

PROJECT CONNECTIONS / PLANNING SERIES 05

Plan for the power you actually need.

Standby Generator Installation Planner

Define outage priorities, then coordinate qualified electrical, fuel, location, approval and service decisions for permanently installed equipment.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative scene; not an identified SJBA member project.

FOUNDED 1994 / CAMDEN / GLOUCESTER / BURLINGTON

SOUTHJERSEYBUSINESSASSOCIATION.ORG

Start with essential activities

This workbook covers permanently installed standby equipment, not portable-generator operation. Backup power cannot guarantee medical safety; discuss essential-care contingencies with the appropriate providers.

STARTING POINT / Priorities • Professional assessment • Proposal review • Installation planning

Measurable outage-support goal and essential activities

Decision owner, target planning date and household participants

Communication, care or service dependencies needing a separate contingency

Use the workbook in three passes

Gather facts and constraints / pages 3-6

Compare and coordinate / pages 7-10

Confirm next steps / pages 11-14

Track progress in the action plan on page 13. Keep completed worksheets private; no online submission is required.

Inventory equipment for the professional

List what supports your priorities. A qualified electrical professional must assess loads, starting demands and compatibility; this is not a homeowner sizing calculator.

Item / model if known	Priority / activity supported	Professional check / notes
Heating / cooling equipment		
Refrigeration		
Water / sump equipment		
Lighting / communications		
Essential household equipment		
Other priority item		

Most important unresolved question / next action

For care-related equipment, keep sensitive details private and ask providers about an independent outage plan.

Understand operating limits

Ask the electrical professional to explain which loads can run together and what load management means for your home. Confirm the selected equipment against the actual design.



BETTER QUESTIONS. CLEARER NEXT STEPS.

Bring the relevant worksheets to your professional conversation. Record the recommendation, who owns the next action and when to follow up.

Illustrative scene; not an identified SJBA member project.

Which equipment is included, excluded or managed automatically?

What cannot operate simultaneously under the proposed design?

How will starting demand and future equipment changes be evaluated?

What limitations or interruption scenarios should the household plan for?

Retain the written load assessment and the final equipment schedule.

Confirm the proposed location

Have the installer evaluate the site using the selected model’s installation manual and applicable requirements. Portable-generator distance rules are not standby siting instructions. [S1]

Site question	Professional finding	Evidence / remaining issue
Exhaust / CO considerations		
Doors / windows / air intakes		
Property / association constraints		
Equipment / service access		
Drainage / site conditions		
Manufacturer / authority review		

Most important unresolved question / next action

Record the manual revision and authority confirmation. This workbook supplies no installation clearances.

Coordinate the fuel supply

Ask a qualified fuel professional about the proposed equipment, available supply and installation conditions. Fuel availability during an outage is part of the household plan.

Which fuel is proposed and what supply is actually available?

Who confirms service capacity and any upgrade or storage needs?

What interruption or replenishment constraints should be planned for?

Who owns fuel approvals, installation handoffs and ongoing service?

Do not perform fuel-system work based on this planning sheet.

Make the electrical handoffs explicit

Ask the electrical professional to confirm transfer equipment, utility interfaces and approval responsibilities. This is a verification record, not a wiring diagram or installation procedure.

Design / approval item	Qualified party / evidence	Due date / unresolved item
Load / equipment design		
Transfer equipment		
Utility coordination		
Permit responsibility		
Fuel / electrical interface		
Required inspections		

Most important unresolved question / next action

Do not connect a generator through a household receptacle or attempt electrical or fuel procedures yourself.

Compare equipment and service offers

Compare the proposed system and support, not just a capacity label. Ask providers to tie specifications and exclusions to your priority inventory and site assessment.

Option / provider A: _____ B: _____

Comparison point	A / evidence	B / evidence
Model / verified specifications		
Included loads / management		
Electrical and fuel work		
Site work / approvals		
Commissioning / owner instruction		
Warranty / service exclusions		

Recommendation / information needed before choosing

Ask who will resolve a fault involving more than one installer or manufacturer.

Budget installation and ownership

Separate initial work from recurring fuel, maintenance and service costs. Confirm the assumptions behind estimates rather than treating them as guaranteed operating costs.

Cost / responsibility	Estimate	Confirmed	Source / date
Equipment / transfer equipment	$	$	
Electrical installation	$	$	
Fuel work / upgrades	$	$	
Site work / approvals	$	$	
Commissioning / instruction	$	$	
Fuel / routine service	$	$	
Contingency / unknowns	$	$	

Decision owner / spending limit / next review date

Annual service estimate $_____; source / date _____; exclusions _____.

Schedule the qualified team

Confirm one coordinating contact and the written deliverable for each handoff. A delivery date is not the date the system is approved and ready for use.

Electrical installer

Finalize design and transfer-equipment scope.

Owner: _____ Due: _____ Received by: _____

Fuel professional / provider

Confirm supply work and readiness.

Owner: _____ Due: _____ Received by: _____

Site-work provider

Complete the approved site preparation.

Owner: _____ Due: _____ Received by: _____

Utility / relevant authority

Confirm required coordination and inspections.

Owner: _____ Due: _____ Received by: _____

Installer / service provider

Complete commissioning and owner instruction.

Owner: _____ Due: _____ Received by: _____

Record each responsible party, target date, dependency and evidence of completion.

Record commissioning and instruction

Have the installer document commissioning and explain the exact model’s owner instructions. Generator exhaust contains carbon monoxide; discuss CO alarm planning and official safety guidance. [S1, S3]

Which commissioning tests and required inspections were documented, and by whom?

Which model, manuals, warranty and service contacts were provided?

What owner instruction, alarm response and operating limits were explained?

What remains incomplete, and who confirms the system is ready?

If a CO alarm sounds or poisoning is suspected, move to fresh air and contact emergency services. Do not troubleshoot in danger.

Assign ongoing service responsibilities

Use verified manufacturer and professional instructions for service intervals and tasks. Record who is qualified to perform each item; do not invent a testing or maintenance schedule.

Responsibility	Instruction source / interval	Assigned contact / next date
Manual / model record		
Scheduled professional service		
Testing / monitoring instructions		
Fuel-related service		
Alarm / household planning review		
Warranty / fault contact		

Most important unresolved question / next action

Record changes when the home’s equipment, fuel arrangements or household needs change.

Resolve the final planning questions

Bring the inventory, site findings and written proposals. Ask the professionals to explain remaining assumptions before you authorize a system or schedule work.

READINESS CHECK / mark confirmed or name the unresolved issue

☐ Electrical professional: loads / limits confirmed

☐ Fuel professional: supply / scope confirmed

☐ Installer: location / manuals / approvals reviewed

☐ Service provider: commissioning / support agreed

Decision: proceed / revise / investigate / pause | Date: _____

PRIORITY 1 / Action: _____

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

PRIORITY 2 / Action: _____

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

PRIORITY 3 / Action: _____

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

Conversation record: recommendation _____; documents _____; follow-up owner / date _____. Review at each design or scope change.

Sources and your next connection

Use these primary resources with the relevant professional. Source checks: October 14, 2026. Blue underlined titles are clickable; [S#] references point to this list.

[S1] Generac | Standby generator guidance

Manufacturer example: use the selected model’s manual and qualified site review. No brand endorsement.

[S2] NJ DCA | Construction permit resources

Confirm project-specific permits and inspection questions with the local enforcing agency.

[S3] CPSC | Generators and carbon monoxide

CO hazard and alarm awareness. Portable-generator placement guidance is not a standby design specification.

General educational planning information, not individualized legal, financial, insurance, clinical, engineering or construction advice. Requirements vary. Qualified professionals and relevant authorities should confirm applicable decisions.

Need professional guidance?

Explore current professionals in the SJBA directory. Bring the relevant worksheet and explain the decision you need help making. Not every role listed is necessarily represented; verify scope, credentials and availability.

About the South Jersey Business Association

Founded in 1994, SJBA is a structured, performance-driven, category-exclusive referral network for serious South Jersey business owners. Its trust-based professional relationships can help residents and business owners identify relevant expertise. SJBA does not guarantee member work or results.

Established business owner? Explore a meeting visit.
Visit the SJBA website for current information.