



Sample owner project report

Example Community Common Area Renovation | Report 04 | Illustrative period October 12–23, 2026

SAMPLE — FOR ILLUSTRATION PURPOSES ONLY. This entire project, its dates, figures, records and events are fictional. It does not describe a Suncoast client, completed project or actual performance.

Prepared as a demonstration by Suncoast Construction & Loss Consulting, Inc. for an example owner board. This report shows how an owner's representative can organize project information, identify decisions and track follow-through. All dates throughout this report are illustrative, not actual deadlines.

Executive overview

Area	Sample status	What the owner needs to know
Overall	ATTENTION	Finish selection and a concealed condition require owner decisions. No change has been authorized by this report.
Schedule	AT RISK	Forecast substantial completion is December 18, versus December 11 baseline: 7 calendar days later. No contract extension is approved.
Cost	WITHIN ALLOWANCE	Revised construction contract is \$1,260,000. Pending proposals total \$28,000; if both are approved, forecast becomes \$1,288,000 against a \$1,300,000 construction funding allowance.
Progress	BEHIND PLAN	Illustrative physical progress: 45% versus 50% planned. Financial earned value is 40% of revised contract; these measure different things.
Quality	FOLLOW UP	Three observation items remain open. Closure evidence and any required professional or authority review are still needed.

Priority recommendation: resolve the finish selection by October 27 and decide the concealed-condition proposal by October 28 after scope and pricing review. Request a contractor recovery schedule before treating the December 18 forecast as achievable.

Reporting basis: mock contractor update dated October 23, mock schedule revision 02, mock cost ledger and sample walk-through notes dated October 22. These are invented inputs, not records available for reliance. No real site visit occurred.

Schedule and owner decisions

Sample management targets only • Reporting cutoff October 23, 2026

Milestone tracking

Milestone	Baseline	Actual or forecast	Variance
Mobilization	Sep 14	Sep 14 actual	0 days
Selective demolition	Oct 2	Oct 5 actual	3 days late
Rough-in complete	Oct 23	Oct 28 forecast	5 days late
Finish installation complete	Nov 20	Nov 27 forecast	7 days late
Substantial completion	Dec 11	Dec 18 forecast	7 days late
Final closeout target	Dec 30	Jan 6, 2027 forecast	7 days late

Variance uses calendar days against the illustrative baseline. Substantial completion and closeout are targets, not certifications. The current forecast assumes timely decisions and acceptable recovery sequencing; a critical-path analysis has not been performed for this example.

Decisions requested

ID and decision	Owner / target	Recommendation and consequence
D-01 Finish selection	Owner board / Oct 27	Confirm standard finish option. A later selection may delay procurement; contractor must substantiate lead times.
D-02 Concealed substrate repair	Owner board / Oct 28	Consider PCO-03 (\$18,000) only after quantity, scope and pricing validation. Five potential days are under review, not an approved extension.
D-03 Optional upgraded lighting	Owner board / Oct 30	Defer PCO-04 (\$10,000) unless the upgrade is a priority. Contractor reports no additional time; verify before approval.

Decision protocol: record the decision, approving authority, scope, amount, time effect and signed change document in the project record. Silence, a meeting discussion or inclusion in this sample report is not authorization to proceed.

Construction cost and payment control

All amounts USD • Fictional construction-only illustration • No actual payment recommendation

Contract reconciliation

Control item	Amount	Basis
Original construction contract	\$1,200,000	Executed base in this fictional scenario
Approved changes CO-01 and CO-02	\$60,000	\$40,000 + \$20,000
Revised construction contract	\$1,260,000	Base plus approved changes only
Gross work earned to date	\$504,000	40% of revised contract; stored materials \$0
Less retainage at 10%	(\$50,400)	10% of cumulative gross earned
Net earned to date	\$453,600	Gross earned less retainage
Prior net payments made	(\$340,200)	Fictional ledger paid-to-date amount
Current application under review	\$113,400	Net earned less prior payments
Unearned contract work remaining	\$756,000	Revised contract less gross earned
Remaining contract cash obligation	\$919,800	Revised contract less prior paid

Payment bridge: \$113,400 current application + \$50,400 held retainage + \$756,000 unearned work = \$919,800 remaining cash obligation. Retainage is already part of the contract, not an extra cost. No other approved-but-unpaid prior amount is assumed. Retainage release terms are not determined by this sample.

Funding and forecast exposure

Item	Amount
Owner construction funding allowance	\$1,300,000
Less revised approved contract	(\$1,260,000)
Uncommitted construction allowance	\$40,000
Pending changes not yet approved	\$28,000
Scenario forecast if both pending changes are approved	\$1,288,000
Allowance remaining in that scenario	\$12,000

The \$28,000 pending exposure is added once to the revised contract, not to earned work or the current application. The funding allowance excludes owner soft costs, financing, furnishings and other noncontract costs. No additional escalation reserve is modeled. The forecast is not a guaranteed final cost.

Payment control: reconcile schedule of values, progress support, required releases and other contract conditions before owner action. This sample is not a payment certification, legal review, authorization or assurance that payment is due.

Changes and document control

Approved and pending items are deliberately separated

Change register

ID / scope	Amount	Status / time
CO-01 Added drainage scope	\$40,000	Approved Oct 1; 0 added days
CO-02 Revised access provisions	\$20,000	Approved Oct 8; 0 added days
PCO-03 Concealed substrate repair	\$18,000	Proposed; 5 potential days under review
PCO-04 Optional lighting upgrade	\$10,000	Proposed; 0 days claimed, unverified

Approved changes total \$60,000. Pending proposals total \$28,000 and are excluded from the approved contract and current pay application. Proposed time effects are not automatically additive to the 7-day schedule forecast and do not establish entitlement or a revised contractual completion date.

RFI and submittal exceptions

Record	Responsible party / target	Current condition and follow-up
RFI-07 Existing substrate detail	Design professional / Oct 26	Open. Request written technical direction before affected work proceeds.
SUB-12 Finish sample	Owner board / Oct 27	Selection outstanding; technical acceptance remains with the responsible reviewer.
SUB-15 Lighting fixture	Design professional / Oct 29	Revise and resubmit; contractor to address marked comments.
DOC-09 Recovery schedule	Contractor / Oct 28	Requested. Show procurement, sequencing and forecast logic.

Illustrative register snapshot: RFIs 12 total / 10 closed / 2 open; submittals 18 total / 14 closed / 4 open. The table highlights selected exceptions, not the complete register. “Closed” means the sample workflow records a response; it is not proof of technical compliance or acceptance of completed work.

Document discipline: retain current approved plans and revisions, meeting minutes, decision records, change documents and supporting payment materials in the owner’s controlled project file. Distribute only current versions to authorized participants; verify superseded instructions are withdrawn.

Risk quality and field coordination

Illustrative observations • No real inspection or site assessment was performed

Risk and issue register

Item / rating	Owner and response	Trigger / next check
R-01 Procurement delay / HIGH	Contractor: validate finish lead time and recovery sequence.	Unresolved D-01 on Oct 27; check Oct 28.
R-02 Concealed condition / HIGH	Contractor and design professional: document extent and obtain technical direction.	RFI-07 response; review before repair.
R-03 Allowance pressure / MEDIUM	Owner board: compare pending work with remaining funding.	Any additional proposal above \$12,000 after both pending items.
R-04 Occupied access / HIGH	Contractor: maintain safe separation and coordinate access with management.	Daily contractor checks; owner rep to escalate reported concerns.

Quality observation follow-up

Record	Observation and required follow-up	Responsibility / status
Q-01	Uneven finish at mock-up edge. Contractor to correct and submit closure evidence.	Contractor / open
Q-02	Missing product label in sample delivery record. Obtain identification and reviewer confirmation as applicable.	Contractor / open
Q-03	Repair area not yet documented. Obtain before-and-after records and design review if required.	Contractor / open

Safety coordination: the fictional contractor update reports no incidents for this period; that statement is not independently verified. Request confirmation of access controls and required project safety coordination. The contractor retains responsibility for construction means, methods, sequencing and safety. Reporting a concern is not assuming safety supervision.

Illustrative photo slots — no project photographs supplied: Photo A, overall work area; Photo B, observation Q-01; Photo C, repair location before and after. In a real report, each image should include date, location, direction and a factual caption. No stock or generated image is presented here as project evidence.

Next period actions and report limits

Illustrative next reporting period October 26–November 6, 2026

Action plan

Action	Responsible party	Target / closure evidence
Resolve RFI-07 technical direction	Design professional	Oct 26 / written response
Confirm finish selection D-01	Owner board	Oct 27 / recorded decision
Submit recovery schedule DOC-09	Contractor	Oct 28 / logic and lead-time support
Decide PCO-03 after review	Owner board	Oct 28 / approved or rejected record
Return revised lighting submittal	Contractor	Oct 29 / resubmission receipt
Decide optional upgrade D-03	Owner board	Oct 30 / decision and any signed change
Close quality observations	Contractor; appropriate reviewer	Nov 4 / evidence and required review
Issue next owner report	Owner's representative	Nov 6 / reconciled status update

Before issuing a real report: confirm the reporting cutoff, source dates, authorized scope, current schedule, cost ledger, pay application support and responsible reviewers. Verify that decisions taken after the cutoff are carried into the next update. Link the actual supporting records rather than treating a report summary as the source record.

Scope and reliance: this fictional sample illustrates information organization and owner decision support only. It is not a contract, proposal, inspection certificate, payment certificate, completion determination, professional opinion or commitment to deliver every listed service. Actual services and authority must be defined in a written agreement.

Suncoast's consulting role is not legal representation. This report offers no legal advice and creates no attorney-client relationship. It does not replace independent counsel, licensed design or engineering services, testing, contractor responsibilities, required inspections or approvals by authorities having jurisdiction.

Observations in an actual engagement may be limited to visible, accessible conditions and the agreed scope. Neither observations nor document tracking certify code compliance, completeness, workmanship, structural adequacy or safety. No schedule, cost, savings or project outcome is guaranteed.

SAMPLE — FOR ILLUSTRATION PURPOSES ONLY. Every project fact and number in this report is invented. Do not use it to approve payment, direct work, establish a deadline or evaluate an actual project.