



2026 FACILITY UPGRADES IMPLEMENTATION CHECKLIST

YOUR STRATEGIC PLANNING GUIDE FOR
OPERATIONAL EXCELLENCE

Use this checklist to assess, prioritize, and implement the facility management trends 2026 that will drive your operational success. Prepared by zogics.com

PHASE 1: CURRENT STATE ASSESSMENT

► Infrastructure Audit

- Measure baseline indoor air quality
- Inventory restroom fixtures (touchless vs. manual)
- Inspect surface hygiene protocols and equipment
- Review wellness amenity availability and condition
- Analyze waste management infrastructure
- Review emergency preparedness equipment locations
- Document existing HVAC systems and filter types
- Assess current lighting systems and energy consumption
- Evaluate space utilization patterns

► Performance Baseline

- Survey occupant satisfaction (baseline scores)
- Record cleaning supply consumption
- Measure waste diversion rates
- Track maintenance costs (planned vs. unplanned)
- Calculate monthly energy consumption (12-month average)
- Document current space utilization percentages
- Calculate cost per square foot

► Compliance Review

- Review EPA disinfectant registration status
- Verify ADA compliance on all fixtures
- Check emergency equipment certification dates
- Confirm backup power system functionality
- Validate fire safety system inspection dates
- Document any regulatory violations or warnings

PHASE 2: GAP ANALYSIS & PRIORITIZATION

► Tier 1: Safety & Compliance (Address Immediately)

- Air quality below acceptable standards
- ADA compliance gaps
- Emergency preparedness deficiencies
- Fire safety system failures
- Regulatory violations

Priority Score: _____ / 5 items requiring immediate attention

► Tier 2: Quick Wins (High ROI, 18-36 Month Payback)

- HVAC filter upgrades to MERV 13+
- Touchless fixture installation (highest-traffic areas)
- Surface hygiene program implementation
- Waste management optimization
- Energy-efficient lighting retrofits
- Predictive maintenance system deployment

Estimated ROI: \$_____ annual savings

► **Tier 3: Occupant Impact (Visible Improvements)**

- Indoor air quality system installation
- Primary restroom touchless conversion
- Wellness amenity additions
- Lobby and entrance area upgrades
- Hydration station deployment

Expected Satisfaction Improvement: _____% increase

► **Tier 4: Long-Term Strategic (12-36 Month Timeline)**

- Comprehensive IAQ overhaul
- Wellness facility build-out
- Building management system integration
- Space optimization infrastructure
- Flexible workstation systems

Strategic Value: Long-term adaptability, future-proofing

PHASE 3: IMPLEMENTATION PLANNING

► **Touchless Restroom Fixtures**

Budget Estimate: \$_____ **Target Completion:** ____/____/2026

Action Items:

- Prioritize restrooms by traffic volume
- Order touchless hand dryers with ADA compliance
- Purchase retrofit kits for existing dispenser footprints
- Order touchless hand sanitizer dispensers
- Schedule installation minimizing operational disruption

- Calculate 5-year cost comparison (paper vs. dryers)
- Train cleaning staff on new equipment maintenance

Success Metric: Reduce paper product costs by ____%

► Comprehensive Surface Hygiene Programs

Budget Estimate: \$_____ **Target Completion:** ___/___/2026

Action Items:

- Audit current disinfectant products for EPA registration
- Select EPA List N or DfE Certified disinfectants
- Order disinfecting wipe dispensers for high-touch zones
- Develop staff training on contact time requirements
- Create cleaning log documentation system
- Establish supply reorder thresholds
- Set up occupant illness rate tracking

Success Metric: Reduce occupant illness rates by ____%

► Wellness Amenities

Budget Estimate: \$_____ **Target Completion:** ___/___/2026

Action Items:

- Identify locations for bottle filling stations
- Order Elkay hydration stations
- Assess underutilized spaces for wellness room conversion
- Evaluate fitness equipment needs and vendor options
- Plan biophilic design elements (plants, natural materials)
- Develop wellness amenity utilization tracking

Success Metric: Improve employee satisfaction scores by ____%

► Waste Management

Budget Estimate: \$_____ **Target Completion:** ____/____/2026

Action Items:

- Conduct waste audit to determine actual generation
- Order right-sized trash/recycling/compost bins
- Design visual sorting guides and signage
- Map high-traffic areas for optimal placement
- Evaluate compaction systems for large facilities
- Establish waste diversion tracking metrics

Success Metric: Improve waste diversion rate by ____%

► Indoor Air Quality Systems

Budget Estimate: \$_____ **Target Completion:** ____/____/2026

Action Items:

- Schedule professional IAQ baseline assessment
- Prioritize high-occupancy spaces for upgrades
- Upgrade HVAC filters to MERV 13+ throughout the facility
- Order UV-C HVAC purification systems
- Purchase portable HEPA air purifiers for priority spaces
- Establish quarterly filter replacement schedule
- Create IAQ documentation system for compliance
- Communicate improvements to occupants

Success Metric: Reduce unplanned downtime by ____%

► Emergency Preparedness

Budget Estimate: \$_____ **Target Completion:** ____/____/2026

Action Items:

- Map facility for 3-minute AED response coverage
- Order AEDs for identified locations
- Stock first aid stations appropriately for occupancy
- Test mass notification systems quarterly
- Verify generator capacity for critical systems
- Schedule CPR/AED certification training for staff
- Conduct emergency drills and document gaps

Success Metric: Achieve 100% AED coverage within 3-minute response time

► Predictive Maintenance Systems

Budget Estimate: \$_____ **Target Completion:** ____/____/2026

Action Items:

- Identify critical assets requiring sensors
- Select building management software platform
- Obtain vendor quotes for sensor installation
- Schedule installation during low-traffic period
- Train facility staff on alert response protocols
- Establish baseline performance metrics
- Set up automated alert thresholds

Success Metric: Reduce unplanned downtime by ____%

► Energy-Efficient Lighting

Budget Estimate: \$ _____ **Target Completion:** ___/___/2026

Action Items:

- Prioritize longest operational hour areas for LED retrofit
- Identify high-ceiling areas requiring lift equipment
- Contact utility for available rebates
- Obtain vendor quotes for LED conversion
- Plan occupancy sensor integration
- Schedule installation to minimize disruption

Success Metric: Reduce lighting energy costs by _____%

► Hybrid Workplace Space Optimization

Budget Estimate: \$ _____ **Target Completion:** ___/___/2026

Action Items:

- Deploy occupancy sensors in conference rooms
- Collect 60-90 days of utilization data
- Analyze actual vs. assumed usage patterns
- Develop space reconfiguration plan
- Communicate changes to end users

Success Metric: Improve space utilization by _____%

► Flexible Workstation Infrastructure

Budget Estimate: \$_____ Target Completion: ___/___/2026

Action Items:

- Evaluate overhead power delivery or raised flooring options
- Select modular furniture systems
- Replace built-in filing with mobile storage
- Deploy wireless presentation systems
- Install universal charging throughout facility

Success Metric: Reduce reconfiguration time by ____%

PHASE 4: BUDGET PLANNING

Capital Expenditure Summary

UPGRADE CATEGORY	ESTIMATED COST	PRIORITY TIER	EXPECTED ROI
Indoor Air Quality	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Touchless Fixtures	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Surface Hygiene	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Wellness Amenities	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Waste Management	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Emergency Preparedness	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Predictive Maintenance	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Energy-Efficient Lighting	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Space Optimization	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	
Flexible Workstations	\$	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	

Total Investment Required: \$_____

Available Budget 2026: \$_____

Budget Gap: \$_____

Funding Sources to Explore

- Utility company rebates (lighting, HVAC)
- Sustainability grants
- Energy efficiency financing programs
- Operational budget reallocation
- Multi-year capital planning
- Cost savings from quick win projects

PHASE 5: PERFORMANCE TRACKING

► Monthly KPI Dashboard

OCCUPANT SATISFACTION	ENERGY CONSUMPTION
Baseline score: _____ /10	Baseline: _____ kWh/month
Current score: _____ /10	Current: _____ kWh/month
Change: _____ %	Change: _____ %

MAINTENANCE COSTS	OCCUPANT SATISFACTION
Baseline: \$_____ /month	Baseline: _____ % average occupancy
Current: \$_____ /month	Current: _____ % average occupancy
Change: _____ %	Cost per sq ft change: _____ %

► Quarterly Review Schedule

Q1 2026 Review: ____/____/2026

- Analyze first quarter performance data
- Adjust implementation timelines as needed
- Address any unexpected challenges
- Communicate progress to stakeholders

Funding Sources to Explore

- Utility company rebates (lighting, HVAC)
- Sustainability grants
- Energy efficiency financing programs
- Operational budget reallocation
- Multi-year capital planning
- Cost savings from quick win projects

PHASE 5: PERFORMANCE TRACKING

► Monthly KPI Dashboard

OCCUPANT SATISFACTION

Baseline score: _____ /10

Current score: _____ /10

Change: _____ %

ENERGY CONSUMPTION

Baseline: _____ kWh/month

Current: _____ kWh/month

Change: _____ %

MAINTENANCE COSTS

Baseline: \$_____ /month

Current: \$_____ /month

Change: _____ %

OCCUPANT SATISFACTION

Baseline: _____ % average occupancy

Current: _____ % average occupancy

Cost per sq ft change: _____ %

► Quarterly Review Schedule

Q1 2026 Review: ____/____/2026

- Analyze first quarter performance data
- Adjust implementation timelines as needed
- Address any unexpected challenges
- Communicate progress to stakeholders

Q2 2026 Review: ___/___/2026

- Evaluate mid-year progress against goals
- Refine systems based on performance data
- Expand successful pilots to additional areas
- Adjust KPI targets if warranted

Q3 2026 Review: ___/___/2026

- Assess third quarter improvements
- Plan Q4 and 2027 expansion priorities
- Document lessons learned
- Prepare annual budget justifications

Q4 2026 Review: ___/___/2026

- Complete full-year performance analysis
- Calculate actual ROI vs. projections
- Identify additional optimization opportunities
- Develop 2027 facility improvement plan



Your facility's excellence in 2026 depends on the decisions you make today.

This checklist is your roadmap. Start with one upgrade, measure results, build on success.