an excellent contractor.

Your local home builders' association has a list of members you can draw from. (See Sec. 7 Resources for association addresses)

Seek out contractors that have experience and references that you can check out.

Call the Better Business Bureau to double check the company's status.

Choose wisely, apply the rule of 3 below to your contractor hiring decision.

\*\*\*As a word of caution be leery of contractors that want you to pay them cash. They often work under the table to avoid G.S.T. You are taking a greater risk if you have any problems. It is important that contractors run an ethical business with the required license and liability insurance. A worker could be injured on the job and you may be held liable. Be sure to check that they have a proper license, insurance and permits for the work to be done.

### **Principle: Rule of Three**

- 1) Three quotes from three contractors.
- 2) Get three references. (and check them out)
- 3) Apply three steps to wise decisions.

1) When you meet the contractor to get quotes you will want to be fair and straight with them. You will want to be comparing apples with apples. In other words you will want to tell each contractor your plan and give them a copy of your specification sheet that you prepared in section 3. This way you will be getting comparisons for the exact same thing. It is good to be up front right away and tell them you are getting three quotes and you would like to know why you would want to deal with this company.

2) Get them to give you their pitch on their quality of work and their reputable service. There are dozens of companies to choose from and most have mission statements of how they can serve you. Then ask them for three references and call each one of them.

Here is how a typical telephone conversation may go and some questions to ask.:

Hello, my name is (Your name). I have been given you as a reference from (The company who gave you the reference) I am in the process of a (Your project) and I would like to ask you a couple of questions. Do you have a moment?

- A) How did your experience work out with (The company)?
    - were they reliable?
    - did they meet all your expectations?
  - B) Would you recommend them to me or your friends?
  - C) Do you have anything that you would like to add regarding this company?
- Thank you for your time, have a great day!

(You can note the positive or negative points directly on to the decision making chart below)

- 3) The basic steps to good decision making are,**
- A) Gathering information. Gathering information regarding the decision you want to make and weighing the pros and cons. (Quotes, references, tips, suggestions).
  - B) Seek counsel of experts. Before making the decision run your ideas by three neutral experts. (People who do not have a vested interest) Talk to your local building association. Phone in to a local radio program that deals with projects. Talk to some experts from a local building supply store.
  - C) Apply all the information to the following Pros & Cons chart.

There are a few blank rows for you to add other qualities that may be important to you. The main idea of the chart is that you list as many positives and negatives you can regarding the information you have gathered. You will probably see from this alone the wisest decision to make but if you are not 100% clear and confident I suggest that you take this information to some neutral experts (One of the associations listed in Section 8) to help you on making this decision.

Pros & cons chart:

	Pros			Cons		
	Company A	Company B	Company C	Company A	Company B	Company C
Professionalism						
Attitude						
Friendliness						
Willingness to give info						
Availability						
Location						
Cost						
Reference rating	Check 3 references			Check 3 references		
fair						
good						
excellent						
Expertise						
Knowledge of my job						
Ability to communicate						
Warranty						
Time to do work						
Gut feeling						
Registered company						
Experience						
<b>Over all Rating</b>						
<b>Addition Notes:</b>						

## Contracts & Responsibilities:

Statistics tell us that the most disputes arise because there is no contract. Most renovation companies have their own contracts with excellent detail but you may find the odd contractor who does excellent work but doesn't have a formal contract. For this purpose we have provided you a generic contract form at the back of this section. This form will work as a legal contract once signed. You need to be clear on who is responsible for what. Be clear on the details of the contract, listing everything, using a separate piece of paper if necessary. It is also generally expected that you will give them the room, time and any payments up front to assist them to do the job efficiently and effectively. (See getting the most from your trades next page)

### You decide:

What exactly is to be done, where and when.

Coordination of the trades and project unless decided renovator will handle. (Regardless who does it make sure you use the same calendar, Productivity Planner in Section Project Plan)

Contracts are clear and signed.

Who is going to be responsible for permits.

Authorized Extras forms are used for any changes to original contract. (Don't accept verbal agreements on changes, use the extra forms or a new contract with added change)

Inspect the work for quality control. The local government inspector inspects the work, done by permit.

To inform the contractor of any problems or deficiencies with the materials or workmanship.

Payment of moneys. (See Builders Lien Act below for ;°Hold Back;± law

### **The contractor is generally responsible for:**

His liability and insurance.

Pay of his workers.

Supervision of his work and workers.

Warranty on parts and labor.

(Be sure that everything is clear and on the contract, signed & dated)

If you have any problems with the contract or work, your concerns can be brought to your local Home Builder Association, Better Business Bureau, Ministry of Housing or Government Consumer Affairs/Services department. They can advise you or at least point you to the right party. If court action is necessary then small claims court is a simple process for any claims under \$10,000.00.

There are many laws passed to protect you from incompetent and dishonest contractors. If need be you can familiarize yourself with them from one of the above bodies but it is my recommendation that you take the time and apply the material thoroughly in this section to avoid any of the common pitfalls and problems. Do not just believe what someone says, make sure you check them out by asking for at least 3 references and call or visit those references.

### **Contractor Payments:**

In most cases you will not need to pay anything up front but if you are installing special equipment like appliances, hot tub or custom wood work, etc. then you may be expected to pay a good portion to show your commitment. Avoid paying cash. Contractors that ask for cash are probably trying to avoid taxes or something which demonstrates dishonesty and should be a major red flag for you. Be sure to make payment with a cheque and to the correct person of the company and always get a receipt at the payment moment. Make sure payments are clearly spelt out in the contract. See section 6, Financing for more details on financing and the tax advantages regarding your home improvement project.

This is a portion of the actual Builders Lien Act in BC. (See Section 7, Resources for more detail) It states that 4 (1) The person primarily liable on each contract, and the person primarily liable on each subcontract, under which a lien may arise under this Act must retain a holdback equal to 10% of the greater of :

- (a) the value of the work or material as they are actually provided under the contract or subcontract, and
- (b) the amount of any payment made on account of the contract or subcontract price.

\*\*\*This hold back is some added consumer protection and you should check with your province or state for amount and the time allowed to hold back. Do not make final payment or sign a completion document until you are completely satisfied and all the work is complete and all equipment is working properly.

### **How to bring the best out of the trades people:**

The principle here is straightforward but not always that easy to apply. The principle is the Golden Rule, ;°do unto others as you would have them do unto you;±. It will do you no good be getting on their case or be watching over them to see how everything is going. You have plenty of

time for quality control which we talk about in more detail in the planning section. For now let's try to remember the golden rule so that every one is happy with each other.

Be hospitable, ask them what you can do so that their job will be easier. They may ask you to have an area cleaned out or that cabinet emptied or your car parked somewhere else so they can have direct access to your home and don't have to worry about banging into anything. Most tradespersons are contracting and want to get things done and move on to the next job, so do your best to facilitate that. If it is a hot summer day, ask them if they would like some cold water or ice tea or something. If it is cold out offer them some coffee or warm chicken broth. I strongly suggest that you set up a coffee room for them to have a comfortable break and lunch. This would be the ideal place to have a pin board to place a copy of the schedule (Productivity Planner) and any other notes or communications to pass back and forth. A little hospitality can go a long way.

Do not watch over them like a hawk and criticize every little thing. Often things don't look that great until the final touches have been installed. If you have a problem or you can clearly see that something isn't going the way you wanted then bring it up to the foreman or the individual in a non condescending way. Maybe say something like "Excuse me, I was thinking things were going to be like this or that? Is that what you are doing?" That will usually bring them on track or at least get it caught so you can clarify how you wanted things

Communicating ideas can be quite difficult at times so be patient and try to get as much of it in writing as necessary. That's what this planner is for, it helps you get your thoughts and ideas out and on paper to ensure the clearest and straightest road to success

Being pleasant and helpful will not only bring the best out in the trades persons but will make you look like #1 in the trades person's eyes. They are there to provide you professional service and that is what you should expect. Remember the golden rule and be sure to enjoy your project.

## **Section 4 Check list:**

Have I checked out the references.

Did I call the Better Business Bureau to check out potential contractors.

Is contractor properly licensed and insured.

Have I locked up and put away all rare, precious and extremely valuable items.

Is the contract perfectly clear, itemized, dated and signed along with payment terms & hold back.

Do contracted parties have copy of contract, schedule, etc.

Is there a break room set up for the workers.

Enjoy the process for you are gaining valuable experiences and probably about to make some new professional friends.

## **Forms for hiring a contractor and changing work orders:**

The next 6 pages include two of each forms. Often several changes take place through out a renovation so make photo copies of the forms before you fill them out so you always have one available for changes. Then after one is filled out you may make a photo copy or just duplicate it and get both signatures and give a copy to the other party.

As it has been emphasized over and over the most important thing is to get as many details of the work to be done in print with both parties signatures.

## Independent Contractor Agreement

**This contract is made on this \_\_\_\_\_ day of this year \_\_\_\_\_ .**  
**Between:**            Please Print Clear

(The Owner)	(The Contractor)
<b>Name:</b> _____	<b>Company name:</b> _____
<b>Address:</b> _____ _____	<b>Contractor name:</b> _____
_____	<b>Address:</b> _____
<b>Telephone:</b> _____ <b>Fax:</b> _____	
_____	<b>Telephone:</b> _____ <b>Fax:</b> _____
<b>Project address:</b> _____	

**This agreement is as follows:**

1. The contractor shall provide the following services as an independent contractor according to the laws of \_\_\_\_\_ the state or province of work being performed.

- 
- 
- 
- 
- 

**- Permits to be obtained by:**

- 
- 
- 
- 

\_\_\_\_\_ (The  
"Work")

2. The contractor shall commence the work above on \_\_\_\_\_ (date) and complete the work \_\_\_\_\_ above on \_\_\_\_\_ (date) for the total price (Including all taxes) of \_\_\_\_\_ dollars according to the terms of payment. (terms)

3. The Contractor shall carry out all work specified above or on attached plans according to building code.

4. The Contractor shall maintain full public liability and property insurance covering the above work.

5. The Contractor shall maintain workers' compensation on all workers under his responsibility as required \_\_\_\_\_ by the state or province of the above address.

6. The Contractor shall warrant all work and materials he/she supplied for one full year from completion \_\_\_\_\_ date and agrees to repair and defects or deficiencies immediately upon receiving written notice.

5. The agreement is governed by the laws of the state or province of the project address.

**Agreed upon and signed, on this date: Day \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_ in the presence of:**

**Owner:** (Print) \_\_\_\_\_ **Contractor:** (Print)

\_\_\_\_\_

**Owner:** (Sign) \_\_\_\_\_ **Contractor:** (Sign)

\_\_\_\_\_

### Authorized Extras

Project: \_\_\_\_\_.

Project address: \_\_\_\_\_.

\_\_\_\_\_

Contract date: \_\_\_\_\_.

Hirer: \_\_\_\_\_.

Contractor: \_\_\_\_\_.

1. The Hirer authorizes and the Contractor agrees to do the following extra work in addition to the work set out in the original contract dated: Day \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_.

\_\_\_\_\_.

- 
- 
- 
- 
- 
- 
- 
- 

(Extras)

2. The agreed total price for the above extra work is \_\_\_\_\_ dollars.

(This amount is the full amount including taxes)

Signed on this day \_\_\_\_\_, year \_\_\_\_\_.

Hirer's signature: \_\_\_\_\_.

Contractors signature: \_\_\_\_\_.

# Change Work Order

Project: \_\_\_\_\_.

Project address: \_\_\_\_\_.

Contract date: \_\_\_\_\_.

Hirer: \_\_\_\_\_.

Contractor: \_\_\_\_\_.

1. The Hirer authorizes and the Contractor agrees to make the following work changes to the above contract:

-  
-  
-  
-  
-  
-  
-  
-

(Changes)

2. The agreed total price for the above work change is \_\_\_\_\_ dollars.

(This amount is the full amount including taxes)

Signed on this day \_\_\_\_\_, year \_\_\_\_\_.

Hirer's signature: \_\_\_\_\_.

Contractors signature: \_\_\_\_\_.

## Section 5 Time Management

*•We must use time creatively and forever realize that time is hope to do great things*

*~ Martin Luther King Jr. ~*



### **Making the most of your time:**

One of the common complaints is the mismanagement of the time needed to do the job, both underestimating or overestimating especially if you are doing a part of it yourself and you are fairly inexperienced. If you are doing the job yourself make sure you give yourself 3,4 or even 5 times the time it would take a professional to do it. To estimate the time a good way is to get a quote on the job at hand and ask the quoter to break the quote down into time and material. Then ask what he/she feels would be necessary for them to complete the job.

Dry wall repairs are a good example. It sounds easy enough but what may take you 4 or 5 coats of mud may take a pro only 2. Then every time you apply mud you have to wait 12-24 hr. for it to dry before you can sand and prime. All this takes time and causes your project to go on longer than you planned.

The principles of good time management are 1) Self management, doing the things you say your going to do. 2) Prioritizing, setting a priority on the tasks in order of importance. Take the time to plan this out before you spend one dime. 3) Goal setting which includes good planning. It has been estimated that good planning will give you a five hundred percent return on energy. You will benefit five times your investment of planning in what it takes to actually do the job. The goal here is to plan out the entire project on the Productivity Planner pages to follow. Starting with the research you intend to do, trade shows you want to visit, defining the job, developing the spec, on throughout the whole project.

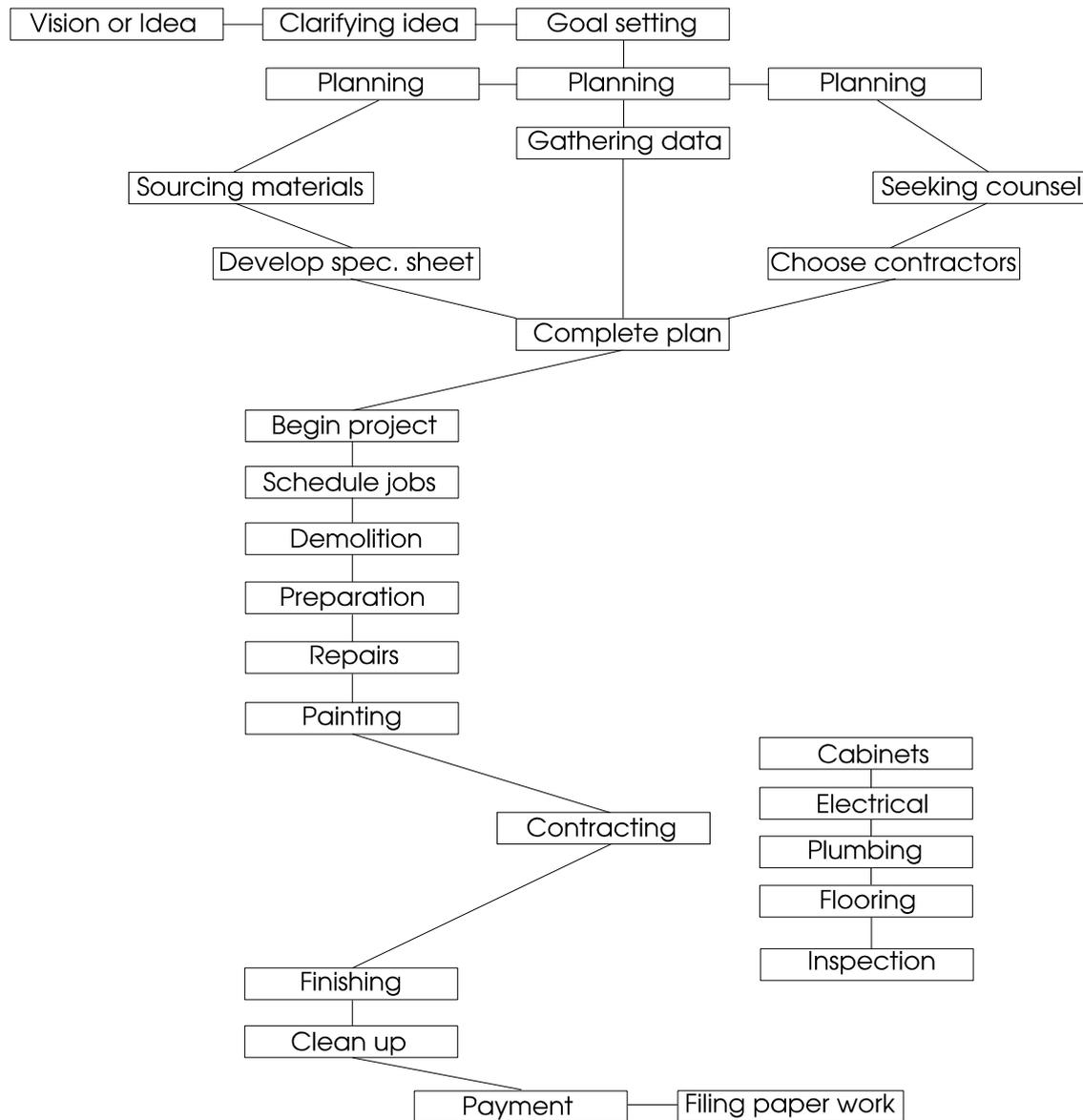
Remember that you want to enjoy this project. You don't want to be rushed or rush others for this is where most of the mistakes take place. Let's take the time necessary to do the job right the first time so that you can enjoy all the wonderful benefits of remodeling and renovation.

### **Scheduling your time:**

Use the blank month calendars in The Plan section at the back to schedule and plan out when you would expect to be doing everything. Try to map out everything from visiting stores and show rooms, to making phone calls and getting quotes to when the actual work is done. I suggest you make several copies for things will probably change several times before you commence work. When things are pretty much set make a final copy and photo copy that as many times so everybody that the renovation will effect can see what is going on. Post it on an activity board or fridge if that would be helpful.

### **Project at a Glance Chart:**

#### **Sample of the apartment remodel.**



**Section 5 Check list:**

Time saver: Go to your local home improvement store and read up on or rent the "How To" video on what task you are about to do to understand the details of the job.  
 Build in 10-20% extra time for each trade.  
 Allow triple the time for you to do a project that you are not familiar with.

## Section 6 Finances & Costs

*Finance is the art of passing currency from hand to hand until it finally disappears.*

*~ Robert W. Sarnoff ~*



How much can you really afford?  
How much is this project going to really cost?  
How will I pay?  
Cash from savings.  
Borrowed funds.  
Line of credit.  
Home equity loan.

### **Financing and your Project:**

One of the most important considerations for your home improvement is the costs associated with the financing of your project. You have several options like those mentioned above. The bottom line is do what you can comfortably afford. Make sure you have plenty of room for unexpected costs, product pricing changes and all the additional expenses you will incur that you would not have normally spent like more dining out or get away ventures while the renovation is going on.

The most common methods of financing are:

- A home improvement loan
- A home-equity line of credit
- A home-equity loan (second mortgage)
- A cash-out refinancing and the traditional method of cash.

Cash may seem to be the best but that's not always the case. You should consult with a financial advisor to see what is in your long-term best interest. If you use cash you could lose out on the interest it could earn in other investments. You need to compare rate of return against interest from borrowing. Again be sure to consult with your banker or financial planner. Also find out what is and what isn't tax deductible because interest payments on a home improvement loan may be tax-deductible, while you can't write off the costs paid for in cash. Talk to your accountant or tax planner here

A home equity line of credit is a form of revolving credit in which your home serves as collateral. This allows you to tap into these funds whenever you need it. The credit line is usually set at a percent value of your home minus the balance of the mortgage.

Consult with your banker or local association (section 7 Resources) for government supported home-improvement plans like the loans the Federal Housing Administration in the USA offers. Canada has similar programs as do most countries.

### **Cost Analysis for the Budget:**

Once you have decided how much you are going to spend you can start working on your budget. It is often hard to get an exact price for the cost of a renovation or project because there are always things that come up or need to be replaced that nobody is aware of. Nobody is to blame. Even the best of planners can not predict everything. This is why there is often a 10% - 20% buffer to cover costs that we did not expect. Plan your budget accordingly.

To estimate the cost of the renovation you will simply gather all the quotations from the suppliers and contractors you intend to use. Add any permits that may need to purchase, consider dumping fees, gasoline and other expenses that you might occur to complete the job. Add all the taxes where applicable and total it up. This will be your estimated cost. You can work the numbers a little more from here and get exact quotations from contractors but they may need to open up a wall or dig a little deeper than a surface visual inspection and measurement. The best thing is to plan to have a buffer for the unexpected. Your banker can probably give you advice here because they run across this all the time. Remember that anything not included in the original contract will cost extra. It's very easy to start tacking on hundreds and even thousands of dollars in change orders that will break both your budget and your timeline.

The following page will give you some ideas on costs you may not expect. When you are gathering information and getting quotations don't be shy to ask what additional costs may be needed for that particular task. Then keep good notes and details. The back side of various pages is designed for your notes and ideas. Even if I am considering doing the renovation myself I sometimes get a professional renovator to quote and ask for a break down of materials and labor to get a better idea of what is involved with that aspect of the renovation.

Photo copy as many of the blank cost analysis sheets as you need to calculate costs. (see blank template in final section The Plan) With all your costs in you can determine how this fits into your over all budget. Then you can decide on how you are going to pay for the project. Stick to your budget especially if you are borrowing for home improvements. If you need to make adjustments you will be able to look at the costs and decide what you should change.

<b>Quotations from suppliers</b>		
Primer	C\$21.99	
Paint	C\$43.50	
Paint supplies	C\$69.00	
Lighting	C\$480.00	
Toilet repairs	C\$48.00	
Cleaning supplies	C\$35.00	
Tools	C\$88.00	
Caulking	C\$15.77	
<b>Sub total</b>	<b>C\$801.26</b>	
<b>Taxes</b>	<b>C\$112.18</b>	
<b>Total</b>	<b>C\$913.44</b>	
<b>Quotations from Contractors</b>		
XYZ Improvement Centre	C\$2,683.00	Cabinets
XYZ Improvement Centre	C\$1,880.00	Flooring
ABC Electrical	C\$480.00	
PPP Plumbing	C\$250.00	
<b>Sub Total</b>	<b>C\$5,293.00</b>	
<b>Taxes</b>	<b>C\$741.02</b>	
<b>Total</b>	<b>C\$6,034.02</b>	
<b>Other Fees, costs</b>		
Permits	C\$0.00	
Dumping	C\$35.00	
<b>Sub Total</b>	<b>C\$35.00</b>	
<b>Taxes</b>	<b>C\$4.90</b>	
<b>Total</b>	<b>C\$39.90</b>	
<b>Expenses</b>		
Gasoline, travel	C\$120.00	
Work shops	C\$80.00	
Planners	C\$40.00	
Books, magazines	C\$20.00	
<b>Sub Total</b>	<b>C\$260.00</b>	
<b>Taxes</b>	<b>C\$36.40</b>	
<b>Total</b>	<b>C\$296.40</b>	
<b>Grand Total</b>	<b>C\$7,283.76</b>	

Don't forget to add 10-20% buffer on the grand total for your total budget. Ten percent for small renovations (under \$5000.00 - \$10,000.00) up to twenty percent for large complex renovations.

**Project Documentation:**

*Practical Planning "Equipping you to be more resourceful"*  
 Visit our website for other effective planning resources @ [www.practicalplanning.com](http://www.practicalplanning.com)

Excellent documentation of the complete project will be to your benefit in the long run. This work book planner is designed that all of your thoughts ideas and plans are located in this one file. If a year or two down the road you want to know what paint you used in the kitchen, you would just simply look at the section (specifications sheet in Project Plan section) you have recorded it in and there it is. You may also want to know dates for warranty purposes or just simply to recall any aspect of the project. The Renovation & Home Improvement Project Planner makes for excellent record keeping.

Be sure to record all the information as you go along.

**Benefits:**

If a problem arises with material or workmanship you will have complete documentation right from details of the contract to who did what and when to all costs and materials used.

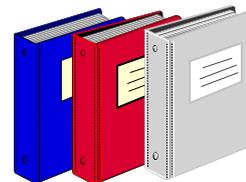
Having everything in one organizer like this will help you recall exactly what was going on through the project if need be.

You will have a list of all materials used for future reference items like paint codes if you wanted to do some touch ups and match paint.

If you do multiple projects you will be able to refer to this for names, experiences, materials, etc.

This work book makes for easy filing and retrieval.

## Section 7, Resources



*"The time to repair the roof is when the sun is shining"*  
~ John F. Kennedy ~

### **Key Contacts and Associations:**

Finding the right advice can sometimes be a challenge. As in Section 3 we helped you identify several ideas on where to find products you may want to use and in Section 4 how to choose a contractor. Here is a list of helpful resources and information. Ancient wisdom says, "Listen to advice and accept instruction, and in the end you will be wise". The best and safest places to get advice are the home builder associations. The associations are there to assist the consumer, define regulations within the building industry. They have links to suppliers, searches for contractors and much much more.

There are two main builder associations in North America one in Canada and one in the USA. Below is their website and mailing address. From there you can be directed to the association in your city.

In Canada;

*Canadian Home Builders Association*

Suite 500, 150 Laurier Avenue West

Ottawa, ON K1P 5J4

(613) 230-3060 Phone, (613) 232-8214 Fax

Web site: <http://www.chba.ca>

In the United States;

*National Association of Home Builders*

1201 15th Street NW, Washington, DC 20005.

(800) 368-5242 or (202) 822-0200

Web site: <http://www.nahb.com/>

The link [Remodel](#) on their website will take you directly to [Remodel.com](http://www.remodel.com) which is the only website exclusively endorsed by the two leading associations of the remodeling industry. National Association of Home Builders Remodelers Council & National Association of the Remodeling Industry.

In Canada you may also want to check out the Canadian Housing and Mortgage Company (CMHC). Canadian Housing Information Centre. 700 Montreal Road, Ottawa, ON, K1A 0P7. Telephone: 1-800-668-2642, Fax: (613) 748-4069, <http://www.cmhc-schl.gc.ca/cmhc.html>

And don't forget the Better Business Bureau. (<http://www.bbb.org>) There are over 130 Better Business Bureaus located throughout the United States. Complaints and inquiries about a specific company should be addressed to the BBB where the company is located. Canada is serviced by 20 Better Business Bureaus. Use the Directory of Canadian BBB's (<http://www.bbb.org/bureaus/canadian.asp>) for a listing of the offices serving each province.

### **Licensing and permits:**

Licensing and permits departments are found at the city hall of the city where the project is located. The processing of a *Building Permit* is generally the same in each city. An application is made; plans are reviewed and approved; fees are paid; the permit is issued; and the project inspected for compliance with the plans.

What requires a building permit in regards to renovations is a little undefined. Basically you require a permit for any structural changes like, bearing walls, major plumbing or electrical, roofing, siding, foundation work. You do not need a permit for cosmetic changes like, paint, flooring, cabinets, replacing existing windows, doors, basic plumbing (faucets, sinks, etc.) or electrical (lights, switches, plugs). What is allowed and what is not is generally not strictly enforced though it is good to know the rules in case of a problem. In B.C. a permit is required to install a dishwasher in a kitchen where there was not one before. Check with your building permit department at the local city hall and talk with the inspector if necessary to get the proper details.

If you have hired a renovator be clear on who is to obtain permits and what for. A good renovator should be completely familiar with what needs to be permitted and what doesn't and the process to obtain one but I suggest that you be an informed consumer and do a bit of home work. At least call the permit department and ask them about what you plan to do.

### **Builders Lien Act in BC:**

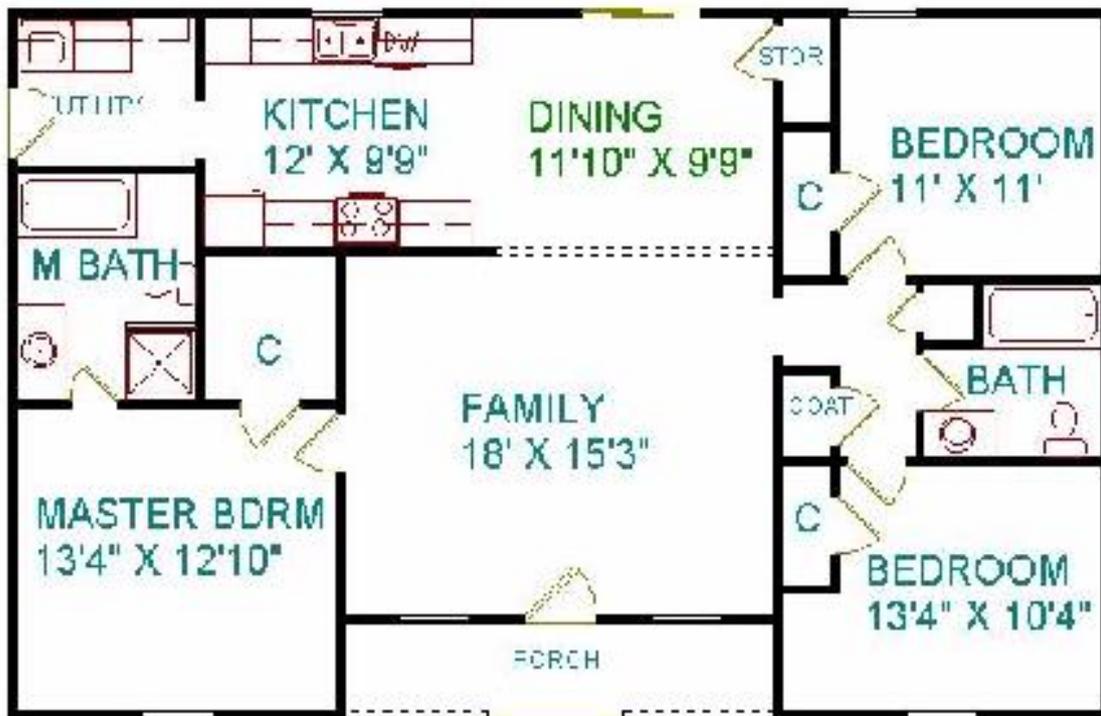
In B.C. Canada the new "Builders Lien Act" was proclaimed January 8 and went into effect on February 1st, 1998. All contractors and suppliers will be affected by the changes! Its purpose is to assist participants in British Columbia's construction industry and their legal advisors to understand the operation of this important piece of legislation. The act can be found at [<http://www.ei.gov.bc.ca/ConstructionSecretariat/buildl>] or just type in "Builders Lien Act" into a search engine and follow the result To order a copy of the Builders Lien Act in British Columbia call: Crown Publications (250) 386-4636. They also have a book available called; "*Questions and Answers on the New Builders Lien Act*"

If you are not in B.C. then check with your local association or government body where you can find the details of the various laws and acts that protect the consumer in relation to your home improvement project.

### **Helpful tools for the job:**

The following pages will include the formulas for making your calculations. The most common calculation is area but you may also need some volume or conversion tables. Don't forget to visit the web site [www.renovationplanner.com](http://www.renovationplanner.com) or [www.practicalplanning.com](http://www.practicalplanning.com) and browse through the "Resource Center" for links to manufacturers and their product lines. Links to some "How To" centers for knowledge on the repair of just about anything in the home. There are links to home magazines as well as other valuable resources and ideas to help make your renovation a success.

### **The Floor Plan:**



Simple floor plans like the aerial view above are all that is needed for you to plan your renovation. Draw on the graph paper provided in this section or use blank sheets to roughly draw the floor plan. You do not need to be exact or to scale, just the basic outline of your walls and their length is enough for calculation of materials needed.

### Kitchens:

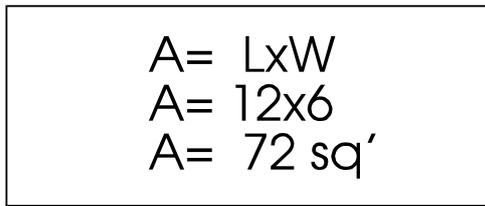
If you are planning your kitchen, bring in the floor plan of that room into any of the major home improvement centers or kitchen cabinet suppliers and they will draw you a 3D perspective and help you decide on what cabinets to use. Make sure to mark down where the fridge, stove, sink and any other major appliances are to help in the lay out.

Most full size fridges 30x60 $\pm$  and stoves are 30 $\pm$  wide but if you have odd size appliances make sure to measure their height and width as well. Then you can look at the hundreds of choices of cabinet styles, door packages, pantry's and other accessories that make kitchens efficient and effectiv

### Floor covering:

Because carpeting is usually calculated in yards you would measure the area of that rooms floor to get the square feet then divide by 9 to get the yards of carpet needed. Example: The above master bedroom is 13.4 $\bar{7}$  x 12.10 $\bar{7}$  which equals approx. 162 square feet divided by 9 equals 18. You would require 18 yards of carpet to cover that room wall to wal

$$L=12'$$

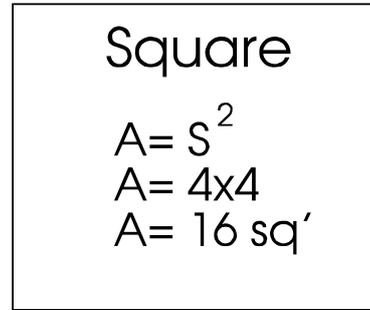


$$W=6'$$

Rectangle

## Calculating Area

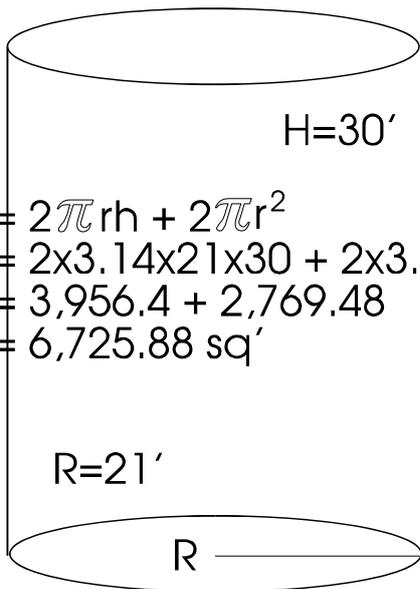
$$S=4'$$



$$S=4'$$

$$S=4'$$

$$S=4'$$



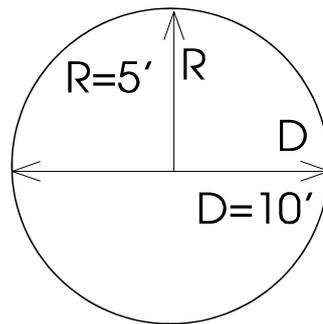
$$A = 2\pi rh + 2\pi r^2$$

$$A = 2 \times 3.14 \times 21 \times 30 + 2 \times 3.14 \times (21)^2$$

$$A = 3,956.4 + 2,769.48$$

$$A = 6,725.88 \text{ sq'}$$

Circle



$$A = \pi r^2$$

$$A = 3.14 \times (5)^2$$

$$A = 3.14 \times 25$$

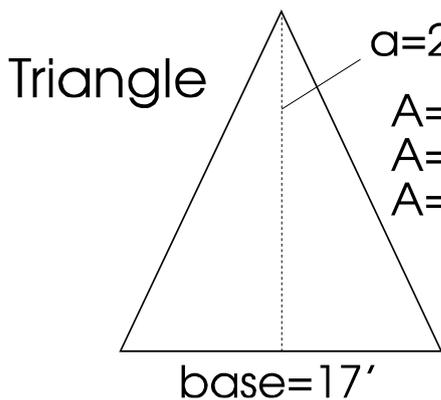
$$A = 78.5 \text{ sq'}$$

or

$$A = 1/4 \pi D^2$$

$$A = 1/4 \times 3.14 \times (10)^2$$

$$A = 78.5 \text{ sq'}$$



$$a=26'$$

Triangle

$$A = 1/2 ab$$

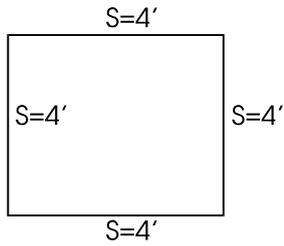
$$A = 1/2 \times 26 \times 17$$

$$A = 221 \text{ sq'}$$

$$\text{base}=17'$$

# Calculating Perimeter

Square

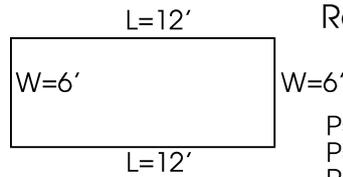


$$P=4S$$

$$P=4 \times 4$$

$$P=16'$$

Rectangle



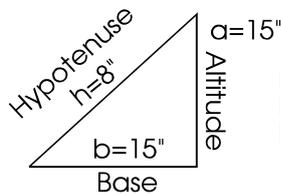
$$P=2L + 2W$$

$$P=(2 \times 12) + (2 \times 6)$$

$$P=24 + 12$$

$$P=36'$$

Right Triangle

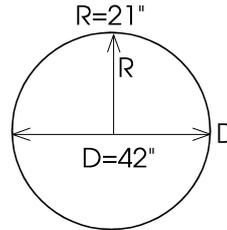


$$P= a+b+h$$

$$P= 15+15+8$$

$$P= 38''$$

Circle



Circumference

$$C=2\pi r$$

$$C=2 \times 3.14 \times 21$$

$$C=131.88''$$

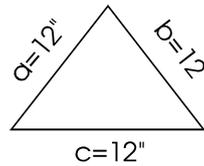
or

$$C=\pi D$$

$$C= 3.14 \times 42''$$

$$C= 131.88''$$

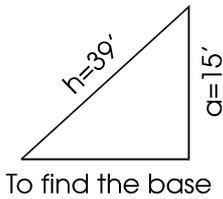
Triangle



$$P= a + b + c$$

$$P= 12 + 12 + 12$$

$$P= 36''$$

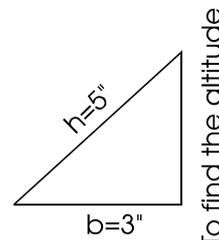


$$b= \sqrt{h^2 - a^2}$$

$$b= \sqrt{1521 - 225}$$

$$b= \sqrt{1296}$$

$$b= 36'$$

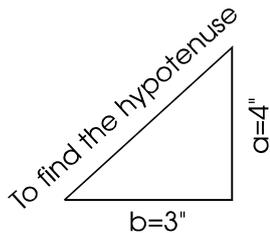


$$a= \sqrt{h^2 - b^2}$$

$$a= \sqrt{25 - 9}$$

$$a= \sqrt{16}$$

$$a= 4''$$



$$h= \sqrt{a^2 + b^2}$$

$$h= \sqrt{16 + 9}$$

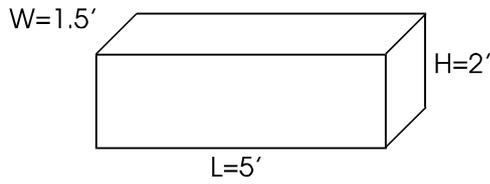
$$h= \sqrt{25}$$

$$h= 5''$$

L=length, H=height, W=width, R=radius, C=circle, D=diameter, S=side, V=volume, A=area  
P= perimeter (For greater accuracy use 3.1416 for  $\pi$ )

# Calculating Volume

Rectangular Solid



$$V=L \times W \times H$$

$$V=5 \times 1.5 \times 2$$

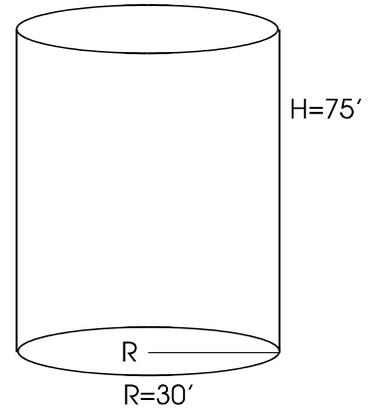
$$V=15 \text{ cu' Cylinder}$$

$$V=\pi r^2 H$$

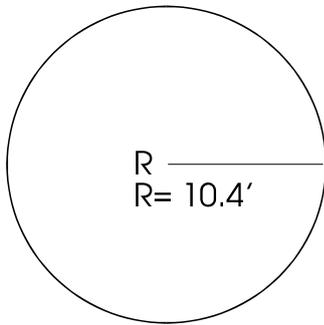
$$V=3.14 \times (30)^2 \times 75$$

$$V=3.14 \times 900 \times 75$$

$$V=211,950 \text{ cu'}$$



Sphere



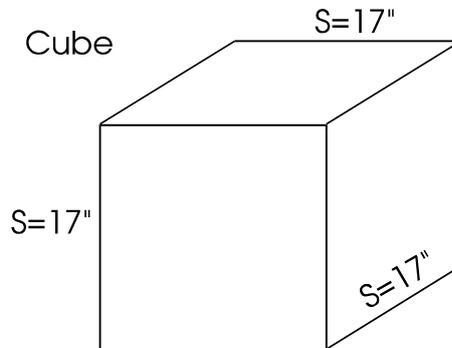
$$V= \frac{4}{3} \pi r^3$$

$$V= \frac{4}{3} \times 3.14 \times 10.4^3$$

$$V= \frac{4}{3} \times 3.14 \times 1124.864$$

$$V= 4709.43 \text{ cu'}$$

Cube



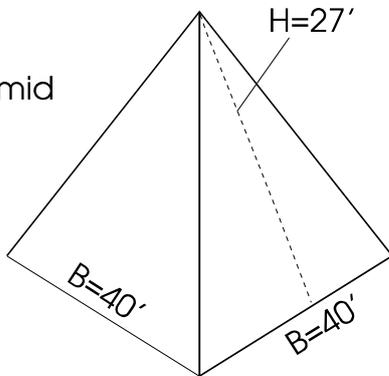
$S=17''$

$$V= S^3$$

$$V= (17 \times 17 \times 17)$$

$$V= 4,913 \text{ cu''}$$

Pyramid



$$V= \frac{1}{3} B^2 H$$

$$V= \frac{1}{3} \times (40 \times 40) \times 27$$

$$V= \frac{1}{3} \times 1600 \times 27$$

$$V= 14,400 \text{ cu'}$$







Quotations from Suppliers							
Item	Item Cost			Tax	Total Cost		
	Pros				Cons		
	Company A	Company B	Company C		Company A	Company B	Company C
Professionalism							
Attitude							
Friendliness							
Willingness to give info							
Availability							
Location							
Cost							
Reference rating	Check 3 references				Check 3 references		
fair							
good							
excellent							
Expertise							
Knowledge of my job							
Ability to communicate							
Warranty							
Time to do work							
Gut feeling							
Registered company							
Experience							
<b>Over all Rating</b>							

Addition Notes:


Expenses			
Item		Tax	Total Cost
	<b>Grand Total</b>		

**Demolition**


**Preparation**


**Repairs:**






Congratulations on a successful project and being  
an excellent planner!

