Pre-Shutdown Planning Checklist

Version 1.0 | Published: 06 July 2026 | Review date: July 2027

Purpose	Checklist for planning engineering shutdowns, planned maintenance, remedial works and project tasks
Use for	Production shutdowns, weekend works, planned outages, installations, remedial work and contractor coordination
Document type	Client resource and planning checklist
Aim	Safer work, fewer delays, better spares control, clearer handover and cleaner restart

1. Purpose

Shutdown work can save significant downtime if it is planned properly. It can also create delays, safety issues and restart problems if scope, spares, isolations, permits, access, people and handover are not controlled. This checklist helps clients plan engineering shutdown work in a structured way.

2. Shutdown planning principles

- Define the scope clearly and separate essential work from desirable work.
- Confirm spares, consumables, tools and access equipment before the shutdown starts.
- Agree permit, isolation, RAMS, contractor and site induction requirements early.
- Build a realistic plan that includes preparation, execution, testing, restart and contingency time.
- Assign owners for each task and confirm who can make decisions during the shutdown.
- Capture defects and extra work without losing control of the main shutdown plan.
- Complete a controlled restart, handover and close-out review.

3. Planning timeline

Timeframe	Key actions
6-8 weeks before	Confirm shutdown dates, production constraints, critical assets, outline scope and high-risk work.
4 weeks before	Confirm spares, contractor needs, RAMS, access equipment, permits and internal labour requirements.

Timeframe	Key actions
2 weeks before	Review task list, parts availability, drawings, method statements, isolation plans and contingency tasks.
1 week before	Confirm induction requirements, job packs, tools, PPE, communication plan and restart requirements.
Day before	Check site readiness, parts on site, access clear, permits ready, handover complete and production condition stable.
During shutdown	Track progress, manage changes, record findings and escalate risks early.
Restart	Complete safety checks, guards, tests, trial run, production handover and monitor initial operation.
Close-out	Capture lessons learned, outstanding defects, spares used, follow-up work and PPM changes.

4. Pre-shutdown checklist

Ref	Check item	Owner	Status	Notes

5. Shutdown task plan

Task ref	Asset / area	Task description	Owner	Start	Finish	Status	Risk / permit

6. Spares, tools and access requirements

Item required	For task / asset	Qty	Confirmed ?	Supplier / location	Notes

7. Restart and handover checklist

Check item	Completed?	By	Time	Notes

8. Close-out actions

Action / defect	Owner	Priority	Due date	Status	Notes

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Document owner	Company Director
Approved by	Daryl Gibson, Director
Signature	_____
Date	06 July 2026
Next review	July 2027