

— FREE RESOURCE

Project Investment Planner

A well-planned project begins with a clear view of the full investment. Use this worksheet to organize the scope, group costs into useful categories, establish allowances, and align financial expectations before design and construction decisions are made.

THE CORE IDEA IS

See the full investment before design and construction decisions are made.

Work through the eight questions with whoever holds the budget, and record the assumptions behind each number as you go.

THE PURPOSE OF THIS PLANNER

The purpose of this planner is to organize the full scope in one place, break costs into clear categories, and set allowances before they become surprises — so financial expectations are agreed before selections and construction decisions are made.

NAME

PROJECT

DATE

— ORGANIZE THE SCOPE

Scope & Cost Categories

1 Full Scope

What work must the full project include?

Example: Planning, permits, demolition, construction, electrical, finishes, fixtures, equipment, and final installation.

2 Outside the Scope

What work or purchases may sit outside the main construction scope?

Example: Professional fees, technology, furnishings, signage, moving costs, and owner-supplied equipment.

3 Cost Categories

Which major cost categories should be tracked separately?

Example: Design and planning, site work, construction, finishes, fixtures, equipment, fees, and contingency.

— SET EXPECTATIONS

Budget & Allowances

4 Investment Range

What is the working investment range for the project?

Example: A target of \$250,000 with an agreed upper limit based on final scope and selections.

5 Allowance Items

Which items need allowances before final selections are made?

Example: Flooring, lighting, plumbing fixtures, cabinetry hardware, appliances, and furniture.

6 Allowance Assumptions

What assumptions are included in each allowance?

Example: The quantity, quality level, material cost, installation, taxes, and delivery expected for the category.

SET EXPECTATIONS

Contingency & Approvals

7 Contingency

What contingency should be reserved for changes or unknowns?

Example: A percentage of the working budget held separately for concealed conditions, scope changes, or price movement.

8 Change Approval

How will cost changes be reviewed and approved?

Example: Every change is documented with its cost and schedule impact before work proceeds.

✓ Investment Direction

In one sentence, summarize the financial expectations for this project.

Ready to put numbers to it

An organized budget is the difference between a surprise and a decision. Visit nwcbuildlab.com/book to schedule a conversation about the scope and range you've set out here.