

Energy Self Assessment Checklist

Pre-Assessment Phase

- ☐ Define scope of assessment*
- ☐ Inform senior management of plan for self-assessment
- ☐ Collect 12 months of utility bills for each building within the defined scope
- ☐ Schedule meeting with individual responsible for operations/maintenance

Assessment Phase

- ☐ Meet with operations/maintenance individual to determine:
 - ☐ Square footage of the building(s)
 - ☐ Obtain schematic of floor plan, if available
 - ☐ Determine type of heating source for building(s) (ie: steam boiler, heat pump, etc)
 - ☐ Ask of type of lighting used (ie: fluorescent T-12, T-8, T-5, incandescent, etc)
 - ☐ Determine other energy consumers & # (ie: air compressors, motors, exhaust fans etc)
 - ☐ Identify the location of each meter on the utility bill
- ☐ Conduct Assessment (consider including operations/maintenance individual)
 - ☐ Assess outside of building envelope
 - ☐ Document lighting fixtures & type of lamp (ie: incandenscent, metal halide, mercury vapor etc)
 - ☐ List areas where building envelope might be breached
 - Broken windows or building shell
 - Exhaust fans wo/dampers
 - Openings where pipes, wires or fixtures penetrate envelope
 - Bay doors or other access locations which are not insulated
 - ☐ Assess inside of building (move through each office/utility room/entry space, hallway, cafeteria, etc)
 - ☐ Count the number of lighting fixtures, lamps/fixture & type of lamp
 - ☐ Document breaches on the inside of the envelope in each space
 - ☐ List other energy consumers (ie: heating units, motors, fans, compressors)
 - ☐ Include other observations (ie: individual space heater, temp variances etc)

Post-Assessment Phase

- ☐ Transcribe notes from assessment as benchmark for future reference
- ☐ Enter data into Energy Star Portfolio Manager
- ☐ Identify “low hanging fruit”
- ☐ In conjunction with operations individual, ID potential areas for a more in-depth assessment
- ☐ Present results of self-assessment to senior management**
- ☐ Consider soliciting an external resource to perform a more in-depth assessment, if appropriate

* Begin with one building as the initial scope for self assessment

** Have the operations/maintenance individual review the report prior to presentation