Leading the Commissioning Process:
Step-by-Step Strategies for New Construction Projects
Daily Agenda

MONDAY
Course Introduction

Winning the Work–An Overview of the Business Side of Commissioning
  • Business aspects of commissioning
  • Ways to attract clients
  • Key selling points
  • How to identify target markets

You're Hired!
  • Introduces the "Class project" that will take participants through every stage of the commissioning process during the five-day course

Determining the Owner's Needs–Developing the Owner's Project Requirements
  • What the OPR includes
  • Why it's important
  • Methods available for creating the OPR
  • Experience an OPR workshop

Creating the OPR Document
  • Summarizing workshop results
  • Creating narratives, performance criteria, measurable goals
  • "Red flags" when reviewing OPRs

Forming the Commissioning Team
  • How and why to form a commissioning team
  • Roles and responsibilities
  • How to help an owner select an architect/engineer
  • How to develop a communication plan

Pulling It All Together–Formalizing Commissioning Using a Commissioning Plan
  • Purpose of a CxPlan
  • How to develop the CxPlan
  • Example CxPlan

TUESDAY
Meet Your Architect and Engineer
  • Addition of the A/E to the “class project” team
What’s a Basis of Design and Why Do We Need One?
- Purpose and content of the BoD
- Example BoD discussion

Helping the Design Team Deliver High Quality
- Tools to help the design team
- Checklists
- Design reviews

Workshop Design Review
- Workshop design review of the "class project" plans

Preparing for the Construction Phase, Part I
- Pre-construction phase activities
- Preparing for verification checks

Preparing for the Construction Phase, Part II
- Functional test procedure development
- Planning for O&M requirements

Note: A one-hour orientation session for the UW commissioning exam is held at the end of class Tuesday.

WEDNESDAY

Test Procedure Group Project
- Participants develop a basic test procedure using information available at this stage in a project

How to Make Your Job Easier—Integrating Commissioning into the Process
- Commissioning specifications and their role in the overall process
- How to develop and integrate Cx specifications
- Purpose and benefit of integrated specs

Requesting, Reviewing, and Using Submittals
- Role of submittals
- Why submittal review is important
- How to request and review submittals
- How submittals play a role in upcoming commissioning activities

Tracking Checklist Completion
- Value of tracking
- What information tracking provides
- How tracking checklists aid in scheduling construction phase activities

Team Meetings and Conflict Resolution
- Techniques for effective team building
- Conflict avoidance and resolution
- Commissioning team meetings

Site Visit Procedures
- Tools and skills necessary to plan and execute a commissioning site visit
- Importance of regular site visits
- Knowledge that is gained
- Effect on other members of the project team
THURSDAY

**Integrating Commissioning with TAB Activities**
- Providing value to the owner
- Understand the distinction between TAB and the commissioning process

**Performing Test Procedures**
- Testing techniques for a variety of system types

**Testing Real Systems—Hands-On Exercises; Test Intro**
- Group activity session
- Hands-on testing experience at the course location

**Reporting Techniques**
- Why and how to maintain regular, organized reports
- Ways to resolve issues

FRIDAY

**Assuring Quality O&M Documentation and Training**
- Importance of quality documentation and training
- Features that identify documentation or training as high-quality

**Occupancy and First Year of Operation**
- Commissioning authority's role
- What types of issues or problems to expect
- How to maintain involvement with the owner and project
- Developing and executing seasonal tests
- Preparing and executing the warranty review

**Continuous Commissioning, Recommissioning, and Retro-Commissioning**
- Differences between these concepts
- Implications of each

**Spreading the Word—Final Report and Case Studies**
- Value and importance of the final report and case studies
- Elements that go into the final report
- Audience report
- Value of the report to the life of the building and project

**Planning a "Lessons Learned" Meeting**
- Meaning and purpose
- Benefits available to all team members