Subcontractor Checklist

A subcontractor checklist for prequalifying, onboarding and managing subcontractors.

Prequalification

- ○ Review the subcontractor's relevant trade experience.
- ○ Assess financial stability and bonding capacity.
- ○ Check references from recent comparable projects.
- ○ Review their safety record and incident history.
- ○ Confirm crew size and current availability.
- ○ Verify required licenses and trade certifications.

Insurance and compliance

- ○ Collect a current certificate of insurance (COI).
- ○ Confirm general liability and workers' compensation coverage.
- ○ Verify coverage limits meet project requirements.
- ○ Request additional insured status where required.
- ○ Confirm any required performance or payment bonds.
- ○ Verify business licensing and tax documentation.

Keep COIs on file and confirm they remain active for the full scope period.

Scope and contract

- ○ Write a clear, detailed scope of work.
- ○ List inclusions, exclusions and clarifications.
- ○ Define quality standards and acceptance criteria.
- ○ Set the contract price and payment schedule.
- ○ Establish the change-order process and pricing.
- ○ Include lien waiver and retainage terms.

Scheduling and coordination

- ○ Confirm start dates and durations in the master schedule.
- ○ Identify dependencies with other trades.
- ○ Define material and equipment responsibilities.
- ○ Set milestones and progress checkpoints.
- ○ Establish daily reporting and communication channels.
- ○ Plan site access, staging and storage for their crew.

Safety and onboarding

- ○ Provide a site safety orientation before work begins.
- ○ Confirm the sub has a site-specific safety plan.
- ○ Verify task-specific training and certifications.
- ○ Review PPE requirements for their work.
- ○ Include the sub in toolbox talks and safety walks.
- ○ Confirm they know hazard and incident reporting procedures.

Performance and closeout

- ○ Inspect work against scope and quality standards.
- ○ Track progress against the schedule and budget.
- ○ Document and resolve any deficiencies or rework.
- ○ Confirm punch list items are completed.
- ○ Collect warranties and as-built information.
- ○ Process final payment and obtain lien waivers.