

# OSBORN COMMISSIONING PROCESS

PROJECT  
INCEPTION

PLANNING  
PHASE

FORM COMMISSIONING  
TEAM

DEVELOP OWNER'S PROJECT  
REQUIREMENTS (OPR)

DEVELOP INITIAL  
COMMISSIONING PLAN

ACCEPTANCE

DESIGN  
PHASE

UPDATE OWNER'S PROJECT  
REQUIREMENTS (OPR) & BASIS  
OF DESIGN (BOD)

SD AND DD  
DESIGN  
REVIEWS

DETERMINE TRAINING  
REQUIREMENTS

DETERMINE  
CONSTRUCTION  
PREFUNCTIONAL  
TESTS

VERIFY OPR  
& BOD

DEVELOP Cx REQUIREMENTS  
FOR CONSTRUCTION  
DOCUMENTS

DEVELOP TEST  
PROCEDURES

REVIEW CD

UPDATE Cx  
PLAN

A/E REVIEW  
MEETING

ACCEPTANCE

CONSTRUCTION  
PHASE

CONSTRUCTION  
KICKOFF MEETING

VERIFY  
SUBMITTALS

VERIFY SYSTEMS  
MANUAL

PRE-FUNCTIONAL TEST  
PROCEDURES

VERIFY CONSTRUCTION  
CHECKLISTS &  
COMPLETENESS

DIRECT AND/OR  
PERFORM SEASONAL  
TESTS

UPDATE ISSUES  
LOG

RESOLVE  
ISSUE

ACCEPTANCE

OCCUPANCY &  
OPERATIONS PHASE

RESOLVE  
ISSUE

UPDATE ISSUES  
LOG

VERIFY  
REMAINING  
SEASONAL  
TESTS

VERIFY  
TRAINING

COORDINATE  
WARRANTY  
REVIEW

UPDATE ISSUES  
LOG

RESOLVE  
ISSUE

ANNUAL  
BENCHMARKING OF  
FACILITY

FINAL COMMISSIONING  
REPOORT

FINAL  
ACCEPTANCE

## PLANNING PHASE

- COMMISSIONING AUTHORITY (CA) RETAINED
- CA MEETS WITH OWNER TO ESTABLISH OWNER REQUIREMENTS AND PROTOCOLS
- CA DEVELOPS INITIAL COMMISSIONING PLAN

## DESIGN PHASE

- COMMISSIONING KICK OFF MEETING
- CA RELAYS DESIGN CRITERIA DOCUMENTATION REQUIREMENTS AND FORMAT TO A/E
- CA REVIEWS SCHEMATIC DESIGNS
- CA REVIEWS DESIGN DEVELOPMENT DOCUMENTS
- CA EXPANDS CX PLAN TO INCLUDE CONSTRUCTION PHASE INFORMATION. CA PREPARES CX SPECS.
- CA REVIEWS CONSTRUCTION DOCUMENTS AT 100%
- CA FINALIZES THE CX SPECS AND THE CX PLAN IDENTIFYING SPECIFIC TESTING PROCEDURES

## CONSTRUCTION PHASE

- CA CONDUCTS CONSTRUCTION CX KICK OFF MEETING
- CA REVIEWS THE KEY APPROVED SHOP DWG SUBMITTALS
- CONTRACTOR SUBMITS MANUFACTURER SPECIFIC START UP PROCEDURES FOR CA REVIEW
- CA DEVELOPS DETAILED, EQUIPMENT SPECIFIC FUNCTIONAL PERFORMANCE TESTING PROCEDURES AND DOCUMENTATION
- CONTRACTOR SUBMITS TRAINING PLAN FOR APPROVAL
- CA CONDUCTS PERIODIC SITE VISITS AND ATTENDS PERIODIC PROGRESS MEETINGS
- CONTRACTOR EXECUTES AND DOCUMENTS THE START-UP AND INITIAL CHECKOUT. CA MAY WITNESS
- INDEPENDENT TESTING AGENCIES CONDUCT TESTS REQUIRED BY THE TECHNICAL SPECIFICATIONS
- CONTRACTOR CONDUCTS SPECIALIZED TESTING SPECIFIED IN THE TECHNICAL SPECIFICATIONS
- CA DIRECTS AND/OR CONDUCTS FUNCTIONAL TESTING AND PREPARES ISSUES REPORTS
- CONTRACTOR RESOLVES ISSUES AND CA VERIFIES SATISFACTORY RESOLUTION
- CONTRACTOR TRAINS OWNER'S PERSONNEL AS REQUIRED BY SPEC.
- A/E AND CONTRACTOR SUBMIT FACILITY O&M MANUAL INFO AND CA REVIEWS CONTENT
- CONTRACTOR SETS UP REQUIRED TRENDS TO DOCUMENT SYSTEM PERFORMANCE

## POST-OCCUPANCY PHASE

- CA SPOT CHECKS START UPS AND BALANCING
- CA ANALYZES TREND LOGS.
- CA DOCUMENTS TESTING AND COMPILES ALL OTHER DESIGN, OPERATION AND MAINTENANCE INFORMATION
- CA VERIFIES TRAINING
- CONTRACTOR UPDATES AND SUBMITS RECORD DRAWINGS AND SPECS.
- CA CONDUCTS AND CONTRACTOR PARTICIPATES IN OPPOSITE SEASON TESTING AND FINALIZES ASSOCIATED DOCUMENTATION
- CA ATTENDS 11-MONTH WARRANTY SITE VISIT
- CONTRACTOR MAINTAINS RECORD INFORMATION AND SUBMITS FINAL AT THE END OF THE WARRANTY PHASE