The DIY Guide to Planning Your *Custom Home*

A homeowner's workbook for choosing a property, setting the scope and carrying your decisions through to move-in.



A finished Legacy home in Mississauga, Ontario.

START WHERE YOU ARE

Choosing land
Property brief · p. 2

Shaping a project
Scope and budget · pp. 3–5

Ready for a quote
Photo package · p. 7

Type into the fields and save a copy, or print the worksheets and write by hand.

PROPERTY BRIEF

Should I pursue this lot?

Compare what attracts you with what still needs evidence. Use one copy of this page per property. A listing, photograph or sketch can give your design team a starting point.

Neighbourhood or property reference

Owned, considering, or comparing?

WHAT THE SITE TELLS YOU

Keep

Which view, tree, mature planting or part of the existing home matters to you?

Look closer

When do nearby windows, shadows, traffic or access change the way the lot feels?

Verify

Which boundary, grade, service or approval question could alter your plans?

EVIDENCE FOR THE FIRST MEETING

- [ ] Survey or listing
- [ ] Site photographs
- [ ] Existing drawings

Who will confirm the biggest unknown?

What decision waits for that answer?

Before committing to a property, ask the design team which questions need a surveyor, municipality or other project specialist to resolve.

SCOPE WORKSHEET

One room or the whole house?

Choose a routine that currently feels awkward. Follow the people, rooms and services involved. That route helps the design team compare a focused renovation with a wider change.



Dinner in the garden

A crowded dining room might need a different table. A long route from the kitchen, a tight door and an unshaded patio bring several spaces into the brief.

When, where and with whom does the problem show up?

What already works and should stay?

Which other spaces or systems are affected?

MY STARTING SCOPE

- [ ] One room
- [ ] Connected spaces
- [ ] Whole home
- [ ] Still open

First priority to protect

How will you know it works?

A useful test

A fixed kitchen island affects one room. Moving the kitchen door can change the garden route, cabinetry, glazing and structure. Ask to see both options in the first scope review.

COST AND DECISIONS

What am I committing to?

Record the decision and its limits while everyone has the same conversation in mind. Ask for a written scope and a way to review changes before they are authorized.

MONEY AVAILABLE TO THE PROJECT

Working range and currency

Amount to keep in reserve

Included in the range

Separate costs or exclusions

Prompts for the conversation include land, design, approvals, preparation, construction, specialist systems, landscaping, taxes and move-in costs. Mark each as included, separate or still unknown.

COMPARE ONE TRADE-OFF

Example A larger opening may improve the garden view and change the structure, shading and cost. Compare it with a smaller opening before choosing.

Option A and what it protects

Option B and what it gives up

DECISION RECORD

Agreed today, and by whom

Open question, owner and due date

An allowance is a placeholder for an undecided item. Ask which selection replaces it, who will confirm the price, and whether the scope or timing changes when that item is chosen.

DESIGN-BUILD SEQUENCE

Six stages, six records.

Keep the records in one project folder. At each review, ask what needs your decision, who will record it and what work depends on it.

01	The property	**Which site fact could change the project?** Site brief, known constraints and questions to verify.
02	Concept & budget	**Which essentials survive if the budget tightens?** Preferred layout, scope and priced assumptions.
03	Drawings & approvals	**Which selections are due before work can be released?** Coordinated drawings, decision dates and approval dependencies.
04	Teardown & structure	**Who may authorize a change if a hidden condition appears?** Site change record, progress photographs and framing review.
05	Services & finishes	**What must be reviewed before surfaces close?** Confirmed service locations, finish samples and walkthrough list.
06	Handover & care	**Who resolves open items and handles service questions?** Demonstrations, outstanding-item list and home-care records.

Our next decision and who owns it

What depends on that decision?

Ask the team to record the version of the drawing or proposal reviewed, the date of the decision and the next person who needs it.

LIVING WELL FEATURE WORKSHEET

Would we use it every week?

Begin with the routine and the person who will care for the feature. You can protect a future option, explore it now or leave it out of the project.

Sauna

Where would you cool down and change? Ask the team to review privacy, ventilation, services and maintenance access.

Cold bath / plunge

Who expects to use it and where would wet towels go? Ask for a service plan covering water care, drainage and equipment access.

Planted living wall

Which room gets the view? Compare a planted wall with a border outside the window. Ask who waters, prunes and replaces the plants.

Fire pit

When would you sit there, and who would join you? Ask the design team to verify siting, local requirements, fuel choices and seasonal care.

Feature and the routine it supports

Who would use and care for it?

MY DECISION FOR THE BRIEF

- ☐ Study now
- ☐ Allow for later
- ☐ Leave it out

Question for the specialist before choosing a product

PHOTO-TO-QUOTE CHECKLIST

Give the team a usable brief.

Use your own pictures and describe what each should explain. A room photo supports an early design conversation. A site visit, measurements and agreed scope are usually needed for a reliable price.

BUILD A PHOTO SET

☐ A wide view	Show the whole room from the entrance and the opposite corner.
☐ An adjacent space	Show where you enter, where you go next and what blocks the route.
☐ A close detail	Show the item to keep or change. Describe the material if known.
☐ Plan or sketch	Add an existing plan or a labelled sketch. Mark measured dimensions and estimates separately.

ATTACH CONTEXT

File name, room, view direction and the change being considered

Scope, location and timing preference

Cost range and assumptions to confirm

Ask for the next level of pricing

Ask whether the team can offer a planning range, needs a measured review or is ready to price a defined scope. Request the inclusions, exclusions, allowances and any information still needed.

Remove identifying details you prefer to keep private before sharing your photographs.

HANDOVER AND CARE

Walk the home as you live in it.

Bring your original brief to the walkthrough. Ask the team to show each household member how the selected systems work and where service information will live.



Try the daily routine

Walk the night-time route to the bathroom. Test the lighting scene and window coverings with the team. Write down anything that needs a second visit.

COLLECT AND CONFIRM

- [ ] Drawings and finish references
- [ ] Equipment manuals and contacts
- [ ] System and control demonstrations
- [ ] Care dates and follow-up owner

Outstanding item and room

Owner, target date and confirmation

Service contact or first-season check

Where the household will find records

Return to the original brief

After using the home, record one design choice that works well and one thing that needs adjustment. Bring both examples to the agreed follow-up.

Photography from Legacy Developers' Mississauga home. Worksheets follow Legacy's six-stage design-build journey and Living Well design principles.