

Capital Project Readiness Checklist

This checklist is designed to help teams pause, evaluate, and prepare before work begins. It provides a practical framework for reviewing the most important planning, financial, and organizational considerations that influence capital project outcomes.

- 1. Strategic Alignment**
Confirm the project directly supports long-term organizational goals, operational priorities, and future growth plans.
- 2. Executive Sponsorship**
Designate an executive sponsor who will provide oversight, remove roadblocks, and ensure the project maintains visibility at the leadership level.
- 3. Defined Scope**
Clearly document project boundaries, deliverables, timelines, and success criteria.
- 4. Preliminary Budget**
Establish a realistic baseline budget that reflects construction costs, soft costs, internal labor, and contingency allowances based on known risks.
- 5. Funding Strategy**
Identify all funding sources early and confirm that the timing of allocated funds aligns with anticipated project milestones and major expense periods.
- 6. Cash Flow Forecast**
Create a phased forecast of projected spending over the life of the project to anticipate funding needs and avoid shortfalls to support long-term planning.
- 7. Approval Framework**
Define how budgets, contracts, invoices, and change orders will be reviewed, approved, and documented to ensure accountability and audit readiness.
- 8. Stakeholder Roles**
Clarify responsibilities across internal teams, consultants, contractors, and leadership to support accountability and minimize communication gaps.
- 9. Documentation Structure**
Establish a centralized system for drawings, contracts, meeting notes, approvals, and project records to ensure consistent access and version control.
- 10. Risk Assessment**
Evaluate potential financial, schedule, compliance, and operational risks before execution begins so mitigation strategies can be built into the project plan.

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