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ENERGIZE BUILDERS

THE CUSTOM HOME DECISION CHECKLIST

TITLE	A project workbook for planning, building and handover
AUTHOR	Alik Konovalenko
EDITION	Digital edition 02 · screen-first · fillable
SHEETS	181

01

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Make the next decision a better one.

A beautiful home is built through hundreds of connected decisions. This book helps you see what a choice affects before the team prices it, orders it or covers it up.

01

Name the decision

Start with the next commitment, the room or the system it changes.

02

Connect the consequences

Bring together the people, interfaces, costs and information it depends on.

03

Keep a usable record

Leave a chosen direction, a reviewer and an evidence reference the team can find.

Use this at your design meeting, before a purchase, during a site review and at handover. Keep the records that explain why a choice was made.

WHAT IS INSIDE

12	192	143	96	21	28
CHAPTERS, EACH WITH A DECISION BRIEF	CHECKPOINTS WITH STATUS AND RECORD	ROUGH-IN AND LOS ANGELES REGISTER ITEMS	SELECTION PROMPTS IN 8 MENUS	WORKING TOOLS, SCHEDULES AND LEDGERS	SELECTED RESOURCES, LINKED

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Begin with the chapter that affects your next commitment, or with the register if the walls are about to close. Everything here is linked; the tabs at the page edge go to the same places.

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The chapter order is a reading route. Your project program and responsible professionals determine the sequence of work.

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A mark is useful only when its meaning is clear.

Tick the box when you have reviewed the prompt. Cross one status box to show what happened next, and leave a record reference the team can find.

CODE	MEANING	WHAT TO LEAVE IN THE RECORD
☐ O	Open	A question that still needs an answer
☐ I	In review	Named reviewer and next date
☐ D	Deferred	Reason, consequence and date to revisit
☐ C	Closed	Agreed decision and evidence reference
☐ N	Not applicable	Why it does not apply to this project

EXAMPLE · A COMPLETED CHECKPOINT ROW

REV	ID	CHECKPOINT / ACTION / EVIDENCE / RECORD	STATUS
☒	EB09.16	**Shop drawing release** Before fabrication starts, reconcile appliance revisions, service locations, field dimensions, finish samples and owner changes in the current coordinated shop drawings. EVID. Approved coordinated shop drawing issue REF. EX-KITCHEN-01 · W04 change record · reviewed Mar 14	☐ O ☒ I ☐ D ☐ C ☐ N

Read it as: the prompt has been reviewed (box ticked), the decision is in review (I crossed), and the record line points to where the longer story lives. The longer record itself is kept in W01.

Closing a workbook item records your agreed process. It does not certify compliance, performance or completion of the physical work.

Keep the longer record in W01. Store drawings, reports and approvals in the project document system, then enter their reference beside the prompt. Reopen a closed item when the design, product or conditions change.

Digital and paper use

Save a working copy in a PDF reader that supports forms. Type a short test entry, save and reopen the file before using the book. Short fields hold references; use the reusable tools for longer notes and Return for a new line. EMAIL › beside an item code opens a ready-made email of that item for your team. In handwriting apps such as GoodNotes or Notability the typed fields are inactive, but every box is drawn on the page, so write by hand; the chapter tabs and links still work. Print at actual size if writing by hand. “About this edition” is on the last sheet.

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Move through the decision.

Use the five stages as a loop. A new finding can send a decision back for more work. Every chapter opener shows the stage where that chapter usually begins.

01 **ASSESS**

What do we know, and what is still assumed?

02 **PLAN**

Which people, spaces and systems must fit together?

03 **SPECIFY**

Which exact scope, model, assembly or requirement is intended?

04 **BUILD**

What must be coordinated and checked before it is hidden or fixed?

05 **VERIFY**

What was actually delivered, checked and handed over?

This educational workbook supports project conversations. It does not replace approved designs, contracts, required inspections, applicable codes or professional advice. The responsible professionals must determine the methods, dimensions and requirements for the actual project.

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The build in order

The chapters are organized by decision. The house is built in phases. This map says which chapters, selections and register groups must be closed before each phase starts. Open the chapter from here.

01 Land and brief

CLOSES BEFORE AN OFFER ON LAND OR A DESIGN CONTRACT

Site investigation, the team, the budget basis and the hillside status.

CLOSE FIRST

- 01 Project brief and site investigation
- 02 Team, scope and financial decisions
- LA Site, geology and the hillside rules

02 Design and permits

CLOSES BEFORE PLAN CHECK SUBMISSION

Layouts, the envelope, the mechanical strategy and the fire and energy codes that shape them.

CLOSE FIRST

- 03 Layouts and everyday use
- 05 Envelope, roof and openings
- 07 Heating, cooling, ventilation and air
- LF Fire-hazard zone and hardening
- LE Energy code, electrification and water

03 Grading, foundations and site work

CLOSES BEFORE EXCAVATION AND THE FIRST POUR

Everything that goes under the house or under the paving.

CLOSE FIRST

- 04 Sitework, structure and concealed work
- 11 Outdoor spaces and specialist amenities
- RW Water management and moisture
- RX Site, exterior and garage
- LS Access, staging and neighbors

04 Framing and structure

CLOSES BEFORE ROUGH-INS BEGIN

Blocking, openings, chases, access and the structure for future loads.

CLOSE FIRST

- 04 Sitework, structure and concealed work
- 05 Envelope, roof and openings
- RF Framing, blocking and openings
- RS Safety, adaptability and the record

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WHERE THE PROJECT STANDS

Every status box you mark in the book appears here too, and a box ticked here marks the item. Tap a code to open its sheet.

		O	I	D	C	N
01 PROJECT BRIEF AND SITE INVESTIGATION						
EB01.01	Project outcome	☐	☐	☐	☐	☐
EB01.02	Actual jurisdiction	☐	☐	☐	☐	☐
EB01.03	Boundary information	☐	☐	☐	☐	☐
EB01.04	Title constraints	☐	☐	☐	☐	☐
EB01.05	Planning envelope	☐	☐	☐	☐	☐
EB01.06	Slope and ground conditions	☐	☐	☐	☐	☐
EB01.07	Drainage context	☐	☐	☐	☐	☐
EB01.08	Wildfire context	☐	☐	☐	☐	☐
EB01.09	Existing structures	☐	☐	☐	☐	☐
EB01.10	Hazardous material survey	☐	☐	☐	☐	☐
EB01.11	Protected landscape	☐	☐	☐	☐	☐
EB01.12	Construction access	☐	☐	☐	☐	☐
EB01.13	Utility feasibility	☐	☐	☐	☐	☐
EB01.14	Future additions	☐	☐	☐	☐	☐
EB01.15	Unknown site costs	☐	☐	☐	☐	☐
EB01.16	Site decision release	☐	☐	☐	☐	☐
02 TEAM, SCOPE AND FINANCIAL DECISIONS						
EB02.01	Decision authority	☐	☐	☐	☐	☐
EB02.02	Contracting identity	☐	☐	☐	☐	☐
EB02.03	Service boundaries	☐	☐	☐	☐	☐
EB02.04	Comparable proposals	☐	☐	☐	☐	☐
EB02.05	Project cost structure	☐	☐	☐	☐	☐
EB02.06	Uncertainty reserve	☐	☐	☐	☐	☐
EB02.07	Allowances	☐	☐	☐	☐	☐
EB02.08	Owner-supplied items	☐	☐	☐	☐	☐
EB02.09	Payment process	☐	☐	☐	☐	☐
EB02.10	Insurance scope	☐	☐	☐	☐	☐
EB02.11	Change procedure	☐	☐	☐	☐	☐
EB02.12	Decision deadlines	☐	☐	☐	☐	☐
EB02.13	Long-lead procurement	☐	☐	☐	☐	☐
EB02.14	Document issue control	☐	☐	☐	☐	☐
EB02.15	Meeting rhythm	☐	☐	☐	☐	☐
EB02.16	Project start agreement	☐	☐	☐	☐	☐
03 LAYOUTS AND EVERYDAY USE						
EB03.01	Furniture layouts	☐	☐	☐	☐	☐
EB03.02	Arrival sequence	☐	☐	☐	☐	☐
EB03.03	Changing mobility	☐	☐	☐	☐	☐
EB03.04	Door movement	☐	☐	☐	☐	☐
EB03.05	Window use	☐	☐	☐	☐	☐
EB03.06	Privacy	☐	☐	☐	☐	☐
EB03.07	Storage quantities	☐	☐	☐	☐	☐
EB03.08	Household work	☐	☐	☐	☐	☐
EB03.09	Guest independence	☐	☐	☐	☐	☐
EB03.10	Children and pets	☐	☐	☐	☐	☐
EB03.11	Work and calls	☐	☐	☐	☐	☐
EB03.12	Outdoor connection	☐	☐	☐	☐	☐
EB03.13	Views from use positions	☐	☐	☐	☐	☐
EB03.14	Ceiling composition	☐	☐	☐	☐	☐
03 LAYOUTS AND EVERYDAY USE (CONT.)						
EB03.15	Mockup priorities	☐	☐	☐	☐	☐
EB03.16	Layout approval record	☐	☐	☐	☐	☐
04 SITEWORK, STRUCTURE AND CONCEALED WORK						
EB04.01	Temporary site controls	☐	☐	☐	☐	☐
EB04.02	Building layout	☐	☐	☐	☐	☐
EB04.03	Excavation findings	☐	☐	☐	☐	☐
EB04.04	Neighboring property	☐	☐	☐	☐	☐
EB04.05	Underground services	☐	☐	☐	☐	☐
EB04.06	Foundation dependencies	☐	☐	☐	☐	☐
EB04.07	Inspection timing	☐	☐	☐	☐	☐
EB04.08	Concrete penetrations	☐	☐	☐	☐	☐
EB04.09	Below-grade water management	☐	☐	☐	☐	☐
EB04.10	Structural changes	☐	☐	☐	☐	☐
EB04.11	Framing openings	☐	☐	☐	☐	☐
EB04.12	Backing and supports	☐	☐	☐	☐	☐
EB04.13	Stairs and levels	☐	☐	☐	☐	☐
EB04.14	Concealed condition photos	☐	☐	☐	☐	☐
EB04.15	Closure exceptions	☐	☐	☐	☐	☐
EB04.16	Concealed work release	☐	☐	☐	☐	☐
05 ENVELOPE, ROOF AND OPENINGS						
EB05.01	Water path continuity	☐	☐	☐	☐	☐
EB05.02	Roof access	☐	☐	☐	☐	☐
EB05.03	Roof penetrations	☐	☐	☐	☐	☐
EB05.04	Drainage maintenance	☐	☐	☐	☐	☐
EB05.05	Window product identity	☐	☐	☐	☐	☐
EB05.06	Large opening interfaces	☐	☐	☐	☐	☐
EB05.07	Window installation	☐	☐	☐	☐	☐
EB05.08	Air control continuity	☐	☐	☐	☐	☐
EB05.09	Insulation continuity	☐	☐	☐	☐	☐
EB05.10	Vapor and condensation design	☐	☐	☐	☐	☐
EB05.11	Exterior shading	☐	☐	☐	☐	☐
EB05.12	Balcony thresholds	☐	☐	☐	☐	☐
EB05.13	Cladding transitions	☐	☐	☐	☐	☐
EB05.14	Wildfire detailing	☐	☐	☐	☐	☐
EB05.15	Field testing	☐	☐	☐	☐	☐
EB05.16	Envelope handover	☐	☐	☐	☐	☐
06 PLUMBING, WATER AND DRAINAGE						
EB06.01	Fixture schedule	☐	☐	☐	☐	☐
EB06.02	Hot water routine	☐	☐	☐	☐	☐
EB06.03	Service demand	☐	☐	☐	☐	☐
EB06.04	Water treatment purpose	☐	☐	☐	☐	☐
EB06.05	Point-of-use distribution	☐	☐	☐	☐	☐
EB06.06	Filter access	☐	☐	☐	☐	☐
EB06.07	Bypass and drainage	☐	☐	☐	☐	☐
EB06.08	Leak response	☐	☐	☐	☐	☐
EB06.09	Valve identification	☐	☐	☐	☐	☐
EB06.10	Shower coordination	☐	☐	☐	☐	☐
EB06.11	Special fixtures	☐	☐	☐	☐	☐

O OPEN · I IN REVIEW · D DEFERRED · C CLOSED · N NOT APPLICABLE · CHECKPOINTS, REGISTER AND SELECTIONS



CHAPTER

01

Project brief and site investigation

What do you need to know about this property before the next commitment?

16 CHECKPOINTS · 4 SHEETS

IN THIS CHAPTER

Decision brief 018
Checkpoints 01–04 019
Checkpoints 05–08 020
Checkpoints 09–12 021
Checkpoints 13–16 022

CLOSE BEFORE THE WALLS DO

LA

PHOTOGRAPH · AN ENERGIZE BUILDERS PROJECT, LOS ANGELES

MORE OF OUR WORK ›

01 ASSESS	02 PLAN	03 SPECIFY	04 BUILD	05 VERIFY

ENTRY FOCUS: ASSESS. REVISIT EVERY STAGE AS NEEDED.

DISCUSS WITH OWNER AND ARCHITECT, WITH A SURVEYOR AND SITE SPECIALISTS.

BEFORE LAND OR DESIGN COMMITMENTS.

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Before you commit

A THE COMMITMENT

A land, design or infrastructure decision based on site conditions, available services and planning assumptions.

B KEEP THE EVIDENCE

A dated site brief, scoped investigations, identified restrictions and a record of accepted uncertainty with a revisit trigger.

C PAUSE AND RESOLVE

An untested assumption could change buildable area, access, foundation design, drainage or the project budget. Name its reviewer before proceeding.

Your next step

YOUR NEXT COMMITMENT / DATE NEEDED

WHO DECIDES / WHO REVIEWS / AFFECTED TRADES

UNRESOLVED ISSUE / NEXT ACTION / RECORD REFERENCE

OPEN THE CHECKPOINTS ›

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REV	ID	CHECKPOINT / ACTION / EVIDENCE / RECORD	STATUS
☐	EB01.01 EMAIL ›	**Project outcome** Write the rooms, routines and future changes the project must support; rank what matters when cost or space conflicts. EVID. Signed household brief and priority order	☐ O ☐ I ☐ D ☐ C ☐ N
☐	EB01.02 EMAIL ›	**Actual jurisdiction** Confirm the property's building authority, planning authority and utility providers before using requirements from a nearby city or another project. EVID. Address jurisdiction and provider record	☐ O ☐ I ☐ D ☐ C ☐ N
☐	EB01.03 EMAIL ›	**Boundary information** Obtain the survey scope and ask which boundaries, easements and encroachments remain unconfirmed. EVID. Survey and unresolved boundary questions	☐ O ☐ I ☐ D ☐ C ☐ N
☐	EB01.04 EMAIL ›	**Title constraints** Have the appropriate adviser identify recorded restrictions that could affect access, construction or future structures. EVID. Title review and adviser comments	☐ O ☐ I ☐ D ☐ C ☐ N

NOTES

NOTES

NOTES

NOTES

O OPEN · I IN REVIEW · D DEFERRED · C CLOSED · N NOT APPLICABLE · LONGER RECORD W01 · RESOURCES R11–R13 R15 R16

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RF Framing, blocking and openings

Every item here is cheap while the framing is open and expensive the week after drywall. Each one names the moment it must be settled, who coordinates it and what to leave in the record. Mark N for the ones that do not apply to your house; the point is to have decided, not to have everything.

CLOSES BEFORE INSULATION · COORDINATED BY THE GC, WITH THE FRAMER AND THE ARCHITECT

REV | ID | ITEM / WHY IT MATTERS / WHAT TO LEAVE IN THE RECORD | STAGE · STATUS

☐ RF.01 EMAIL ›

Blocking for everything that hangs

Towel bars, grab bars, curtain rods, shelving, wall-hung vanities, TVs, mirrors and art all need solid backing. Drywall anchors fail; blocking does not.

REC. A marked-up plan or photos of every block with its height, kept with the pre-drywall photo set.

FRAMING

☐ O ☐ I ☐ D ☐ C ☐ N

NOTES

☐ RF.02 EMAIL ›

Future grab-bar backing in every bathroom

Backing at toilet and shower locations costs almost nothing now and makes the house adaptable later without opening tile.

REC. Heights and locations on the bathroom elevations.

FRAMING

☐ O ☐ I ☐ D ☐ C ☐ N

NOTES

☐ RF.03 EMAIL ›

Wall-hung toilet and vanity carriers

In-wall carriers need stud spacing and depth decided before plumbing rough-in, not at tile.

REC. Carrier model and rough-in sheet in the plumbing submittals.

FRAMING

☐ O ☐ I ☐ D ☐ C ☐ N

NOTES

☐ RF.04 EMAIL ›

Door and window headers aligned

Mismatched head heights show forever once trim is on. Confirm one head height per room and per elevation.

REC. Head heights on the door and window schedules.

FRAMING

☐ O ☐ I ☐ D ☐ C ☐ N

NOTES

O OPEN · I IN REVIEW · D DEFERRED · C CLOSED · N NOT APPLICABLE · STAGE = WHEN THE ITEM BECOMES COSTLY TO CHANGE · RECORD: W01

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CLOSES BEFORE INSULATION · COORDINATED BY THE GC, WITH THE FRAMER AND THE ARCHITECT

REV ID ITEM / WHY IT MATTERS / WHAT TO LEAVE IN THE RECORD STAGE · STATUS

☐ RF.05 EMAIL ›

Pocket and sliding door walls

FRAMING

The pocket section of a wall cannot carry outlets, switches or plumbing. Decide every pocket door before electrical layout.

☐ O ☐ I ☐ D ☐ C ☐ N

REC. Pocket locations on the door schedule and the electrical plan.

NOTES

☐ RF.06 EMAIL ›

Ceiling heights and dropped soffits

FRAMING

Soffits for ducts, range hoods and beams change the room. Walk them before the drywall ceiling goes in.

☐ O ☐ I ☐ D ☐ C ☐ N

REC. A reflected ceiling plan with soffit depths.

NOTES

☐ RF.07 EMAIL ›

Recesses for the refrigerator, washer and dryer

FRAMING

A flush fridge or a recessed dryer box needs the wall built for it. Confirm appliance depths with the actual models.

☐ O ☐ I ☐ D ☐ C ☐ N

REC. Appliance spec sheets with the framing detail.

NOTES

☐ RF.08 EMAIL ›

Attic and under-floor access

FRAMING

Access hatches sized for the equipment that will live there, with a route to it. Nobody services a unit they cannot reach.

☐ O ☐ I ☐ D ☐ C ☐ N

REC. Hatch size and location on the plan; equipment clearances noted.

NOTES

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LA Site, geology and the hillside rules

A hillside lot in Los Angeles adds a layer of decisions that a generic checklist never mentions: soils and geology, grading and export, retaining structures, fire-hazard zones, the 2025 Energy Code and the practical problem of getting trucks up a narrow street. The items below are questions to resolve with the responsible professionals and the City; the numbers and rules change, so every item asks you to confirm the current requirement rather than rely on this page.

CLOSES BEFORE DESIGN IS FIXED · COORDINATED BY GEOTECHNICAL ENGINEER, SURVEYOR AND ARCHITECT

REV | ID | ITEM / WHY IT MATTERS / WHAT TO LEAVE IN THE RECORD | STAGE · STATUS

☐ LA.01 EMAIL ›

Hillside, fire-zone, fault and specific-plan status

BEFORE LAND PURCHASE

☐ O ☐ I ☐ D ☐ C ☐ N

Look the parcel up before the first sketch: Hillside Area, Very High Fire Hazard Severity Zone, fault zone, coastal zone, Mulholland or other specific plans, protected trees.

REC. ZIMAS report and the planning determination in the project record.

NOTES

☐ LA.02 EMAIL ›

Geotechnical investigation scoped for the actual design

BEFORE DESIGN

☐ O ☐ I ☐ D ☐ C ☐ N

Borings, slope stability and the geologist's report drive the foundation type, the retaining walls and the schedule. Order it before the design is fixed, not after plan check asks.

REC. Soils and geology reports with the LADBS approval letter.

NOTES

☐ LA.03 EMAIL ›

Topographic survey and slope analysis

BEFORE DESIGN

☐ O ☐ I ☐ D ☐ C ☐ N

Slope bands set how much house the lot allows and how tall it can be. A proper survey prevents a redesign.

REC. Survey and slope analysis map.

NOTES

☐ LA.04 EMAIL ›

Grading quantities, limits and the haul route

DESIGN

☐ O ☐ I ☐ D ☐ C ☐ N

Cut, fill, export and the number of truck trips decide cost and the neighbors' patience. Confirm the current grading thresholds and whether a haul-route approval applies.

REC. Grading plan with quantities; haul-route approval if required.

NOTES

O OPEN · I IN REVIEW · D DEFERRED · C CLOSED · N NOT APPLICABLE · STAGE = WHEN THE ITEM BECOMES COSTLY TO CHANGE · RECORD: W01

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S03 Lighting, fans and outlets by room

Count what each room gets. Walk the framing with this sheet and the electrical plan.

ROOM	RECESSED	PENDANT / SURFACE	FANS	OUTLETS	SWITCHES / DIMMERS	NOTES
Entry						
Living						
Dining						
Kitchen						
Pantry						
Family / media						
Office						
Primary bedroom						
Primary bath						
Primary closet						
Bedroom 2						
Bath 2						
Bedroom 3						
Bath 3						
Bedroom 4						
Bath 4						
Powder						
Laundry						
Mudroom						
Halls and stairs						
Garage						
Exterior						
TOTALS						

ONE ROW PER ITEM. KEEP THIS SHEET CURRENT; THE TRADES WORK FROM IT.

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L01 Change-order log

Every change, in order, with what it did to the money and the schedule. W04 holds the reasoning for one change; this page holds the running total.

NO.	DATE	SCOPE OF THE CHANGE	COST ±	DAYS ±	APPROVED BY / REF.
TOTALS					

COPY THE SHEET WHEN IT FILLS. THE DECISION BEHIND EACH LINE LIVES IN W01 OR W04.

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Keep in touch

Every code below is also a link: tap it on screen, or scan it with a phone camera from the printed page.

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