

PROJECT CONNECTIONS / PLANNING KIT 05

Prepare Before the Forecast Becomes Urgent.

South Jersey Winter Home Readiness Planner

Coordinate known home concerns, qualified service and a household outage plan before winter disruptions.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative supplied photo; not member project evidence.

FOUNDED 1994 / CAMDEN / GLOUCESTER / BURLINGTON

SOUTHJERSEYBUSINESSASSOCIATION.ORG

Start with known concerns

Prioritize reliable heat, household needs and unresolved service findings. If there is immediate danger, a fire or a CO alarm, leave the unsafe area and contact emergency services; preparation worksheets come afterward. [S1, S3]

YOUR STAGE / Identify / Arrange service / Prepare / Review

Priority concern / measurable preparation goal / responsible person

Target readiness date / service contacts / people to consult

Progress measure / review cadence / forecast-update source

USE THIS WORKBOOK

Gather facts and requirements / pages 3-6

Compare and coordinate / pages 7-10

Review readiness and act / pages 11-14

This is preventive planning. Maintained equipment is not a guarantee of safety.

Gather safe observations and records

Use existing equipment documents and safe ground-level observations. Record uncertainties for the appropriate professional; do not open equipment or climb for an assessment.

Area / record	Observed concern / date	Professional question
Heating equipment / service history		
Chimney or fireplace, if present		
Exterior / roof / drainage concerns		
Water-related concern / past problem		
Alarm / equipment instruction records		

Next question / responsible person / review date

Keep actual model, service and warranty references together. Ask professionals what records are useful.

Prepare the heating conversation

Ask a qualified heating professional to assess the actual equipment and explain the recommendation. Begin with the known problem or maintenance question, not a replacement assumption.

Equipment / service-record reference / concern to explain

Assessment scope / exclusions / findings requested

Recommendation / options / consequences of deferring

Actual quote / service timing / next decision owner

Retain manufacturer instructions and the professional report. Clarify whether other trades or approvals are involved.

Plan the chimney or fireplace consultation

Complete this page only if applicable. Confirm the provider has the specific chimney/fireplace capability needed; roofing or HVAC work alone does not establish it.

Appliance or fireplace / records / intended use question

Qualified provider / scope / exclusions / assessment date

Findings / restrictions / further work or review needed

Record to retain / handoff to another provider / owner

No lighting, repair or operation instructions are provided. Follow qualified advice and the actual equipment instructions.

Coordinate weather resistance and drainage

Ask the right provider to evaluate the concern. A stain, draft or visible exterior condition is an observation rather than a diagnosis.

Exterior / roofing professional

Assess the observed concern and identify specialist work or access limits.

Owner: _____ Due: _____ Received by: _____

Drainage / landscape professional where needed

Clarify water-management questions and dependencies with exterior work.

Owner: _____ Due: _____ Received by: _____

Plumbing or other qualified trade as needed

Review water-related concerns within verified scope.

Owner: _____ Due: _____ Received by: _____

Household coordinator

Confirm service windows, protection and receipt of instructions.

Owner: _____ Due: _____ Received by: _____

Do not use ladders, roofs or hazardous spaces to complete this worksheet. Ask what work must precede sealing or finishing.

Plan household outage arrangements

Use current NJOEM guidance and your utility information. Discuss electricity-dependent medical or assistive equipment with the relevant provider; do not record diagnoses here. [S2]

Trusted alert source / utility contact reference / update method

Household communication / agreed check-in / alternative channel

Provider-confirmed dependency plan / private record location

Safe alternative arrangements / person confirming / review date

This workbook provides no generator setup or heater-operation instructions. Ask qualified providers about any equipment plan before relying on it.

Compare service arrangements

Compare the specific work offered, actual availability and documentation. A provider being available does not establish suitability for every system.

Option / provider A: _____ B: _____

Comparison point	A / evidence / date	B / evidence / date
Verified equipment / trade capability		
Assessment / maintenance scope		
Exclusions / other specialist needed		
Actual timing / access / follow-up		
Price basis / records / warranty terms		

Tradeoff / information needed / decision owner / review date

Record a fallback if the service date changes. Do not assume a universal annual schedule fits every component; confirm applicable guidance.

Budget assessment, repair and options

Record each actual recommendation and quote. Separate necessary assessment from repair decisions and voluntary improvements.

Period / scenario: _____ Currency: _____

Cost / responsibility	Estimate	Confirmed	Source / cash due
Heating assessment / approved work			
Chimney or fireplace assessment			
Exterior / weather-resistance work			
Water-related professional review			
Outage preparation arrangements			
Optional improvements / contingency			

Total / one-time vs. recurring / decision owner / next review

Ask what information is needed before choosing repair or replacement. Avoid counting the same quote in both assessment and repair totals.

Sequence the work and handoffs

Ensure each provider knows the work that could affect their stage. Confirm household access needs and appropriate permissions before work.

RECORD 01

Work / qualified role / proposed date

Prerequisite / access / protection / requirement to verify

Completion record / cleanup / received by / next stage

RECORD 02

Work / qualified role / proposed date

Prerequisite / access / protection / requirement to verify

Completion record / cleanup / received by / next stage

Record changes and new restrictions as soon as they are confirmed. A planned date is not a completion record.

Review official safety guidance

Read the current official resources with the household. For a sounding CO alarm, move outside to fresh air, call emergency services and do not reenter until responders permit it. [S3]

01 / CO / smoke alarm instructions and questions for the fire authority

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

---

02 / Winter alerts / emergency communications / household preparation

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

---

03 / Outage and equipment-dependency questions for qualified providers

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

NJOEM warns against indoor generator use and using an oven for heat. This planner does not provide alternative-heating or generator operating instructions. [S1, S2]

Keep completion records usable

Record what was completed and what remains open. Store operating instructions where the responsible household members can find them.

[ ] Service findings / outstanding restrictions documented

Evidence / accountable owner / date: _____

[ ] Manufacturer and provider instructions retained

Evidence / accountable owner / date: _____

[ ] Household responsibilities / contact method confirmed

Evidence / accountable owner / date: _____

[ ] Follow-up dates and changed-condition triggers assigned

Evidence / accountable owner / date: _____

Go / no-go decision, reason and limits / decision owner / date

Fallback / next action / review trigger

Ask for clarification when instructions conflict. Do not treat a paid invoice as confirmation that every concern was assessed.

Conversations and accountable next steps

Use the equipment records and household priorities to focus each conversation.

Heating / chimney / exterior provider: What remains unassessed or restricted?

Household / utility / relevant provider: Which dependency needs a confirmed backup plan before winter?

Role / meeting date / question / documents to bring

Recommendation / next action / owner / deadline / follow-up

Decision / limits: _____ Review cadence: _____

PRIORITY 1 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

PRIORITY 2 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

Keep completed records private. Share only what the recipient needs through an agreed secure channel.

Sources and your next connection

Primary resources checked October 15, 2026 (UTC). Recheck before acting. Blue underlined titles are clickable; [S#] references identify the sources below.

[S1] NJOEM: Winter Weather Hazards

Winter preparation and public safety guidance for New Jersey households.

[S2] NJOEM: Power Outages

Outage planning, utilities and electricity-dependent equipment considerations.

[S3] CPSC: Carbon Monoxide Fact Sheet

CO alarm response and prevention information; follow emergency authorities.

General educational planning information, not individualized clinical, engineering, equipment-operation or construction advice. Requirements vary; qualified professionals and responsible authorities should confirm applicable decisions.

Need professional guidance?

Explore current professionals in the SJBA directory. Bring your questions. Roles in this workbook are conceptual; verify representation, qualifications, scope and availability.

About SJBA

Founded in 1994, the South Jersey Business Association is a structured, performance-driven, category-exclusive referral network for serious South Jersey business owners. SJBA does not guarantee member work or results.

Established business owner? Explore a meeting visit.
Visit SJBA for current resources and information.