Renovation roadmap checklist: Prepare for your iSFP

An individual renovation roadmap (individueller Sanierungsfahrplan, iSFP) combines a building survey, calculations, options and a final discussion. Collect available documents and your goals. Missing documents do not automatically rule out advice.

1. Building and starting point

- ☐ Record the property address, contact details, ownership and people involved; for an owners' association (Wohnungseigentümergemeinschaft, WEG), include the manager and decision-makers.
- ☐ Collect the building type, construction year, building application or notification date and number of residential units.
- ☐ Record current use, living area and heated area, plus rental, vacancy or owner occupation during renovation.
- ☐ Identify listed status or building fabric of particular conservation value.
- ☐ Record moisture, mould, roof, heating or other building defects; discuss any separate investigation of their causes.

2. Plans and building envelope

- ☐ Prepare floor plans for every storey, sections, elevations and area and volume calculations.
- ☐ Collect the building specification, evidence of age and information on extensions, loft conversions or changes of use.
- ☐ Provide any existing energy performance certificate.
- ☐ Collect evidence for windows, external doors and insulation; add known materials, insulation thicknesses and installation years.
- ☐ Prepare photographs of construction details and earlier works, plus existing thermal images, airtightness tests or moisture investigations.

Notes / missing documents

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iSFP: Documents and process

3. Building services and energy use

- [ ] Collect the heating type, manufacturer, model and installation year, plus service records, chimney sweep reports and existing heat-load calculations.
- [ ] Describe radiators, underfloor heating and typical flow temperatures.
- [ ] Gather information on hot water, ventilation, solar thermal systems, photovoltaics and any quotations already obtained.
- [ ] Collect heating energy and relevant electricity use for three consecutive years if possible, with bills, delivery quantities, meter readings and reading periods.
- [ ] Provide occupancy, room temperatures, vacancy and changes in use; explain unusual consumption years.

4. Goals, budget and sequence

- [ ] Identify the reason for renovating and priorities such as running costs, comfort, summer heat protection, climate, property value, sound insulation or accessibility.
- [ ] Prepare your timeline, investment capacity now and later, and financing limits.
- [ ] Record maintenance already due on the roof, render, windows or heating.
- [ ] Discuss dependencies between windows, insulation, heating, photovoltaics and any planned loft conversion.
- [ ] Clarify occupancy during works, work you wish to do yourself and how its proper execution will be confirmed, and the approvals needed.

Notes / missing documents

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iSFP: Completion and open questions

5. Appointment, funding and site visit

- ☐ Before commissioning, clarify whether an iSFP fits your needs, the scope, fee, additional services and expected results.
- ☐ Distinguish funding for residential energy advice (Energieberatung für Wohngebäude, EBW) from later funding applications for individual renovation measures.
- ☐ For funded advice, apply to BAFA before advice starts, personally or through an authorised representative; an advice contract signed beforehand needs the required funding reservation clause.
- ☐ Arrange access to heating, meters, basement, attic and relevant rooms; organise keys and coordination with tenants.
- ☐ Record questions, missing documents and inaccessible construction details; show draughts, moisture and comfort problems and provide available photos.

6. Results and next steps

- ☐ Agree the stages of advice: Building survey, calculations, comparison of options and final discussion.
- ☐ Ask for explanations of assumptions, uncertainty, measure packages, cost estimates and interactions; compare them with your budget and goals.
- ☐ Receive and discuss both documents: “Mein Sanierungsfahrplan” (my renovation roadmap) and “Umsetzungshilfe für meine Maßnahmen” (implementation guidance for my measures).
- ☐ Record that you decide whether and when to carry out measures; an iSFP does not replace detailed execution design, defect diagnosis or full site management.
- ☐ Allow for later detailed design, quotations, separate funding applications and construction support where needed; check funding conditions again before the next contract.

Notes on use

Identify missing or uncertain information openly and agree what will be surveyed, measured or based on transparent assumptions. An iSFP is a strategic decision aid; modelled effects do not guarantee actual savings, construction costs or grant amounts. Funding and iSFP benefits depend on the project and applicable conditions. The relevant programme documents and individual grant decision govern the case.

Sources and online checklist

BAFA: Residential energy advice (EBW, German)

BAFA: EBW application guidance (German)

BAFA: Minimum requirements for an iSFP (German)

Back to the Pegasus online checklist

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