

**bEQ Committee
Atlanta Annual Meeting
June 28, 2015**

Members Present: Ross Montgomery, Michael Brandemuehl, Hoy Bohanon, Hywel Davies, Charles Eley, Larry Markel, Harry Misuriello, Dan Nall, Ray Patenaude, Filza Walters, Tim Wentz (coordinating officer)

Incoming members: Nate Boyd, Hugh Crowther, Jaap Hogeling, Benny Skelton, Jim Vallort (incoming coordinating officer)

Guests: Billy Austin, John Constantinide, Bruce Hunn, Gerald Kettler, Paul Levy, Vikram Murthy, Annie Smith, Branico Todorovic, Paul Torcellini, Edward Tsui, Nora Wang, Anthony York

Staff: Lilas Pratt (staff liaison), Claire Ramspeck, Mark Ames, Nicole Jones, Jim Scarborough

Principal Motions

Motion #1: That the bEQ Committee approve the meeting minutes from the May 2015 interim meeting

Vote: Motion passed by voice vote; **5-0-1 CNV**

Note: Walters abstained as she did not attend the meeting.

Motion #2: Markel moved that the bEQ Committee approve Godfrey to move onto phase 2 work for the marketing plan (Brandemuehl seconded).

Vote: Approved voice vote; **7-0-0 CNV**

Motion #3: Brandemuehl moved that the committee accept a modification to the multiple use building/campus procedure to allow hotels that have greater than 5% restaurant space to use multiple use procedure for hotel/restaurant spaces.

Vote: passes voice vote **6-0-0 CNV**

Note: Misuriello had left the meeting

New and Open Action Items

June 28, 2015 Atlanta Annual Meeting:

- **AI 1:** Pratt to draw up strawman on the bEQ Lite concept for review and edit by the committee.
- **AI 2:** Pratt to send resources to **Gerald Kettler** for District 2030 meeting in September 2015.
- **AI 3:** Pratt to create a list of advantages to an online data entry system.

May 21-22, 2015 Atlanta meeting:

- **AI 1:** Brandemuehl to determine strategy and timing for follow-up meetings with EPA, BOMA, and USGBC after July 1 (including strategy about LEED compliance paths).
- **AI 8:** Marketing subcommittee to develop a recognition program for submitters.
- **AI 9:** Larry Markel to draft a plan for initiating a prototype in Orlando for expanding ASHRAE products and services in other municipalities.

- **AI 10: Methodology subcommittee** to generate a concept for bEQ LITE and bring back to committee.
- **AI 11: Marketing subcommittee** to create a plan to present to EPA on how to integrate/link bEQ and potentially bEQ LITE with ENERGY STAR Portfolio Manager.
- **AI 12: Methodology subcommittee** to look at mapping ENERGY STAR Portfolio Manager against bEQ scores.

January 25, 2015 Chicago Winter Meeting:

- **AI 3: Michael Brandemuehl** to have **Methodology Subcommittee** evaluate the submission review process for further automation and speed.
- **AI 7: Pratt** to send **Nate Boyd** information on previous bEQ Journal articles.
- **AI 8: Brandemuehl** to work with **Krishnan Gowri** on his request to incorporate bEQ into the rapid capture for energy modeling project.
- **AI 9: Eley** (Standard 189.1 Liaison) to explore the use of bEQ as a compliance tool with outcome based codes with Standard 189.1 as appropriate.

August 27 & 29, 2014 Methodology SubC Conference Calls

- **AI 6: Pratt** to modify As Designed procedure instructions, for review by the bEQ Committee, to reflect that fully designed buildings can get a preliminary label that would then be verified after construction is complete. – **Ongoing as part of Workbook updates**

June 29, 2014 Seattle Annual Meeting

- **AI 1: Eley** to lead an effort to ~~write a conference paper for~~ document the bEQ In Operation process and methodology. (On Hold)

May 21, 2014 Marketing Subcommittee Conference Call

- **AI 6: Nall** to put together a first draft for an ASHRAE HQ building case study with help from **Walters**.

January 19, 2014 New York Winter Meeting

- **AI 4: Pratt** to catalog articles about bEQ on the ftp site for access by the **Committee**.

Meeting Minutes

1. Call to Order – Meeting convened at 8:30am EDT

- Introductions
- ASHRAE Code of Ethics ([Appendix A](#)) – Information Item
- Committee Structure & Roster ([Appendix B](#))
- Review of Agenda by committee; (any proposed changes).
- Review of Voting Rules
 - Committee has 8 voting members; Quorum is more than 50% = 5 voting members.
 - All matters to be decided by a majority of those voting, with fiscal matters requiring a two thirds majority.

2. Coordinating Officer Report – Tim Wentz

- Tim Wentz reported that ExCom is very interested in the work and pleased with the progress made by this committee.

- He has reported to ExCom on the Godfrey report and some of the new initiatives being considered by this committee.

3. New Business – Montgomery

a. Approval of past meeting minutes

Motion #1: Brandemuehl moved that the bEQ Committee approve the meeting minutes from the May 2015 interim meeting (Markel seconded)

Vote: Approved voice vote; **5-0-1 CNV** (Walters abstained as she did not attend the meeting)

b. USGBC approval of bEQ for LEED – Information item

- i. Letter to USGBC ([Appendix C](#))
- ii. June 16, 2015 Conference Call notes ([Appendix D](#))
 - An exploratory conference call was held on June 16, 2015. Additional conversations will take place in July/August. It was a very positive call.
 - This call focused on EBOM (existing buildings) and the In Operation rating, but the As Designed can be discussed in the future. USGBC was receptive to including the In Operation rating in EBOM with next update in October.
 - ENERGY STAR is the current path to EBOM energy points. bEQ would be an alternate path. One approach is to position bEQ as a step beyond ENERGY STAR for underserved building types.
 - USGBC noted and the committee needs to keep in mind moving forward (particularly in respect to the As Designed rating) that there are multiple compliance paths to LEED from ASHRAE.

c. Godfrey Phase 2 work approval

- i. June 5, 2015 Conference Call notes ([Appendix E](#))
- ii. New Concept Brief ([Appendix F](#))
- iii. Motion to approve start of Phase 2 work ([Appendix G](#))
 - General discussion:
 - The committee agreed that Godfrey has done good job and provided good ideas; however several members were reluctant to move onto phase 2 as they didn't feel the committee was ready for marketing, rather the committee is still in the process of exploring alignment, partnerships, and what the message is rather than how to package that message.
 - Comstock suggests a media tour rather than advertising.
 - It was suggested that the committee needs to clearly understand the value proposition and why bEQ is better than other programs before marketing the program. Marketing before that would at best be lost money and at worst be confusing to the marketplace.
 - There has been a lot of work to get to elevator speech – but work is still needed to determine what to emphasize and what is important.
 - Phase 2 is not the actual marketing but rather just a plan for what the messaging should be and a plan to market that message. Part of phase 2 is determining the message.
 - It was noted that cities like Orlando are on a strict timeline, so this work is needed. One message is that bEQ standardizes the process and format of the energy audit for all buildings.
 - Some committee members expressed misgivings due to a perception that there is a shortfall in Godfrey's understanding of the program because their recommendations didn't completely match the committee's expectations.
 - Another issue raised was bEQ's relationships with other existing methodologies. The methodology is currently aligned with standard 100, and the committee has

discussed a greater involvement with ENERGY STAR in the methodologies. The DOE asset rating has also been discussed, but not fully explored.

- These partnerships could change the methodology and it is unclear how that will affect the messaging. More feedback on how to move forward with EPA and USGBC is expected in July/August. At that point, the committee will need to move quickly with Godfrey.
- It was suggested that the committee needs to understand bEQ's relationship with other programs. The marketing work may generate lots of interest, but the goal is users. There are lots of programs out there. Building owners will turn to their service providers who will ask the technical questions and help a building decide which tool to use.
- The committee agreed that bEQ is not ready to go marketing, but the work of Phase2 is the work that will allow the development of a marketing plan.
- The committee also agreed that the additional scope of work for a logo and/or name change is premature.

Motion #2: Markel moved that the bEQ Committee approve Godfrey to move onto phase 2 work for the marketing plan (Brandemuehl seconded).

Vote: Approved voice vote; **7-0-0 CNV**

4. Methodology Subcommittee Report – Brandemuehl

- The research work statement was submitted to RAC on May 15 and has now been approved by RAC. It should go out to bid this fall.
- The subcommittee discussed a modification to multiple use building/campus procedures to accommodate hotels with significant restaurant space.
- There are fundamental differences between hotels with and without a restaurant. The 5% threshold is consistent with DOE procedures for the Asset Score program.

Motion #3: Brandemuehl moved that the committee accept an modification to the to multiple use building/campus procedure to allow hotels that have greater than 5% restaurant space to use multiple use procedure for hotel/restaurant spaces.

Vote: passes voice vote **6-0-0 CNV** (Misuriello had left the meeting)

- The subcommittee discussed adding a list of assessment providers on the website; but took no action at this time. They would like to look into advertising options to address this issue.
- The subcommittee further discussed the use of bEQ Lite as way to get a preliminary rating without the use of a PE or certified provider. A strawman on this concept is needed.

AI 1: Pratt to draw up strawman on the bEQ Lite concept for review and edit by the committee.

5. Marketing Subcommittee Report – Markel

- Ideas were solicited on how to recognize the assessors who submit for ratings (not the buildings including certificates, ribbons (for meeting badges), listing submitter names on the bEQ website.
- The committee discussed doing more intensive training work with bEQ, specifically
 - Using ASHRAE resources to help people implement and follow through with bEQ.
 - Getting feedback on additions to bEQ, such as time stamp Dashboards.
 - Making bEQ more responsive.
- The committee discussed how to coordinating bEQ with BIRDO policies.
 - The way the BIRDO policies are written is with multiple paths for buildings that fall out of the threshold for performance. That threshold is often 50% on ENERGY STAR.

- One of the paths is an ASHRAE Audit, so it makes sense to require something like bEQ so that the output for the energy audit is the same for all buildings.
- Right now in Orlando, bEQ is listed as an alternative path, but it would be nice to make it the only option for the energy audit path
- Energy audit is not the only path – retro-commissioning is also a path, for example.
- There are 10 cities working on these BIRDO policies. Atlanta has already voted theirs in and it is done, but others are still in document construction. Jay Perkins (GGAC) attended every Atlanta meeting and reported back.
- It would be helpful for bEQ and GGAC to provide resources to the GGAC reps that may be dealing with this around the country.
- NRDC and IMT are primary drivers in this area.
- The committee suggests submitting a public session for the Orlando meeting highlighting what the city of Orlando is doing. Seminar and Workshop proposals are due August 10.
- The 2030 District project has 10 cities whose objective is to reduce energy and water usage. There are another 30 cities poised to join these districts. The committee needs to further promote the bEQ program to these cities.
- There is a national meeting in September 2015 in Cleveland on 2030 Districts. The meeting program is not yet finalized. Gerald Kettler can communicate information on bEQ at that meeting.

AI 2: Pratt to send resources to Gerald Kettler for District 2030 meeting in September 2015.

6. Old Business – Montgomery

- a. Review of Action Items ([Appendix H](#))
- b. Workbook Changes / Updates Status – Pratt
- c. bEQ Submissions to date ([Appendix I](#))
- d. University Course Update – Tim Wentz ([Appendix J](#))
 - Tim Wentz reported on the semester long course on existing building energy audits.
 - Most of the course was online. The course syllabus is shown in Appendix J.
 - The university bent over backwards to support the students with energy data and other information/resources. They assigned the students a PE from facility management and provided all needed equipment.
 - The university was interested to see if the outputs were consistent, reliable, and usable for measuring energy consumption. They were also looking for ammunition for improving buildings. Other resources being explored by the university include a system from Association of Physical Plant Administrators (APPA) and ENERGY STAR.
 - The Procedures for Commercial Building Energy Audits was used as the text and the bEQ workbooks were used as the framework for the audits.
 - The first building was done as a full class. Subsequent buildings were done by separate teams.
 - The first building received a C which led to facility management getting money to replace windows in the building. Facility management used level 1 audit and the rating sheet to vice-chancellor to lobby for the money that they had been asking for 3 years.
 - One of the selected buildings is a political battleground that chancellor wants to rip it down, but it is a military building that veterans support. So refusal to invest any money in upgrading the building.
 - Take-aways from the class:
 - Consistent reliable energy consumption data
 - Ammunition for capital expenditures
 - No-cost/low-cost lower on list

- Opportunity for technicians to work with students to learn more about energy efficiency and energy efficiency measures.
 - Students ask questions, so technical staff gets a better understanding of what they have/do and why they have/do it.
 - The committee suggested that Tim Wentz work with the students to write an article for facility management and/or curriculum magazines? Jodi Scott could help identify publications to target.
 - The course syllabus will be available on line – it could also be for something shorter.
 - The final result for the buildings audited were one D, two C's, and a not ranked.
 - It was suggested that the not ranked building get a plaque that says “Not ranked” with “no acceptable ventilation system” as the reason.
- e. The use of letter grades in the rating
- The connotation of an A, B, C, D from one generation to another is a very different – to some a C can be a very bad thing.
 - There have been many discussions on this within the committee.
 - One of the reasons that the letter grade still exists is not knowing if the program is aiming towards a mandatory or voluntary status. If the program is mandatory, it can give grades. If voluntary, the rating needs to be less pejorative.
 - Some constituents will have trouble with letter grades
 - This has been a point of negotiation to not list EUIs or other information for buildings below a certain threshold. Anything below that would have to get an energy audit, but would not publicize their letter grade or rating.
 - Could see where C is maximum worst grade to be published.
 - A building doesn't have to post the letter grade. The real value is what is learned about the building and how to improve it.
 - bEQ is a tough grader on purpose because looking to move people to net zero, unlike ENERGY STAR which is just pass/fail. bEQ is the premier toughest program out there.
 - There needs to be some coordination with the building performance Adhoc and also with the GGAC subcommittee on promoting bEQ.
- f. Developing Economies Advocacy Request for Info/Guidance (Wentz)
- The final report was provided to the BOD at this meeting.
 - One recommendation in the report is the adaption of bEQ to developing economies. There is value in extending bEQ to developing economies and empowering those members to use the program in those environments.
- g. Atlanta Workshop – Monday 4-5pm (Montgomery, Brandemuehl, Townsend)
- Secretary's note: The session, *Energy Rating and Managing Your Commercial Building Using ASHRAE Building Energy Quotient (bEQ)*, was successfully conducted on Monday, June 29 from 4pm to 5pm and had 87 attendees.
7. bEQ Budget Review
- The committee agreed that the on-line data entry is a high priority. It is unlikely that the bEQ program will be successful in the long without taking this step.
 - An online system would also provide a better opportunity to gauge interest based on people that are putting in the information themselves.
 - The committee needs to put together the justification and take it the BOD for approval – it does not need to be in the budget. The advantages should include the financial angle and it makes sense to stress member benefits.

AI 3: Pratt to create a list of advantages to an online data entry system.

8. MBO Status and Update ([Appendix K](#))

9. Other Business

a. OPEN STUDIO report by Nora Wang

- NREL has created open studio to allow users to more easily create an ENERGY PLUS model. The DOE Asset Score is a web based model that uses Open studio. Measures can be dragged and dropped to create the model.
- The Asset Score tool produces an OSM file to be exported for the website and generates the XLM that can be exported to other tools.
- The goal is to make it open enough so that consulting firms can use the data for their own tools. PSD is one of the consulting firms that is using Open Studio to do more complicated parametric analysis.
- It is also used for other purposes, including code compliance.
- NREL has developed BuildingSync schema for energy audit data that will coordinate with 211P. One of the tools that will it coordinate with is SEED (developed by LBNL)
- DOE is just publishing the schema, not tailoring it. The schema is already published by NREL, just following it so can talk to other tools.
- Resource links:
 - SEED, a data platform of tools: <http://energy.gov/eere/buildings/standard-energy-efficiency-data-platform>
 - BuildingSync(tm): <http://www.nrel.gov/buildings/buildingsync.html>

b. Coordination/contact with BOMA

- This is an on-going activity.

c. Utility incentive programs

- FP&L wasn't really interested. Local municipalities are now being pursued.

d. Other organizations to contact

- There is a meeting in Istanbul ASHRAE chapters (CRC Region at large) in October or November. A presentation on the bEQ program would be a good idea.
- REVA
- CIBSE
- Living Futures organization (They have just released a scoring system.)

e. Assignment of Liaisons

- Standard 100 – TBD
- Standard 90.1 – Misuriello
- Standard 189.1 – Eley
- Standard 62.1 – Bohanon
- Standard 214P – TB D
- Standard 211P – TBD
- Technical Committees (TC 4.7, TC 7.6) – Brandemuehl
- GGAC – Boyd

10. Upcoming Meetings/Presentations

- a. Fall face to face Interim meeting (TBD)
- b. Next Conference call (TBD)
- c. Orlando Winter Meeting – January 24, 2016, 8:30am-11:30am

11. Closing Comments – Montgomery

- Ross Montgomery thanked all of the committee members for their work during the past year and presented outgoing members with certificates for their participation.

12. Incoming bEQ Chair – Brandemuehl

- The committee thanked Ross Montgomery for his service as chair.
- Charles Eley will be chair of the Methodology subcommittee and Larry Markel will be chair of the Marketing subcommittee.
- There will be a training conference call for new members scheduled for July or August.

13. Adjourn – Meeting adjourned at 11:26am EDT

Appendix A: ASHRAE Code of Ethics

1.140.001.1 As members of ASHRAE or participants in ASHRAE committees, we pledge to act with honesty, fairness, courtesy, competence, integrity and respect for others in our conduct.

A. Efforts of the Society, its members, and its bodies shall be directed at all times to enhancing the public health, safety and welfare.

B. Members and organized bodies of the Society shall be good stewards of the world's resources including energy, natural, human and financial resources.

C. Our products and services shall be offered only in areas where our competence and expertise can satisfy the public need.

D. We shall act with care and competence in all activities, using and developing up-to-date knowledge and skills.

E. We shall avoid real or perceived conflicts of interest whenever possible, and disclose them to affected parties when they do exist.

F. The confidentiality of business affairs, proprietary information, intellectual property, procedures, and restricted Society discussions and materials shall be respected.

G. Each member is expected and encouraged to be committed to the code of ethics of his or her own professional or trade association in their nation and area of work.

H. Activities crossing national and cultural boundaries shall respect the ethical codes of the seat of the principal activity.

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Appendix B: bEQ Committee Structure – FY 2014-2015

bEQ Committee Members (voting): Ross Montgomery (Chair), Michael Brandemuehl (Vice-chair), Larry Markel (Tech Council Representative), Ray Patenaude (Members Council Representative), Filza Walters (Pub-Ed Council Representative), Hoy Bohanon (Member-at-Large), Harry Misuriello (Member-at-Large), Dan Nall (Member-at-Large)

bEQ Consultants/Others (non-voting): Hywel Davies, Charles Eley, Tim Wentz (Coordinating Officer)

Marketing Subcommittee: Larry Markel (chair), Ray Patenaude, Filza Walters , Hywel Davies, Tim Wentz

Methodology subcommittee: Michael Brandemuehl (chair), Hoy Bohanon, Harry Misuriello, Dan Nall, Charles Eley

Committee Liaisons: Standard 100 – Patenaude; Standard 90.1 – Misuriello; Standard 189.1 – Eley; Standard 62.1 – Bohanon; Standard 241P – Montgomery; Technical Committees (TC 4.7, TC 7.6) –Brandemuehl

bEQ Scope, Purpose and Operation

This committee is responsible for the business planning, training and marketing of the programs of this enterprise. This committee has the overall responsibility to determine technical developments that are required to support these activities. This committee has the responsibility for directing the development of marketing programs to determined target audiences.

The committee shall report through ExCom to the Board of Directors.

This committee is responsible for the operation of the BEQ enterprise as determined by the Board and for coordinating the activities of all three councils regarding the ASHRAE Building Labeling program.

This committee shall review its Rules of the Board. Each change recommended by this committee shall be submitted to the Board for vote.

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Appendix C: Letter to USGBC regarding bEQ in LEED



Shaping Tomorrow's
Built Environment Today

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Ross D. Montgomery, P.E.
Chair, Building Energy Quotient (bEQ) Committee

Reply to: **Quality Systems and Technology, Inc.**
5309 Deer Forest Place
Parrish, FL 34219
Tel: 941.737.1401
rossmont@aol.com

U.S. Green Building Council
2101 L Street, NW, Suite 500
Washington, DC 20037

May 26, 2015

Attn: Mr. Brendan Owen

Re: ASHRAE bEQ acceptance as pre-requisite for EBOM EA credit

Dear Brendan:

In response to your recent discussions with Mr. Tim Wentz, our Treasurer and bEQ coordinating officer, and others in ASHRAE leadership about better aligning our organizations' offerings with the needs and desires of the Industry and marketplace, we are pleased make this proposal to USGBC.

We are writing to request that USGBC accept ASHRAE's Building Energy Quotient (bEQ) program as an alternate compliance path to satisfy Prerequisite "XX", and as a basis for adding credit points under section "YY" within the "LEED EBOM – EA program".

We believe the manner in which bEQ establishes thresholds and metrics for energy performance and efficiency meet or exceed your current program requirements. Our bEQ committee is eager to work with your program to document how bEQ fulfills EBOM EA. We would also like to work with you to prepare materials demonstrating to users how to apply bEQ within LEED EBOM EA, in order to increase the market awareness of both programs and to provide additional energy conservation opportunities to the users of LEED EBOM - EA.

For example, based on a preliminary mapping of EBOM EA to bEQ ratings, a bEQ rating of **“A+ through C”**(also designated as “Zero Net Energy through Average” – see figure below) should be acceptable as a pre-requisite for EBOM EA. ASHRAE staff and the bEQ Committee can work with you to document the calculations and validate bEQ as an alternate compliance path. The entire bEQ program can be understood from our ASHRAE (American Society of Heating, Refrigerating, and Air Conditioning Engineers) website www.ashrae.org , specifically designed and dedicated to bEQ, www.buildingenergyquotient.org.



We are hereby requesting a meeting between our technical staffs at the earliest opportunity to validate the information provided above and to align the bEQ scale to an equitable number of credit points within LEED EBOM – EA.

Thank you for your consideration. Our committee and staff are happy to answer questions or provide any additional details you need to make this happen. Please let me know your opinion as soon as you can; we are anxious to get started.

Respectfully,

Appendix D: June 16, 2015 bEQ-USGBC Conference Call Notes

bEQ-LEED meeting June 16, 2015

Attendees USGBC: Brendan Owens, Tonja McCoy, Gail Hampshire,
Attendees ASHRAE: Ross Montgomery, Larry Markel, Tim Wentz, Lilas Pratt

Meeting convened at 10am EDT.

RM: Discussions for a long time regarding coordinating bEQ and LEED. Finally at a point to do that. This call is really to take that next step to get technical and logical people together to start this next step. How do we do this?

BO: The first step is kind of a proof of concept. There is a general feeling that bEQ serves a lot of the needs of market transformation and what is in LEED today. Would like to talk at a high level and so everyone has the same expectations.

BO: Supportive of finding a way to have bEQ work for LEED projects – seems to be a natural fit. Want to explore all of the options out there. Have talked to some folks re: the proliferation of multiple compliance paths within LEED which is becoming a concern. Difficult to do a comparison between three very different compliance paths that all arrive at the same place. Would like to get an understanding of ASHRAE's expectations.

RM: All discussions have been about In Operation rating in relation to EBOM. Not currently looking at As Designed rating (although we reserve this for a future discussion point).

BO: Limiting scope of discussion is helpful. In terms of process: several mechanisms in place that could be used. This would seem to be a good candidate for a "pilot credit". LEED has a pretty substantial process for public comment and consensus, so needed a more dynamic way to allow for continuous change that is more market focused. So, create a credit that want to test and put it in the pilot library for teams to use as an innovation credit or an alternative compliance path. This puts something out there and gathers data so as to allow a smart path for permanent inclusion via the higher scrutiny path.

The other option is to have it submitted as a LEED interpretation. The approval process for this is more rigorous and technical as it doesn't have the experimental phase of the pilot path. Would prefer to not go down this path, so as to allow the market to provide feedback.

RM: The pilot credit would be "advertised" and shown on menu so that people could see it as a possible path. The interpretation credit would not seem to have that visibility.

BO: Yes, although some interpretations have had press releases attached to them.

BO: In order to get approval to put into the pilot library, need a concrete proposal. Would like to have USGBC staff involved in those discussions. Have some questions to be answered.

RM: Are these details that could be worked out in the next couple of weeks?

GH: The pilot updates are quarterly and current deadline is already passed for this quarter. The earliest that this would be published now would be October 2015. Need to figure out more details about the approach in advance of trying to get it through the committees. Need to determine if looking at a pilot alternate compliance path (up to 18-points) for energy credits or as an innovation point (1-point) (which is probably an

easier option to pass). Would still be looking for teams to provide both ENERGY STAR Portfolio Manager and bEQ.

RM: Do you currently allow ENERGY STAR to work for credits?

BO: ENERGY STAR Portfolio Manager is the primary tool for earning up to 18 points in the energy credits. While ASHRAE has gone out of their way to say they are not a competitor to ENERGY STAR, but this would generally be positioning bEQ as an alternate compliance path to ENERGY STAR and so there may need to be some explaining needed to EPA (from a political standpoint) as we explore this path.

RM: Does ASHRAE get to pick between the alternative compliance path (18 pts) or an innovative path (1-pt) or does USGBC pick that? If we have a choice, ASHRAE would want to go with the alternative path with the 18 points.

BO: Don't know enough about what the correct application of bEQ could be do know the best path at this point.

GH: Need some feedback from a few folks are not on the call.

LP: Many building types and markets are underserved by ENERGY STAR that bEQ covers.

BO: Need a call to walk USGBC through how bEQ works.

TW: David Underwood is incoming ASHRAE President, so the most Tom could say at this point is that our two organizations have entered into discussions to see how we can work together moving forward. And this is a very positive step.

AI: USGBC to set up a meeting to discuss the technical aspects of bEQ (probably early July).

AI: Pratt to send bEQ presentation, workbook (IO), how-to document, and other resources available on the bEQ website to USGBC.

Meeting Adjourned at 10:35am EDT.

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Appendix E: June 5, 2015 Godfrey Conference Call Notes

June 5, 2015 Conference Call

RE: Godfrey Recommendations & Committee input

Participants Godfrey: Donna Harris, Chris Templeton,

Participants ASHRAE: Ross Montgomery, Michael Brandemuehl, Larry Markel, Steve Comstock, Lilas Pratt

Convened 12:05pm EDT

RM: Committee wanted to continue to be all the various things that bEQ is and has become. Certainly want to work with ENERGY STAR, but don't want to turn the reins over to them. Making some adjustments to work better with EPA and hope to partner in the future. On board with all the other recommendations.

MB: The obvious issue was whether bEQ got marketed as an energy performance management tool or as a rating program or something else. One of the unique aspects of bEQ is the ability/potential to pull together everything from design systems like LEED to benchmarking to improvement to rating, etc. Marketing as only an energy management tool loses some of that potential.

LM: Don't want to go away from the rating. People can go into more depth than an ENERGY STAR Portfolio Manager rating, points someone in the right direction if they are willing to be pointed and led that way. The interviews confirmed that there is real value in this type of deeper dive and assessment. The committee is looking for ways to collaborate with ENERGY STAR without having them market for us.

DH: The intent was not to turn over the reins to ENERGY STAR, but rather tap into the power of ENERGY STAR which would provide access to markets that might not be available to bEQ otherwise.

DH: Meant that the messaging should lead with the energy management tool since bEQ has something that no one else has. Aren't saying to change the way do things completely, but that message is the one that will resonate with the building owner.

SC: Have discussed web based access and a bEQ lite type product.

DH: Are going to proceed with the rating system component and continue to market that, then bEQ may wish to revisit the letter grades.

MB: The committee has discussed that along with the name and other related issues. The one of the things that the committee sees as the benefit of bEQ is not only at the lower end, but also at the higher end. The energy management tool side of it appeals to the lower end of building performance, but the flip side is that bEQ provides additional differentiation at the higher end of building performance.

CT: Most companies have their offering and then they have what they promote. The concepting exercise will look at what aspects of the program should be promoted. There needs to be a very solid core message of bEQ stands for as a program.

MB: Obviously, have to focus on something to start the marketing ... need to do that without losing all the aspects of the whole program.

LM: Focusing on aligning more to the needs of the workplace and trying to understand that more. The committee is trying to make sure that bEQ is the right product. The meeting with EPA was very encouraging. So, still trying to figure out how to provide an offering that people will ask for.

RM: ASHRAE leadership met with EPA, BOMA, and USGBC and initiated conversations to open doors for collaboration on bEQ.

RM: Want to make that Godfrey is okay with this direction from the committee.

CT: Going to sit down with concepting team and they are going to ask to have the program explained and to have the differentiating factors pointed out. They will come up with multiple ideas which will be narrowed down to three concepts that will likely work the best. The trick is that they will want to have the program boiled down to three to five words.

LM: Concern is that you have a proven method to develop powerful messaging and that may be where some of the mixed messaging comes from. Really feel need to push implementation, figure out what is feasible with some of these partners. Concerned about moving forward with the messaging, not sure how effective that is going to be and can only do so much with the messaging because this is not a consumer product. Not sure ready for next phase until we figure out what to offer.

LP: What makes bEQ the most comprehensive assessment product is the fact that it has actionable items along with all the other features.

MB: The part that has probably shown the most promise in the near term probably is the energy management and performance improvement. The design side aspects are not as mature at this time. Okay with charging forward with messaging around the energy management.

RM: Besides the obvious of getting this approved to move forward – how can we help?

DH: Godfrey will update the recommendations based on the feedback from the committee. That will be the deliverable from this call and that will give you something to approve to move to the next stage. The other question that will need to be addressed is whether you want to proceed with some kind of name change.

LP: May wish to have Godfrey provide a proposal on the cost to explore a name change. The committee will need to approve that proposal and then get money approved to move that way.

RM: The next meetings are June 27 and 28, so it would be helpful to have information long before that.

DH: Once approved to move to Phase 2, the concepting work takes about 4 weeks. Presentation of that concept can be done either face to face or as a GoToMeeting.

LM: Committee is pleased with the work so far and realizes that this is a tough job.

DH: High Performance Buildings Conference this past week – went to Jim Newman's presentation. The only thing that I would recommend in your go-forward, might want to have an approved message for other presenters to use. May want to do a train the trainer session to help them understand the new message and how it was derived.

Adjourned 12:45pm EDT

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CONCEPT BRIEF
bEQ - ASHRAE Brand Essence
6/10/15

OBJECTIVE:

Identify potential challenges and opportunities for ASHRAE to improve awareness and adoption of their building energy assessment program.

TECHNOLOGY

Being able to have an API connection to ENERGY STAR would be a huge step forward for bEQ. Having a way to upload an ENERGY STAR score and not reinventing the wheel would be a huge opportunity. The audience is looking for tools that are easy to use and maintain. This desire is fueling the growth of several online dashboard tools and building automation systems.

MARKET

Mandated building energy performance reporting is becoming more common in the US. There are 10 cities and 11 states that have adopted mandated or required policy measures, plus another 19 cities and 7 states/regions that have voluntary campaigns. All of these programs have partnered with ENERGY STAR's Portfolio Manager to measure and report building energy performance.

AUDIENCE

Building owners, facility managers, government officials, engineers and real-estate brokers all want to see the performance of commercial buildings improve. They aren't working, and they want to know first of all, "What's going to have to be done to make them work?" Then secondly, they want to have something that monitors the performance so they can track it. Building energy performance are the key words. How can we get it to where we want it to be? And then how can we keep it where we want it to be? Rating is secondary.

BRAND

Through research, standards writing, publishing and continuing education, ASHRAE shapes tomorrow's built environment today. ASHRAE is a very well-known brand and organization. More closely aligning the program to the ASHRAE brand will lend credibility. The program is not nearly as well known as ENERGY STAR and does not have the budget to compete with the ENERGY STAR brand. The program could gain traction by focusing marketing and messages on what makes the program different from other rating systems.



Brand MESSAGING PLATFORM / 6-10-15

BUSINESS STRATEGY	Identify potential challenges and opportunities for ASHRAE to improve awareness and adoption of their building energy assessment program.
MARCOM STRATEGY	Develop a global brand and marketing approach to establish ASHRAE's building energy assessment program as the most comprehensive program available.
MARCOM OBJECTIVE	Develop an awareness and perception that ASHRAE's program offers actionable recommendations to improve a building's energy efficiency, something that other programs don't offer.
OVERARCHING MESSAGE	ASHRAE's building energy assessment program provides both in operation and as designed assessments. That coupled with actionable recommendations for improvement of a building's energy efficiency make the program the most comprehensive available today.
CORE IDEA	ASHRAE's building energy assessment program is the only one comprehensive enough to yield actionable recommendations for improvement.
REASONS TO BELIEVE	PROOF POINTS
Credible	<ul style="list-style-type: none"> Program is from ASHRAE, a trusted brand Program is part of the ASHRAE suite of services Assessments are completed by certified professionals
Actionable	<ul style="list-style-type: none"> Provides recommendations for improvement Asset and operational assessments are provided for each building reviewed
Forward-Looking	<ul style="list-style-type: none"> The program, like ASHRAE in general, constantly pursues continuous improvement The audit is a plan for future improvement The program is designed to evolve as building technology and mechanical systems improve ASHRAE is committed to improving lifetime building energy performance
Collaborative	<ul style="list-style-type: none"> ASHRAE seeks and embraces collaborative efforts with organizations, agencies and individuals sharing their commitment to sustainable built environments

Appendix G: Godfrey Phase 2 Approval

1. Approval to Move to Phase 2 of Marketing Plan

	Yes	No	Abstain
I accept approve directing Godfrey to move onto Phase 2 (Concept) work.			
<i>Reason for Negative/Abstaining Vote(s):</i>			

Fiscal Impact: The opportunity funds originally approved to cover this work expire at the end of the current Society year on June 30, 2015. However, there is enough money in the current marketing budget to cover both the remaining phase 2 and phase 3 work in the Godfrey proposal.

Background:

A conference call was held with bEQ leadership and Godfrey on June 5, 2015. As a result of that conference call a new concept brief was created by Godfrey. The conference call notes and the concept brief documents are attached to this letter ballot. ([Appendix E](#) and [Appendix F](#), above)

Appendix H: Open Action Items

June 28, 2015 Atlanta Annual Meeting:

- **AI 1: Pratt** to draw up strawman on the bEQ Lite concept for review and edit by the committee.
- **AI 2: Pratt** to send resources to **Gerald Kettler** for District 2030 meeting in September 2015.
- **AI 3: Pratt** to create a list of advantages to an online data entry system.

May 21-22, 2015 Atlanta meeting:

- **AI 1: ~~Montgomery~~ and Brandemuehl** to determine strategy and timing for follow-up meetings with EPA, BOMA, and USGBC after July 1 (including strategy about LEED compliance paths).
- ✓ **AI 2: Montgomery** to follow-up with **TC 7.6** to request that the PCBEA rewrite include bEQ in the energy benchmarking requirements. (*Email sent. Nate/Bruce on subcommittee. bEQ has been added to handbook chapter.*)
- ✓ **AI 3: Montgomery** to follow up on the suggestion to reach out to municipalities and universities with sustainability plans
- ✓ **AI 4: Pratt** to add **Mark Ames** and **Jim Scarborough** to all future copy lists for meetings and information.
- **AI 8: Marketing subcommittee** to develop a recognition program for submitters.
- **AI 9: Larry Markel** to draft a plan for initiating a prototype in Orlando for expanding ASHRAE products and services in other municipalities.
- **AI 10: Methodology subcommittee** to generate a concept for bEQ LITE and bring back to committee.
- **AI 11: Marketing subcommittee** to create a plan to present to EPA on how to integrate/link bEQ and potentially bEQ LITE with ENERGY STAR Portfolio Manager.
- **AI 12: Methodology subcommittee** to look at mapping ENERGY STAR Portfolio Manager against bEQ scores.

January 25, 2015 Chicago Winter Meeting:

- **AI 3: Michael Brandemuehl** to have **Methodology Subcommittee** evaluate the submission review process for further automation and speed.
- **AI 7: Pratt** to send **Nate Boyd** information on previous bEQ Journal articles.
- **AI 8: Brandemuehl** to work with **Krishnan Gowri** on his request to incorporate bEQ into the rapid capture for energy modeling project.
- **AI 9: Eley** (Standard 189.1 Liaison) to explore the use of bEQ as a compliance tool with outcome based codes with Standard 189.1 as appropriate.

November 16-17, 2014 Atlanta meeting:

- ✓ **AI 11:** Lilas Pratt to work with **Steve Comstock** to add “Powered by ASHRAE” to the bEQ headers on the website and workbooks and to determine if the phrase is registered.

August 27 & 29, 2014 Methodology SubC Conference Calls

- **AI 6:** Pratt to modify As Designed procedure instructions, for review by the bEQ Committee, to reflect that fully designed buildings can get a preliminary label that would then be verified after construction is complete. – **Ongoing as part of Workbook updates**

June 29, 2014 Seattle Annual Meeting

- **AI 1:** Eley to lead an effort to ~~write a conference paper for~~ document the bEQ In Operation process and methodology. (On Hold)

May 21, 2014 Marketing Subcommittee Conference Call

- **AI 6:** Nall to put together a first draft for an ASHRAE HQ building case study with help from Walters.

January 19, 2014 New York Winter Meeting

- **AI 4:** Pratt to catalog articles about bEQ on the ftp site for access by the **Committee**.

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Appendix I: bEQ Submissions Status

#	Submission Type	Country	CZ	ASHRAE Region	Building Type	Building Size	Status	Approval Date
1	In Operation	USA	4	Reg III	Office	75,157	Award - C	11/15/12
2	In Operation	USA	3	Reg X	Office	126,000	Award - B	2/12/13
3	In Operation	USA	5	Reg V	K-12 School	47,000	Award - B	3/8/13
4	In Operation	USA	3A	Reg IV	Office	354,209	Award - B	1/22/13
5	In Operation	USA	2A	Reg XII	Fire Station	13,345	Award - A-	9/17/13
6	In Operation	USA	3A	Reg IV	Office	34,721	Award - A-	11/17/13
7	In Operation	Bermuda	2A	??	Office	199,707	Award - C	9/25/13
8	In Operation	USA	2	Reg XII	Fire Station	7,191	Award - C	11/17/13
9	In Operation	Mexico	3	Reg VIII	Office	1,586	Award - A	11/17/13
10	In Operation	USA	2A	Reg XII	Fire Station	8,221	Award - B	5/30/14
11	In Operation	USA	2A	Reg XII	Fire Station	8,706	Award - C	5/30/14
12	In Operation	Canada	6A	Reg II	College	149,826	Award - C	7/28/14
13	In Operation	Philippines	1A	Reg XIII	Office	91,041	Award - C	9/30/14
14	In Operation	China	2A	Reg XIII	Office	329,055	Award - B	12/31/14
15	In Operation	USA	4A	Reg VII	Other Office	15,000	Award - C	12/31/14
16	In Operation	USA	4A	Reg III	Govt Office	33,968	Award - B	1/20/15
17	In Operation	USA	5A	Reg IX	Office	6,268	Award - A-	12/31/14
18	In Operation	Canada	6B	Reg II	College/Unv	110,000	Award - B	1/20/15
19	In Operation	Canada	6A	Reg II	Dormitory	181,593	In Process	
20	In Operation	USA	5A	Reg IX	Prof Office	32,220	Award - B	1/6/15
21	In Operation	Mexico	3A	Reg VIII	Conv Store	2,332	Award - B	1/6/15
22	In Operation	China	2A	Reg XIII	Mixed Office	577,493	Award - B	2/18/15
23	In Operation	Argentina	3A	Reg XII	College/Unv	30,386	Award - A-	2/18/15
24	In Operation	USA	2A	Reg XII	Bank/Office	34,651	Award - B	2/28/15
25	In Operation	USA	2A	Reg XII	Mixed Office	875,235	Award - C	2/28/15
26	In Operation	USA	2A	Reg XII	Mixed Office	257,536	Award - C	3/31/15
27	In Operation	USA	2A	Reg XII	Mixed Office	870,094	Award - C	3/10/15
28	In Operation	USA	5A	Reg IX	Mixed Office	33,920	Award - C	5/1/15
29	As Designed	USA	5A	Reg IX	Office	19,588	Pending	
30	In Operation	USA	5A	Reg IX	Office	19,588	Pending	
31	In Operation	Philippines	1A	Reg XIII	Multi-Use	835,418	Award - B	5/28/15
32	In Operation	USA	3A	Reg VII	Govt Office	109,870	In Process	
33	In Operation	USA	2A	Reg XII	Fire Station	7287	In Process	

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Appendix J: University Course Syllabus

University of Nebraska-Lincoln
Construction Management Program
CNST-498/898, Section 007
Course Syllabus Spring 2015

Special Topics in Construction Management – Building Energy Assessment and Rating

Instructor:	Tim Wentz, Construction Management Kirk Conger, Facility Management
Office:	Room 113, Nebraska Hall
Credit:	3 Hours
Course Description:	An introduction and study of commercial existing building energy assessment principles and protocols including course instruction/lecture, hands-on techniques of measurement and verification, IEQ parameter identification and measurement, and energy metric comparison/analysis for the application and submission of a building disclosure, rating, and labeling program.
Course Objectives:	<p>The objective of this course is to build a knowledge foundation of building energy assessment and the application of building disclosure and rating programs by applying the ASHRAE bEQ program to a pool of existing buildings provided by Facility Management. Outcomes of the course include:</p> <ul style="list-style-type: none">• Generate a ASHRAE bEQ In Operation rating for up to 12 existing buildings in the UNL inventory• Produce a listing of potential Energy Efficiency Measures (EEM) including financial payback analysis for each building rated• Understand the different building type offerings and the impact of climate zones on energy use.• Measurement of program required parameters• Analyze raw energy consumption data from measured-meter readings.• Understand energy metrics and how they are developed.• Understand energy certification of professionals in order to work in this field of engineering• bEQ Plaque, Certificate, and Dashboard for each building with an energy assessment
Prerequisites:	Senior standing and permission, or Graduate standing
Texts:	ASHRAE Procedures for Commercial Building Energy Audits, 2 nd edition ASHRAE Standard 100-2014 ASHRAE bEQ workbooks (most current version) ASHRAE BEAP certification study guide ASHRAE Standard 105 ASHRAE Standard 214P draft ASHRAE Performance Measurement Protocols for Commercial Buildings: Best Practices Guide
References:	ASHRAE Building Energy Quotient Program (bEQ)

Evaluation: Final project will include the Design-Build project proposal and a bEQ project submission for each building receiving an ASHRAE bEQ rating. Graduate students will be further required to produce a technical paper (with the title, purpose, and scope to be determined at a later date). Costs paid to ASHRAE for a bEQ submission is not the responsibility of the student.

Grading: Grading will be done to standard University of Nebraska letter grades. Grades are determined as follows:

A+	97.0 to 100%
A	93.1 to 96.9%
A-	91.0 to 93.0%
B+	87.0 to 90.9%
B	83.1 to 86.9%
B-	81.0 to 83.0
C+	77.0 to 80.9%
C	73.1 to 76.9%
C-	71.0 to 73.0
D+	67.0 to 70.9%
D	63.1 to 66.9%
D-	60.0 to 63.0
F	59.9 and below

Grading of Homework: All quizzes and homework assignments are due at the time and date listed for the assignment. Any assignment turned in after the due date and time will be considered late. Late assignment will be accepted up to 24 hours after its due date with a 50% reduction in grade. No assignment will be accepted after that time.

Attendance and Participation: Punctuality, class attendance, participation and preparation is a reflection of your professionalism. Unavoidable absences must be reported to the instructor or the Construction Management Department Office prior to the absence.

Course Web Site: A course web site will be constructed on the University's BlackBoard system. The course web site will be used extensively to distribute information and to provide access to course materials and resources. Accordingly, it is the student's responsibility to regularly review the course web site and to ensure that the student's information (in particular, their email address) is accurate and up to date.

Code of Conduct All students are expected to comply with UNL's Code of Conduct. Any student found guilty of academic dishonesty shall be subject to both academic and disciplinary sanctions, as outlined in the 'Student Rights and Responsibilities' section of the undergraduate bulletin. ASHRAE copyright and privacy policies will be adhered to.

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Appendix K: MBO Status & Update

Strategic Direction 3- ASHRAE will position itself as an essential resource for optimizing the performance of building and energy systems throughout their life cycles.
 Assigned to: **bEQ Committee**
 Theme: **President Tom Phoenix; "People, Passion and Performance."** MBO 2014-15 Update 6/1/2015

Item #	MBO (rev 6/29/14-supercedes earlier versions)	Status:	Date Due	Assigned To Lead Efforts	MBO Comments
1	Each member of the committee become responsible to facilitate/preform and/or sell 1- rating submission of AD or IO	complete	6/1/2015	Committee	Several submissions have been made
2	Complete validation methodology for 25 building types in "As Designed" rating	complete	6/1/2015	METHODOLOGY	November 2014-Launched beta A/D all building types
3	Create an agenda for a BEQ WORKSHOP and TRAINING program ;distribute to chapters for their use.	complete	1/1/2015	METHODOLOGY/ Marketing	Ppt developed + TT created a course as well
4	Up-date BEQ DL Presentations with new information, changes to program, videos, added occupancies, and features/benefits.	complete	complete	Staff	our bEQ website has been updated
5	Plan and submit for a BEQ Forum or Seminar at Winter meeting	complete	9/1/2014	MARKETING	Chicago Program
6	Create formal survey to BEAP/BEPP/PE and possible AEDG/IAQG/PCEA to ask bEQ marketing questions. Coordinate with marketing plan.	complete	9/1/2014	Marketing / Committee	Godfrey completed
7	Update BEQ Brochure and distribute to 3-Councils,GGAC, + chapters.	complete	1/1/2015	Staff	complete
8	Determine % data base usage of EUI's between AD and IO ratings between Standard 100 and EnStar/TaFi/PortMgr and make decisions about a path to consistency.	complete	1/1/2015	METHODOLOGY	Included in RTAR research project scope
9	New Journal and/or Insights article. Topics can include bEQ successes,case studies, methodology behind our multipliers and/or logic behind using Std. 100 tables, benefits behind our scaling,etc.	complete	2/1/2015	MARKETING/MET HODOLOGY	Journal is full for this year
10	Make a plan for bEQ-Residential and/or High-rise residential and/or community rating program extension	complete	6/1/2015	MARKETING	High Rise residential complete-Residential post-poned until another time
11	Coordinate the Commercial Energy Audit publication with bEQ Level 1 energy audit requirements and forms; consider changing bEQ forms to match/plug into CEA forms so both can be used together in a single step.	complete	12/1/2014	MARKETING	discussed and agreed to make appropriate revisions although not exact matches
12	Review for stringency and possible even expand IEQ questions regarding Enclosures, IAQ, Lighting, Daylighting,etc. Coordinate allowable global equivalents of related standards and codes.	complete	1/1/2015	METHODOLOGY	changes were made to workbooks by HB
13	Establish a formal relationship and liase with GGAC and Advocacy Committees	complete	continuous	Committee	liasion = RM
14	Evaluate the "free trial" offer July-Nov 2014; Make recommendations to consider revised pricing and discount structure for bEQ program	complete	1/1/2015	Marketing	continued thru 2016
15	Follow up with FLORIDA RATING SYSTEM LEGISLATION to take advantage of new law	complete	9/1/2014	METHODOLOGY	code class on bEQ is perfected and approved by FBPR (RM is author)
16	Work with USGBC to achieve benefit to LEED (new and existing) by a bEQ rating relative to the EA energy credits. (GBCI already does this)	complete	1/1/2015	MARKETING	bEQ leadership CO, EVP, and President Phoenix met with USGBC and US Army
17	Propose for a Marketing plan and work scope for bEQ related activities, including hiring a consultant for 2014. Create budget, motion to the BOD to ask for money. (Urgent need-top priority)	complete	7/30/2014	MARKETING	Godfrey hired/underway
18	Identify marketing opportunities and targets to sell bEQ, ie. AFE, BOMA, PES, Real estate associations, banking associations, financial planners, states, large campuses,etc. Develop specific strategies to market bEQ to organizations and market sectors. Develop a list of short "video" segments that could be used to market bEQ to market sectors, and present to the committee for evaluation and implementation.	complete	9/1/2014	MARKETING	video completed, some outreach performed, USGBC letter issued.
19	Make a business plan for automating bEQ on-line; develop a list of specific automated tasks and benefits/features. Estimate costs and time schedule to complete. Start initial phase of development.	complete	6/1/2015	MARKETING	proposed costs and process are calculated; preliminary amounts added to budget
20	Identify standards and highlight attributes that deal with bEQ issues, such as IOS, 202, 189,90,55,62,etc. Communicate these attributes to the PC's and update the bEQ DL presentation.	complete	9/1/2014	METHODOLOGY	official liasions established
21	Identify major cities with sustainability plans that could align with bEQ, ie. Salt Lake City, Orlando, Ashville, etc. (J.Colton/staff is a resource for this info). Form a strike force to communicate to these opportunities.	complete	1/1/2015	MARKETING/Staff	Follow-up list established
22	Identify Global bEQ outreach and application of our bEQ program outside US. Create instruction set for inclusion into our instructions.	complete	1/1/2015	MARKETING	Inclusion properties added to program; several entires received
23	Establish relationships with Green building rating providers to communicate the value of bEQ to their program, ie., USGBC,GG,other GBC's in different countries. Update DL presentation with ppt slides to document features and benefits. Add benefit related adjectives to bEQ program such as "performance verification" and "benchmarking" and "tool" to help enhance perception of bEQ(not just a rating program); coordinate with marketing plan.	complete	6/1/2015	MARKETING	bEQ leadership CO, EVP, and President Phoenix met with USGBC and US Army; USGBC letter sent.
24	Coordinate 90.1(G),100,189.1,214P with bEQ for consistency and to identify potential conflicts	complete	9/1/2014	MARKETING	New marketing initiative
25	Create Research project submission that performs a parametric analysis of our current AD rating using a single EUI versus dual EUI tables, and to coordinate using Standard 100, 90.1, CBCECS, and our current strategy.	complete	1/1/2015	METHODOLOGY	official liasions established
26	Update rules and instructions for dealing with mixed use building occupancies and large campus occupancies. Establish "boundaries" and guidelines for submitting mixed use types using area weighted algorithm or equivalent method.	complete	10/1/2014	METHODOLOGY	RP submitted
27		complete	10/1/2014	METHODOLOGY	rules added

Marketing Subcommittee:

1. Markel/Chair
2. Walters
3. Patenaude
4. Wentz
5. Davies

Methodology Subcommittee:

1. Brandmuel/Chair
2. Bohanon
3. Missuriello
4. Nall
5. Eley

Planned Proposed Meetings:

- a. Winter 2015 (Chicago)
- b. Summer 2015 (Atlanta)
- c. 2014: bEQ training for new members; cc:July 11, 2014;1-2pm
- d. 2014: bEQ marketing cc in early July to make plan for marketing + possible f/f meeting in August:bEQ Marketing and Methodology subcommittees; week of September 8, 2014. e. 2014: bEQ cc: October 17, 2014 3pm-5pm
- f. 2014: December 5-6, 2014 Methodology Summit; (Atlanta)
- g. 2015: bEQ Marketing and Methodology subcommittees; week of January 12, 2015.
- h. Marketing and Methodology subcommittee meeting Saturday January 24, 2015
- i. More after Winter 2015 meeting.

Strategic Direction 3- ASHRAE will position itself as an essential resource for optimizing the performance of building and energy systems throughout their life cycles.

Strategies

- 3.1 Aggressively market ASHRAE to enhance its image with the industry, policy makers, and other stakeholders through advocacy, public relations, association relations and dissemination of its products and services.
- 3.2 Expand ASHRAE's marketing focus to target all stakeholders in building and energy systems design and operation such as contractors, building owners, and architects.
- 3.3 Make ASHRAE's products and services useful, desirable, and accessible to both existing and prospective customers by strengthening and adding focus to the ASHRAE brand as a key resource.
- 3.4 Provide tools to enable chapters to become a local focus for education and community outreach.
- 3.5 Help ASHRAE regions and chapters provide appropriate and timely information to state and local government bodies.
- 3.6 Establish and maintain effective relations with key government agencies so that ASHRAE is recognized as a resource for regulatory and legislative development and for program implementation.
- 3.7 Conduct periodic market research and environmental scans to understand and act upon the needs of current and prospective members.
- 3.8 Target selected industry media to present ASHRAE and its activities.
- 3.9 Promote availability of appropriate products and services to markets outside the ASHRAE membership.

Rationale

1. Public interest in HVAC&R related issues is growing and ASHRAE has the technical knowledge to meet this need.
2. Policy makers and other stakeholders need to be aware of ASHRAE's expertise.
3. Increasing competition requires ASHRAE to distinguish itself as the leader in the field. ASHRAE needs to be recognized as the building and energy systems design and performance experts.
4. The utilization of ASHRAE's knowledge base can directly lead to gains in worker productivity and efficiency of industrial processes.
5. Appropriate commissioning through the life cycle of a building promotes optimum performance.

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