



Energy Efficiency Retrofit Project Management Checklist 2026

Pre-Project Assessment & Feasibility

Initial evaluation of existing energy usage, site audits, and identification of potential retrofit opportunities and ROI potential.

Facility Name

Write something...

Assessment Date

Enter date...

Retrofit Priority Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Current Energy Inefficiencies Identified

Write something...

Estimated Annual Energy Savings (%)

Enter a number...

Targeted Energy Systems

- ☐ HVAC
- ☐ Lighting
- ☐ Insulation
- ☐ Solar/Renewables
- ☐ Building Envelope

Previous Energy Utility Bills

 Upload File

Stakeholder Engagement & Budgeting

Defining project scope, securing internal approvals, allocating financial resources, and establishing a project timeline.

Project Sponsor Name

Write something...

Budget Approval Date

Enter date...

Total Allocated Budget (USD)

Enter a number...

Internal Stakeholders Involved

- ☐ Facilities Manager
- ☐ Finance Department
- ☐ Sustainability Officer
- ☐ Operations Director
- ☐ IT/Systems Integration Team

Funding Source

- ☐ Capital Expenditure (CAPEX)
- ☐ Operating Expenditure (OPEX)
- ☐ Government Energy Grant
- ☐ External Investor

Budget Approval Signature

Energy Audit & Baseline Establishment

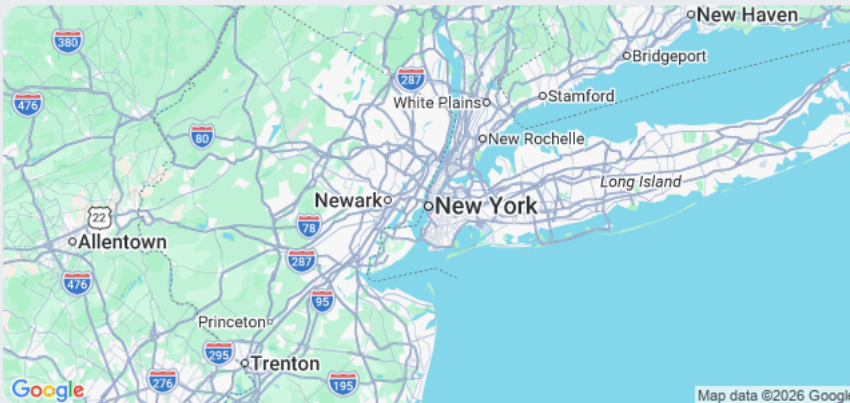
Detailed measurement of current energy consumption metrics to serve as a benchmark for post-retrofit performance evaluation.

Audit Execution Date

Enter date...

Facility/Site Location

 [Set My Current Location](#)



Current Annual Energy Consumption (kWh/Therm)

Enter a number...

Primary Energy Source

- ☐ Electricity
- ☐ Natural Gas
- ☐ Diesel
- ☐ Solar/Renewable

Measured Metering Points

- ☐ Main Utility Meter
- ☐ Sub-meters
- ☐ HVAC Meters
- ☐ Lighting Circuit Meters

Baseline Performance Observations

Write something...

Previous Energy Bills/Utility Data

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Lead Auditor Verification

Vendor Selection & Procurement

Managing RFP processes, evaluating contractor technical expertise, and finalizing contracts for hardware and installation services.

RFP Issuance Date

Enter date...

Vendor Evaluation Criteria

- ☐ Price Competitiveness
- ☐ Technical Expertise
- ☐ Sustainability Rating
- ☐ Past Performance/References
- ☐ Compliance with Energy Standards

Vendor Selection Status

- ☐ Under Review
- ☐ Shortlisted
- ☐ Contract Awarded
- ☐ Negotiation Phase

Vendor Quote & Proposal Documents

 **Upload File**

Vendor Risk Assessment Summary

Write something...

Procurement Officer Approval

Technical Design & Engineering Specifications

Reviewing detailed engineering plans, ensuring compatibility with existing infrastructure, and verifying compliance with 2026 efficiency standards.

Engineering Design Reference ID

Write something...

Technical Specifications Summary

Write something...

Compliance Standard Level

- ☐ ISO 50001
- ☐ ASHRAE Standard
- ☐ Local Building Code
- ☐ LEED Certification

Required Engineering Reviewers

- ☐ Structural Engineer
- ☐ Electrical Engineer
- ☐ HVAC Specialist
- ☐ Sustainability Consultant

Design Approval Date

Enter date...

Blueprint & Schematic Upload

 Upload File

Lead Engineer Approval

Procurement & Material Logistics

Tracking the delivery of energy-efficient equipment, sensors, and insulation materials to ensure zero downtime during installation.

Expected Delivery Date

Enter date...

Vendor Name

Write something...

Material Categories Received

- ☐ HVAC Components
- ☐ Lighting & Sensors
- ☐ Insulation Materials
- ☐ Smart Controllers
- ☐ Renewable Energy Hardware

Total Procurement Cost

Delivery Note / Packing Slip

 Upload File

Delivery Status

- ☐ Pending
- ☐ In Transit
- ☐ Delivered
- ☐ Delayed

Warehouse/Site Receiver Signature

Installation & Implementation Oversight

On-site monitoring of retrofit activities, ensuring adherence to safety protocols and technical design specifications.

Installation Start Date

Installed Components

- ☐ LED Lighting Systems
- ☐ Smart Thermostats/HVAC Controls
- ☐ High-Efficiency Insulation
- ☐ Insulated Glazing/Windows
- ☐ Variable Speed Drives (VSD)
- ☐ Solar PV Modules

Installation Compliance Status

- ☐ Fully Compliant
- ☐ Minor Deviations Noted
- ☐ Non-Compliant - Requires Remediation

Installation Discrepancies & Notes

Write something...

Site Photos of Installed Equipment

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Site Supervisor Verification

Commissioning & System Integration

Testing newly installed components, integrating them with existing Building Management Systems (BMS), and calibrating sensors.

Commissioning Completion Date

Enter date...

Integration Status

- ☐ Pending
- ☐ In Progress
- ☐

Systems Integrated

- ☐ Building Management System (BMS)
- ☐ Smart Metering Infrastructure
- ☐ HVAC Controls
- ☐ Lighting Control Systems
- ☐ Renewable Energy Inverters

System Calibration Notes

Write something...

Commissioning Report & Verification Certificate

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Lead Engineer Approval

Post-Retrofit Performance Verification

Comparing new energy consumption data against the established baseline to quantify energy savings and efficiency gains.

Verification Audit Date

Enter date...

Measured Energy Reduction (%)

Enter a number...

Energy Saving Targets Achieved

- ☐ Heating Efficiency
- ☐ Cooling/HVAC Efficiency
- ☐ Lighting Optimization
- ☐ Insulation Integrity
- ☐ Equipment Power Consumption

Discrepancy Analysis Report

Write something...

Post-Installation Energy Metering Logs

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Lead Energy Auditor Approval

Project Closeout & Documentation

Finalizing all maintenance manuals, updating energy models, and archiving compliance certificates and warranty information.

Project Completion Date

Enter date...

Final Documentation Checklist

- ☐ As-Built Drawings
- ☐ Updated Energy Baseline Report
- ☐ Equipment Warranty Certificates
- ☐ Vendor Compliance Certificates
- ☐ Post-Installation Inspection Report

Final Energy Savings Report

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Project Lessons Learned & Recommendations

Write something...

Project Manager Final Approval

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🔑 Finish

🔧 Generate Sample Report