



Energy Demand Response Program Readiness Checklist 2026

Program Enrollment & Contract Compliance

Verification of utility agreement terms, regulatory compliance, and legal requirements for participation in Demand Response (DR) events.

Contract Effective Date

Utility Provider Name

- ☐ Utility Provider A
- ☐ Utility Provider B
- ☐ Other

Program Type

- ☐ Price-Responsive
- ☐ Incentive-Based
- ☐ Critical Peak Pricing

Executed Service Agreement

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Compliance Requirements Verified

- ☐ Regulatory Compliance
- ☐ Insurance Coverage
- ☐ Load Shedding Penalties Acknowledged
- ☐ Meter Accuracy Verification

Compliance Officer Approval

Load Profile & Baseline Establishment

Assessment of historical energy consumption patterns, baseline calculation methods, and identification of critical vs. shedable loads.

Baseline Period Start Date

Enter date...

Baseline Period End Date

Enter date...

Baseline Calculation Methodology

- ☐ Regression Analysis
- ☐ Average Historical Load
- ☐ Weather-Adjusted Baseline
- ☐ Regulated Utility Standard

Average Peak Load (kW)

Enter a number...

Identified Sheddable Load Types

- ☐ HVAC Systems
- ☐ Lighting Systems
- ☐ Industrial Processing Equipment
- ☐ Water Heating/Cooling
- ☐ Compressed Air Systems

Historical Load Profile Data (CSV/XLSX)

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Baseline Deviation Notes & Assumptions

Write something...

Communication & Control Infrastructure

Audit of IoT sensors, smart meters, telemetry systems, and automated communication protocols required for event triggering.

Primary Communication Protocol Type

- ☐ OpenADR
- ☐ Modbus/TCP
- ☐ BACnet
- ☐ MQTT
- ☐ Proprietary/Other

Gateway/Controller IP Address or Identifier

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Integrated Control Systems

- ☐ Smart Meters
- ☐ BMS (Building Management System)
- ☐ PLC (Programmable Logic Controllers)
- ☐ IoT Sensors
- ☐ Automated Load Controllers

Last Communication Hardware Audit Date

Enter date...

Network Topology Diagram

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Infrastructure Engineer Verification

Operational Resource Assessment

Evaluation of controllable assets such as HVAC systems, backup generators, battery storage, and industrial machinery capability.

Identified Controllable Assets

- ☐ HVAC Systems
- ☐ Battery Energy Storage Systems (BESS)
- ☐ Backup Diesel Generators
- ☐ Industrial Processing Equipment
- ☐ Electric Vehicle (EV) Charging Stations
- ☐ Compressed Air Systems
- ☐ Lighting Control Systems

Estimated Maximum Load Reduction Capacity (kW)

Enter a number...

Asset Criticality Level

- ☐ Critical (Cannot be shed)
- ☐ Semi-Critical (Short-term shedding allowed)
- ☐ Non-Critical (Primary candidate for shedding)

Operational Constraints & Limitations

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Asset Maintenance Logs & Technical Datasheets

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Event Response Protocols & SOPs

Review of Standard Operating Procedures (SOPs) for manual vs. automated load shedding and emergency shutdown sequences.

Primary Response Mode

- ☐ Automated (Direct Load Control)
- ☐ Manual (Operator Directed)
- ☐ Semi-Automated (Hybrid)

Critical Assets to Defer/Shutdown

- ☐ HVAC Systems
- ☐ Non-Essential Lighting
- ☐ Pumping Systems
- ☐ Electric Vehicle Charging Stations
- ☐ Manufacturing Production Lines

Emergency Escalation Workflow

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Standard Operating Procedure (SOP) Document

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Operations Manager Approval

Monitoring, Reporting & Analytics

Validation of real-time energy monitoring software, data logging accuracy, and reporting workflows for incentive verification.

Last Data Audit Date

Enter date...

Data Logging Frequency

- ☐ Real-time
- ☐ Every 15 Minutes
- ☐ Hourly
- ☐ Daily

Monitored Energy Metrics

- ☐ kW Demand
- ☐ kWh Consumption
- ☐ Power Factor
- ☐ Voltage Levels
- ☐ Peak Load Variance

Discrepancy Notes & Error Logs

Write something...

Monthly Energy Performance Report

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Data Integrity Auditor Verification

Staff Training & Emergency Preparedness

Checklist for facility manager training, employee communication plan, and contingency measures for failed load reduction.

Training Modules Completed

- ☐ Basic DR Protocol Overview
- ☐ Manual Load Shedding Procedures
- ☐ Automated System Override Training
- ☐ Emergency Communication Tree
- ☐ Post-Event Reporting Workflow

Last Training Session Date

Enter date...

Next Scheduled Drill Date

Write something...

Staff Training Attendance Logs

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Personnel Competency Level

- ☐ Beginner
- ☐ Intermediate
- ☐ Advanced/Lead Operator

Safety Officer Verification

Financial & Incentive Management

Verification of budget allocation for DR participation, cost-benefit analysis of load shedding, and revenue tracking for performance incentives.

Estimated Annual DR Revenue Projection

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Maximum Allowable Load Shedding Cost Threshold

Enter a number...

Incentive Payment Disbursement Date

Enter date...

Revenue Stream Sources

- ☐ Direct Utility Rebates
- ☐ Capacity Payments
- ☐ Energy Settlement Credits
- ☐ Tax Incentives/Subsidies

Contract & Agreement Documentation

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Financial Controller Approval

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✔ Finish

🔧 Generate Sample Report