

The Plan-First Checklist

One plan. Two or three bids. One written scope everyone prices. Work down this list in order — everything above the bid stage is cheaper to decide on paper than in the field.

Before you call anyone

- ☐ Write down how you will actually use the space — who is out there, when, and doing what.
- ☐ List what has to be finished or usable first if the project gets phased.
- ☐ Set an honest investment range and be willing to say it out loud.
- ☐ Take photos of the space today, including where water sits after a storm.
- ☐ Find your plat or a rough site sketch with dimensions, if you have one.

What a complete plan has to settle

- ☐ Layout and dimensions you have actually decided on.
- ☐ Finished elevations, step counts and retaining.
- ☐ Drainage direction — where water leaves the property.
- ☐ Feature list with sizes, not just names.
- ☐ Material selections, or at minimum a stated allowance level.
- ☐ Electrical, gas, low-voltage, irrigation sleeves and any pool plumbing.
- ☐ Structures, their sizes, footings and attachment.
- ☐ Demolition and haul-off — what is being removed and by whom.
- ☐ Phasing and build sequence if it is not all going in at once.

Before you pay for design

- ☐ Confirm in writing who owns the plan when it is paid for.
- ☐ Confirm how many revision rounds are included.
- ☐ Confirm your rights to build the plan with a different licensed contractor.
- ☐ Confirm what the deliverable actually is — drawings, dimensions, scope document.

When you go out for bids

- ☐ Bid the same complete plan to two or three qualified licensed contractors.
- ☐ Send every bidder the identical written scope document.
- ☐ Ask every bidder the same clarifying questions, in writing.
- ☐ Verify license, insurance and who is actually performing the work.

Reading the bids line by line

- ☐ Is demolition and haul-off carried, or excluded?
- ☐ Is drainage carried, and is the direction stated?
- ☐ Are materials specified by manufacturer, series, size, pattern and color?
- ☐ Are allowances real selections or placeholders?
- ☐ Are permits, engineering or any required review carried, and by whom?
- ☐ What is the payment schedule, and does it match the build sequence?
- ☐ What is the written warranty, and what does it cover?
- ☐ What is excluded? Read that section first.

Before you sign

- ☐ Compare scope first, price second.
- ☐ Ask what happens to price if a specific piece of scope is cut or phased.
- ☐ Make the hard calls on paper, where changes are still free.
- ☐ Choose on scope, standards, schedule, warranty and fit — not the bottom number alone.

This checklist is general planning education, not a design, engineering or code determination. Final scope, structural details, permitting and any required review depend on your site conditions, the approved design, applicable authority requirements and your signed scope. aeoutdoorliving.com