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Contractor Checklist©

NARI of Greater Chicagoland provides this checklist to homeowners for use throughout all stages of most home improvement projects. Following this checklist will help minimize problems throughout the project and help set expectations for both the Homeowner and the Contractor.

BEFORE THE FIRST MEETING WITH YOUR CONTRACTOR	Yes	No
I have a firm budget amount in mind, and am prepared to give that number to a contractor.		
I have a general idea of the project I would like to have completed.		
I have researched ideas (designs, products, etc.) and am prepared to show these ideas to a Contractor.		
The Contractor was responsive to my initial and/or subsequent communications.		
The Contractor has a website which I was able to review.		
I explained my timeline, and the Contractor is available to work within that time frame.		
I am prepared to make myself and any other decision maker available for our initial meeting.		
DURING THE FIRST MEETING WITH YOUR CONTRACTOR	Yes	No
The Contractor/Salesperson was on time, or communicated with me if he/she was late.		
The Contractor's appearance was neat and professional.		
The Contractor's vehicle was presentable.		
The Contractor had a presentation book, photos, or other visual presentation for projects they have completed which are similar to mine.		
The Contractor listened to my ideas and asked questions about my needs.		
The Contractor suggested options, alternatives or ideas that fit into my budget.		
The Contractor is a member of a trade organization (NARI, NAHB, NKBA, etc.)		
The Contractor is a member of any other organizations (BBB, Chamber, etc.)		
The Company has been in business, under their current name, for a sufficient amount of time.		
The Contractor participates in continuing education and/or individuals have Certification(s).		
The Contractor presented me with a list of references for projects they have completed recently that are similar to mine.		
I did not feel pressured into signing a contract immediately.		
I felt comfortable with the individual with whom I met.		
BEFORE SIGNING YOUR CONTRACT	Yes	No
The Contractor presented me with the Illinois "Know Your Consumer Rights" pamphlet and had me sign it if the contract is in excess of \$1,000.		
The contract indicated the Contractors business name, address and phone number.		
The contract identified start and completion dates.		
The contract identified EVERY portion of the project in detail.		
The contract identified materials/products to be used with either a set price or an "allowance".		
The contract identifies a specific payment schedule timeline with specific dates or project benchmarks, amounts and/or percentages.		
The contract spells out all product and workmanship warranties.		
I (and any other decision makers) have thoroughly read and understand all aspects of the contract. I have received timely and clear answers to any questions or concerns I posed to the Contractor regarding the contract.		
The Contractor presented me with copies of their Liability and Workman's Compensation Certificates of Insurance, as well as copies of any of their sub-contractors' insurance COI's, and I have verified with the issuing bodies (agent/insurance company) that the insurance is in good standing.		

The Contractor has presented me with their license number (when required), and I have verified with the issuing body that the license is in good standing. (Note, in the State of Illinois, General Contractors do not need to obtain state licensure, but your municipality probably requires some sort of business license.)		
I have contacted the Contractor's References, used NARIGC's "Call References and Ask" checklist, and am satisfied with the answers given.		
I feel the Contractor is being open, honest and communicative with me, and I feel comfortable working with this company.		

STOP RIGHT HERE!

Analyze your answers to the above questions. If there are any outstanding "No's" or if you just don't feel comfortable with the Contractor, you may wish to look for another company to complete your project, and start your checklist over again.

AFTER SIGNING YOUR CONTRACT/ PRIOR TO THE START OF THE PROJECT.	Yes	No
I have provided the Contractor with a list of contact information for all decision makers, and the best way to reach me/us with any questions or concerns.		
The Contractor has provided me with a list of contact information for him/herself, the Project Manager for the job, and any other pertinent people I can contact with questions or concerns.		
I have provided the Contractor with keys/security codes to enter my house or arranged for someone to be present for the duration of scheduled work days.		
I have removed all items from the work area, including items in closets, cabinets and storage areas.		
I have removed/secured all items surrounding the work area (pictures, breakables, etc. on adjacent walls). I have also removed/secured items from any area that will serve as a "path" workers will use to and from the work area, and I have secured any valuables.		
I have made arrangements to keep children and pets out of the work area for the duration of the project.		
I understand that the work area may not be useable for the duration of the project, and have made other arrangements for activities (cooking, bathing, home entry, etc.)		
DURING THE PROJECT	Yes	No
I am available and responsive if the Contractor has any questions or concerns.		
The Contractor is presenting "Change Orders" for any work that is outside the scope of the initial contract, even if there is no change in the pricing as listed on the original contract. The Change Orders specifically indicate the item that has been changed or added as well as a dollar amount, if applicable.		
I am adhering to any product selection timelines the Contractor has set forth. If I am not meeting these deadlines, I understand this may cause delays.		
I am adhering to any payment schedule set forth in the contract. If I am not meeting this schedule, I understand this may cause delays.		
I am inspecting all materials delivered, <i>prior to installation</i> , to verify that they are the correct model, color, etc.		
I am <i>immediately</i> in contact with the Contractor and/or Project Manager if I notice any concerns or have any questions.		
The Contractor and I are in constant communication regarding any scheduling changes.		
The Contractor, as best as possible, is cleaning up the work area and surrounding areas on a daily basis.		
At the end of the project, I have inspected all work done by the contractor and will make final payment once I am satisfied. If I am not satisfied, I will discuss with the Contractor to "hold back" a <i>portion</i> of the final payment equal to the dollar amount for the work with which I am not satisfied.		