



Handbook Committee

Reference Manual

Approved by Handbook Committee 06-26-2016

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1 HANDBOOK CONTENT AND PHILOSOPHY

ASHRAE is the recognized authority on current engineering procedures and practices in the fields of heating, ventilation, air conditioning, and refrigeration (HVAC&R). The Society publishes the ASHRAE Handbook primarily to provide technical information and data for the design engineer. The information is directed at those who understand engineering principles and need its procedures, design data, and review of recent industry practices. Typical users include consulting engineers, plant engineers, equipment vendors, contractors, government officials, and engineering students.

1.1 COMMITTEE RESPONSIBILITIES

The Handbook Committee (HBC) is responsible for preparing and publishing the ASHRAE Handbook. This committee formulates editorial policies and establishes the overall philosophy and guidelines for the Handbook to ensure a well-rounded, authoritative publication consistent with the mission of ASHRAE. The HBC or its representative replies in writing to all comments received that pertain to Handbook content or procedures. The HBC assigns the preparation of chapters to appropriate Technical Committees (TCs).

The revision cycle is a four-year process. Each chapter is assigned to a specific HBC member who serves as a liaison to the TC responsible for the chapter. Liaisons are typically assigned to several chapters/TCs. The typical Handbook Revision Schedule can be found on the Handbook Central page of the ASHRAE website (see Reference List).

1.2 PRODUCT: THE HANDBOOK

The Handbook is published each year in print and electronic formats, in a four-year, repeating sequence of volumes as follows:

- Fundamentals
- Refrigeration
- HVAC Applications
- HVAC Systems and Equipment

All four volumes of the Handbook are also published each year in a combined electronic form. The Handbook, both electronic and print, is published in two editions. One edition contains inch-pound (I-P) units of measurement and the other contains the International System (SI) of units.

The general content and philosophy of the volumes are as follows:

1.2.1 **Fundamentals** covers the basic principles and data for the entire technology of the industry, including the following:

- Theories and engineering concepts
- Data on general subjects applicable to many specific fields
- Data on basic working materials
- Methods of calculating heating, cooling, and ventilation loads
- Data and procedures for relatively unchanging subjects such as pressure losses in fittings and duct and pipe sizing

1.2.2 **Refrigeration** covers refrigeration equipment and systems in a particular application, process, or cold storage facility and addresses current design for specific applications.

1.2.3 **HVAC Applications** describes the use of heating, ventilation, and air-conditioning to provide desired conditions in a particular building occupancy or to accomplish a specific purpose in particular applications.

1.2.4 **HVAC Systems and Equipment** describes both the combinations of equipment and the components or assemblies that perform a particular function either individually or in combination.

1.3 SOURCE: TECHNICAL COMMITTEES (TCs)

1.3.1 The TCs establish the scope of the chapter(s) assigned to them and select reviewers and revisers. The reviewers suggest deletions and additions. The revisers organize the material and rewrite it within the guidelines established by the HBC and as described in the Authors and Revisers Guide. The volume subcommittees determine if the guidelines have been followed and have the authority to change or delete material if the TC is unwilling to do so. The final arbiter in a dispute is the HBC; the procedure is described in Section 3.6 of the Handbook Committee's Manual of Procedures (MOP).

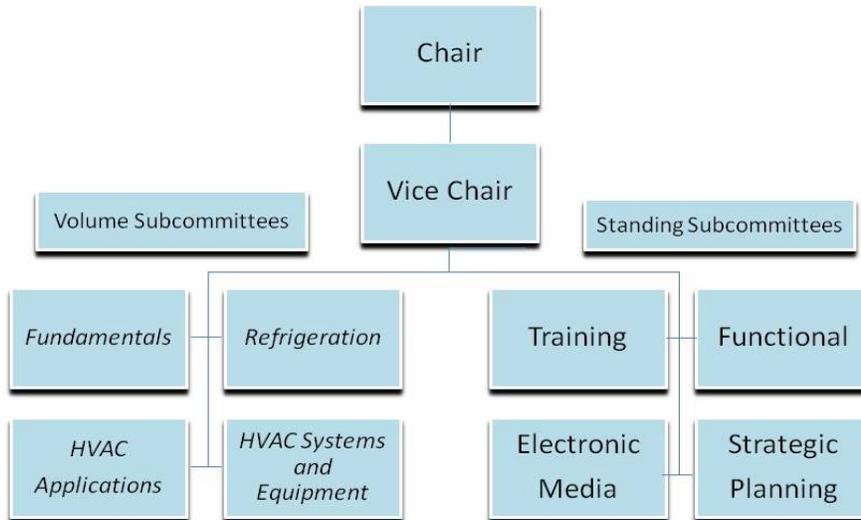
1.3.2 The Manual of Procedures (MOP) for Technical Committees, Task Groups, and Technical Resource Committees states:

"Each TC/TG/TRG is charged with the responsibility of reviewing Handbook chapters within its field of interest and making appropriate recommendations to the Handbook Committee. The TC/TG/TRG is responsible for the technical content of these chapters, but review and revision must be coordinated with the publication schedule established by the Handbook Committee." (Para. 3.2.1)

1.3.3 The HBC, in cooperation with the Handbook Editor, prepares and maintains the Authors and Revisers Guide (ARG).

2 COMMITTEE, SOCIETY, AND STAFF STRUCTURE

The committee structure is shown in the diagram below:



2.1 SUBCOMMITTEES

2.1.1 Subcommittees for Handbook Volumes

- .1 Each volume subcommittee has responsibility for preparing a specific Handbook volume.
- .2 Subcommittee members help find individuals or groups to review chapters. TCs are the primary sources for chapter authors, reviewers, and revisers.
- .3 Volume subcommittee members work with each reviewer to transmit comments, criticism, and suggestions to the responsible author or reviser so the chapter will reflect current practice.
- .4 At their first ASHRAE annual conference, the incoming volume subcommittee chair meets with the incoming volume subcommittee
 - (a) to review duties and responsibilities of the subcommittee,
 - (b) to review and finalize chapter assignments, and
 - (c) to review and discuss commentary forms for each chapter as prepared by the prior volume subcommittee liaisons.

[.5 At the following ASHRAE winter conference, the incoming volume subcommittee uses the chapter revision history maintained by Handbook](#)

staff to determine the status of each chapter regarding its timeliness and currency. The volume subcommittee uses its collective judgment, taking into account the stability of each chapter's content. The volume subcommittee members (liaisons) inform each TC of the status of their chapter(s) as determined. Adjustments to status may be suggested by the respective TCs, in conjunction with the liaison, for possible change.

2.1.2 Other Subcommittees

- .1 The Executive Subcommittee consists of the HBC chair, the chairs of the volume subcommittees, and the Board Ex-Officio (BOD ExO) member for the HBC. The HBC chair is the chair of the Executive Subcommittee. This subcommittee is concerned with activities of the HBC in the current Society year.
- .2 The Training Subcommittee has the newest volume chair as its chair, and other members as appointed by the HBC chair. This subcommittee is responsible for training incoming HBC members and the authors and revisers of Handbook chapters.
- .3 The Functional Subcommittee has the second newest volume chair as its chair, and other members as appointed by the HBC chair. This subcommittee is responsible for annually reviewing and recommending updates as needed for the Rules of the Board (ROBs), Manual of Procedures (MOP), and the Authors and Revisers Guide (ARG).
- .4 The Electronic Media Subcommittee has the third newest volume chair as its chair, and other members as appointed by the HBC chair. This subcommittee investigates and makes recommendations regarding electronic content development and delivery.
- .5 The Strategic Planning Subcommittee has the HBC's vice chair as its chair, and other members as appointed by the HBC chair. This subcommittee recommends objectives to further the Society's goals for the Handbook and makes plans for the committee's future operation.
- .6 Other standing or temporary committees may be appointed or dissolved by the current HBC chair.

2.2 COMMITTEE MEMBERS

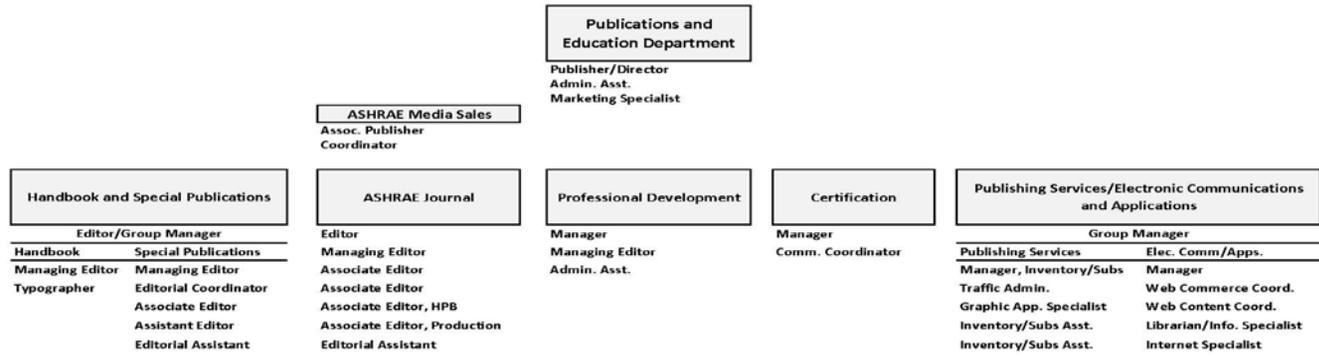
- .1 The HBC chair is usually the retiring subcommittee chair for the volume most recently published. The chair
 - (a) presides at all HBC meetings, and
 - (b) prepares the agenda for these meetings in consultation with the Handbook Editor.

- .2 The HBC vice chair usually is the chair of the subcommittee responsible for the volume published in that fiscal year. The vice chair presides at HBC meetings in the absence of the chair.
- .3 The chair for each volume subcommittee
 - (a) assigns volume subcommittee members as liaisons to TCs for specific chapters,
 - (b) monitors and keeps the Handbook Editor informed of the progress on chapters being prepared, and
 - (c) regularly reports to the HBC on all matters pertaining to the assigned volume.
- .4 HBC members are expected to attend both the annual and winter conferences. The full Handbook Committee meeting is usually held on Sunday of each conference. The annual and winter conferences also present the best chance to meet with assigned TC Handbook Subcommittee chairs. Specific tasks of HBC members include
 - (a) acting as liaisons between the Editor and revisers,
 - (b) arranging for adequate review of their assigned chapters,
 - (c) monitoring progress of the review and revision process, and
 - (d) submitting final, TC-approved manuscripts to the Editor.

2.3 STAFF SUPPORT

- .1 The Handbook Editor and staff support the HBC. The Editor prepares and distributes meeting notices, agendas, minutes, and any other material required for committee use.
- .2 The Handbook Editor and supporting staff
 - (a) edit TC- and HBC-liaison-approved chapter manuscripts, sometimes substantially, and
 - (b) suggest new chapters that conform to Section 1.0, Handbook Content and Philosophy.
- .3 The Publisher grants permission to quote, reprint, or otherwise reproduce material from Handbook volumes, based on policy established by the BOD. If any request is not clearly covered by such policy, the Publisher submits it to the BOD for a decision.

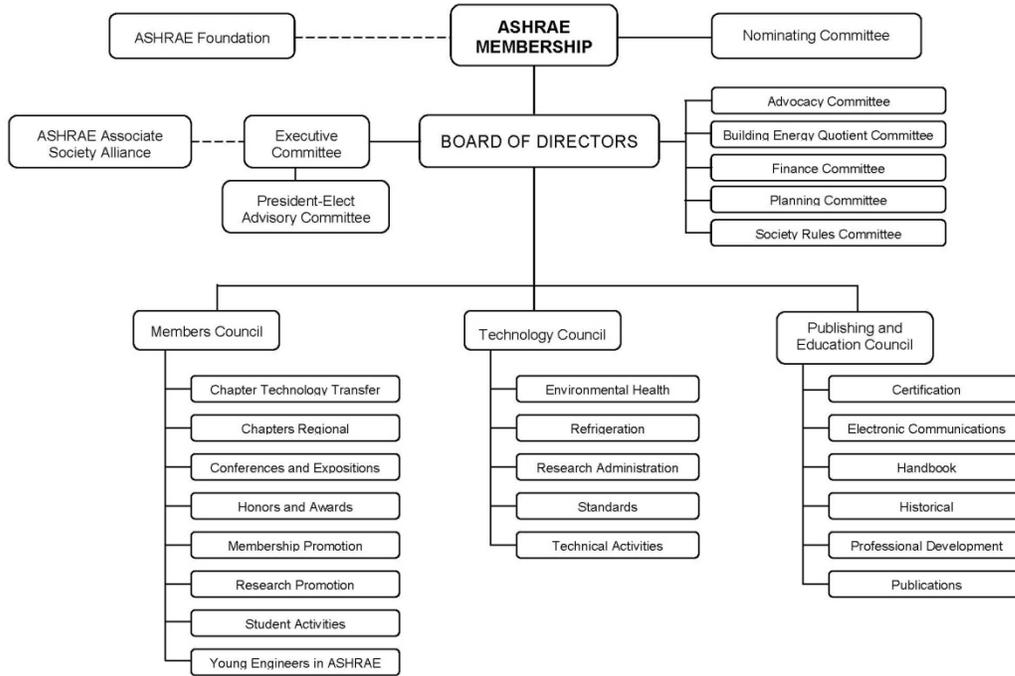
.4 Publications and Education Department Organization



2.4 SOCIETY ORGANIZATION



ASHRAE STRUCTURE



Effective 2012-07-01

3 MISCELLANEOUS

3.1 INTERACTIONS WITH OTHER COMMITTEES

- 3.1.1 The HBC coordinates with the Technical Activities Committee (TAC), appropriate TCs, and other society committees as needed.
- 3.1.2 In the event TCs are not able to or do not provide the necessary reviews or revisions, the HBC seeks other appropriate means to complete the reviews and revisions in a timely manner.
- 3.1.3 The HBC works with the editors of ASHRAE Journal and ASHRAE Insights to publish articles containing Handbook material of current value.
- 3.1.4 The HBC gives the ASHRAE Conferences and Expositions Committee (CEC) suggestions for program material that develops during review and revision of chapters. The CEC provides the HBC with author's comments on reviewed papers' impact on Handbook information and with abstracts for potential inclusion with relevant chapters.
- 3.1.5 The Training Subcommittee chair leads an authors and revisers workshop each year at the ASHRAE winter conference. The purpose of the workshop is to help the TCs in their duties of revising and/or authoring Handbook chapters. The leader is responsible for planning, scheduling, and announcing the workshop.
- 3.1.6 The HBC chair appoints, from the committee's membership, liaisons to the TAC sections. These liaisons attend the assigned TC Chairs'/Section meetings at the annual and winter conferences.

3.2 TRAINING AND MENTORING

- 3.2.1 The Training Subcommittee is responsible for training new committee members. The Training Subcommittee conducts a training session for new and continuing HBC members at the ASHRAE annual (summer) conference.
- 3.2.2 The volume subcommittee chairs maintain contact with their subcommittee members and transmit to the Training Subcommittee any observations of areas for improvement.
- 3.2.3 The Handbook Editor sends new HBC members a copy of the applicable Rules of the Board (ROBs), Manual of Procedures (MOP), Authors and Revisers Guide (ARG), the current HBC roster, and minutes for the most recent meeting.
- 3.2.4 Each new HBC member should develop a rapport with other members to gain experience and maximize productivity.

- 3.2.5 The chair
- (a) ensures that the time allotted at the beginning of the first meeting is sufficient for proper introduction of the new members,
 - (b) assesses at a later meeting the effectiveness of the training program,
 - (c) provides assistance as needed to enhance the training program, and
 - (d) includes an objective for mentoring in the committee's Management by Objectives (MBO).
- 3.2.6 Handbook liaisons are trained using the Handbook Liaison Training PowerPoint, which can be found on the Handbook Central page of the ASHRAE website.
- 3.2.7 TC Handbook Subcommittee chairs are trained using the Handbook Subcommittee Chair Training PowerPoint, which can be found on the Handbook Central page of the ASHRAE website.

3.3 GOVERNING DOCUMENTS

The important governing documents are as follows:

- 3.3.1 The Rules of the Board (ROBs).
- 3.3.2 The Manual of Procedures (MOP).
- 3.3.3 Guidelines for proposing changes to Rules of the Board (ROBs)
- .1 ROB 3.400, Manual of Procedures for Officers and Directors, Section 10.3:
 - .2 Rules of the ASHRAE Board of Directors, authorized by Bylaws Section 4.3, are compiled annually by the staff of the Society from actions of the Board.
 - .3 Rules of the Board are contained in the following five volumes:
 - Volume 1 – Principles, Policies, Position Statements
 - Volume 2 – Standing Rules for Board, Councils, Committees
 - Volume 3 – Manuals and Procedures
 - Volume 4 – Sunset Rules and Interpretations
 - Volume 5 – Archives
 - .4 Changes to Rules of the Board. Proposed changes (additions and deletions) to Rules of the Board (ROBs) are submitted by committees, councils, and Board members. Changes proposed by a committee are submitted through the body to which it reports; councils and Board members may submit proposed changes directly to the Board of Directors.
 - .5 To propose a change to an existing ROB, present the current ROB with changes marked by double underlining to designate words proposed to be added and

strikethrough to designate words proposed to be deleted. A proposed change, as a minimum, shall include the complete ROB number (e.g., 2.106.001.2), the proposed change(s) marked as indicated above, and the reason(s) for the change(s).

- .6 To propose a new ROB, present the wording for the new rule and include a statement indicating a recommended placement of the new rule within the ROB organization. Examples:

It is recommended that this rule be placed in ROB Volume 1, Policies.

It is recommended that this rule be placed in ROB Volume 2, Publishing and Education Council.

- .7 To propose rescinding an existing ROB, include in the recommendation the ROB volume in which the rule is located, the rule number or other identification code, and the wording of the rule to be rescinded.

3.3.4 Changes to the Manual of Procedures (MOP)

- .1 Changes to the HBC MOP are submitted to the Publishing and Education Council (PEC) after an affirmative vote of the HBC.
- .2 Appendices are part of the MOP and, therefore, require PEC approval.

3.4 TOOLS AVAILABLE

- 3.4.1 The most important tool developed for helping HBC liaisons in their work is the Authors and Revisers Guide (ARG), which can be found on the Handbook Central page of the ASHRAE website. The ARG also contains a Handbook Chapter Review Form and the Handbook Chapter Approval Checklist.

3.5 TRANSPORTATION REIMBURSEMENT POLICY

The transportation reimbursement policy is decided and voted on by Society. The official documentation is provided to all committee members for each conference and in case of changes to the policy.

4 REFERENCE LIST

The following documents can be found either on the [Handbook Committee page](#) or the [Handbook Central page](#) of the [ASHRAE website](#):

- Typical Handbook Revision Schedule
- Handbook Liaison Training PowerPoint presentation
- TC Handbook Subcommittee Chair Training PowerPoint presentation
- Rules of the Board (ROBs)
- Manual of Procedures (MOP)
- Authors and Revisers Guide (ARG)