

# Performance Assurance Plan—Training Format

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1. Section 1
    - A. Purpose and objectives
    - B. Baseline—an accurate baseline documenting existing conditions, systems, equipment, and performance that will be modified by the project
    - C. Design—a design that is life cycle cost-effective, buildable, maintainable, and will deliver the proposed performance
  2. Section 2
    - A. UESC project training plan—a training plan including training schedule, video recording, and project notebook
  3. Section 3
    - A. Project overview, systems, and equipment changes and warranties
    - B. ECM details
      - a. Description
      - b. Location
      - c. Controls, sequence of operations
      - d. Performance projected and maintaining performance
      - e. O&M requirements
      - f. Functional testing.
        - i. Annual tune-ups
        - ii. Troubleshooting
  4. Section 4
    - A. Cx plan and report
    - B. Equipment submittals, delivered, and installed meets design specifications
    - C. Cx protocol including activities checklist with performance target
    - D. Start-up performance verification based on measured data
    - E. Functional testing
  5. Section 5
    - A. Performance verification
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- B. Report findings, conclusions, and recommendations
- C. Invoicing and payment process
- D. Annual reporting

6. Section 6

- A. Installation—the ECMs must be installed so that they meet the quality, characteristics, and functionality of the design and the manufacturers' recommended procedures as well as applicable code and agency requirements as described or referenced in the contract
- B. ECM Training—as agreed to in the contract
  - a. Classroom
  - b. Installed equipment
  - c. Observe functional testing of each ECM
  - d. Observe Cx of each ECM
  - e. Review Cx report
  - f. Functional testing—once installed, each ECM will be tested according to the manufacturers' recommendations
  - g. Cx, performance verification, and Cx Report—the Cx protocol must be applied to all ECMs

7. Section 7

- A. Post-acceptance
- B. Utility engagement, as described in contract
- C. Wraparound 1-year warranty
- D. O&M if included in contract
- E. RCx, performance verification, training, report at 3–4-year intervals
- F. Agency
- G. O&M
- H. RCx, performance verification, reporting