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Course Description



- Complexities associated with building construction plans require interdependence of trades and professions to achieve success through collaboration.
- Project commissioning teamwork coupled with consistent process application achieves results.
- Collaborative techniques enhance teamwork.
- Interaction and sharing of ideas and methods with audience enhances learning objectives.



Learning Objectives

At the end of the this course, participants will be able to:



- 1. Understand how modern building construction paradigms create the need for collaboration and cooperation among trades and suppliers in order to accomplish the many objectives that fall under the auspices of commissioning. These range from ensuring design intent to ensuring compliance with indoor air quality standards to validating the optimization of mechanical, electrical, plumbing, and fire protection systems.
- 2. Understand the role of the commissioning authority in helping to foster and encourage this collaboration and cooperation.
- 3. Learn to lead in the commissioning capacity in spite of, in most cases, not having the direct line of authority to compel it. This includes communicating that compliance with laws, codes, regulations, standards, etc. is a joint obligation of all parties associated with the projects that must be met on behalf of the owner.
- 4. Learn to take the lead on site conditions that will in the future expedite trouble shooting and repair of structural, mechanical, electrical, plumbing, fire protection and occupant safety issues that arise.



ENGAGING THE COMMISSIONING TEAM:



Long TermCommitment

Typically does not result in matrimony

ENGAGING THE COMMISSIONING TEAM:



Is not about hiring commissioning teams

It <u>IS</u> about firing up Cx Teams

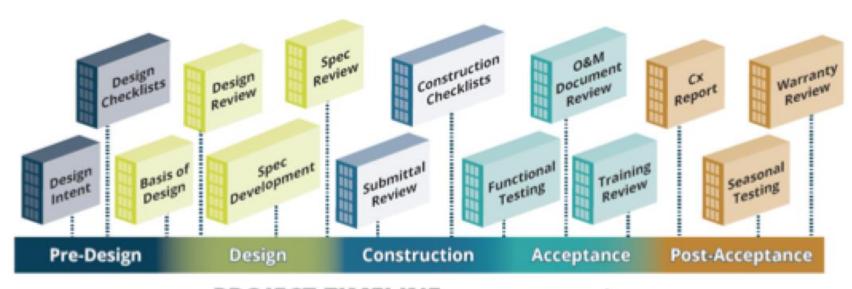
COMMISSIONING PROCESS

- ACG Commissioning Guideline 2005: For Building Owners, Design Professionals and Commissioning Service Providers
- ◆ ASHRAE Standard 202 2013: Commissioning Process
- ◆ ASHRAE Guideline 1 1996: The HVAC Commissioning Process
- ◆ ASHRAE Guideline 1.1 2007: HVAC&R Technical Requirements for the Commissioning Process
- ◆ ASHRAE Guideline 0 2005: The Commissioning Process

ACG Commissioning Guideline – 2018

Cx PROCESS

COMMISSIONING ACTIVITIES



PROJECT TIMELINE -

- ◆ Design Intent Documents (DID, OPR)
- Commissioning Plan
- Commissioning Specifications
- Design Reviews
- ◆ Submittal Reviews
- ◆ Site Observations, Meetings
- ◆ Resolution Tracking Forms (RTF's)
- System Verification Checklists (SVC's)
- Organized Systems Start-Ups

- ◆ Functional Performance Tests (FPT's)
- ◆Operation and Maintenance (O&M) training
- **◆**0&M Documentation
- Commissioning Report
- Systems Manuals
- Warranty Review of Building Operation
- Preventative Maintenance Programs
- Energy Usage Evaluations





Commissioning Specification:

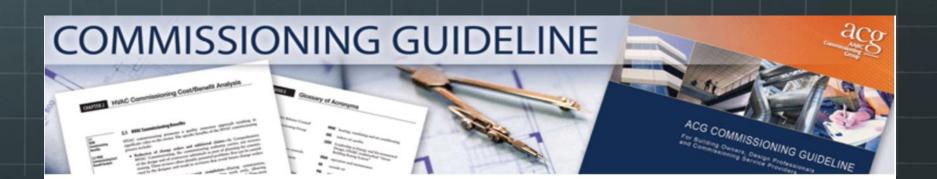
- Develop commissioning plan
- Commissioning team
- Systems to be commissioned
- ◆ Define approximate extent of testing
- Contractor roles and responsibilities



- Owner / Operator
- **◆** Architect
- **♦ Design Consultants**
- Commissioning Authority
- **◆** Construction Manager (or GC)
- **◆ Mechanical Contractor**
- **◆ Electrical Contractor**
- **◆ Temperature Controls Contractor**
- **◆ Test and Balance Contractor**

THE CX TEAM DELIVERABLES

- **♦** Start-Up Specialists
- **◆** Equipment Vendors
- **♦** Specialty Trades
- Specialty Consultants
- **♦** Program Manager
- **◆ Service Contract Providers**
- **♦**BAS Specialists
- **♦IT Support Groups**



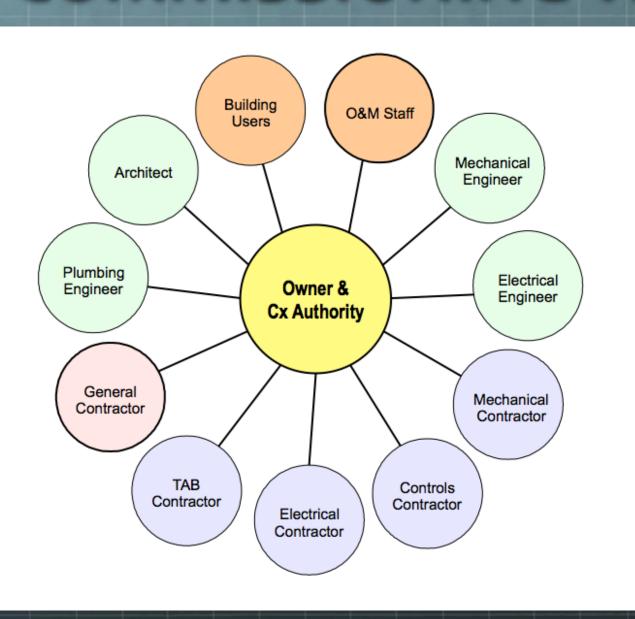
Cx TEAM DELIVERABLES

- ◆ OPR Owner/Designers
- Cx Plan Contractors
- Cx Specifications Contractors/Designers
- ◆ Design Reviews Owner/Designer
- ◆ Submittal Reviews Owner/Designer/Contractors
- ◆ Site Meetings Owner/Designer/Contractors
- ◆RTF Owner/Designer/Contractors
- ◆SVC's Contractors
- Systems Start-Ups Contractors

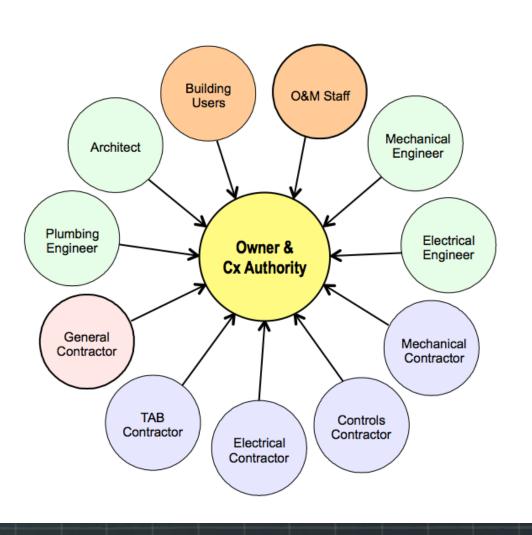


- ◆ FPT's Contractors/Designers
- ◆O&M Training Contractors
- ◆O&M Manuals Contractor/Designer/Owner
- Cx Report –Designer/Owner
- ◆Systems Manuals Owner
- ◆Warranty Review Owner
- ◆PM Programs Owner
- ◆ Energy Usage Evaluations Owner

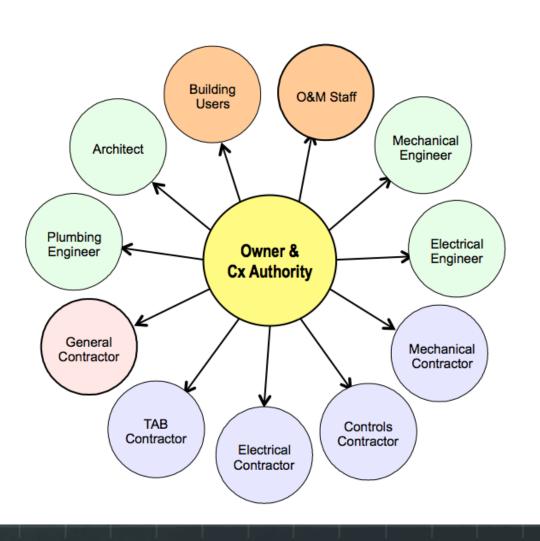
Cx closeout documentation delivery offers opportunities for continuing services



Commissioning Failure



Commissioning Success



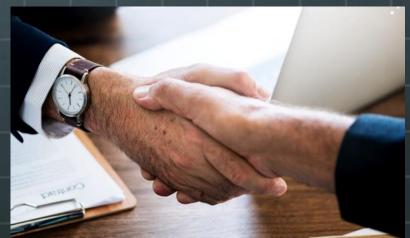


STAKEHOLDERS MUST COLLABORATE



Owner / Operator

- ◆ Develop Owner's Project Requirements
- Assign Cx Team Member and attend meetings
- Retain a commissioning agent
- Communicate requirements to the design team
- Coordinate facilities and staff participation
- Conduct regular site observation



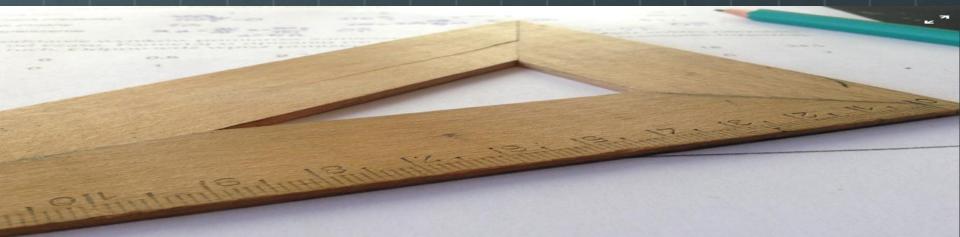
Architect

- Assign Cx Team Member and attend meetings
- Coordinate work of design consultants
- Consider spatial requirements
- Consider room naming convention
- Conduct regular site observation
- ◆ Coordinate design & changes w/ owner & users



Design Consultants

- Assign Cx Team Members and attend meetings
- ◆ Provide Basis of Design and Design Intent
- ◆Respond to RFI's and CO's
- Conduct regular site observation
- Coordinate design & changes w/ owner & users
- ◆ Review O&M manuals, as-built drawings, etc.
- Provide training on the design intent



Commissioning Authority

- Assign Cx Team Leader and attend meetings
- ◆Review Design
- Provide Commissioning Plan and Specification
- Conduct regular site observation visits
- Provide System Verification Checklists
- ◆ Monitor system start-ups
- Conduct Functional Performance Tests
- Review O&M documentation and training



Construction Manager / General Contractor

- ◆Implement Cx per the specifications
- Assign Cx Team Member and attend meetings
- ◆ Project Scheduling
- ◆ Manage overall completion of work
- Manage project documentation
- Coordination of contractors
- Maintaining specified building conditions



Mechanical Contractor

- Assign Cx Team Member and attend meetings
- Manage subcontractors and vendors
- ◆ Document Progress (SVC's)
- ◆ Coordinate equipment start-up
- ◆Operate systems as required for FPT's
- ◆Plan and deliver O&M staff training
- ◆Provide O&M manuals, as-built drawings, etc.



Electrical Contractor

- Assign Cx Team Member and attend meetings
- Coordinate electrical installation w/ mechanical
- Attend meetings
- ◆ Document Progress (SVC's)
- Operate systems as required for FPT's
- ◆Plan and deliver O&M staff training
- ◆Provide O&M manuals, as-built drawings, etc.



Temperature Controls Contractor

- Assign Cx Team member and attend meetings
- Design and complete controls installation as required by Construction Documents
- ◆ Document Progress (SVC's, Pt.-to-Pt., SOO Δ)
- Coordinate with TAB agency
- ◆Operate systems as required for FPT's
- ◆Plan and deliver O&M staff training
- ◆Provide O&M manuals, as-built drawings, etc.



Test and Balance Agency

- Assign Cx team member and attend meetings
- Review design for adequate testing provisions
- Submit TAB data sheets for approval
- Coordinate work with master schedule
- Review site conditions prior to field work
- ◆Submit complete and accurate TAB Report
- ◆Participate in verification of TAB Report



Vendors / Testing Agencies

- Coordinate dates with contractors
- ◆Perform equipment startup & documentation
- Provide calibrated test equipment
- Support commissioning testing
- Provide qualified owner's training



CX PLAN

- ◆ Cx Plan is a set of tools for building the Cx Process
- ◆ Consider Cx Team members as clients
- Craft process elements for appropriate parties
- ◆ Consistency: Documentation
- ◆ Consistency: Approach
- ◆ User Friendly
- ◆ Minimize redundancies
- ◆ Leverage start-up/checkout
- ◆ Seek collaboration



- ◆ Interpersonal relationships
- ◆ Learn and use names
- ◆ Collaborate and coordinate
- ◆ Early, efficient & often
- ◆ Coincide with OAC or Contractor Meetings
- ◆ Pre-Bid/Pre-Construction Meetings
- ◆ Pre-Installation Meetings
- Coordination Meetings



- ◆ Attendance Sheets
 - Spell names correctly
 - Use official company names
 - ◆ Set up check boxes
 - ◆ Update sign-in grow the list
 - ◆ Include name, company, phone & email
 - ◆ Make corrections



 $158 \ Burt \ Road \ | \ Lexington, \ KY \ 40503 \ | \ Tel. \ (859) \ 278-5552 \ | \ Fax \ (859) \ 278-6501$ $2611 \ Waterfront \ Pkwy. \ E. \ Drive, \ Ste. \ 340 \ | \ Indianapolis, \ IN \ 46214 \ | \ Tel. \ (317) \ 536-2618$

Project: MSU-RESSF Meeting: Commissioning Meeting Date/Time: 4/10/18 approx. 11:00 AM

Name	Representing	Phone	Email	1
Jim Magee	FCG	(859) 221-5838	jim@facomgrp.com	



158 Burt Road | Lexington, KY 40503 | Tel. (859) 278-5552 | Fax (859) 278-6501 2611 Waterfront Parkway, Suite 340 | Indianapolis, IN 46214 | Tel. (317) 536-2618

Project: MSU – Renovate/Expand Student Services Facility

DECA Number 440-UNIT-MS16-00

Regarding: Construction Phase Commissioning Meeting Minutes

Site Date: March 27, 2018

Time & Duration: 11:00 AM
Prepared by: Jim Magee

Attendees

Gardner May	Morehead State University (MSU)
Matthew Watkins	Morehead State University (MSU)
	Morehead State University (MSU)
Marc Williams	CBTS/MSU
Kevin Euga	CMTA
Justin Lane	Monarch Construction Company (MCC)
Jake Raymond	Monarch Construction Company (MCC)
Rob Miracle	Siemens
Wes Black	Elliott
Randy Seagraves	Dixon Electrical (Dixon)
Clay Kissick	Facility Commissioning Group (FCG)

Construction Phase Commissioning Meeting Minutes

Purpose: To track the project progress relative to the commissioning process, address

problems that alter the design intent or affect the commissioning process and to

provide an open forum for the exchange of information between Cx Team

members.

Presenter: Justin Lane Recorder: Clay Kissick

1. Circulated Attendance Sheet and made introductions.

- 1.1. Siemens is attending commissioning meetings to achieve proper coordination with Monarch and subcontractors.
- 2. Review Action Items from last Meeting:
 - 2.1. May 1, 2018 is Lighting Controls equipment initial start-up scheduled date.
 - 2.2. <u>ACTION ITEM:</u> Siemens noted many existing HVAC terminal devices have failed damper actuators, and Siemens will provide a list of these to MCC March 28, 2018.
 - 2.2.1.1. <u>ACTION ITEM:</u> Siemens reported that Potter (low voltage subcontractor) identified16 bad hot water valve actuators, 20 missing thermostats and 18 missing discharge air sensors; Siemens agreed to provide details of identification and location to MCC March 28, 2018.
 - 2.2.1.2. <u>ACTION ITEM:</u> Siemens will review the Potter list of failed components with MCC tomorrow, March 28, 2018.

SVC's

- ◆ Interface with Contractors
- ♦ Easy to use/KISS
- ◆ Not the Greater Los Angeles phone book
- ◆ Templates and Tables
- ◆ Assist this is a collaborative Cx Deliverable
- ◆ Monitor
- ◆ Report status regularly



System Verification Checklist US Bank Branch Westminster

System: Zone Dampers

Commissioning

158 Burt Road Lexington, KY 40503 Tel. (859) 278-5552 Fax (859) 278-6501

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				MECHANICAL CONTRACTOR										TEMPERATURE CONTROLS CONTRACTOR			
-	Tag	Area Served	Dwg.#	Unit Tag	Ceiling	Hanger	Bellmouth	Flexible		Duct Inlet	24V	Initials & Date	Temperature Controls			Initials & Date	
"	rag	Alea Serveu	Dwg. #	Onit rag	Installation	Rods	Fitting	Ductwork	Damper	Size	Connection		Zone Sensor	24V Actuator	T-Stat ID	miniais & Date	
1	ZD 101	Lobby 101	M201														
2	ZD 103	Office 103	M201														
3	ZD 104	Conference 104	M201														
4	ZD 107	ATM/Cash 106, Teller 107, Coupon 108	M201														
5	ZD 112	Vault Vestibule 109, Vault 110, Supplies 110, Passage 112	M201														
6	ZD 116	Break Room 116	M201														
7	ZD 117	Office 117	M201														
8	ZD 118	Office 118	M201														
9	ZD 119A	Open Office 119	M201														
10	ZD 119B	Open Office 119	M201														

#	Date	Remarks
1		
2		
3		
4		
5		



System Verification Checklist

US Bank Branch Westminster

System: Lighting Controls

Area Served: Location of lighting fixtures and devices **Drawing:** Reference to the lighting layout drawing

Electrical Contractor Installation Checks

- Occupancy Sensor(s)
 - #: The number of occupancy sensors installed matches what is indicated in the construction documents or as required to provide specified coverage, E101
 - Type: Occupancy sensor type installed in location indicated, E101
 - OS Wiring: Occupancy wiring installation complete, E101
 - Position: Occupancy sensor is mounted as indicated, E101
 - Wired: Wiring and terminations are complete for the occupancy sensors
- Light Fixtures
 - Type: Light fixture type identified in construction documents, E101
 - o #: The number of light fixtures indicated in the construction documents, E101
 - EM: The number of emergency fixtures identified in the construction documents, E101
 - Wired: Wiring and terminations are complete for the light fixtures
- Light Switches
 - Type: Light switch type identified in construction documents, E101
 - #: The number of light switches installed matches what is indicated in the construction documents, E101
 - Wired: Wiring and terminations are complete for the light switches
- Initial and Date indicating completion



Facility
Commissioning

System Verification Checklist US Bank Branch Westminster

System: Lighting Controls

158 Burt Road Lexington, KY 40503 Tel. (859) 278-5552 Fax (859) 278-6501

2611 Waterfront Parkway, Suite 340 Indianapolis, IN 46214 Tel. (317) 536-2618

			ELECTRICAL CONTRACTOR												
Dura # Anna Samuel			Occupancy Sensor(s)/Photocell				Lighting Fixtures				Switch			N-4-4-X	Initials O Data
Dwg. #	Area Served	#	ID	Type	Wiring	Position	Type	#	Emerg.	Wired	Туре	#	Wired	Note(s)	Initials & Date
Interior Lighting															
E201	Vestibule 100	0					A1	2	2		0				
	Lobby 101	0					B1	4	0		0				
E201							B2	3	1						
5204	ATT 1/0 1 100	+		- 06		147-11	EX	1	1		A	4			
E201	ATM/Cash 106	1		OS		Wall	E	2	1		\$os	1			
E201	Conference 104	1		OS		Wall	В	3	0		\$os	1			
E201	Supplies 111	0					E1	1	1		0				
	Open Office 102						B1	1	1		0				
E201		0					B2	1	1						
		+					EX	1	1						
							B2	1	1						
	Teller Area 107	О					М	6	0		\$	8			
E201				-			С	5	0						
							E1	1	1						
							D	2	0						
E201	Open Office 119	0					B1	3	0		0				
E201	Branch NER 105	1		os		Wall	J1	1	0		\$os	1			
E201	Mechanical 115	1		os		Wall	J	1	0		\$os	1			
	Break Room 116					Wall	Е	1	0		\$os	1			
E201		1		os			E1	1	1						
							D	1	0						
E201	Unisex 113	1		os		Wall	D1	1	1		\$os	1			
E201	Unisex 114	1		os		Wall	D1	1	1		\$os	1			
E201	Office 117	1		os		Wall	В	3	0		\$os	1			
E201	Office 118	1		os		Wall	В	3	0		\$os	1			
E201	Office 103	1		OS		Wall	В	3	0		\$os	1			
5201		1		20		Mall	Е	1	0		\$os	1			
E201	Vault 110			OS		Wall	E1	1	1		\$os	1			

Equipment Lists

						and the same of th
	Facility KCTCS	158 Burt Road Lexington, KY 4050 Tel. (859) 278-5552 Fax (859) 278-650				
	Commissioning Group	2611 Waterfront Parkway, Suite 34 Indianapolis, IN 46214 Tet. (317) 536-261				
						www.facomgrp.com
Air I	Handling Unit (237323)	Location	Dwg.	Manufacturer	Model Number	Serial Number
1	AHU-1	Mechanical Room 114	H6.1	Ventrol	ITF	25231-01
Heat	t Recovery Unit (238129)	Location	Dwg.	Manufacturer	Model Number	Serial Number
1	OU-1	Roof	H7.2	Daikin	RXTQ48TAVJU	F002172
Indo	por Units (238129)	Location	Dwg.	Manufacturer	Model Number	Serial Number
1	IU-W-05	Elev. Equip 115	H1.1	Daikin	FXAQ07PVJU	E019022
2	IU-W-05	Comm 116	H1.1	Daikin	FXAQ07PVJU	E019016
3	IU-W-05	Elec. Room 118A	H1.1	Daikin	FXAQ07PVJU	E019011
4	IU-W-05	Elec. Room 118B	H1.1	Daikin	FXAQ07PVJU	E019014
5	IU-W-05	Comm 209	H1.2	Daikin	FXAQ07PVJU	E019017
6	IU-W-05	Comm 216	H1.2	Daikin	FXAQ07PVJU	E019012
7	IU-W-05	Comm 306	H1.3	Daikin	FXAQ07PVJU	E018972
8	IU-W-05	Comm 324	H1.3	Daikin	FXAQ07PVJU	E018971
Fans	s (233423)	Area Served	Dwg.	Manufacturer	Model Number	Serial Number
1	PA-1	OU-1	H6-1	Nortek	Fan Wall (22-85 - 213T - 44 x 41 x 31 - B4)	25231-01
			100		Fan Wall	

Digital Tools

- → iPads/Tablet Computers
- ◆ Construction Management Software
- ◆ Commissioning Software
- ◆ Cell Phones
 - **♦** Camera
 - ◆ Voice memos
 - ◆ Notes
 - **♦** GPS
- ◆ Apps
 - ♦ Sound Levels
 - ◆ Weather
 - **♦** Compass



COLLABORATIVE METHODS Group Setup

- Deliberate Setup of a Team
- Before Beginning Work
- lncreases High Performance Potential
- **4 Common Group Models**



COLLABORATIVE METHODS Chance

- Collaboration by chance
- Most basic of 4 models
- Cx Team is a random pick of who's available
- No regards for skills or needs of members

COLLABORATIVE METHODS Acuity

- Collaboration by acuity
- Creates Cx Team w/ balanced skill sets
- Conceptualist, Formalist, Operations, Technician
- Each of 4 acuities exist on Cx Team

COLLABORATIVE METHODS Interest

- Collaboration by interest
- © Cx Team composed of similar curiosities, careers & hobbies
- Common interests related to problem to be solved
- Common unique knowledge trumps balanced acuity in these Cx Teams

COLLABORATIVE METHODS Leader

- Collaboration by leader
- Members chosen by leader
- **©** Cx Team member with
 - Compatible values
 - Similar schedules
 - Common work environments
- Addresses acuity and interest



COLLABORATIVE METHODS Spence's Rules

- Look for common ground
- Learn about others
- Critique results, not people (don't make it personal)
- Give and get respect
- Proceed slowly
- Be explicit and clear
- Remember the 5 C's of Communication: clarity, completeness, conciseness, concreteness, correctness

Muneera Spence: "Graphic Design: Collaborative Process = Understanding self and Others"

COLLABORATIVE METHODS Katzenbach and Smith's Team Basics

- Small groups
- Complimentary skills
- Common purpose
- Specific performance goals
- Shared working approaches
- Mutual accountability
- ("Optimal performance through accountability")

Katzenbach and Smith: "The Wisdom of Teams"

COLLABORATIVE METHODS Working Styles

- Alone/Quiet/Focused
 - Self paced
 - Internal thinkers
 - Driven by goals
 - Conscious of ownership issues
 - Best at expressing themselves in writing



COLLABORATIVE METHODS Working Styles

- Shared/High Energy/Dynamic
 - Fast paced
 - External thinkers
 - Conceptual
 - Consensus builders
 - Best at expressing themselves verbally

COLLABORATIVE METHODS Working Style Conflicts

- Alone/Quiet/Focused vs. Shared/High Energy/Dynamic
 - "Aloners" become passiveaggressive
 - "Sharers" become overly aggressive

COLLABORATIVE METHODS Avoiding Conflicts

- Manage expectations
- Build consensus
- Communicate affectively
- Follow consistent process
- Maintain routines and methods

COLLABORATIVE METHODS Thinking Styles

- Detailed
- Visionary



COLLABORATIVE METHODS Learning Styles

- Auditory learning
- Kinesthetic learning
- Visual learning



COLLABORATIVE METHODS Spence's Interpersonal Communications

- 52% body language
- 37% tone of voice
- 11% based on words
- Indirect & Direct Communicators

COLLABORATIVE METHODS Spence's Listening Skills

- Listening facilitates learning and shows respect for speakers
- Focus your mind on person speaking
- Use body language to signal attention and interest
- Verbally reflect and respond to what the speaker feels and says

COLLABORATIVE METHODS Barriers to Collaboration

- #1 is difficulty achieving agreement from diverse opinions and views
- Organizational rankings
- Stranger danger
- Needle in the haystack
- Hoarding
- "Not invented here"



COLLABORATIVE METHODS Magee's List of Characters

- Singers and Composers
- Cult of Personality
- Horse Traders
- Envoys
- Salesman



Leading From Behind



CONCLUSIONS

- Cx is a collaborative process
- CxA's must manage teams of people
- CxA's do not hold contracts
- Collaboration enhances Cx Teams
- Cx Teamwork combined with sound Cx process achieves results
- CxA's are facilitators and respect is your currency
- Communication is the gateway to collaboration

This concludes The American Institute of Architects Continuing Education Systems Course

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