

PROJECT TRAINING AND ORIENTATION PROCEDURE

Owner training and orientation on equipment and systems provided by the Contractor is accomplished in three general steps using three forms.

1. Overall Plan. After reviewing the specifications, the Owner and Commissioning Agent (CA) fill out a table listing all the equipment that will have training or orientation provided for, on Form C-5a, *Project Training Plan--General Scope and Responsible Parties*. This form lists, among other things, the trainee type and number, rigor of desired training by the Owner, the primary responsible subcontractor, the trainer's company and columns for tracking training agendas. The Commissioning agent provides this form to the Contractor for reference.
2. Specific Training Agendas. For each piece of equipment or system being trained on, the Owner and CA fill out Section 1 of the *Training and Orientation Agenda*, Form C-5b. This section includes some of the information from Form C-5a regarding the scope of training and the intended audience, for reference by the trainer in developing their training agenda. The CA develops a plan for including in the training session contractors / trainers from different disciplines, when appropriate, by listing their company names in Section 2 of the form. In particular, the controls contractor will provide brief training on controls, in the same session with the mechanical training for equipment controlled by the building automation system.

This form is then submitted to the Contractor who has their trainer fill out the rest of Section 2 and 3 of the form (Form C-5b), describing the subjects covered, duration of each subject and the methods that will be used in the training, along with the name and qualifications of the trainer(s). The trainer returns this form to the Contractor, who submits it to the Owner and CA. The Owner and CA review the agenda; make comments; approve subject to the comments; and submit back to the Contractor. The Contractor provides the approved agenda to the trainer to use during the training. The trainer provides a copy of the agenda to each trainee.

3. Training Record. For each piece of equipment, prior to training, the Contractor provides to their trainer(s) Form C-5c, *Training and Orientation Record*. On this form, the trainer documents each training session (duration and general subjects covered). The trainer signs for the session and obtains the signature of each trainee. The trainer also checks off subjects covered on their Agenda (Form C-5b). When the training is complete, the Contractor provides a copy of the *Training and Orientation Record*, Form C-5c, and the trainer's Agenda, Form C-5b. The Owner and CA review C-5c and make final approval by signing it. The CA may witness any of the training sessions.