



2019–2024 ASHRAE Strategic Plan

Prepared by ASHRAE Planning Committee
Approved by ASHRAE Board of Directors, May 6, 2019

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INTRODUCTION

This plan, developed by the ASHRAE Planning Committee in collaboration with the Board of Directors, will guide the work of the Society during the five-year period from 2019-2024. It was developed during 2018-2019 through a process initiated by a stakeholder engagement exercise involving members of ASHRAE and key industry organizations who gave their views on ASHRAE's position in the industry and its perceived strengths and challenges. With facilitation by the Planning Committee, the Board then conducted a brainstorming session to develop preliminary objectives and initiatives. These addressed both outward facing issues affecting the industry and society as well as inward facing issues related to the needs of ASHRAE members and organizational efficiency. The final plan was drafted by the Planning Committee with Board oversight following multiple reviews including review by regional leadership teams. The final phase of development was preparation of implementation and tracking procedures, roll-out plans, and budget estimates. Communication of the new plan to councils and committees began in spring 2019 with formal implementation beginning in July 2019.

MISSION, VISION AND VALUES

As part of the Strategic Plan development process, the Planning Committee reviewed the Society mission and vision statements. Although it was affirmed that these statements remain a solid foundation for the organization and for the work set out in this plan, the Planning Committee recommended that they be revised to reflect ASHRAE's current work and aspirations more clearly. No changes were recommended to ASHRAE's Core Values.

In November 2018, the Board of Directors approved the updated Mission and Vision statements:

Mission

Previous: To advance the arts and sciences of heating, ventilating, air conditioning and refrigerating to serve humanity and promote a sustainable world.

Updated: To serve humanity by advancing the arts and sciences of heating, ventilation, air conditioning, refrigeration and their allied fields.

Vision

Previous: ASHRAE will be the global leader, the foremost source of technical and educational information, and the primary provider of opportunity for professional growth in the arts and sciences of heating, ventilating, air conditioning, and refrigerating.

Updated: A healthy and sustainable built environment for all.

Values

- Excellence
- Integrity
- Volunteerism
- Commitment
- Collaboration
- Diversity

GOALS AND OBJECTIVES

ASHRAE's leadership has identified **three goals**: to advance the industry, provide value to ASHRAE members and prepare the Society for the future and **objectives** that support each goal. **Four initiatives** have been identified to respond to these goals and objectives as shown in the table below. The initiatives are described in detail on the next page (p. 7).

GOAL 1 Position ASHRAE as an Essential Knowledge Resource for a Sustainable, High-Performance Built Environment	
OBJECTIVES	INITIATIVES
a. Utilize a holistic approach to ASHRAE's offerings and activities to drive positive economic, environmental and social impact through innovation in building design and operations	
b. Expand capabilities globally to create, aggregate and disseminate essential information and knowledge focusing on emerging market trends and transformative approaches	
GOAL 2 Maximize Member Value and Engagement	
OBJECTIVES	INITIATIVES
a. Infuse enthusiasm, vitality and diversity throughout ASHRAE events and services	
b. Expand the impact of collaboration and partnerships with industry organizations, universities and government agencies	
c. Leverage technology to increase member engagement, awareness and value	
GOAL 3 Optimize ASHRAE's Organizational Structure to Maximize Performance	
OBJECTIVES	INITIATIVES
a. Prototype and launch new approaches that will increase ASHRAE's relevance and speed to market for key offerings	
b. Optimize ASHRAE's organizational systems and structures to increase capacity, efficiency and effectiveness	
c. Cultivate industry and member philanthropy to extend ASHRAE's impact and reach	

KEY		Resilient Buildings and Communities		Indoor Environmental Quality		Organizational Streamlining		Improve Chapter Engagement, Capacity and Support

STRATEGIC PLAN AREAS AND INITIATIVES

Initiatives provide a focus for the Society to drive advancement, create value, and improve efficiency.

Initiative Area: Built Environment of the Future

1 RESILIENT BUILDINGS and COMMUNITIES



The cycle of building development, design and construction is moving more rapidly than ever. Key stakeholders in the design and construction process face new challenges of responding to a range of environmental, market and consumer-driven pressures. Increasingly, it is being recognized that “smart” buildings and integrated systems are central to successfully addressing challenges posed by climate change, natural disasters, accidents, disease and terrorism. ASHRAE must stimulate innovation and exploration related to these challenges, and promote best practices that enable adaptability, resilience and recovery of buildings and communities.

2 INDOOR ENVIRONMENTAL QUALITY



The indoor environment is increasingly recognized as the leading priority for built environment, with implications extending beyond simple acceptability of indoor conditions to its influence on productivity, learning and health. The indoor environment of the future identifies and optimizes interactions between air quality, thermal comfort, lighting and acoustics, based on a firm understanding of implications for occupants’ health and wellness. ASHRAE convenes and collaborates with experts and stakeholders across the industry to engage in discussion and exploration of this topic to accelerate collective knowledge in the field. This initiative aims to elevate ASHRAE’s role in facilitating this discussion, generating thought leadership and promoting understanding of indoor environmental quality (IEQ) among practitioners.

Initiative Area: Future of ASHRAE

3 ORGANIZATIONAL STREAMLINING



ASHRAE is a large and complex organization with hundreds of technical, standards and managerial committees, supported by a rich network of leaders and subject matter experts. ASHRAE will reach its potential for leadership and influence through an organizational structure that eliminates redundancy, has flexibility to adapt to regional differences and allocates valued time and resources to the most impactful pursuits. This initiative intends to improve internal governance, volunteer and staffing structures to ensure a strong connection across the societal organization and its chapters around the globe.

4 IMPROVE CHAPTER ENGAGEMENT, CAPACITY and SUPPORT



ASHRAE must evaluate and develop methods to better engage chapters, regions and the members they serve in an integrated way. A more supportive and proactive strategy for chapter and regional oversight will minimize variability and ensure that all ASHRAE members experience a strong and valuable connection to the local and societal components.



BACKGROUND

The cycle of building development, design and construction is moving more rapidly than ever and key stakeholders in the design and construction process face new challenges of responding to a range of environmental, market and consumer-driven pressures. Increasingly, it is being recognized that “smart” buildings and integrated systems are central to successfully addressing challenges posed by climate change, natural disasters, accidents, disease, and terrorism. ASHRAE must stimulate innovation and exploration related to these challenges, and promote best practices that enable adaptability, resilience and recovery of buildings and communities.

Table 1 provides more detail:

TABLE 1

BUILT ENVIRONMENT OF THE FUTURE: Resilient Buildings and Communities	
Resources	In addition to normal financial resources (e.g., research and publications budgets and reserve fund), there is an opportunity for funding from government agencies, foundations, and international agencies such as the United Nations, World Bank, and other humanitarian organizations.
Benefits	<p><u>To the Society:</u> Establish a leadership role in advancing new practice paradigms and raising awareness about the importance of resilient buildings and communities. Revenue resulting from repackaging of existing guidelines, development of new content and guidelines.</p> <p><u>To the Member:</u> Access to new research results and practice tools. Association with ASHRAE mission to serve humanity.</p>
Desired Outcomes	<ol style="list-style-type: none"> 1. Establish and maintain at least two new partnerships (MoU or leverage existing partnerships) with external organizations, societies, or government agencies and collaborate on resilient buildings and communities research and the development/adoption of standards, guidelines, programs, rating systems and educational materials. 2. Develop, publish and maintain a Resilient Building or Resilient Building/Community Standard, accompanying Design Guide(s) and design tools, educational programs and materials for adoption and use in adapting to climate change in vulnerable geographic areas. 3. Benchmark and track membership awareness of resilience practices and set targets for improved awareness over the next 5 years.
Key Stakeholders	<ul style="list-style-type: none"> ▪ Engineers ▪ Architects ▪ Relief Organizations ▪ Insurance Companies ▪ Governments ▪ Law Enforcement Agencies ▪ Financial Institutions ▪ United Nations Office for Disaster Risk Reduction ▪ Manufacturers ▪ Retailers Related ▪ Society Committees



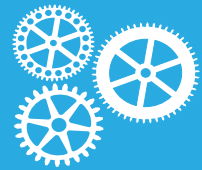
BACKGROUND

The indoor environment is increasingly recognized as the leading priority for built environment, with implications extending beyond simple acceptability of indoor conditions to its influence on productivity, learning and health. The indoor environment of the future identifies and optimizes interactions between air quality, thermal comfort, lighting, and acoustics, based on a firm understanding of implications for occupants' health and wellness. ASHRAE convenes and collaborates with experts and stakeholders across the industry to engage in discussion and exploration of this topic to accelerate collective knowledge in the field. This initiative aims to elevate ASHRAE's role in facilitating this discussion, generating thought leadership and promoting understanding of indoor environmental quality (IEQ) among practitioners.

Table 2 provides more detail:

TABLE 2

BUILT ENVIRONMENT OF THE FUTURE: Indoor Environmental Quality	
Resources	Can be funded through technology, publishing and education budgets. Potential exists for funding partnerships with foundations and non-governmental organizations.
Benefits	<p><u>To the Society:</u> Establish leadership role in advancing new practice paradigms and improving quality of health and well-being in the built environment. Revenue resulting from sales of standards, other publications, and educational programs.</p> <p><u>To the Member:</u> Access to new research results and practice tools. Association with ASHRAE mission to serve humanity.</p>
Desired Outcomes	<ol style="list-style-type: none"> 1. Add to body of scientific knowledge on the relationship of IEQ to health, productivity, and well-being of building occupants and develop practical methods for estimating the economic value of improvements in IEQ such as reduced sick days, reduced health care costs, and improved student learning. 2. Develop an IEQ standard based on health and productivity objectives that addresses air quality, thermal environment, light, sound, and vibration in an integrated way. 3. Establish partnerships with key scientific, technical, and government organizations to advance IEQ research, technology, and policy. Seek to promote communication among researchers, practitioners, and policymakers through conferences, publications, and marketing efforts.
Key Stakeholders	<ul style="list-style-type: none"> ▪ Policymakers ▪ Regulatory bodies ▪ International Standards Organization (ISO) ▪ European Committee for Standardization (CEN) ▪ US General Services Administration (GSA) ▪ US Dept. of Housing and Urban Development (HUD) ▪ International Well Building Institute ▪ Green Building Councils National Center for Healthy Housing ▪ Foundations interested in wellness/health



BACKGROUND

ASHRAE is a large and complex organization with hundreds of technical, standards, and managerial committees, supported by a rich network of leaders and subject matter experts. ASHRAE will reach its potential for leadership and influence through an organizational structure that eliminates redundancy, has flexibility to adapt to regional differences, and allocates valued time and resources to the most impactful pursuits. This initiative intends to improve internal governance, volunteer, and staffing structures to ensure a strong connection across the societal organization and its chapters around the globe.

Table 3 provides more detail:

TABLE 3

FUTURE OF ASHRAE: Organizational Streamlining	
Resources	Financial contributions, which are expected to be minimal, from the operating budgets of the Councils and Standing Committees. The major resource needed will be time from our volunteer members/leaders at the grassroots and Society level, as well as staff.
Benefits	<p><u>To the Society:</u> A more flexible, efficient and effective operational framework allowing volunteer time, staff talent and other resources to be reinvested in targeted areas to drive this plan.</p> <p><u>To the Member:</u> A more accessible association that is using resources to the highest and best use to advance the profession. Ability to move to market more rapidly will result in increased credibility and relevancy of the Society with members and the industry as a whole.</p>
Desired Outcomes	<ol style="list-style-type: none"> 1. Evaluate the staff/volunteer support structure to optimize volunteer engagement, efficiency and effectiveness of the Society (e.g. volunteer time efficiency). Present and implement findings to support the delivery of key products and services (e.g. Guidelines, Standards, Research, Publications, and Programs) with less cost, reduced time to market and an advancement in market responsiveness. 2. Redesign leadership/governance structure to support increased operational efficiency and effectiveness of the organization. 3. Targeted streamlining for committee operational effectiveness through reduction of overlap and optimization of quantity, scopes, and process (e.g. merging of technical committees for cross communication, efficiency and effectiveness). 4. Increase efficiency of Winter and Annual conferences by reducing volunteer time, staff time, and financial expenditures at Winter and Annual conferences by at least 20%.
Key Stakeholders	<ul style="list-style-type: none"> ▪ ASHRAE Membership ▪ Industry ▪ Leadership of the Board, Councils and Committees affected



BACKGROUND

ASHRAE must evaluate and develop methods to better engage chapters, regions, and the members they serve in an integrated way. A more supportive and proactive strategy for chapter and regional oversight will minimize variability and ensure that all ASHRAE members experience a strong and valuable connection to the local and societal components.

Table 4 provides more detail:

TABLE 4

FUTURE OF ASHRAE: Improvement of Chapter Engagement, Capacity and Support	
Resources	Can be funded through Members Council budget. Other resources in place include Manual of Chapter Operations, Basecamp and www.ashrae.org/chapterresources .
Benefits	<p><u>To the Society:</u> Streamlined processes enable chapters, regional leadership and the society to share resources and information more effectively. Accountability for Chapter success is clearer with standardized guidelines and performance metrics. The Society will receive additional revenue resulting from increased Chapter member recruitment and retention.</p> <p><u>To the Member:</u> Ability to more deeply and more meaningfully engage with ASHRAE's mission without added bureaucracy.</p>
Desired Outcomes	<ol style="list-style-type: none"> 1. Develop and deploy a standardized Society-wide system for collecting, recording and benchmarking Chapter-level data and performance metrics. The system will provide an efficient and streamlined process for the exchange of resources and information among Society, Regional leadership and the Chapters. 2. Develop and standardize program guidelines, training, and associated resources based on best practices for all ASHRAE Chapters where possible. When regional differences require flexibility, adapt those guidelines as needed while maintaining the desired outcome (templates, examples, CRC and centralized training). 3. Evaluate methods to "coach" new officers/chairs in each chapter on the duties of their position/role and how best to accomplish them. Also assist them in seeking coordinated collaboration with outside groups when beneficial. 4. Expand the Distinguished Lecturer program and review and revise the Short Course business model to increase Chapter access and use. 5. Develop methods for promoting the value and benefits of employee participation in ASHRAE to employers to encourage sponsorship and support.
Key Stakeholders	<ul style="list-style-type: none"> ▪ Chapter leadership ▪ Industry associations and organizations within and outside of the US ▪ ASHRAE Members ▪ Universities

FINANCIAL IMPACT, BUDGETING PROCESS AND RECOMMENDATIONS

The fiscal impacts of the 2019-2024 Strategic Plan are built into the ASHRAE annual budgeting process. This is done in concert with annual planning for the Society theme activities and current cost reduction efforts. The councils and committees provided updates and submitted their budget forecasts in early March 2019 to Finance Committee, Planning Committee and Executive Committee. The updates included support for the 2019-2024 Strategic Plan.

ASHRAE Executive Committee reviewed all budget forecast proposals during their spring 2019 meeting and developed a list of program and financial priorities. Based on these recommendations, Finance Committee updated the current-year ASHRAE budget and forecasts through 2022. The Treasurer presented this budget to the Board for approval at the 2019 Annual Conference in Kansas City.

Proposals for future work for Society years 2020-2024 resulting from the Society theme initiatives, ad hoc recommendation, or council or committee program must include a minimum three-year budget analysis along with the project's fiscal impact statement and the resulting benefits to the Society. The fiscal impact analysis shall be submitted initially for approval by the Board through Finance Committee and then be updated with actual cost to date for the current fiscal year, cost since inception and updated budget forecasts for the next three fiscal years if the project is expected to extend beyond the current fiscal year. For inclusion in the next fiscal year's budget and future year's forecasts, updates shall be submitted for approval by the Board annually at the winter meeting by the council or committee responsible for the project's oversight and management.



IMPLEMENTATION

The following measures will be used to assist with the implementation of the Strategic Plan.

1. **Member Satisfaction:** Task Member Services, under the leadership of Members Council, to establish an annual member survey with a single consistent satisfaction metric to allow for year-over-year evaluation of the strategic plan.
2. **Member Engagement and Retention:** Institute effort and imagination in developing member retention programs similar to what has been successfully implemented for new member retention activities. Institute special initiatives to increase volunteer engagement:
 - a. Planning Committee should coordinate and conduct a focused workshop/focus group exercise with Membership Promotion Committee, Chapter Technology Transfer Committee, Chapter Programs, ASHRAE Learning Institute, and Handbook Committee to develop a common collaboration and integration strategy for member retention.
 - b. Strengthen volunteer engagement at the Chapter level by expanding recommended chapter committee and subcommittee structures within Chapter Operations Manual and promote consistent annual population of the structure through the PAOE program.
 - c. Expanding chapter committee and subcommittee structures for non-North American Chapters recognizing the unique needs and opportunities for these chapters to engage chapter members.
 - d. Institute a yearly membership drive to promote and increase active membership and participation in Technical and Standards Committees.
3. **Operational Efficiency:** Task ExCom to study and focus on trends in the Operating Cost per Member and develop strategies and action items to bring to the Board to optimize operational efficiency.
4. **Market Responsiveness:** Task Pub Ed Council and Tech Council to redesign their respective product to market processes to reduce the average time to market for our products. The current average time to market of 6.8 years must be shortened if we are to stay relevant as market leaders. This metric might only be improved by concentrating on processes such as “one product at a time.”
5. **Research Leadership:** Focus on leveraging ASHRAE Research dollars with matching funds from other research partners and funding sources. This may require dedicated staff to track and manage if we are to be effective. Senior thought leadership should be engaged along with the Manager of Research, Tech Council, RAC and TAC to develop strategies and metrics to maximize the return on investment and conversion of research into practical application guidelines and standards in research topics of interest and concern to the ASHRAE membership.