



Ongoing Commissioning OCx Best Practices

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6.0Cx TEAM SELECTION AND MANAGEMENT



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Learning Objectives

- Introduction OCx Team
- Identify and Form a Multi-Disciplinary Team
- OCx Team Selection And Management

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The planning phase of an OCx plan (ideally within the NCCx or EBCx process unless OCx is developed as a stand-alone process) should confirm and clearly document the owner's project goals and objectives; evaluate OCx's applicability to the project; scope, design, and plan for the applicable technology tool(s) to support the project; and document the plan.



Introduction

- The OCx Team is made up of industry experts and key stakeholders who are responsible for bringing the project to a successful conclusion and keeping the programme running smoothly.
- The phase of the OCx project, the facility needs (CFR), and the owner's programmes will all have an impact on the specific roles and duties of the team.
- Early on in the OCx process, it is important to bring on board an experienced CxP who can help with the management and planning of the programme.
- In order to achieve the most possible benefits, the Owner and their staff need to be trained and involved throughout the process.
- The core team duties are broken down into each phase in the following chart, which comes from the BCxA Continuing Commissioning Best Practices.

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Engage a Commissioning Provider / Authority

- Employ RFQ/P Qualifications-Based Selection (QBS) to find a third-party commissioning provider to lead the project. The QBS process is a U.S.–mandated professional services evaluation, scoring, and selection best practise.
- The commissioning authority is the leader of the commissioning team and is responsible for planning, organizing, and facilitating the commissioning process on behalf of the owner.
- Selecting the commissioning provider represents one of the most important commissioning decisions that a building owner makes. The provider should be certified by a nationally recognized organization and have the requisite qualifications for the project that is being commissioned.



Selecting a CxA Provider

- Knowledge of the vertical market segment, building type, safety, security, and occupancy. Commercial offices, healthcare, K12, data centres, and laboratories are vertical markets where the CxP's experience is essential. Higher education is frequently regarded a single market area, although the project requires facility type expertise.
- Commissioning the building's assemblies, systems, and equipment.
- Long-term cost-benefit or life cycle evaluations, preventative maintenance, monitoring, and emergency planning for systems and assemblies.
- Experience implementing the OCx project's facility improvement measures (FIMs).
- Expertise managing technology solution implementation for the OCx project (mindfulness for master planning, asset tracking and planning, e.g.)
- Experience managing the challenges and dangers of commissioning existing facilities, including routine operations, maintenance schedules, and emergency procedures, over the long term.



Define and Document OCx Goals and Objectives

Establish a rough order of magnitude of costs and benefits.

- The CxP estimates OCx costs and benefits and sets expectations to help the owner and other stakeholders set goals and objectives.



Develop and document clear goals and objectives.

- Quantifiable, practical, and concrete OCx goals should be set immediately.
- As planning continues, certain goals and approaches may alter. Objectives should not compromise the CFR or OPR. Goals would not violate comfort or dependability to save energy, support aggressive occupancy patterns, or necessitate complicated equipment programming.
- Knowing the owner's objective and expected outcomes helps determine the required effort and investment to support the programme. Involving the owner to set project goals guides the project.



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Identify and Establish a Team Comprised of Experts from Several Disciplines

Role	Planning Phase	Implementation Phase	Sustaining Phase
Commissioning Provider (CxP)	• Update/document CFR • Develop OCx Plan • Organize OCx Team and set expectations • Perform condition assessment • Overall lead for Phase	• Develop and provide Diagnostic Plan • Design and support technology implementation • Perform Data and analytics review for Master List of Findings	• Transition OCx to standard operations • Perform Periodic review and update of CFR and OCx Plans
Systems Integrator (SI)¹	• Review OCx Plan and OCx goals and objectives • Perform technology gap analysis • Identify technology requirements	• Design and manage technology implementation	• Manage technology solution upgrades and updates as required by periodic CFR and OCx plan changes
Owner (OCx Champion)	• Support overall OCx initiative and priority within organization • Communicate key OCx project goals and objectives • Review OCx Plan for acceptance • Communicate CFR/review CFR for updates	• Support timeline and resource requirements for implementation • Review Master List of Findings and approve applicable corrective actions	• Maintain CFR • Engage CxP periodically for ongoing updates to OCx Plan • Review OCx results and approve corrective actions for ongoing sustained facility performance
Owner's IT Representative¹	• Identify Owner security and IT requirements for technology system design considerations	• Review design and validate implementation of technology solution • Support networking and communication requirements in line with Owner security and IT network requirements	• Maintain network, communication, and security requirements for technology solution

Identify and Establish a Team Comprised of Experts from Several Disciplines

Facility and BAS Manager	• Communicate CFR/review CFR for updates • Support technology gap analysis for identification and utilization of existing BAS capabilities	• Support/manage BAS system requirements for data collection and management per the OCx Plan	• Act as Overall lead for ongoing Sustaining Phase
Building Operators & Engineers	• Inform the condition-assessment effort • Identify key opportunities for OCx	• Review and verify Master List of Findings • Support corrective actions • Incorporate OCx process into Preventive Maintenance Plan	• Implement OCx process into stable operations
Technology Provider(s) ¹	• Provide OCx team with system capabilities and requirements for OCx Plan consideration	• Implement technology solution at the direction of the CxP and Systems Integrator	• Provide ongoing license and solution requirements as applicable to ongoing data management and analytics requirements
Technology Maintenance Staff ¹		• Support execution of technology system for data management and analytics	• Maintain technology system firmware and upgrade requirements

OCx Team Roles and Responsibilities



The commissioning provider serves in many capacities throughout an OCx project. The overall role of the CxP is to:

1. Manage the OCx process and cadence of ongoing activities
2. With the Owner, define a project scope of work
3. Define the data requirements
4. Guide the specification or application of technology to the OCx project scope
5. Develop the OCx plan
6. Oversee development of the Diagnostic Plan and execution
7. Develop actionable recommendations, including development of written scopes of work or criteria, for documenting the work required for implementing measures
8. Oversee adherence to the project management procedures established
9. Oversee adherence to the change management procedures established
10. Verification of implemented measures



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