

Annual Facility Budget Worksheet

A practical planning worksheet for facility managers and directors.

Manager checklist

- Baseline recurring contracts and planned maintenance
- Reactive repair allowance by category and location
- Known deferred work and risk-ranked backlog
- Capital candidates, estimate confidence, target year and business justification

Leadership review

- What risk is reduced?
- Who owns the next action?
- What evidence confirms completion?
- Is the cost operating, preventive, or capital?

Planning resource only. Adapt criteria to the property, jurisdiction, client procedures, manufacturer guidance, and qualified-professional requirements.