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.