



FREE HOMEOWNER PLANNING GUIDE

ADU & DADU Planning Guide

How to test the property, define the living arrangement, and coordinate a compact home from feasibility through final approval.

USE THIS FOR

Better questions, clearer scope and more useful early conversations.

KEEP IN MIND

Every property, permit path and existing condition requires project-specific verification.

For homeowners exploring an attached accessory dwelling unit, basement conversion, garage conversion, or detached backyard home for family, rental, caregiving, work, or long-term flexibility.



START WITH PURPOSE

Good planning makes the unknowns visible.

How to use this guide

An ADU or DADU is a complete dwelling in a small footprint. Its success depends on property rules, access, privacy, utilities, structure, drainage, fire and life safety, and everyday livability being considered together. Start by testing the property and intended use before falling in love with a plan. Use this guide to prepare for a useful conversation, not to diagnose the house from a distance. Write down assumptions as assumptions. When new information changes the plan, ask for the scope, cost, and schedule effect in writing before work continues whenever practical.

Six principles to carry through the project

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| 01 Define the result before the products. A strong brief describes what daily life should improve, what must remain, and which compromises are acceptable. | 02 Compare scopes, not just totals. Two proposals can look similar while assigning demolition, permits, protection, selections, restoration, and unknowns very differently. |
| 03 Make decisions in dependency order. Layout and performance choices come before finishes; products that affect rough-in or fabrication must be known before those steps are released. | 04 Treat unknowns honestly. Visible conditions, reasonable expectations, and concealed possibilities are different categories. Investigation can reduce uncertainty, but some conditions remain unknowable until opening. |
| 05 Protect quality beneath the finish. Structure, water control, fire and life safety, utility work, ventilation, and manufacturer requirements should not be traded away for a cosmetic upgrade. | 06 Keep one current record. Consolidated decisions, drawings, selections, questions, approvals, and changes help the homeowner and every trade work from the same information. |

Planning boundary: This document supports early discussion and decision-making. It is not a site assessment, permit decision, engineering review, estimate, contract, or substitute for manufacturer instructions.

THE PROJECT PATH

Decisions should create useful outputs.

01 Use and property goals

Define who may live there, desired independence, privacy, accessibility, parking assumptions, outdoor space, and long-term use.

HOMEOWNER DECISION

Choose the intended occupancy pattern and rank size, privacy, flexibility, and investment priorities.

EXPECTED OUTPUT

A use brief and clear criteria for comparing attached, converted, and detached options.

02 Property and records research

Review lot information, easements, existing structures, utility records, permit history, trees, slope, drainage, and local rules with the proper sources.

HOMEOWNER DECISION

Provide known documents and authorize survey, records, or specialist research when needed.

EXPECTED OUTPUT

A feasibility summary identifying viable concepts, constraints, and unanswered property questions.

03 Site and existing-condition investigation

Study construction access, excavation, foundation approach, utility routes, soil or slope concerns, and connections to the primary home. Conversion projects also require close review of height, moisture, egress, structure, and fire separation.

HOMEOWNER DECISION

Select investigations needed to reduce major uncertainty.

EXPECTED OUTPUT

Measured information, site observations, and recommendations for survey, civil, structural, or utility input.

04 Concept and scope alignment

Test placement, floor plan, daylight, storage, entries, sound separation, exterior form, and relationship to neighbors and the main home.

HOMEOWNER DECISION

Choose a concept and decide where compact design or added area best serves the use.

EXPECTED OUTPUT

A preferred concept with preliminary systems, site work, and scope assumptions.

THE PROJECT PATH

Decisions should create useful outputs.

05 Design, engineering, and permits

Coordinate architecture, structure, energy information, site requirements, MEP systems, and the permit package. Track agency comments without treating review time as guaranteed.

HOMEOWNER DECISION

Approve design milestones and respond to consultant or agency decisions.

EXPECTED OUTPUT

Coordinated permit documents, submitted application, correction log, and issued set when approved.

06 Selections and preconstruction

Finalize windows, exterior materials, cabinets, fixtures, appliances, lighting, flooring, and equipment; connect each choice to procurement and installation.

HOMEOWNER DECISION

Meet selection deadlines and approve scope, allowances, exclusions, and logistics.

EXPECTED OUTPUT

Construction agreement, selection schedule, purchasing plan, site logistics, and baseline schedule.

07 Construction, approvals, and handoff

Complete site work, foundation, structure, weather enclosure, rough systems, insulation, interiors, fixtures, and site restoration with required inspections and documented hold points.

HOMEOWNER DECISION

Review changes, verify intended operation, and complete the final walkthrough.

EXPECTED OUTPUT

A completed dwelling with final approval status, manuals, records, finish references, and maintenance guidance.

Before construction is released

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| ☐ Current drawings and written scope agree | ☐ Permit, inspection, and consultant paths are identified |
| ☐ Approval roles and communication channel are clear | ☐ Long-lead status and decision dates are visible |
| ☐ Critical selections and owner-supplied items are documented | ☐ Site logistics, protection, and change approval are understood |

SCOPE, COST AND TIME

Compare what is included—not just the total.

Property and site

- ☐ Survey, boundaries, easements, trees, slope, drainage, and access
- ☐ Zoning and permit feasibility verified with current authority
- ☐ Excavation, soils, foundation, retaining, staging, and landscape restoration

Building

- ☐ Structure, roof, envelope, windows, doors, insulation, and air sealing
- ☐ Fire separation, egress, alarms, safe access, and address or service requirements
- ☐ Kitchen, bath, laundry, storage, accessibility, daylight, privacy, and acoustics

Utilities and delivery

- ☐ Water, sewer or septic, electrical, gas if any, heating, cooling, and ventilation
- ☐ Metering, capacity, routing, trenching, shutdowns, and tie-ins
- ☐ Consultants, fees, permits, inspections, selections, appliances, and closeout

What commonly moves budget or schedule

Unit type and site

Detached construction, conversions, and additions have different foundation, tie-in, fire-separation, and access demands.

Utility capacity and distance

Available capacity, trench routes, panels, pumps, meters, and connection points can materially affect scope and sequence.

Ground and drainage conditions

Slope, excavation, groundwater, soils, retaining, and stormwater requirements may require specialist design or added work.

Compact customization

Small rooms still contain a full kitchen, bath, mechanical system, storage, and detailed coordination.

Permit and consultant review

Survey, architecture, structural, civil, energy, utility, and agency work can overlap but do not run on guaranteed timelines.

Construction access

Backyard work may require narrow-path material movement, limited equipment, neighbor coordination, or special staging.

Selections and lead times

Windows, equipment, cabinets, doors, utility components, and exterior products may control portions of the schedule.

Primary-home interfaces

Attached work and utility tie-ins can require protection, temporary outages, finish restoration, and code-related upgrades.

BEFORE WORK BEGINS

Prepare the household and the decision path.

Homeowner preparation

- ☐ Choose one or two household decision-makers and agree on how approvals will be given.
- ☐ Create a short priority list: must solve, would like, and can wait. Use it when scope or budget choices compete.
- ☐ Gather surveys, plans, past permits, product records, repair history, and any photos of earlier work.
- ☐ Remove valuables and fragile items; discuss furniture, artwork, window coverings, and stored belongings before mobilization.
- ☐ Plan for children, pets, parking, deliveries, work hours, bathroom access, and any needed temporary kitchen or living setup.
- ☐ Tell the team about alarms, gates, neighbors, HOA rules, home-office hours, allergies, or access restrictions.
- ☐ Keep project decisions in the agreed system rather than splitting them across texts, calls, and side conversations.
- ☐ Expect some disruption. Decide in advance when you need notice for noisy work or utility shutoffs.
- ☐ Discuss privacy, mail, trash, storage, parking, outdoor use, and shared utilities with the future occupant in practical terms.
- ☐ Avoid promising a move-in date or rental income until feasibility, approvals, scope, and schedule are developed.

Questions worth asking

- 01** Who will be the day-to-day contact, and how often will we receive progress updates?
- 02** What is included, excluded, allowed for, owner-supplied, or still awaiting a decision?
- 03** Which drawings, engineering, permits, inspections, or specialist reviews are likely to be required?
- 04** How will concealed conditions be documented, priced, approved, and scheduled before added work begins?
- 05** Which selections have long lead times, and what are the decision deadlines?
- 06** How will occupied areas, pets, children, furnishings, landscaping, and daily access be protected?
- 07** How are schedule changes communicated, and what owner decisions could affect the critical path?
- 08** What quality checks occur before framing, waterproofing, wiring, plumbing, or other concealed work is covered?
- 09** Who coordinates trade partners and confirms that their work is ready for the next trade?
- 10** What permits, manuals, warranties, finish records, and maintenance guidance will be provided at handoff?
- 11** Who verifies current property eligibility and documents the conclusion?
- 12** How will the main home remain secure and functional during utility tie-ins and backyard construction?

PAUSE, VERIFY AND FINISH WELL

Quality includes what happens before and after the visible work.

Red flags and unresolved unknowns

- ☐ A price presented as final before the existing conditions, design, selections, and scope boundaries are understood.
- ☐ A proposal that omits protection, demolition disposal, permits, supervision, finish restoration, or final cleanup.
- ☐ Pressure to start demolition while drawings, key selections, or responsibility for open items remain unclear.
- ☐ Verbal changes with no written description of added scope, price, and schedule effect.
- ☐ No clear plan for dust, noise, temporary utility interruptions, weather exposure, or safe homeowner access.
- ☐ Assurances that hidden areas are fine without investigation, documentation, or an appropriate contingency plan.
- ☐ Products chosen for appearance without checking substrate, exposure, maintenance, installation, or warranty requirements.
- ☐ No defined inspection hold points before important concealed work is covered.
- ☐ A concept sold as universally permit-ready without confirming property-specific eligibility and site work.
- ☐ Utility, drainage, fire-separation, survey, or landscape restoration treated as someone else's problem without named responsibility.

Closeout and handoff

- ☐ Walk every work area in good light and record remaining items in one shared punch list.
- ☐ Confirm that required final inspections and permit signoffs are complete or that any open item is clearly assigned.
- ☐ Operate doors, drawers, windows, fixtures, lights, fans, controls, appliances, and safety devices included in the work.
- ☐ Review cleaning, curing, ventilation, seasonal adjustment, and maintenance instructions before normal use.
- ☐ Collect approved plans, permits, inspection records, manuals, warranties, finish schedules, paint colors, and spare materials.
- ☐ Photograph shutoffs, access panels, concealed blocking, and key rough-in locations when documentation is available.
- ☐ Confirm the final change-order record, owner-supplied item status, and any remaining delivery or service appointment.
- ☐ Check that debris, temporary protection, keys, access codes, and contractor-owned materials have been addressed.
- ☐ Understand who to contact for a question, warranty concern, or urgent issue after completion.
- ☐ Store the closeout package with the home's permanent records for maintenance and future resale.

Professional verification: ADU and DADU rules, permits, utility requirements, and property eligibility vary and can change. Confirm current requirements with the local authority and qualified design, engineering, utility, and construction professionals. Do not rely on this guide as a zoning, code, rental, tax, financing, or legal opinion.

Start with an honest conversation.

If you are weighing a basement unit, garage conversion, addition, or detached backyard home, start with the property and intended use. Ideal Construction & Renovation can help organize the feasibility questions and build a responsible path toward design and construction.