

OVERALL STAFF TRAINING AND ORIENTATION PLAN

Project: _____ Date: _____ Prepared by: _____

(To be filled out by the Commissioning Agent in consultation with the Owner)

Equipment / System	Spec Section	Total Hours (if spec'd)	Scope Code ⁵	Trainee Type ⁶ (list no. of ea.)	Primary Responsible Contractor	Trainers' Company	Agenda Recv'd?	Planned Training Date(s)
Mechanical / HVAC								
Electrical								

Equipment / System	Spec Section	Total Hours (if spec'd)	Scope Code ⁵	Trainee Type ⁶ (list no. of ea.)	Primary Responsible Contractor	Trainers' Company	Agenda Recv'd?	Planned Training Date(s)
Re-Commissioning¹								
Architect²								
Mechanical Designer³								
Electrical Designer⁴								

¹**Recommissioning.** The commissioning agent will provide instruction on the use of blank functional test forms for periodic recommissioning of equipment and systems, per the specification.

²**Architect.** The architect will provide a general overview of the facility, its use, special features, tenant and public considerations, etc.

³**Mechanical Design Engineer.** The mechanical designer will provide an overview of the major systems and equipment in the facility, including for each system: the design intent, why the system was chosen, an overview of its operation, and interactions with other systems, any special areas to be aware of, issues regarding future expansion and remodeling, etc.

⁴**Electrical Design Engineer.** The electrical designer will provide an overview of the major electrical systems and equipment in the facility, particularly the lighting control systems, fire alarm, security and emergency power, focusing on the design intent, why the system was chosen, an overview of its operation, and interactions with other systems, any special areas to be aware of, issues regarding future expansion and remodeling, etc.

⁵**General Scope Codes** (refer to the specifications and to the specific equipment Training Agenda for additional details)

- A Provide an *overview* of the purpose and operation of this equipment, including required interactions of trainees with the equipment.
- B At an *intermediate level*, provide technical information regarding the purpose, operation and maintenance of this equipment, expecting that serious malfunctions will be addressed by factory reps.
- C At a *very technical level*, provide information regarding the purpose, operation, troubleshooting and maintenance of this equipment, expecting that almost all operation, service and repair will be provided by the trainees.

⁶**Trainee Types**

FM = facility manager, FE = facility engineer and assistants, FT = facility technician / maintenance, PM = project manager, T = tenants, O = other

*OSCI = Owner supplied, contractor installed