



MAKING BUILDINGS WORK

MEMBERS HANDBOOK

*Proficient
Professional
Commissioning*

COMMISSIONING

**2022
EDITION**

**CONSTITUTION OF THE
COMMISSIONING SPECIALISTS ASSOCIATION**

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Commissioning Specialists Association

1. NAME

The Association shall be known as the **COMMISSIONING SPECIALISTS ASSOCIATION**.

2. OBJECTIVES OF THE ASSOCIATION

- **POLICY:** To promote excellence in the technical expertise and business practice of those engaged in the profession of Commissioning Specialists.
- **ACCREDITATION:** To grade engineers and technicians engaged in commissioning according to ability and experience.
- **INSTRUMENTATION:** To document a Code of Practice for the maintenance and calibration of instruments used by Members.
- **ADVICE:** To advise Members on matters relating to the Member's activities and to employ professional advisers to assist in doing so.
- **LIAISON:** To liaise with manufacturers and building services organisations in order to better advise Members on new developments.
- **MEMBER WELFARE:** To promote the welfare and advance of the Association and its Members and to protect their interests.
- **MARKETING INFORMATION:** To collate statistics and market information for the benefit of Members.
- **PUBLICITY:** To initiate advertising and publicity and to promote schemes calculated to increase the business of Members of the Association and, in particular, to maintain a working dialogue with relevant trade journals and media on all matters affecting commissioning.
- **REPRESENTATION:** To enter into membership of any association, or other body.
- **LEGISLATION:** To consider all legislative measures and proposals, Government regulations or enactments and any matter of a similar nature that may affect the interests of Members of the Association and to take whatever measures may be considered necessary in respect thereto.
- **CO-OPERATION:** To co-operate with Government Departments and other associations or groups of manufacturers, users or others, whether at home or abroad, in any matter which may affect the Members of the Association.
- **NEWSLETTER:** To publish a newsletter for Members at regular intervals.
- **GENERAL:** To do all such activities as may seem conducive to the attainment of any or all aforementioned objectives or for the general benefit of the Members.

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3. **OFFICE**

The Office of the Association shall be at such place as the Committee may from time to time decide. From 1 April 2014 the Office of the Association will be at 9 Kings Court, Harwood Road, Horsham, West Sussex, RH13 5UR.

4. **MEMBERSHIP**

Membership of the Association shall be dependant on acceptance of the Code of Practice. Such acceptance embodies an undertaking by the Member to conduct themselves, at all times, in a manner commensurate with the requirements of that Code.

Membership of the Association shall be as follows:

a) Category A: **CORPORATE MEMBERSHIP**

Any specialist commissioning engineering firm, company or organisation within the Building Services and Engineering Industries shall be eligible to be considered for Corporate Membership. At least one Director / Partner of the company should have a Grade 4 CSA membership for 3 years.

Firms or companies shall nominate one or more partners or directors for consideration as representatives of that firm or company who may attend meetings and vote on behalf of the Member.

b) Category B: **ASSOCIATE MEMBERSHIP**

Any other firm, company or organisation having an interest in commissioning (but not as their main source of business or interest) shall be eligible to be considered for Associate Membership.

Firms, companies or organisations shall nominate one or more partners, directors or officers for consideration as representatives of that firm, company or organisation.

c) Category C: **INDIVIDUAL MEMBERSHIP**

Any individual engineer or technician employed on commissioning and any students within the Industry and others who are interested in obtaining information and newsletters produced by the Association shall be eligible to be considered for Individual Membership.

d) Category D: **INDIVIDUAL ASSOCIATE MEMBERSHIP**

This category was formed in 2003 to accommodate individuals who are not doing commissioning work in the UK but are affiliated to commissioning through other trades, i.e. electrical, mechanical engineers etc. This membership will not be graded, but a Certificate of Membership will be issued and the Association's benefits afforded as with other categories. It does not confer voting rights at the Annual General Meeting.

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e) Category E: **HONORARY INFORMATION**

At the discretion of the Committee, Honorary Membership may be awarded to individuals for exceptional service to the Association. This lifetime position may be held by a maximum of ten people at any one time.

5. **PROPOSAL OF MEMBERS**

Every firm, company, organisation or individual requesting admission shall be proposed by one Corporate Member and seconded by another, both of whom shall vouch from their personal knowledge for the fitness of the candidate. The appropriate membership application form, duly completed, together with the names of the prepares and seconded, shall be sent to the Secretary who shall ensure that these particulars are placed before the Membership Committee, who shall at its sole discretion elect the applicant for Membership of the Association. The Membership Committee reserve the right not to admit any applicant for Membership if they deem it to be detrimental to the basic fundamental principles of the Association.

6. **ENTRANCE FEE AND SUBSCRIPTION**

Every applicant for Corporate or Associate Membership of the Association shall pay to the Association an entrance fee. If the applicant is accepted for Membership the entrance fee shall be set against the first year's annual subscription, which shall be paid pro rata for the period between the Member joining the Association and the date when subscriptions next become due. Applicants for Individual Membership shall pay the full subscription rate for this category irrespective of that date of acceptance. The entrance fee shall be such as the Committee may from time to time determine.

Each Member shall pay an annual subscription to the Association. For the purposes of payment of an annual subscription, but not otherwise, Members having more than one office to which communications from the Association are to be addressed, shall pay an annual subscription in respect of each office. The annual subscription shall also be determined from time to time by the Committee. Notice of the annual subscriptions shall be given to Members.

7. **SUBSCRIPTION SCALES**

Subscription scales shall be as decided and published from time to time by the Committee. The current schedule is appended.

8. **DATE WHEN SUBSCRIPTIONS ARE DUE**

All annual subscriptions (except the first subscription of a new Member) shall be payable on or before the first day of January in each year, without demand.

9. **PAYMENT OF SUBSCRIPTIONS**

All entrance fees and subscriptions paid by cheque shall be made payable to "COMMISSIONING SPECIALISTS ASSOCIATION".

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10. **VOTING RIGHTS**

Corporate Members and the elected representatives of both Associate and Individual Members may vote at any General Meeting and be counted in the quorum. All Members may attend meetings. Associate and Individual members shall elect their own representatives to the Main Committee.

11. **RESIGNATION OF MEMBERS**

Any Member may resign their Membership by giving the Secretary notice in writing to that effect, which notice shall not be given later than 31st October in any subscription year. Any Member giving notice after 1st November and before 31st December in any subscription year shall be liable to pay their subscription for the following year.

12. **EXPULSION OF MEMBERS**

The Committee may propose the expulsion of a Member if at any time it shall be of the opinion that the interests of the Association so require. A simple majority of the Members may, by a resolution passed at a General Meeting, ratify the decision of the Committee to expel a Member.

Should any Member default in the payment of their subscription or should fail to comply with this Constitution generally or shall, in the opinion of the Committee, bring the Association or commissioning into disrepute, the Member may be suspended from the Association by the National Chairman acting alone, pending a decision of the Committee and ratification by the Association in General Meeting of a decision to expel the Member.

13. **EFFECT OF CEASING TO BE A MEMBER**

Any person shall, on ceasing to be a Member of the Association, forfeit all right to and claim upon the Association and its property and funds.

14. **COMMITTEE**

The management of the Association (except as otherwise provided for in this Constitution) including setting and agreeing the general budget shall be deputed to a Committee of not more than sixteen Members, comprising a National Chairman, National Vice-Chairman, Treasurer, nine Corporate Members plus two associate Members with a responsibility for representing Associate Members and two individual Members with a responsibility for representing Individual Members. Six Members, including either the National Chairman or National Vice-Chairman, shall constitute a quorum.

15. **ELECTION OF COMMITTEE MEMBERS**

At the Annual General Meeting of the Association the Committee Members shall be elected. The National Chairman and Treasurer shall hold office for two years. Other Members will be elected annually by submission of their names, duly proposed and seconded, at least 15 days before the Annual General Meeting and those names circulated with the meeting agenda, in advance of the meeting. Existing Members of the Committee may be re-elected. Associate and Individual Members shall elect their own representatives.

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16. VACANCIES ON THE COMMITTEE

The Committee shall have power to appoint a Member to fill any casual vacancy on the Committee until the next Annual General Meeting. Any Member so appointed shall retire at the next Annual General Meeting, but shall be eligible for election as a Member of the Committee at such meeting.

17. MEETINGS OF COMMITTEE

The Committee shall meet at least once in every two months to examine the accounts and arrange the affairs of the Association. Minutes shall be taken of all the proceedings of the Committee and shall be open to the inspection of any Member of the Association on application to the Secretary. The National Chairman shall instruct the Secretary to carry out the instructions of the Committee.

18. OFFICERS AND TRUSTEES

The Trustees of the property of the Association shall be elected by the Committee from amongst its Members. The number of Trustees shall not be more than four nor less than two and the property of the Association shall be vested in them. They shall deal with the property of the Association as directed by resolution of the Committee (of which an entry in the minute book shall be conclusive evidence) and shall be indemnified against risk and expense out of the Association's property. The Trustees shall hold office until death or resignation or until removed from office by a resolution of the Committee which may, for any reason which may seem sufficient to a majority of the Members of the Committee present and voting at any meeting, remove any Trustee or Trustees from the office of Trustee.

Where by reason of any death or resignation or removal it shall appear necessary to the Committee that a new Trustee or Trustees be appointed, or if the Committee shall deem it expedient to appoint an additional Trustee or additional Trustees, the Committee shall by resolution nominate the person or persons to be appointed the new Trustee or trustees. For the purpose of giving effect to such nomination the National Chairman is nominated as the person to appoint new Trustees of the Association within the meaning of the Trustee Act 1925 Section 36 and shall by deed appoint the person or persons so nominated by the Committee as the new Trustee or trustees of the Association and the provisions of the Trustee Act 1925 shall apply to any such appointment. Any statement of fact in any such deed of appointment shall be in favour of a person dealing bona fide and for value with the Association be conclusive evidence of the fact so stated.

19. REGULATIONS

The Committee may from time to time make, repeal and amend all such regulations (not inconsistent with this Constitution) as it shall think expedient for the management and well-being of the Association. All regulations made by the Committee under this rule shall be binding on the Members until repealed by the Committee or set aside by resolution of the Association in General Meeting.

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20. **SECRETARY**

The Committee shall have the power to appoint, pay and dismiss a Secretary and such other servants as it shall deem necessary. The Committee may, having first set a budget for so doing, delegate its powers to appoint servants to the Secretary.

The Secretary shall be responsible to the national Chairman and in the absence of that person the National Vice-Chairman for the day to day running of the Association, including expenditure subject to such controls on the Secretary's powers as are previously agreed by the Committee.

21. **BORROWING POWERS**

If at any time the Association in General Meeting shall pass a resolution authorising the Committee to borrow money, the Committee shall be empowered to borrow for the purposes of the Association such amount of money, either at one time or from time to time, and a such rate of interest and in such form and manner and upon such security as shall be specified in such resolution and the Trustees shall, at the discretion of the Committee, make all such dispositions of the Associations property as the Committee may deem proper for giving security for such loans and interest.

22. **ANNUAL GENERAL MEETING**

An Annual General Meeting of the Association shall be held on a date set by the Committee convenient to the year end provided always that fifteen months shall not elapse without an Annual General Meeting.

At the Annual General Meeting the following business shall be conducted:

- (a) The presentation and (if accepted) the passing of the accounts for the previous financial year ended on the 31st Day of December prior to the Meeting, which accounts shall first have been audited by the Association's auditors.
- (b) The election of the Committee.
- (c) The election of auditors
- (d) Such other business as shall have been communicated to the Secretary and included in the notice of the Meeting sent to the Members.

23. **EXTRAORDINARY GENERAL MEETING**

An Extraordinary General Meeting may be convened at any time and shall be convened within 21 days on the requisition of the National Chairman or seven Committee Members or sixty percent of the Corporate Members of the Association. Such requisition must state the purpose for which such meeting is required.

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24. NOTICE OF GENERAL MEETINGS

The Secretary shall, at least fourteen days before any General Meeting, send to every Member at their address recorded in the books of the Association a notice of the Meeting stating the time when and the place where the Meeting will be held and the business conducted.

25. BUSINESS

The business at a General Meeting shall be limited to that provided by these rules and those further matters set out in the notice convening the Meeting.

26. QUORUM

The quorum of the Annual General Meeting or an Extraordinary General Meeting shall be sixty percent of the Corporate Members of the Association.

27. FINANCIAL YEAR

The Financial Year of the Association shall be from 1st January until 31st December.

28. INDEPENDENT EXAMINATION OF ACCOUNTS

Accounts of the Association shall be drawn up by the Treasurer as soon as possible after the end of each financial year and shall be examined by the appointed independent examiners. This does not preclude the accounts from being audited should the Association so desire.

29. MEMBERS NOT MAKE PROFITS

No Member shall, except for special or professional services rendered at the request of the Committee, on any pretence and in any manner receive any profit, salary, or emoluments from the funds or transactions of the Association.

30. MEMBERS' ADDRESSES

Every Member of the Association shall from time to time communicate to the Secretary their address or that of their agent and all notices sent by first class post to such address shall be considered as having been given on the day following the date of posting.

31. INTERPRETATION OF CONSTITUTION

The Committee shall be the sole authority for the interpretation of the Constitution and of the regulations made from time to time by the Committee and the decision of the Committee on any question of interpretation or upon any matter affecting the Association and not provided for by this Constitution or by the regulations shall be final and binding on the Members.

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32. AMENDMENT OF CONSTITUTION

The Constitution may be added to, repealed or amended by resolution at any Annual General Meeting or Extraordinary General Meeting, provided that no such resolution shall be deemed to have been passed unless it is carried by a majority of at least two thirds of the Members voting on such resolution and provided further that twenty eight days notice of the resolution shall have been given to Members.

33. DISSOLUTION OF ASSOCIATION

If at any General Meeting a resolution for the dissolution of the Association shall be passed by a majority of the Members present and at an Extraordinary General Meeting not less than six weeks later, of which not less than four weeks written notice have been given to each Member and at which not less than one half of the Members shall be present, that resolution shall be confirmed by a resolution passed by a majority of two thirds of the Members voting on such resolution, the Committee shall immediately or at such future date as shall be specified in such resolution proceed to realise the property of the Association and after the discharge of all liabilities shall divide such property rateably in proportion to the amount each Member has paid in entrance fee and subscription among all the Corporate Members of the Association and on the completion of such division the Association shall be dissolved.

34. HEADINGS

The headings in this Constitution are for ease of reference only and shall not be taken into account in its interpretation.

ACCREDITATION & TECHNICAL STANDARDS

The CSA has set Job Descriptions for all Grades, accredits technicians who are Members and set working standards which are both acceptable to the building services industry in general and the commissioning industry in particular.

It offers training to promote the status of Commissioning Specialists, in order to raise the technical requirements and to give a more professional approach. There are Distance Learning Courses, examinations, definitive gradings and rules for the various sections of technicians employed, with each Member receiving a certificate of achievement and an identity card as proof of Membership.

GRADING OF TECHNICIANS

1. Commissioning Trainee/ Assistant
2. Intermediate Commissioning/Balancing Technician
3. Commissioning Technician
4. Commissioning Engineer
5. Senior Commissioning Engineer
6. Commissioning Manager
7. CM1 CSA Commissioning Manager
8. CM 2 CSA Senior Commissioning Manager
9. CM3 CSA Project Commissioning Manager

Qualifications up to Grade 3 are by completion of the three Parts of the Distance Learning Course and the passing of the assessment test for each part. Qualification for Grade 4 is by a two part examination set by the Training Committee. These parts are a) Technical Paper; b) Theory Paper. Qualification for Grade 5 is by submission of a dissertation and subsequent Viva Voce with a panel from the Training Committee. Qualification for Grade 6 is the completion of the 2 day ITCM course. The CM Commissioning manager grades require a dissertation report, references, online interview and completion of one or both of the CM Courses. Achievement of each grade is also dependant on the applicant satisfying practical experience requirements that ensure theoretical knowledge alone cannot lead to qualification.

There are alternative criteria at each level which take into account an applicants relevant experience and academic qualifications. This is particularly useful for entrants who are entering commissioning from an allied trade or profession after several years service.

The aims of this system are to:

- 1/ Satisfy the professional and technical qualification requirements of Clients.
- 2/ Reassure Clients that the commissioning staff on their project have had the correct formal training for the type and standard of work they are carrying out.
- 3/ Give commissioning staff a formal career development path and raise their technical proficiency and skill levels.

INSTRUMENT STANDARDS

1. **AVAILABILITY**
Each Member shall maintain, either by ownership, hire or agreed access to, sufficient numbers of the recognised instruments to carry out the tasks designated by the CIBSE Codes of Practice, contract method statements and/or recognised practice.

2. **STANDARDS**
Instrument standards will generally be those listed within appendix 1 as meeting the criteria for the particular tasks designated. Other similar instruments may be acceptable providing their proven accuracy under the same operating conditions is not less than the accuracy of the designated instrument.

3. **CALIBRATION & CERTIFICATION**
All electrical, electronic and mechanical instruments, plus such instruments that require accurate levelling, must be regularly checked for calibration by a recognised independent authority. The instruments must be certified throughout all ranges of operation that they are within the manufacturers stated tolerance, or be provided with complete calibration charts/graphs to enable a "true" value to be determined from an "indicated" reading.

4. **CHECK INSTRUMENTS**
It is a recommendation of the Association that each Corporate Member maintains, or has access to, a set of calibrated/certified instruments held within their organisation specifically to check all site instruments on a routine regular basis (monthly in the case of micro-manometers).

5. **NEW INSTRUMENTS**
All new instruments should carry a certificate that they conform to the standards of accuracy laid down within the data published by the manufacturer.

6. **IDENTIFICATION**
Every instrument will be made individually identifiable by means of a permanently engraved company or personal identification, reference, serial number or hire company reference. All identifications or references, except those of hire companies, is to be notified to the CSA for entry into the instrument data bank so as to make tracing of "lost" instruments an easier task.

7. **INSTRUMENT REVIEW**
New instruments coming onto the market will be reviewed by the Association.

8. **DEVELOPMENT**
The Association will willingly discuss development of new instruments with manufacturers.

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Suggested Instruments.

NB - The following list is not exhaustive. Manufacturers shown are for indication only and their inclusion is NOT an endorsement by the CSA. Omission of a manufacturer is NOT an indication that their products are inferior or unacceptable to the CSA.

USE	INSTRUMENT	MANUFACTURER
Air velocity in ducts	Pitot Tube	Airflow Developments, Testo
	Incline manometer	Airflow Developments
	Digital Micro-manometer	Airflow Developments DP Measurements, Testo
Air velocity at terminals	Vane Anemometer	Airflow Developments, Testo British Rototherm
	Mini Vane Anemometer	Airflow Developments, Testo
	Thermal Anemometer	Airflow Developments, Testo
Air Pressure	Digital Micro-manometer	Airflow Developments DP Measurements, Testo
	Diaphragm Gauge	DP Measurements, Dwyer
Clean Rooms	Micro-Manometer	DPMeasurements, Testo, Airflow Dev.
Rotation	Mechanical Tachometer	Smiths, Testo
	Optical Tachometer	Veeder Root; Lucas, Testo
	Stroboscope	Dawe, Testo
Electrical Current	Clamp-on Ammeter	AVO; H.E.M.E.; Robin
Combustion	Combustion Analyser	Bacharach; Kane & May, Testo
Differential Pressure	Mercury Manometer	Poddymeter
	Fluorocarbon Manometer	Poddymeter
	Electronic Manometer	Crane Fluid Systems, Testo
	Diaphragm Gauge	Aeroquip
Temperature	Mercury in glass Thermometer	Various
	Electronic Thermometer	Comark; Digitron; Testo Kane & May
Humidity	Sling Hygrometer	Casella; Negretti & Zambra
	Electronic Indicator	Solomat; Kane & May, Testo
	Thermohydrograph	Casella; Terwin
Sound & Vibration	Sound Level Analyser	Bruel & Kjaer; Dawe; Lucas CEL, Testo
Electrical	Multimeter	AVO; Fluke; Robin
	Insulation Tester	Megger; Various
Water Pressure	Dial Pressure Gauge	Binder; Various

SERVICES OFFERED BY THE CSA

Overheads that are unrelated to actual contract incomes can be very draining on the profit margins of any company. The Commissioning Specialists Association recognise this fact only too well and therefore offer a unique service to both Members and non-members alike in an effort to relieve this type of situation.

Chargeable on a daily basis, the expert and experienced services of the CSA staff can be put at your disposal to carry out the following functions:

Training - illustrated lectures and seminars on commissioning of mechanical services can be given.

Publications - the CSA produces technical memoranda on various aspects of commissioning and, of course, the very useful Commissioning Engineers Compendium. They are also just releasing a series of short "Guidance Notes" on particular aspects of commissioning or major problem areas.

Distance Learning Courses - the CSA has developed a range of Distance Learning Courses which, allied with site experience, provide formal education for commissioning technicians and others in the commissioning process.

Flutec - the offers Flutec (1.88 s.g.) for use in water manometers.

Index - the regular newsletter to keep you aware of what's going on in the commissioning world.

JOB DESCRIPTIONS

JOB TITLE: NEW TO COMMISSIONING

JOB GRADE: TRAINEE

Duties &
Responsibilities:

- a) To become familiar with site safety and current Health & Safety at Work Regulations.
- b) To learn site discipline and procedures
- c) To assist senior personnel in carrying out commissioning activities on site and generally to observe instructions given by an authorised person.
- d) To learn about instruments used on site, how to handle and look after them.
- e) To report to site control when arriving and leaving site.
- f) Undertake and comply with company's training policy.

Development Aim:

To comply fully in the Company and CSA training schemes with a view to completing the Part A of the Distance Learning Course of the Commissioning Specialists Association.

JOB TITLE: COMMISSIONING TRAINEE/ ASSISTANT

JOB GRADE: GRADE ONE

Academic standard: As Path of Development

- Duties & Responsibilities:
- a) To be familiar with company Health & Safety policy and be aware of the requirements of safety for yourself and others.
 - b) To assist senior personnel in carrying out commissioning activities on site and generally to observe instructions given by an authorised person.
 - c) To take part in the pre-commissioning activities and to become familiar with working drawings and job technical specifications.
 - d) To learn about instruments used on site, how to look after them, which instruments are appropriate to various tasks and how to use and read them.
 - e) To learn how to balance water and air flows whilst assisting more senior staff.
 - f) To report to site control when arriving and leaving site.

Development Aim: To participate fully in the Company and CSA training schemes with a view to completing Parts A and B of the Distance Learning Course of the Commissioning Specialists Association.

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**JOB TITLE: INTERMEDIATE COMMISSIONING/BALANCING
TECHNICIAN**

JOB GRADE: GRADE TWO

Academic standard: As Path of Development

- Duties & Responsibilities:
- a) To be familiar with company Health & Safety policy and be aware of the requirements of safety for yourself and others.
 - b) To be familiar with the scope of works, installed equipment and Client's technical schedules.
 - c) To understand and comply with your employer's Method Statements and any other specific instructions given by your employer.
 - d) To obtain design information, tolerances and agreed methods of working.
 - e) To be aware of the programme of work you are required to achieve.
 - f) To carry out balancing of air and water systems under supervision.
 - g) To liaise on any problems with your immediate senior or supervisor and to record and convey them using approved reporting procedures.
 - h) To complete air and water balance test sheets legibly and presentably for checking by the lead engineer or supervisor.
 - i) To become competent to demonstrate completed and balanced work to relevant authorities.
 - j) To learn to identify additional work that is requested, implied or expected over and above your employer's agreed contractual commitment.
 - k) To follow your employer's procedures for carrying out additional work.
 - l) To ensure that all instruments used for definitive readings are covered by a current calibration certificate and instruments used in proportional balancing have a current record of checks made against a 'master' instrument.
 - m) To be responsible for the safety and careful handling of and account for all instruments issued to you by your employer.

Development Aim: To participate fully in your Company and CSA training schemes with a view to completing Part C of the Distance Learning Course of the Commissioning Specialists Association.

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JOB TITLE: COMMISSIONING/BALANCING TECHNICIAN

JOB GRADE: GRADE THREE

Academic standard: As Path of Development

Duties & Responsibilities:

- a) To be familiar with the company Health & Safety policy and be aware of the requirements of safety for yourself and others, and carry out and understand risk assessment.
- b) To assist senior personnel in commissioning activities.
- c) To liaise with the Client's representative if so directed.
- d) To obtain design information, tolerances and produce methods statements for approval.
- e) To ensure all relevant instruments, documentation and information are available prior to going on site.
- f) To make contact with your office daily if you are the senior representative of your company on site.
- g) To establish the commissionability of each system. To be competent in all air and water balancing activities, site testing of installed equipment and fault diagnosis and to develop management skills.
- h) To be competent to work on site without supervision and to take charge of others on appropriate contracts
- i) To be cognisant of current electrical regulations.
- j) To assist in starting up major plant.
- k) To carry out environmental checks.
- l) To keep a daily diary of agents and activities under your control, including a list of specialist contractors on site, trainees working under your direction and any decisions made by authorities on site which may affect progress. Any delays must be recorded, giving reasons.
- m) To assist in the training and motivation of trainees under your supervision on site.
- n) To produce test data and commissioning reports in line with your employer's standard procedures and submit them fully collated to your supervisor or, if directed, the Client's representative.

To assist in the training and motivation of Grade 1 and Grade 2 personnel under your supervision on site.

Development aim: To participate in Company Training Schemes and undertake sufficient personal development so as to be capable of obtaining a pass at the Commissioning Specialists Association Grade 4 examination.

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JOB TITLE: COMMISSIONING ENGINEER

JOB GRADE: GRADE FOUR

Academic standard: As Path of Development

- Duties & Responsibilities:
- a) To be responsible for all aspects of site safety for yourself and others including risk assessment, method statements and toolbox talks.
 - b) To assist your company's manager to achieve successful completion of the project.
 - c) To carry out any tasks for Grade 1 to 3 as may be necessary or mandatory.
 - d) To be fully conversant with the structure of the project management.
 - e) To liaise with the Client's representative and accept his instructions in accordance with your company's procedures when acting as senior representative on site.
 - f) To carry out commissionability review of all systems under your control.
 - g) To delegate to technicians such sections of work as they should be able to undertake in accordance with their job descriptions.
 - h) To ensure that you have adequate resources to meet the programme for commissioning.
 - i) To ensure that your manager or supervisor is aware of any changes in programme in sufficient time for adequate resources to be supplied to site or surplus technicians to be relocated.
 - j) To carry out witness testing of systems and operate your employer's company policy for completion certification.
 - k) To be conversant with electrical diagrams and controls operation.
 - l) To liaise with other trades on site to ensure access is available as required for your works and for any specialist under your control.
 - m) To be familiar with refrigeration, electrical and controls disciplines in order to discuss, control, inspect and accept the work of these specialists on behalf of your employer when required.
 - n) To write concise reports to accompany test documentation for record purposes.
 - o) To actively encourage, motivate and assist the development and training of Grade 1, Grade 2 and Grade 3 personnel under your supervision.

Development aim: To be aware of and research changes within the industry. Develop and promote good working practices, and man management skills.

To undertake sufficient personal development so as to be capable of developing and presenting a dissertation to meet the requirements for progression to Commissioning Specialists Association Grade 5.

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JOB TITLE: SENIOR COMMISSIONING ENGINEER

JOB GRADE: GRADE FIVE

Academic standard: As Path of Development

- Duties & Responsibilities:
- a) To be responsible for all aspects of site safety for yourself and others including risk assessment, method statements and toolbox talks.
 - b) To be skilled in communication and man-management.
 - c) To fully understand drawings, specifications and contractual commitments for the project.
 - d) To produce method statements for work which you control directly and to obtain, co-ordinate and submit, as necessary, method statements from specialists.
 - e) To obtain approval for method statements submitted.
 - f) To be fully aware of your company's policies in respect of their contractual commitments.
 - g) To liaise with the Client's representative on all matters concerning the project.
 - h) To set up site accommodation for technicians, be responsible for arranging facilities, security, general tidiness and preparation of all site reports.
 - i) To co-ordinate and discipline all the site activities of those under your control.
 - j) To produce programmes as required to aid timely completion of the contract.
 - k) To ensure the correct procedures are followed for pre-commissioning and essential actions are taken.
 - l) To monitor and record progress of commissioning and all other trades which directly or indirectly affect commissioning.
 - m) To be skilled in detailed report writing, planning and site meetings.
 - n) To have a working knowledge of all specialised activities associated with your discipline.
 - o) To have a knowledge of IEE Regulations and electrical installations.
 - p) To have knowledge of all piped services used in buildings.
 - q) To undertake reviews of building services designs with respect to commissionability.
 - r) To produce technical reports and hold discussions with designers to improve commissionability.
 - s) To evaluate the technical aspects of method statements for specialists under your control.
 - t) To understand and apply the requirements for correct instrumentation in checking and witnessing specialist's work.

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(Grade 5 Job Description – continued)

- u) To familiarise and implement your clients requirements to achieve handover.
- v) To actively encourage, motivate and assist with the development and training of personnel under your supervision.

Development aim: To undertake sufficient personal development so as to be capable of satisfying the Committee of the CSA as to your suitability for progression to CSA Grade 6.

Commissioning Specialists Association

JOB TITLE: COMMISSIONING MANAGER

JOB GRADE: GRADE SIX

Academic standard: As Path of Development

- Duties &a) Responsibilities:
- a) To be responsible for all aspects of site safety for yourself and others including risk assessments, method statements and toolbox talks.
 - b) To take full control of one or more projects and be responsible to your employer.
 - c) To be responsible, on behalf of your employer, to his Client for all site events within the scope of the contract.
 - d) To agree documentation requirements and standards.
 - e) To evaluate labour requirements against the programme and tender submissions.
 - f) To be skilled in communication and man-management.
 - g) To recognise strengths and weaknesses in those to whom you delegate and work to form an effective team.
 - h) To respond to changes in requirements objectively.
 - i) To identify all design data and ensure adherence to specific standards.
 - j) To recognise your own abilities and know when to call for assistance in dealing with matters which fall beyond your experience.
 - k) To produce commissioning reports to the satisfaction of your employers and their Clients.
 - l) To review and evaluate commissionability of designs to minimise time taken on site, ensure Client satisfaction with the end product and maximise your employer's company efficiency.
 - m) To report regularly and as required to your employer on the specialism for which you are employed.

Please Note: You will only be considered for a Grade 6 Commissioning Manager if you have previously passed the Grade 4 exam and completed the Grade 5 Thesis, and have the relevant proven commissioning experience. For further information please refer to the Path of Development and job descriptions in the Training & Career Development Handbook.

JOB TITLE: **CSA COMMISSIONING MANAGER**

JOB GRADE: **GRADE CM1**

Academic standard: **As Path of Development**

- a) To be able to identify the key processes that relate to commissioning management for the planning and design phase. .
- b) To know and understand the key processes that relate to the pre-construction phase of commissioning management.
- c) To understand and manage the construction phase of commissioning management.
- d) To know the key processes that relate to the commissioning management testing and commissioning phase.
- e) To be able to identify the key process that relate to the commissioning management handover phase.
- f) Worked on at least 1 commissioning management project.

Please Note: You will only be considered for a Grade CM1 Commissioning Manager if you have previously undertaken at least 1 commissioning management project. You will also need to complete the ITCM two day CSA commissioning management course. You must also have the relevant proven commissioning experience. For further information please refer to the Path of Development and job descriptions in the Training & Career Development Handbook.

JOB TITLE: **CSA SENIOR COMMISSIONING MANAGER**

JOB GRADE: GRADE CM2

Academic standard: As Path of Development

- a) To be able to identify the key processes that relate to commissioning management for the planning and design phase. .
- b) To know and understand the key processes that relate to the pre-construction phase of commissioning management.
- c) To understand and manage the construction phase of commissioning management.
- d) To know the key processes that relate to the commissioning management testing and commissioning phase.
- e) To be able to identify the key process that relate to the commissioning management handover phase.
- f) Worked on at least 4 medium or 2 large commissioning management projects.

Please Note: You will only be considered for a Grade CM2 Senior Commissioning Manager grade if you have previously undertaken at least 4 medium or 2 large commissioning management projects. You will also need to complete the ITCM two day CSA commissioning management course and a 2500 commissioning management dissertation report (unless grade 5 already completed) and an online interview. You must also have the relevant proven commissioning experience. For further information please refer to the Path of Development and job descriptions in the Training & Career Development Handbook.

JOB TITLE: **CSA PROJECT COMMISSIONING MANAGER**

JOB GRADE: GRADE CM3

Academic standard: As Path of Development

- a) To be able to identify the key processes that relate to commissioning management for the planning and design phase. .
- b) To know and understand the key processes that relate to the pre-construction phase of commissioning management.
- c) To understand and manage the construction phase of commissioning management.
- d) To know the key processes that relate to the commissioning management testing and commissioning phase.
- e) To be able to identify the key process that relate to the commissioning management handover phase.
- f) Worked on at least 5 large scale commissioning management projects.

Please Note: You will only be considered for a Grade CM3 Commissioning Project Manager grade if you have previously undertaken at least 5 large commissioning management projects. You will also need to complete the ITCM two day CSA commissioning management course, the ACM (advanced commissioning management course) and a 3000 - 3500 commissioning management dissertation report (unless grade 5 already completed) and an online interview. You must also have the relevant proven commissioning experience. For further information please refer to the Path of Development and job descriptions in the Training & Career Development Handbook.

APPENDIX 'B'

ANNUAL SUBSCRIPTION RATES - from January 2016

VAT is charged at 20%

Corporate Membership - companies or individuals employing staff or sub-contractors engaged in commissioning.

FM1	Turnover £750,000 per annum & above	£1,375 + VAT
FM2	Turnover £500,000 up to £749,999 per annum	£1,237.50 + VAT
FM3	Turnover £250,000 up to £499,999 per annum	£1,100 + VAT
FM4	Turnover £200,000 up to £249,999 per annum	£ 962.50 + VAT
FM5	Turnover £150,000 up to £199,999 per annum	£ 770 + VAT
FM6	Turnover £100,000 up to £149,999 per annum	£ 550 + VAT
FM7	Turnover £ 50,000 up to £ 99,999 per annum	£ 385 + VAT

The above fees may be paid by monthly standing order, by arrangement with the Secretary.

Associate Membership - companies manufacturing, specifying or utilising commissioning techniques or equipment.

AM	Irrespective of turnover	£250.00 + VAT
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Individual Membership - not available to companies or individual sub-contractors operating as a company and employing staff or sub-contractors as commissioning technicians.

IM	Applicable to individuals only	Fees vary according to Grade
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Individual Associate Membership – for individuals who are not commissioning engineers but are affiliated through a related trade and have an interest in the CSA.

IAM	Applicable to individuals only	£60.00 + VAT
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VAT - the Associations VAT number is 566 3468 11

Payment of fees and subscriptions – Credit/Debit Card/BACS/PayPal

APPOINTED OFFICIALS AND ELECTED OFFICERS, JUNE 2017

TRUSTEES

Neil White	Crosscount Limited
Ron Lightfoot	Commissioning Management Ltd.
Roger Carlin	Ashford Environmental Services Ltd

MAIN COMMITTEE

Chairman	Neil Burdess	Banyards
Vice Chairman	Andrew Watkin	Airtech Premier Ltd
Treasurer	Alan Cram	(Accountant/Treasurer)
Members	Neil White	Crosscount Ltd
	Paul Brown	
	Roger Carlin	Ashford Environmental Services Ltd
	Dave Stephens	
	Roy Tyler	Media Control
	Keith Barker	Tectonic Techniques
	Joe Wu	
	Carlo Gambardella	Beech Technical Services Limited

MANAGEMENT COMMITTEE

David Stephens	
Andrew Watkin	Airtech Premier Ltd
Neil Burdess	Banyards
Roger Carlin	Ashford Environmental Services Ltd
Neil White	Crosscount Ltd
Alan Cram	CSA Treasurer/Accountant
Julie Parker	CSA Secretary

SUB-COMMITTEE CHAIRMEN

MARKETING	Keith Barker
TECHNICAL	Darren Harbor
TRAINING	Carlo gambardella

STAFF

Julie Parker	Association Secretary
Joanne Rowe	Senior Office Assistant
Kate McIntyre	Office Assistant

CODE OF PRACTICE

This CODE OF PRACTICE represents a binding commitment on the part of each Member of the COMMISSIONING SPECIALISTS ASSOCIATION (of whatever grade of Membership) to a high standard of quality, integrity, safety and reliability.

Each Member shall observe and comply with the following requirements in all of its specialist work, provided that the customer for whom the contract is being undertaken is operating and interpreting that contract in a fair and reasonable way.

1. STANDARD OF WORKMANSHIP

The Member shall observe a good standard of workmanship and any goods or services manufactured or fabricated or supplied by the Member shall be of good quality. All services, workmanship, goods and materials shall comply with the requirements of the contract and shall be to the reasonable satisfaction of the Client (or Main Contractor) for whom the work is performed.

The Member shall consistently check all of the work carried out and remedy all defects and shall ensure that all finished work is of the specified standard.

2. QUALITY ASSURANCE

The Member shall, wherever practicable, adhere to a recognised third-party Quality Assurance scheme in respect of all site work and (where applicable) in respect of services supplied, manufacturing or fabricating work. Where it is not practical for a Member to be Q.A. Certified, operations must be carried out in such a manner as to ensure the quality of the work and/or the Q.A. procedures of the Client must be followed. Such Quality Assurance schemes shall be approved by the Association.

3. TRAINING

The Member shall demonstrate a positive commitment to training and shall take active steps to ensure that all operatives, supervisors, office staff and managers receive proper and continuing training in all relevant aspects of their work. "Relevant Aspects" shall be those aspects of their work which affect the standard, safety or efficiency of the Members work.

4. SAFETY

The Member shall demonstrate a positive commitment to safety and shall take all reasonably practicable steps to ensure the safety of all work and to protect employees and all others who may be affected by the work from all hazards which may arise out of such work.

5. EMPLOYMENT

The Member shall take all reasonably practicable steps to ensure the welfare and stability of employment of all employees and shall fulfil all legal and other duties as an employer. The Member shall not discriminate unlawfully or improperly in respect of employment.

6. SUB-CONTRACTING

Where the Member sub-contracts any work, it shall ensure that the sub-contractor is a competent and bona fide firm with all appropriate insurance cover and shall also ensure that the sub-contractor complies with this Code of Practice. The Member shall act with fairness and integrity in all dealings with sub-contractors.

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Commissioning Specialists Association

7. BUSINESS INTEGRITY

The Member shall observe a high standard of business integrity in all business dealings, whether with Clients or Main Contractors or with Suppliers or Sub-Contractors. In particular the Member shall:

- (a) accept fair and reasonable terms and conditions in all contracts with Suppliers and Sub-Contractors
- (b) only pursue claims (whether against Clients or Main Contractors for whom work is being carried out, or against Suppliers or Sub-Contractors who are working for the Member) which are believed to be valid, reasonable and sustainable.

8. COMPETITION

The Member shall not engage in unlawful price-fixing or market-sharing or in any other unlawful or anti-competitive behaviour.

APPLICATION AND ENFORCEMENT OF THE CODE OF PRACTICE

The Code of Practice shall be applied and enforced by reference to the Constitution of the Association - See Clause 4.

- (a) All Members shall be bound, as a condition of Membership, to comply fully with the Association's Code of Practice.
- (b) No Specialist Company or Person shall be admitted to Membership until a commitment to quality and integrity has been demonstrated to the satisfaction of the Main Committee and an undertaking has been formally given to comply with the Association's Code of Practice.
- (c) In the event that any Member fails to comply with the Code of Practice, the Member shall receive a warning, together with appropriate advice on compliance with the Code of Practice. In the event of further failure to comply with the Code of Practice the Member may be suspended or expelled from the Association by decision of the Main Committee. In circumstances where the Committee feels that an initial failure to comply with the Code of Practice is of sufficient gravity, the Member may be suspended or expelled without first receiving any warning or guidance. Representation of the Member can be made to the Committee if deemed appropriate.

In the event of any complaint arising out of an alleged breach of this Code of Practice by a Member, formal written notice of the complaint should be sent to the Secretary of the Association, who will arrange for the matter to be investigated factually and, if necessary, brought to the attention of the Main Committee for consideration and appropriate action.

Issued by: **Julie Parker - Secretary**
for and behalf of the

Commissioning Specialists Association
9 Kings Court
Harwood Road
Horsham
West Sussex
RH13 5UR
Tel: 01403 754133
Email: office@csa.org.uk
Website: www.csa.org.uk

THE COMMISSIONING SPECIALISTS ASSOCIATION



INDIVIDUAL MEMBERS
PATH OF DEVELOPMENT Sept 2021

