



CSA

Commissioning
Management
Application Process

Rev: 08

Date: 04th July 2024



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CM Introduction

Welcome to the newly formed Commissioning Specialist Association (CSA) Commissioning Managers (CM) grading system.

This new process is open to all commissioning 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, CM Supporting Documentation & Client References](#)

[Stage 2 Dissertation Report](#)

[Stage 3 Commissioning Managers Interview](#)

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



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Overview of The Commissioning Management Application Process

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

Stage 1 Commissioning Managers CV, CM Supporting Evidence & Client References

- 1) **Submit your most recent Commissioning Management CV.** This CV should follow the criteria detailed in [Commissioning Managers CV](#)
- 2) **Submit client references.** This should follow [Client References](#).
- 3) **Submit CM project supporting documents that you have produced or signed-off, from a recent CM project. This should follow [CM Supporting Project Evidence](#)**
- 4) **Fill in the [Application form for CM grade \(must be completed\)](#)**

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

Stage 2 Commissioning Management Dissertation

- 5) **Submit a dissertation commissioning management report.** The structure of the report should follow the detailed guidelines provided under [Dissertation Report](#). In addition to this
 - a. This dissertation should cover each stage of the commissioning managers duties and the obstacles faced/overcome. This requires the candidate to give project examples for each project duty shown.
 - 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

- 6) **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, the CSA will issue an interview invite.**
- 7) **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.



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Stage 1 Commissioning Managers CV, CM Supporting Evidence & Client References

A. Commissioning Managers CV

Differing from a standard CV - the Commissioning Managers CV should **only relate to commissioning management** duties. This Commissioning Management CV should be limited to

- Profile describing technical background & Professional qualifications.
- Years' experience as a commissioning manager followed by
- Commissioning Management Project Experience (Name / Type of project / Project CM dates / Role you conducted)
- Sequential list of Commissioning Management Projects using the above format (this should match the total years' experience as a CM)
- If commissioning management formed part of your project role, identify the timeframe dedicated to commissioning management duties only.

IMPORTANT NOTE: Generic CV's that are non-Commissioning Management specific will be rejected by the Assessment Panel.

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. CM Supporting Project Evidence

As part of your initial submission for Commissioning Management Grading you must submit CM project supporting documents that **you have produced** or **signed-off**, from a recent project you have or are currently working on. These documents must be project specific and non-generic (no templates)

CM1 – 2 x documents from a recent CM project (Commissioning Plan, Commissioning Study, etc)

CM2 - 4 x documents from a recent CM project (Commissioning Plan, Commissioning Study, etc)

CM3 - 6 x documents from a recent CM project (Commissioning Plan, Commissioning Study, etc)



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D. Application form for CM grade (must be completed)

Commissioning Management Grade Applying for (CM1, CM2 or CM3):	
Past CSA Grade: (State CSA grade or N/A if no previous grade)	
Confirmation you have provided a Commissioning Management CV (CM CV only relates to CM Projects) (Yes/No)	
Confirmation you have submitted supporting CM documentation and all documents project specific (Yes/No)	
Confirmation you have submitted the appropriate number of CM documents for CM grade being applied for (CM1 - 2 docs) (CM2 – 4 docs) (CM3 – 6 docs)	
Years' Experience as a Commissioning Manager (CM duties only)	

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**.....

Note: The Assessment Panel will reject partially filled applications as being "incomplete"



Stage 2 Dissertation Report

Dissertation Content & Structure

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.

For each CM role you undertake provide at least one project example that explains how you managed this process or task as a CM. For example, if you performed a commissioning focused design review on project XYZ – include a section that shows an example of what your CM review found on project XYZ along with supporting evidence of how this was raised/recorded/tracked/closed. This process should be repeated for all sections that relate to your role.

The dissertation report should contain everything within the report and appendices. If candidates wish to re-use the same evidence used in stage 1 this will have to be submitted within this report and appropriately cross-referenced.

Note 1: 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.

Note 2: 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.



Stage 2 Dissertation Report continued

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.

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).



Stage 2 Dissertation Report continued

G. Important Dissertation Notes

1. Applicants' submission must include completed checklist below and each of the elements required.
2. Dissertation Format: Dissertation must be in word or PDF format.
3. Combined as a single PDF formatted document with index / appendix.
4. 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.
5. The candidate can white out any sensitive client / project information in the evidence submitted to the CSA.
6. The candidate will have 6 months to submit their dissertation report (including references) from the commencement date that the CSA office advises.
7. 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.	
Check that the Dissertation report has been written from a project perspective – explaining each CM duty via a project example.	
Dissertation report includes supporting evidence for each section	
Check that supporting evidence is relevant to the related sub section and contains an appropriate cross reference if in Appendix.	
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.....



Stage 3 Commissioning Managers Interview

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

A. Interview date/time in UK time zone.

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.

Important note that Introduction to Commissioning Management (ITCM) must be passed within 1 year of applying for Commissioning Management grade.



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1. Upgrades / Path of Development

Upgrading from the existing path of development / CM grading system.

1. Candidates holding CSA Grade 5 or 6 will require to follow the full CM process.
2. Candidates currently on the CM pathway of Development would require to

Email office@csa.org.uk requesting an upgrade. This upgrade request must include:

- A. Which CM Grade they are applying for
- B. Reason for upgrade (Currently CM1 and now have 4+ years' experience having now performed client training and handover as CM so would like to upgrade to CM2)
- C. Updated Commissioning Managers CV showing total CM experience.

Any upgrade requests that don't contain items A through C will be rejected.

3. CM Upgrade requests

The Assessment Panel will review each upgrade request on an individual basis.

Outcomes may vary. The Assessment Panel reserve the right to

- A. Request additional information for dissertation and new evidence.
- B. Request rewriting previous dissertation to include new CM Duties and responsibilities and evidence.
- C. Request another CM Interview.
- D. Reject upgrade request.
- E. Request specific requirements before awarding upgrade.
- F. A combination of some of the options above

IMPORTANT NOTE: The CSA highly recommend Commissioning Managers joining the CSA select the most appropriate grade suited to their Commissioning Management experience on their original application!



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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 conducted.</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.