

12 Stages of Successful Remodeling, Renovation

A step-by-step guide to capital improvement projects



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Renovating and remodeling capital improvement projects can be very involved and often have many moving parts. They require an organized process to ensure a successful outcome.

First, let's talk about the difference between a "remodel" and "renovation"—understanding the nuances helps clients make informed decisions and helps protect their investment. *Remodeling* is usually more complex, often including physical changes to the structure itself or to a specific area in a building or home. If you are interested in remodeling your Association's condominium lobby, for example, it is likely you want to change the actual layout and appearance, not just the aesthetics.

A *renovation*, however, is often described in terms of restoring finishes and building components to their previous or original condition. Older or poorly maintained buildings often require substantial effort to restore finishes and other cosmetic attributes, or to return building components to a functional state.

It is important to note that remodeling and renovation are not mutually exclusive, and the terms are frequently used interchangeably. You can do both at the same time.

As mentioned, these types of capital improvement projects require a strategic and efficient process to ensure each facet is completed on time and on budget. Implementing a customer-focused 12-stage approach will simplify and streamline a project from start-up to close-out. This process—which spans multiple disciplines including design, bidding, permitting, management and quality assurance—is customized to meet the unique needs of each owner and their unique remodeling or renovation project goals.



Bergeman Group team discussing a renovation project

1 Starting Up

The start of any successful journey begins with a road map to ensure everyone reaches the intended destination in a timely and efficient manner. Reviewing and analyzing existing project-related documents provided by an Association or owner allows us to gather additional information and helps ascertain a project's current status. Often, preliminary site visits are needed to gather data in order to obtain good familiarization with the property, a preliminary understanding of the areas needing repair or remodeling, and comprehension of the various concerns that are known to exist.

2 Evaluation and Due Diligence

After an initial introduction to the

property, it's often necessary to proactively work to identify areas that may require additional research, investigation or due diligence. Taking time to plan and complete your due diligence helps detail the elements needed to define the scope of the project or evaluate the proposed project plan. This can be done through a Property Condition Assessment or General Constructability Review. Depending upon the proposed project and age of the building, laboratory testing and analysis may also be needed, for example, to identify if any hazardous materials exist.

3 Project Scope

Once you've gathered all the necessary data, your project scope can be refined to include the features, functions

and items that must be addressed to achieve your renovation or remodeling goals. This includes documenting inclusions and exclusions to the proposed scope of work.

4 Design and Bid Documents

With the desired scope now well defined, it is time for your architects and engineers to do their part and complete the required construction and permit documents. It is important to decide if a traditional design-bid-build or a design-build project delivery method is to be chosen. For a traditional design-bid-build format, an experienced design team will orchestrate the production of plans and specifications, which are then provided to a contractor for pricing. However, if a design-build project delivery format is chosen, the contractor is made responsible for both design and construction. Using the design-build format can save some time during the pre-construction phase, although it requires that you give your contractor control over architectural and engineering decisions that are customarily not theirs to make and may even not be within their expertise. The design-build format also makes it more difficult to get apples-to-apples bids from prospective contractors. For these reasons, the prevalent, most popular and generally recommended project delivery model remains a traditional design-bid-build format.

5 Competitive Bids

During the bidding phase, a professional construction management firm

makes sure prospective contractors provide apples-to-apples bid offerings for the proposed scope of work. By thoroughly vetting and critiquing each bid, your construction manager should be working on your behalf to ensure bids received meet project requirements.

6 Contractor Selection

After reviewing and analyzing the contractors' competitive bids, a contractor needs to be selected by your Association. Once selected, your construction manager will coordinate with the key decision makers to develop an Owner-Contractor Agreement and negotiate the terms with the contractor.

7 Permitting

Assistance with the preparation of permit applications and submission of the construction documents to governing authorities for approval is often the next stage. Your construction management team coordinates with the contractor to obtain the requisite building permits. Be aware that approval time by local officials may vary, which can delay a project or adjust its scope.

8 Finalizing the Budget

Once the final bids are received and a contractor is selected, an updated project budget is assembled for approval by the board or owner. Upon approval, the contractor's performance is monitored, and the monthly budget is updated, assisting with cash flow forecasting.

9 Project Funding

If reserves for the project are not

available and residents want to avoid a substantial special assessment, an owner's representative or construction manager can assist with finding appropriate options for the funding of a renovation or remodeling project. They will research, compile and present a comprehensive list of funding sources for review and approval.

10 Town Hall Meeting and Presentations

An effective communication tool is community-based town hall meetings. These meetings are open to all stakeholders and are held at critical junctures. They are designed to help obtain "buy-in" and ease anxiety surrounding the project, providing peace of mind.

11 Construction

Finally, there is the construction phase. Your construction management firm acts as your representative during the construction phase. Their team monitors the budget and details the contractors' progress, quality and overall performance. During construction, they should strive to minimize the inconveniences often associated with construction activities.

12 Closing Out

Upon project completion, a record of the project is provided, including key documents, drawings, specifications, the final budget and applicable warranties and guarantees from the contractor.

Experience tells us that successful projects happen when much consideration is given to the pre-construction phase. Therefore, don't rush to construction without making sure you have a good plan in place as each project, each building and each owner is unique.

President and CEO of Bergeman Group, Dana Bergeman brings over 25 years of experience in the architecture, engineering, and construction industry. His vision for the company is reflected in its core values: advocate on your behalf, help protect your investment, defend your interests by helping mitigate risks, and educate clients, enabling you to make informed decisions. For more information, visit bergemangroup.com.

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