



OCCUPIED-PROPERTY RENOVATION PLANNING CHECKLIST

Plan the work around the people who use the property.

Planning aid only; not a proposal, technical assessment, final scope or agreement. Confirm the requirements for your property and proposed work.

MAP THE PEOPLE AND SPACES AFFECTED

- ☐ List occupied units, vacant units, leasing areas, amenities and shared routes affected by each phase. Identify which areas need to remain available during daily operations.
- ☐ Identify the property contact and backup, project contact, approval contact, and the person responsible for resident communication. Agree how urgent questions will reach the right person.
- ☐ Gather known move-in dates, leasing events, amenity commitments and access constraints. Ask the property team about accommodation needs that must be considered without circulating private resident information.
- ☐ Separate construction questions from property-management decisions. Identify any access, notice, permit or specialist requirements that need confirmation by the responsible party.

BUILD A SEQUENCE THE PROPERTY CAN DISCUSS

- ☐ Divide occupied apartment renovations into clear buildings, units or common-area phases. Separate vacant-unit availability from access to occupied homes. Describe what closes, what stays available and what must happen before the next phase begins.
- ☐ Discuss work windows, noisy or disruptive tasks, temporary service interruptions and material lead times. Identify who confirms arrangements before dates are communicated.
- ☐ Ask whether a sample unit, finish review or initial work area should be approved before repeating the scope elsewhere. Record the decision and who can accept it.
- ☐ Identify dependencies with other trades and property activities. For example, a unit handoff can depend on a finish decision, completed repair or required inspection. Record who confirms each dependency. Ask what happens if access, a material selection or a previous phase is delayed.



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AGREE ON ACCESS AND SITE LOGISTICS

- ☐ Agree who arranges entry, provides keys or escorts, verifies access and records areas that could not be reached. Avoid assuming an occupied unit will be available on request.
- ☐ Review proposed deliveries, staging, equipment locations, parking and waste removal with the property team. Identify shared routes and spaces that need a specific coordination plan.
- ☐ Discuss protection of existing finishes, adjacent occupied areas and belongings. Ask how concerns or unexpected conditions will be documented and raised for a decision.
- ☐ Identify what the property team needs to verify before work starts in each area. Keep daily coordination arrangements separate from unconfirmed assumptions in the initial schedule.

KEEP RESIDENTS AND DECISION-MAKERS INFORMED

- ☐ Agree who prepares, approves and distributes resident communications, and who checks applicable timing and access requirements. Confirm the affected areas and contact details before distribution.
- ☐ Decide what an update should contain: completed work, next steps, changed dates, access needs and decisions due. Agree the reporting cadence rather than assuming one.
- ☐ Discuss how photos will be shared and labeled by work area. Avoid residents, unit-identifying personal information and private documents in shared images.
- ☐ Agree how scope changes or new findings move from a field observation to a documented decision. Identify who can approve work and how the schedule or budget impact will be recorded.

CLOSE A PHASE BEFORE MOVING ON

- ☐ Agree who joins the walkthrough, how incomplete items are recorded and who confirms they have been addressed. Distinguish a progress review from final acceptance.
- ☐ Discuss cleanup, equipment removal and return of shared spaces to the property team. Confirm what must be checked before an area is reopened or handed back.
- ☐ Identify the closeout information the owner needs, such as agreed scope records, approved changes, relevant product information and any applicable warranty documents.
- ☐ Review lessons from the first phase before repeating the sequence. Update access, resident communication and scheduling assumptions for the next work area.



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ILLUSTRATIVE EXAMPLE: PLAN BY DECISIONS BEFORE DATES

A property team is discussing exterior work beside occupied units and a shared entry. The sequence below is fictional planning guidance, not a confirmed schedule or site-specific access plan. It makes dependencies visible without promising durations.

- Confirm the affected area. The property and project contacts review entrances, unit access, staging and shared routes. An unresolved access arrangement remains an open decision before that area is released for work.
- Coordinate notices after confirming arrangements. Name who prepares, approves and distributes resident notices and who checks applicable notice and entry requirements. Communicate only confirmed arrangements, affected areas and a contact for questions.
- Review the first work area. Agree who reviews the initial preparation or finish before repeating it elsewhere. If a concealed condition or unavailable access changes the scope, record the finding, responsible decision-maker and next step before confirming the next phase.
- Hand back and reassess. Confirm the required walkthrough, outstanding items, cleanup and arrangements for reopening the area. Update the next phase and any affected notices after dependencies are resolved; do not assume a fixed handoff date.

Capture access constraints in a project scope brief.