**Sample Training Form**

**Training Plan**

The training session is intended to provide the owner with a complete understanding of all technical systems in the facility covered in the commissioning scope and as covered in the project specifications. Training shall consist of classroom and field observation of system operation startup, shut down, maintenance, and trouble shooting.

All operation and maintenance manuals and shop drawings must be submitted and approved prior to the training session. Provide one copy of approved operation and maintenance manuals to the commissioning authority (CxA) prior to scheduling training. The CxA will review the operation and maintenance manuals for completeness and to see if sufficient information is included for proper operator training.

For this project the training scope shall be:

|  |  |  |
| --- | --- | --- |
| **Subject** | **Firm** | **Instructor** |
| Division 11 – Equipment |  |  |
| Division 21 – Fire Suppression |  |  |
| Division 22 - Plumbing |  |  |
| Division 23 - HVAC |  |  |
| Division 23 – RCMS System |  |  |
| Division 26 - Electrical |  |  |
| Division 27 – Communications |  |  |
| Division 28 – Safety & Security |  |  |
| Division 33 - Utilities |  |  |
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Each instructor shall provide a training Agenda for their training session. The Agenda shall be submitted for review prior to the training session. The training Agenda format shall be outlined in the attached sample outline.

Each instructor shall provide all training materials, e.g. Submittal Information, Maintenance Manuals, Shop Drawings, Diagrams, etc., required to provide training sufficient to fully train the owner’s operators to operate and maintain the installed system.

Each instructor’s presentation shall be video recorded by the contractor for future use by the owner.

**TRAINING AGENDA** (Sample Outline)

Subject:

Instructor:

Firm:

Phone: Fax:

Email:

Training Session Proposed Date: / / Duration: Hours

Subject Description:

Reference Documentation:

|  |
| --- |
| **Classroom Training Agenda** |
| Item 1 | General Product Description (Review Submittal Documents)  |
| Item 2 | Standard Operating Procedures with standard conditions and settings (Review Maintenance Manual) |
| Item 3 | Maintenance Procedures and Required Maintenance Materials. (Review Maintenance Manual) |
| Item 4 | Review Procedure to call for warranty diagnosis and repair. |
| Item 5 | Description for disassembly, diagnosis, and repair procedures. (Review Maintenance Manual) |
| Item 6 | Repair parts and maintenance materials procurement procedures. (Review Maintenance Manual) |
| Item 7 | Recommended spare parts. (Review Maintenance Manual)  |
| Item 8 | Available advanced training. |
| Item 9 | Question and answer period |
| Item 10 | Training Evaluation handout and collection. (Return to CxA) |
| **Field Training Agenda** |
| Item 1 | Demonstrate Startup Procedures  |
| Item 2 | Demonstrate Normal Operating Conditions and Settings |
| Item 3 | Demonstrate Shut Down Procedures |
| Item 4 | Demonstrate Maintenance Procedures |
| Item 5 | Demonstrate Alarm Condition Procedures |
| Item 6 | Question and answer period |
| Item 7 | Question and answer period |

Approved: (CxA) Date:

Approved: (Owner) Date:

**Training Session Sign –In Sheet**

Subject:

Instructor:

Firm:

Training Session Date: / / Time: AM/PM

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| --- | --- | --- | --- |
| **Name** | **Company** | **Phone** | **Email** |
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**Training Evaluation Form**

Name (optional):

**Please indicate the rating below that best describes your experience in this Training Session.**

 1 = Very Well 5 = Not At All

1. **How were the objectives of this Training Session met? 1 2 3 4 5 N/A**
2. **Do you know where the components / systems are located? 1 2 3 4 5 N/A**
3. **Do you know what area the components/systems are serving? 1 2 3 4 5 N/A**
4. **Do you understand the various types and purpose of these 1 2 3 4 5 N/A components / systems?**
5. **Do you understand how to systematically troubleshoot 1 2 3 4 5 N/A common problems with these components / systems?**
6. **Do you know how the components / systems operate under 1 2 3 4 5 N/A normal modes?**
7. **How well do you understand the importance of meeting the 1 2 3 4 5 N/A design intent for the systems covered?**
8. **Are you able to efficiently find the relevant information in 1 2 3 4 5 N/A systems manual to operate and maintain the components / systems you were trained for in this session?**
9. **Do you know how to perform the needed maintenance on the 1 2 3 4 5 N/A equipment and get the information needed?**
10. **Do you know how to get updated technical information for the 1 2 3 4 5 N/A components / systems?**

**Additional Comments:**