



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

CSA Commissioning Management

CM Grading System & Application Process



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

Contents

CM Introduction	3
Overview of The Commissioning Management Application Process	4
Stage 1 Commissioning Managers CV & Client References	5
A. Commissioning Managers CV's	5
B. Client References	5
C. Application for CM grade to be considered	5
Stage 2 Dissertation Report.....	6
A. Planning / Design	6
B. Pre-Construction	6
C. Construction.....	6
D. Testing & Commissioning	6
Stage 2 Dissertation Report continued.....	7
E. Handover.....	7
F. Post-Handover (Initial & Aftercare).....	7
G. Important Dissertation Notes	7
H. Check List	7
Stage 3 Commissioning Managers Interview.....	8
A. Interview dates/times in UK time	8
B. Interview Invites.....	8
C. The interview itself.....	8
D. Finding out the official decision	8
1. Upgrades / Path of Development.....	9
2. Commissioning Managers Criteria Table	10



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

CM Introduction

Welcome to the newly formed Commissioning Specialist Association (CSA) Commissioning Managers (CM) grading system. The CSA committee members have recognised that the commissioning industry is more diverse in the day-to-day requirements for specialist engineers and commissioning managers and that the existing CSA grading system was weighted mechanically for commissioning engineers between grades 1 to 4. The previous requirements being that any Commissioning manager must have passed the Grade 4 exam prior to being offered a CSA grade 5 or 6.

This new process is open to all commissioning engineers and managers across all backgrounds. This document sets out the detailed requirements that you will need to complete / submit, to be assessed against the grade you are applying for.

There are 3 **CSA Commissioning Managers Grades:**

- CSA Commissioning Manager (CM1)
- CSA Senior Commissioning Manager (CM2)
- CSA Project Commissioning Manager (CM3)

The CM process for all new candidates across all CM grades has been split into 3 sequential stages.

[Stage 1 Commissioning Managers CV & Client References](#)

[Stage 2 Dissertation Report](#)

[Stage 3 Commissioning Managers Interview](#)

For commissioning engineers/managers already on the CSA PoD they can follow [Upgrades / Path of Development](#)



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

Overview of The Commissioning Management Application Process

The new CM process has been split into 3 sequential stages.

Stage 1 Commissioning Managers CV & Client References

- 1) **Submit your most recent CV.** This CV should follow the criteria detailed in [Commissioning Managers CV](#)
- 2) **Submit client references.** This should follow [Client References](#).
- 3) **Fill in the [Application for CM grade to be considered](#).**

Candidates with Stage 1 approved*, can proceed to **Stage 2**.

Stage 2 Commissioning Management Dissertation

- 4) **Submit a dissertation commissioning management report.** The structure of the report should follow the detailed guidelines provided under [Dissertation Report](#). In general. In addition to this it should be noted that
 - a. This dissertation should cover each stage of the commissioning managers duties and the obstacles faced/overcome.
 - b. The candidate is required to demonstrate their knowledge of the process and prove (via evidence) how they use this on at least 1 project for each stage of commissioning.

Dissertations that are approved*, can move onto **Stage 3**

Stage 3 Commissioning Management Interview

- 1) **Candidates that have successfully completed and been approved for Stages 1 and 2 will enter the final Interview Stage**
 - a. **Candidates will be requested to give dates that are suitable for the interview**
 - b. **Once a suitable date is chosen, an interview invite will be issued by the CSA**
- 2) **Candidates Interview will be based on their CM experience**

Candidates with successful interviews* will have their full application circulated to the CM panel for final approval.

*Candidates that are unsuccessful at any stage may be requested to provide additional supporting evidence, be asked to repeat the stage, or potentially have a different grade awarded than applied for.



25 YEARS OF MAKING BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

Stage 1 Commissioning Managers CV & Client References

A. Commissioning Managers CV's

The applicant must submit a detailed CV which includes the following: -

- Profile describing technical background.
- Professional qualifications
- Years' experience as a commissioning manager
- If commissioning management formed part of your project role, identify the time-frame dedicated to commissioning management duties only.
- Employment History
- Project Experience (Name / Type of project / Project date / Role you carried out)
- Any other professional experience i.e. member of BSRIA/CIBSE etc

B. Client References

Client references shall be from recent projects that you have undertaken the duties of a Commissioning Manager. Client references must be on letter headed paper or email in PDF format.

CM1 - Statement of applicants Commissioning Management experience from a CSA Corporate member / Senior manager within the applicant's company or 2 x client references for a recent project.

CM2 - 3 x Client references from recent projects.

CM3 - 4 x Client references for recent projects.

C. Application for CM grade to be considered

Grade Applying for:	
Past CSA Grade: (If Applicable)	
Years' Experience as a Commissioning Manager This only applies to the time spent dedicated to Commissioning Management.	

I confirm that I will comply and issue the criteria as set out in this document and agree to abide by the Articles of the Association, its Constitution & Code of Practice (these are included in the Members Handbook which will be issued to you on acceptance of your Membership of the Association. Should you require prior sight of these documents, please contact the CSA Secretary office@csa.org.uk)

Applicants Company.....

Applicant Signature.....

Date.....

If applying through your employer, please supply your Employer/Director's signature.

Employer/Directors Full Name.....

Signature.....



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

Stage 2 Dissertation Report

Below is a guide to the requirements of the dissertation report depending on the grade that is being applied for, we expect the applicant where possible to base his/her dissertation on a previously completed project or projects.

Note: There is a possibility that CM1/CM2 applicants won't meet the required experience of all the dissertation requirements, applicants should clearly note within their dissertation report items they have not covered as a commissioning manager, we also note that CM1/2 candidates may not have for example any post contract experience, again this will need to be noted by the candidate so that the CSA panel can consider in the dissertation marking/reviews.

**Tip: include a separate section in your dissertation for duties that you have not carried out as a commissioning manager (This section will not count towards your total word count),*

A. Planning / Design

Identify the key processes that relate to commissioning management for the planning/design phase.

Some examples below, but not be limited to:

Obstacles overcome, Review design brief, commissioning focused design reviews (commissionability study), commissioning specification, preparation of the commissioning plan and Commissioning Activity Sheets / Schedules.

B. Pre-Construction

Identify the key processes that relate to commissioning management for the pre-construction phase.

Some examples below, but not be limited to:

Obstacles overcome, Commissioning programmes, review Hands on / TAB commissioning tenders, commissioning workshops, project tracking schedules, FAT's.

C. Construction

Identify the key processes that relate to commissioning management for the Construction phase.

Some examples below, but not be limited to:

Obstacles overcome, Commissioning meetings, logic linked commissioning programme to Construction / M&E, review commissioning methodologies / method statements, proforma test sheets, site installation checks, witnessing static testing and mock-up performance.

D. Testing & Commissioning

Identify the key processes that relate to commissioning management for the testing & commissioning phase. Some examples below, but not be limited to:

Obstacles overcome, Pre commissioning & setting to work, managing the commissioning process, meetings, witnessing of MEP systems, monitoring, and reporting the commissioning progress, co-ordination of 3rd party witnessing, reviewing and collation of commissioning documentation.



Stage 2 Dissertation Report continued

E. Handover

Identify the key processes that relate to commissioning management for the handover phase.

Some examples below, but not be limited to:

Obstacles overcome, review / collating statutory commissioning documentation, Handover meetings, Final Commissioning reports with updated commissioning plan, As Built, O & M's Building logbook, Snagging, Client, Training etc.

F. Post-Handover (Initial & Aftercare)

Identify the key processes that relate to commissioning management for the post-handover phase.

Some examples below, but not be limited to:

Obstacles overcome, close out reporting, client training, troubleshooting and fine tuning, producing lesson learnt reports. Seasonal testing, occupant satisfaction surveys, building performance reviews, updating of commissioning records, Soft Landings, BREEAM, LEED, NABERS, ESTIDAMA (UAE).

G. Important Dissertation Notes

1. Introduction to Commissioning Management (ITCM) must be passed within 1 year of applying for CM1.
2. Applicants' submission must include completed checklist below and each of the elements required combined as a single PDF formatted document with index / appendix.
3. Dissertation reports to be limited to the required maximum words i.e. **CM1** 2500, **CM2** 3000, **CM3** 3500 this does not include any additional evidence such as CV's / Client references or evidence such as commissioning plans / commissioning documents.
4. The candidate can white out any sensitive client / project information in the evidence submitted to the CSA.
5. The candidate will have 6 months to submit their dissertation report (including references) from the commencement date that the CSA office advises.
6. The candidate must highlight areas of the commissioning managers role that they do not yet have the relevant experience or carried out on recent projects; this is so that the CSA can review the candidates future experience on future upgrade applications.

H. Check List

Action	Date / Completed
CSA office have confirmed your dissertation can proceed/ start date.	
Dissertation report includes supporting evidence for each section	
Check the word count is correct for the CM level applied for.	
Submit dissertation & supporting evidence within 6 months of start date	

Applicant Signed.....

Date.....



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

Stage 3 Commissioning Managers Interview

On successful completion of Stages 1 & 2 candidates will move onto the CM Interview stage

A. Interview dates/times in UK time

Candidate will be requested for a selection of available online interview potential date/times for the interview to be scheduled including time zones.

B. Interview Invites

An on-line interview will be sent at the next available free time slot that suits interviewer/interviewee schedule.

C. The interview itself

An online interview will be conducted recording the candidates answers to the pre-selected questions.

At the end of the interview the candidate will be informed of the outcome.

The outcome can be:

- Approved for applied CM grade.
- Request for additional information.
- Request for a second interview.
- Approved at a grade different to the one applied for.

D. Finding out the official decision

In all circumstances the interview will be sent to the CM Panel for a final decision.

The CSA office will communicate the final CM Panel decision to the candidate



25 YEARS OF MAKING
BUILDINGS WORK

Commissioning Managers Grading

Rev: - 07

Dated: - 12th July 2023

1. Upgrades / Path of Development

Upgrading from the existing path of development / grading system.

1. Candidates already holding CSA Grade 5 or 6 do not need to submit a commissioning manager dissertation but do need to complete stage 1 (await approval) then Stage 3.
Stage 2 can be skipped in recognition that Grade 5 thesis has been approved.
2. Candidates on the existing Pathway of Development below Grade 5 that have moved into Commissioning Management field can enter the CM pathway of development based on their years of experience as a Commissioning Manager, noting the following:
 - a. Only the time spent in **Commissioning Management** counts towards the total CM experience.
 - b. All candidates below Grade 5 entering the CM pathway are required submit a commissioning manager dissertation Stages 1 through 3.
3. These are guideline requirements and do not cover every personal situation and therefore the Committee retains the right to allocate a grade based on the information submitted or obtained.



2. Commissioning Managers Criteria Table

CSA Grade	CM Years' Experience Required	Required Projects	Required Evidence / Criteria / Dissertation Report	CSA Course requirement
CSA Commissioning Manager (CM1)	1 - 3 years	As a minimum has worked on 1 x commissioning management project	<p>CV highlighting Project experience + Professional Qualifications.</p> <p>Statement of applicants Commissioning Management experience from a CSA Corporate member / Senior manager within the applicant's company or 2 x Client references for a recent project.</p> <p>Provide a 2000 – 2500 – words. Commissioning Management dissertation report. This report requires each candidate to provide evidence for each section.</p> <p>On approval of dissertation an online interview will be</p>	Introduction to Commissioning Management (ITCM) within one year of applying for CM1 grade.
CSA Senior Commissioning Manager (CM2)	4 – 10	<p>>4 x Medium sized projects</p> <p>Or >2 x Large scale projects</p>	<p>CV highlighting Project experience + Professional Qualifications.</p> <p>3 x Client references for recent projects.</p> <p>Provide a 2500 – 3000 – words. Commissioning Management dissertation report. This report requires each candidate to provide evidence for each section.</p> <p>On approval of dissertation an online interview will be conducted</p>	Introduction to Commissioning Management (ITCM)
CSA Project Commissioning Manager (CM3)	+10	>5 x Large scale projects	<p>CV highlighting Project experience + Professional Qualifications.</p> <p>4 x Client references for recent projects.</p> <p>Provide a 3000 – 3500 – words. Commissioning Management dissertation report. This report requires each candidate to provide evidence for each section.</p> <p>On approval of dissertation an online interview will be conducted.</p>	Introduction to Commissioning Management (ITCM) + New Advanced CM course (Currently known as Grade 7) *when available

Note 1: If a candidate has a mechanical/electrical degree, then a 6-month credit in required experience will be granted.

Note 2: Scale of projects from a commissioning perspective can be subjective. Project scales will be discussed at Interview stage for those candidates that are unsure of scale.