

THREEFOLD DEVELOPMENT PARTNERS

CAPITAL • DEVELOPMENT • CONSTRUCTION

CHECKLIST

Owner's Project Control Checklist

The controls an owner needs in place — authority, documents, money, schedule, information — before construction makes decisions irreversible.

For: Owners and owner representatives carrying delivery risk

Decision it supports: Whether you actually control your project, or only receive reports about it.

Aligned in purpose. Disciplined in execution. Built to endure.

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Work through it with the record in front of you rather than from memory. Where an item cannot be evidenced, write down that it cannot, and the date you checked. A gap you have written down is manageable; a gap you have assumed away is not.

AUTHORITY

- ☐ One written authority matrix: who approves what, to what value, with what evidence.
- ☐ Named alternates for every approver, so absence does not stall or bypass control.
- ☐ A rule that verbal direction on site is not an approval and does not bind the owner.
- ☐ Separation between the person requesting a change and the person approving it.
- ☐ A record of every approval in one place, not across individual mailboxes.

DOCUMENTS

- ☐ A single current set marked as current, with superseded sets clearly retired.
- ☐ Version control on drawings, specifications and the assumptions register.
- ☐ A log of requests for information and their answers, with dates.
- ☐ Consultant scopes in writing, including what each consultant is not doing.
- ☐ Permits and conditions tracked against the work they govern.

MONEY

- ☐ A cost report tied to committed values, not to early estimates.
- ☐ Pay applications checked against installed work, lien waivers and retainage terms.
- ☐ Change orders priced, approved and reflected in the current cost report before work proceeds.
- ☐ Contingency drawdown tracked with the reason for each release.
- ☐ Allowances and unresolved scopes listed openly as exposure, not as settled cost.

SCHEDULE AND INFORMATION

- ☐ A baseline schedule and a current schedule kept as separate records.
- ☐ Float ownership stated, so it is not consumed silently.
- ☐ Long-lead items tracked from order date, not from installation date.
- ☐ One reporting format the owner actually reads, on a fixed cadence.
- ☐ An escalation rule: what must reach the owner within 24 hours regardless of cadence.

MONTHLY OWNER REVIEW AGENDA

- ☐ Decisions taken since the last review, and by whom.
- ☐ Open decisions the owner must make, with deadlines and consequences.
- ☐ Cost position: committed, changed, remaining, exposed.
- ☐ Schedule position: baseline, current, causes of movement.
- ☐ Risks that became real, and the assumptions that failed.

IMPORTANT

General working material, not advice for a specific project. Nothing in this document is an offer of financing or securities, a commitment of funds, an appraisal, or a legal, tax or engineering opinion. Verify every item against your own counsel, licensed design professionals and the authority having jurisdiction.

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