



FREE HOMEOWNER PLANNING GUIDE

Whole-Home Renovation Guide

A room-by-room and system-by-system framework for making one connected home instead of a collection of unrelated projects.

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 planning broad layout changes, several rooms at once, major systems work, or a renovation intended to support a long stay in the home.



START WITH PURPOSE

Good planning makes the unknowns visible.

How to use this guide

Whole-home work creates hundreds of connected decisions. Moving one wall may change structure, flooring, lighting, ducts, cabinetry, and circulation elsewhere. The planning challenge is to preserve the home's good qualities while creating one coordinated scope, finish language, construction sequence, and occupancy 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 Home and life audit

Map daily routines, storage, circulation, light, privacy, accessibility, energy comfort, maintenance concerns, and the parts of the home worth keeping.

HOMEOWNER DECISION

Rank household outcomes and decide whether the project should be comprehensive or phased.

EXPECTED OUTPUT

A whole-home brief, room priorities, preservation list, and long-term use goals.

02 Condition and systems assessment

Review structure, envelope, roof interfaces, windows, electrical, plumbing, HVAC, insulation, drainage, and prior alterations. Determine where targeted investigation is justified.

HOMEOWNER DECISION

Authorize evaluations and decide which aging systems belong in the renovation.

EXPECTED OUTPUT

Existing-condition record, systems strategy, and visible-versus-unknown risk list.

03 Master plan and phasing

Develop a connected layout and compare one-time construction with practical phases. Trace how structural and system changes affect every floor and finish.

HOMEOWNER DECISION

Choose the master direction, temporary-living approach, and any future-ready work.

EXPECTED OUTPUT

Master plan, phasing map, broad scope, and temporary-condition strategy.

04 Detailed design and coordination

Resolve structure, openings, cabinetry, kitchens, baths, lighting, mechanical zones, flooring, trim, doors, hardware, and exterior interfaces.

HOMEOWNER DECISION

Approve layouts, performance choices, finish standards, and room-by-room selections.

EXPECTED OUTPUT

Coordinated drawings, schedules, specifications, and open-decision log.

THE PROJECT PATH

Decisions should create useful outputs.

05 Pricing, permits, and procurement

Price the coordinated scope, separate true options, confirm consultant and permit responsibilities, and identify long-lead packages.

HOMEOWNER DECISION

Align scope to investment without removing required durability or safety work.

EXPECTED OUTPUT

Defined proposal, alternates, permit plan, purchasing schedule, and construction milestones.

06 Move-out or occupied-home setup

Plan storage, moving, temporary kitchen and bath needs, utility interruptions, security, dust control, access, and communication.

HOMEOWNER DECISION

Confirm what stays, what moves, and how the household will live during each phase.

EXPECTED OUTPUT

Mobilization plan, protected zones, logistics map, and readiness checklist.

07 Construction and final integration

Sequence demolition, structure, envelope, systems, insulation, drywall, cabinets, tile, flooring, trim, paint, fixtures, commissioning, and punch work.

HOMEOWNER DECISION

Make consolidated decisions and review room-to-room consistency at milestones.

EXPECTED OUTPUT

A cohesive finished home, tested systems, completed punch list, and organized closeout records.

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.

Homewide conditions

- ☐ Foundation, structure, envelope, roof, windows, doors, and drainage
- ☐ Electrical service, plumbing supply and waste, HVAC, ventilation, insulation, and air sealing
- ☐ Hazardous-material indicators, previous alterations, moisture, pests, and concealed-condition plan

Rooms and finishes

- ☐ Kitchen, bathrooms, laundry, storage, bedrooms, living spaces, and circulation
- ☐ Flooring continuity, trim, doors, hardware, paint, lighting, and built-ins
- ☐ Transitions to retained rooms, exterior work, and future phases

Delivery

- ☐ Move-out or occupied-home logistics, protection, staging, security, and temporary services
- ☐ Design, engineering, permits, inspections, procurement, trade coordination, and cleaning
- ☐ Testing, punch list, manuals, finish records, warranties, and maintenance planning

What commonly moves budget or schedule

Breadth and interdependence

The more rooms and systems touched, the more coordination, protection, and finish continuity the project requires.

Structural reconfiguration

Openings, stairs, bearing walls, roof support, and foundation changes need design, engineering, and careful sequencing.

Systems modernization

Service upgrades, rewiring, repiping, ducts, heating, cooling, ventilation, and controls may extend beyond visible remodel areas.

Occupied versus vacant work

Keeping the home livable can require phases, temporary services, repeated protection, and tighter daily cleanup.

Finish continuity

Matching or replacing continuous flooring, trim, paint, doors, and ceilings can expand restoration limits.

Procurement volume

Cabinetry, windows, doors, fixtures, equipment, tile, and hardware create many linked lead times.

Existing-home surprises

Large demolition exposes more history, including undocumented work, damage, and out-of-level conditions.

Decision volume

Delayed or contradictory household choices can interrupt several trades at once.

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.
- ☐ Create a room inventory showing items to keep, donate, store, protect, or reinstall.
- ☐ Choose a realistic relocation or temporary-living plan before the construction sequence is finalized.

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** How will you coordinate room-by-room design so systems and finishes remain consistent?
- 12** Which future improvements should be roughed in now even if they are not finished in this phase?

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.
- ☐ Each room priced separately with no allowance for shared walls, systems, circulation, or finish transitions.
- ☐ A phasing plan that repeatedly opens completed areas or leaves the home without a workable kitchen, bath, or safe path.

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: Whole-home renovation can affect structure, fire and life safety, electrical, plumbing, mechanical systems, energy performance, and the building envelope. Qualified professionals and the local authority must determine applicable requirements. Existing conditions and concealed work cannot be confirmed from a general guide.

Start with an honest conversation.

A whole-home plan should make the complicated parts visible before demolition. Ideal Construction & Renovation can walk the property, connect your priorities to the home's condition, and help define a coordinated scope for design, pricing, and construction.