## Integrated Commissioning Process ENGAGEMENT MATRIX GUIDELINES - LARGE CAP Projects (>\$5M)

Level 0 - Leading or co-leading the activity				Key F	Project	Roles						Stakeh	olders		
<b>Level 1- Mandatory</b> . Must be invited to participate and schedules coordinated to ensure an engagement		l													
opportunity. Meeting should be tailored to audience.															
Should be copied on documents or meeting minutes.					er			t	<u>.</u>						
Level 2- Invited, Informed or Consulted. Must be informed and given the opportunity for participation.				*	Engineer		<u>e</u>	Project Contact	lage						
Stakeholders should be copied on documents or			E	Architect			Applicable	t Co	Man	nce	901	ion			
meeting minutes.		يدا	Теа	Arch	MEP		ppli	ojeci	ect I	ena	nan	vati	λ		
Level 3 - Optional level of engagement. Stakeholders should advise PM if they want to participate in		Agent	Engineering Team	ıal /	Design Professional MEP		+ A	Pro	Project Manager	- Building Maintenance	- Utilities Maintenance	Conservation	Office of Sustainability		
optional activities. Stakeholders s		A gi	leer	sion	sioi	>	ပ	NSc	D&C	g	Ma	Co	aina	rols	ıger
hould be copied on documents or meeting minutes.		onir	ngir	ofes	ofes	Jenc	ctor	d Ci	d D	ldin	ities	ırgy	ust	ont	lana
Level 4 - Copied on final document distribution.		issi	S E	Pre	Pro	g Aç	at Risk or GC contractors	ate	ate	Bui	Uŧil	- Energy	of S	on C	λ gι
	Client	Commissioning	D&C	Design Professional	sign	esting Agency	CM at Risk or G Subcontractors	Designated CPSM	Designated	Σ,	- <b>W</b> ³	- ₩	ice	Johnson Controls	Building Manager
Task	ä	ပိ	ĞΤ	De	De	Ţ	CM	De	De	O&M	O&M	O&M	Off	Jol	Bu
Cx Team Selection Cx Consultant Selection (Timed to complete with Design Te	aam Sala	action)													
Determine procurement method	ann Seid		1						0						
Develop RFP/Q			2		2				0						
Post if necessary									0						
Review proposals and create short list			1	2	2				0	3		3			
Selection or Interview of Commissioning Agent for Project			1	2	2				0	3		3			
Negotiate and execute contract(s)			2						0						
Design Phase															
Conceptual Design + Programming															
Concept Design Page Turn Meeting + Document Review	1	2	1	1	1		2	0	0	2	2			1	1
and Comment Period Schematic Design	•	_	•				_			_	_			•	·
Schematic Design Schematic Design Page Turn Meeting + Document Review							_		_	_	_				
and Comment Period	1	1	1	1	1		2	1	0	2	2			1	1
Review of Energy Modeling / EUI Targeting	3	1	0	1	0		3	2	0	3	3	1	4		
Owner's Project Requirements (complete with SD Phase)	1 ,					<u> </u>							_		
OPR Workshops  Design Development	1	0	1	1	1		3	2	0	1	1	2	4		2
Design Development Page Turn Meeting + Document								4		4				4	4
Review and Comment Period	1	1	1	1	1		2	1	0	1	1			1	1
Review of Energy Modeling / EUI Targeting  50% Construction Documents	3	1	0	1	0		3	2	0	3	3	1	4		
50% Construction Documents 50% Construction Documents Page Turn Meeting +															
Document Review and Comment Period	1	1	1	1	1		2	1	0	1	1	2		1	1
Review of Energy Modeling / EUI Targeting	3	1	0	1	0		3	2	0	3	3	1	4		
100% Construction Documents 100% Construction Documents Page Turn Meeting															
(INCLUDE Building System Overview) + Document Review	1	1	1	0	1		2	1	0	1	1	2		1	1
and Comment Period															
Review of Energy Modeling / EUI Targeting  Close out of all review comments and CxA comments	3	0	0	3	0		3	3	0	3	3	2	4		
		U	'	3			3	3	U	3	3	2			
Construction Phase															
Meetings								0	•	0	0			4	4
Pre-construction kick-off meeting  Cx Project Kick Off Meeting	2	0	1	2	1		1	2	0	1	2 1	2		1	1
M&V Project Kick Off Meeting		0	1	3	3		3		0	2	2	2		•	
Bi-Weekly Cx Meetings + 3D Model Review + Site Walk		0	1	2	2		1		1	2	2			1	
(START at MEP rough-in) Bi-Weekly OAC meetings (optional for O&M staff)			•	1	3		0	3	1	3	3			•	
Field Mock Ups					J		U	3	•	3	3				
Mock-Ups of MEPF (if applicable)	I	2	2	1	1		0	3	0	1		2			
Mock-Ups for Building Envelope		2	2	1	2		0	3	0	3					
Testing and Start Up															
Pipe Testing and Flushing		1		3		1	0		2	3	3				
Building Envelope Testing		1		1		1	0		1	_					
Ductwork Cleaning Ductwork Testing		1		3	2	1	0			3					
Controls Point to Point Checkout		1		3	2	•	0			3				1	
Equipment Pre-Functional Testing		1		3	2		0		2	3				1	
Equipment Start Up		1		3	2		0		2	2				1	
Functional Performance Testing		0		3	2		1		2	2				1	
Field Quality Assurance Testing (Waterproofing - Water Testing)	<u>L</u>	1	L_	1		0	1		0						
Test and Balance		1		3	2		0		2	3				1	
									<b></b>						

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meeting minutes.			Team	rchi			+ Applicable	ject	ct M	enan	nanc	vatio	<b>&gt;</b>		
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hould be copied on documents or meeting minutes.  Level 4 - Copied on final document distribution.		ioni	Engineering	rofe	rofe	√gen	sk or	o pe	ed D	lidir I	ilitie	- Energy	Sust	Con	Man
Level 4 - Copied on imal document distribution.	ıt	Commissioning Agent	D&C	Design Professional Architect	Design Professional MEP	Festing Agency	CM at Risk or GC Subcontractors	Designated CPSM Project Contact	Designated D&C	M - Bu		M - Er	Office of Sustainability	Johnson Controls	Building Manager
Task	Client	S	GT	Des	Des	Tes	CM Sub	Des	Des	O&M	O&M	O&M	Offi	Joh	Buil
Training  Manufacturer Training (video record)	2	3	<u> </u>	3	2		0	Τ	2	1	ı	2			2
Building Management Training and Systems Training -															
Overview How the Building is Supposed to Operate (video record)	2	0	2	3	0		1		2	1	1	1			1
Metasys Interface Training + Troubleshooting	2	1	2	3	2		0		2	1				0	1
Milestone Inspections and Punchlist Development	-		2	4	4		0		4	4	2				
50% Complete - Inspection 80% Complete - Inspection	2	1	2	1	1		0		1	1	2				
MEPF Punchlist Development Inspection Walk	2	1	2	3	0		1		0	1				1	
100% Complete - Certificate of Occupancy Inspection			_	1			0		1						2
MEPF Punchlist Sign Off				3	1		1		0	2	2				2
Close Out and Final Reporting															
Final Tab Report		2	4	1	4		0		4	4		4			4
Cx Issues Log Close-Out + Final Report		0	4	4	4		0		4	4					4
Final Cx Report		0	4	4	4		4		4	4		4			4
Final Systems Manual Review of Close Out Documents (Review Period)		0	4	4	4		0		4	4					2
Turn Over of Close Out Documents: O&M Docs, Warranties		-	2						-		_				
etc.	4														4
		4	4	4	4		0		0	4	4				_
Material Completion - Turn Over to GT O&M + Warranty		4	4	4	4		0		0	4	4				7
	Period	4	4	4	4		0		0	4	4				_
Material Completion - Turn Over to GT O&M + Warranty	Period	4	4	4	4		0		0	4	4				
Material Completion - Turn Over to GT O&M + Warranty   Warranty Phase / Measurement and Verification Ph Warranty Period - Quarter 1 Quarterly Building Operation, Outstanding Issues, M&V	Period		3	4	4		0			1	4	2			1
Material Completion - Turn Over to GT O&M + Warranty   Warranty Phase / Measurement and Verification Ph Warranty Period - Quarter 1 Quarterly Building Operation, Outstanding Issues, M&V Meeting	Period ase	0		4	4		0		0	1	4	2			1
Material Completion - Turn Over to GT O&M + Warranty I  Warranty Phase / Measurement and Verification Ph  Warranty Period - Quarter 1  Quarterly Building Operation, Outstanding Issues, M&V  Meeting  Additional Training (1 day) to Facility Staff, as needed	Period ase	0	3	4	4		0		0 2	1 1	4	2			1 1
Material Completion - Turn Over to GT O&M + Warranty   Warranty Phase / Measurement and Verification Ph Warranty Period - Quarter 1 Quarterly Building Operation, Outstanding Issues, M&V Meeting	Period ase	0 0 2	3	4	4		0		0 2 0	1 1 1					1 1 1
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Material Completion - Turn Over to GT O&M + Warranty I  Warranty Phase / Measurement and Verification Ph  Warranty Period - Quarter 1  Quarterly Building Operation, Outstanding Issues, M&V Meeting  Additional Training (1 day) to Facility Staff, as needed  Warranty Issue Resolution Meetings  Measurement & Verification Quarterly Progress Report +  EUI Review and Report  Seasonal Test and Balance, as applicable in this quarter	Period ase 2 2 2	0 0 2 0	3 4	4	4	0			0 2 0 4	1 1 1 4			4		1 1 1 4
Warranty Phase / Measurement and Verification Phemorement Phase / Measurement P	Period ase 2 2 2 1	0 0 2 0	3 3 4 2	4	4	0			0 2 0 4	1 1 1 4 2		4	4		1 1 1 4 1
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Warranty Phase / Measurement and Verification Phemorement Phase / Measurement P	Period ase  2 2 2 1	0 0 2 0 0 0 2 0	3 4 2 3 4 2	4			0		0 2 0 4 1	1 1 1 4 2	4	2			1 1 1 1 1 1 1 4
Warranty Phase / Measurement and Verification Phemorement Phase / Measurement P	2 2 2 1 1 2 2 2 1 1 2 2 2 2 1 1 2 2 2 2	0 0 2 0 0 0 2 0	3 3 4 2				0		0 2 0 4 1	1 1 1 4 2 1 1 4 2	4	2			1 1 1 1 1 1 1
Warranty Phase / Measurement and Verification Phemorement Phase / Measurement P	2 2 2 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	0 0 2 0 0 0 2 0 0	3 3 4 2 3 4 2				0		0 2 0 4 1 0 2 0 4 1	1 1 1 4 2	4	2			1 1 1 1 1 1 1 1
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Warranty Phase / Measurement and Verification Phase / Quarter 1  Quarterly Building Operation, Outstanding Issues, M&V Meeting  Additional Training (1 day) to Facility Staff, as needed  Warranty Issue Resolution Meetings  Measurement & Verification Quarterly Progress Report +  EUI Review and Report  Seasonal Test and Balance, as applicable in this quarter  Warranty Period - Quarter 2  Quarterly Building Operation, Outstanding Issues, M&V Meeting  Additional Training (1 day) to Facility Staff, as needed  Warranty Issue Resolution Meetings  Measurement & Verification Quarterly Progress Report +  EUI Review and Report  Seasonal Test and Balance, as applicable in this quarter  Warranty Period - Quarter 3  Quarterly Building Operation, Outstanding Issues, M&V Meeting  Additional Training (1 day) to Facility Staff, as needed  Warranty Issue Resolution Meetings  Measurement & Verification Quarterly Progress Report +  EUI Review and Report	2 2 2 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	0 0 0 0 0 0 0 0 0	3 3 4 2 3 4 2			0	0		0 2 0 4 1 0 2 0 4 1	1 1 1 4 2 1 1 4 2	4	2			1 1 1 1 1 1 1 1 1 1 4
Warranty Phase / Measurement and Verification Phemorement Phase / Measurement P	2 2 2 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	0 0 2 0 0 0 2 0 0	3 3 4 2 3 4 2				0		0 2 0 4 1 0 2 0 4 1	1 1 1 4 2 1 1 4 2	4	4 4	4		1 1 1 1 1 1 1 1 1
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