

HOA Improvement Project Checklist

Reusable planning, approval, oversight, and closeout form

PROJECT NAME

PROJECT NO.

DATE OPENED

PROPERTY / LOCATION

PROJECT MANAGER

BOARD LIAISON

REQUESTED BY

TARGET START

TARGET COMPLETION

PRIORITY

1. PROJECT DEFINITION & NEED

- ☐ Document the problem, need, safety concern, or community benefit.
- ☐ Define the proposed improvement and intended outcome.
- ☐ Confirm the improvement is within HOA responsibility and authority.
- ☐ Identify affected common areas, owners, easements, and utilities.
- ☐ Review governing documents, rules, policies, and prior board decisions.
- ☐ Photograph and document existing conditions.
- ☐ Identify accessibility, drainage, environmental, and maintenance impacts.
- ☐ Establish preliminary scope, assumptions, exclusions, and success criteria.

PROJECT SUMMARY / JUSTIFICATION

PRELIMINARY DECISION

- ☐ Proceed to feasibility and budgeting.
- ☐ Revise scope before further review.
- ☐ Place on hold.
- ☐ Decline / no further action.

Due Diligence & Approval

Use this page before authorizing contracts or construction

2. FEASIBILITY, COMPLIANCE & RISK

- ☐ Obtain site measurements, plans, specifications, or professional assessment.
- ☐ Confirm property ownership, boundaries, easements, and access rights.
- ☐ Determine permit, zoning, engineering, architectural, or utility requirements.
- ☐ Review insurance coverage and notify the carrier if appropriate.
- ☐ Evaluate safety hazards, ADA/accessibility considerations, and liability exposure.
- ☐ Identify environmental, tree, stormwater, drainage, and noise requirements.
- ☐ Assess operational impact, future maintenance, warranties, and useful life.
- ☐ Consult association counsel or qualified professionals when warranted.

3. BUDGET & PROCUREMENT

- ☐ Prepare total project budget, including design, permits, contingency, and closeout.
- ☐ Confirm available reserve or operating funds and applicable reserve restrictions.
- ☐ Obtain the number of competitive bids required by policy or governing documents.
- ☐ Use a consistent written scope so bids can be compared fairly.
- ☐ Verify contractor licensing, insurance, references, capacity, and exclusions.
- ☐ Review payment schedule; avoid excessive deposits and tie payments to milestones.
- ☐ Identify change-order authority and maximum contingency allowance.
- ☐ Prepare bid comparison and recommendation for the board record.

4. BOARD / OWNER APPROVAL

- ☐ Confirm whether board approval, owner vote, or membership notice is required.
- ☐ Place the item on a properly noticed meeting agenda.
- ☐ Provide scope, bids, budget source, timeline, and recommendation to decision-makers.
- ☐ Record motions, votes, recusals, funding authorization, and conditions in minutes.
- ☐ Issue written notice to affected owners and residents when required.

APPROVED BUDGET

CONTINGENCY

APPROVAL DATE

MOTION / RESOLUTION

Contracting & Construction

Document responsibilities, communications, and field oversight

5. CONTRACT & PRE-CONSTRUCTION

- ☐ Execute a written contract with final scope, price, schedule, and deliverables.
- ☐ Confirm certificates of insurance and required endorsements before work begins.
- ☐ Collect permits, bonds, licenses, product data, and subcontractor information.
- ☐ Define work hours, staging, parking, access, security, cleanup, and restroom rules.
- ☐ Establish owner/resident notices, emergency contacts, and complaint routing.
- ☐ Document existing site conditions with dated photographs.
- ☐ Hold a pre-construction meeting and identify authorized representatives.
- ☐ Confirm utility locates, shutdowns, traffic control, and protection of property.

6. CONSTRUCTION OVERSIGHT

- ☐ Maintain a project log with dates, weather, visitors, incidents, and decisions.
- ☐ Monitor schedule, workmanship, materials, safety, access, and site cleanliness.
- ☐ Compare progress invoices with completed work and stored materials.
- ☐ Require written, priced, and authorized change orders before changed work proceeds.
- ☐ Document delays, deficiencies, resident concerns, and corrective actions.
- ☐ Track permits, inspections, testing, professional certifications, and approvals.
- ☐ Provide periodic status and budget reports to the board and management.
- ☐ Retain correspondence, meeting notes, photos, invoices, and lien-related documents.

CONSTRUCTION CONTACTS

CONTRACTOR

CONTACT

PHONE / EMAIL

DESIGNER / ENGINEER

PERMIT NO.

EMERGENCY CONTACT

STATUS / ISSUES / DECISIONS

Inspection, Closeout & Follow-Up

Complete before final payment and archive with the association records

7. COMPLETION & ACCEPTANCE

- ☐ Conduct substantial-completion inspection with contractor and project representatives.
- ☐ Prepare, assign, and verify completion of the punch list.
- ☐ Receive final permit approvals, certificates, testing results, and sign-offs.
- ☐ Receive warranties, manuals, as-built drawings, keys, codes, and spare materials.
- ☐ Confirm final cleanup, landscape restoration, and removal of equipment and debris.
- ☐ Verify final invoice, approved change orders, retainage, and total project cost.
- ☐ Collect lien waivers/releases and other contractually required closeout documents.
- ☐ Obtain formal board/management acceptance before final payment.

8. POST-PROJECT FOLLOW-UP

- ☐ Notify residents of completion, reopening, operating changes, or maintenance rules.
- ☐ Update asset inventory, reserve schedule, maintenance calendar, and vendor records.
- ☐ Schedule warranty inspections and seasonal or annual maintenance.
- ☐ Document lessons learned, unresolved issues, and recommended future improvements.
- ☐ Archive the complete project file according to the records-retention policy.

FINAL PROJECT SUMMARY

FINAL CONTRACT AMOUNT

TOTAL CHANGE ORDERS

FINAL PROJECT COST

COMPLETION DATE

FINAL COMMENTS / LESSONS LEARNED

AUTHORIZATION & RECORD

PROJECT MANAGER / MANAGEMENT

DATE

BOARD AUTHORIZED REPRESENTATIVE

DATE