

bEQ Committee
Atlanta Interim Meeting
May 6-7, 2016

Members Present: Michael Brandemuehl (chair), Hoy Bohanon (vice-chair), Hugh Crowther, Larry Markel, Tim McGinn, Nate Boyd (Day 1), Hywel Davies, Charles Eley, Jaap Hogeling, Ben Skelton, Jim Vallort (Coordinating officer),

Not available: Nate Boyd, Dan Nall

Staff: Lilas Pratt (staff liaison), Vanita Gupta, Jodi Scott, Joslyn Ratcliff, Emily Sigman, Lauren Walters, Jim Scarborough (by phone)

Principal Motions¹

Motion 1: Larry Markel moved and Nate Boyd seconded the meeting minutes from the January 24, 2016 meeting in Orlando be approved.

Vote: Motion passes 5-0-0, CNV

Motion 2: Bohanon moved, Hugh seconded that Bruce Hunn be accepted as the bEQ liaison from SPC 211P.

Vote: Motion passes 4-0-0, CNV

Motion 3: Hoy Bohanon moved and Larry Markel seconded that the letter grades be removed from the bEQ label.

Vote: Motion passes 4-0-0, CNV

Motion 4: Charles Eley moved and Hugh Crowther seconded that changes 1 through 3 from Charles Eley's 5/6/2016 email (see background information in notes) be made to the workbooks.

Vote: Motion passes 4-0-0, CNV

New and Open Action Items

May 6-7, 2016 Atlanta Interim Meeting:

- **AI 1: Pratt** to update the workbooks to correct kBtu conversion factors for electricity and to use the site-source multipliers from the DOE ZEB definition.
- **AI 2: Pratt** to make a list of all fields in each rating workbook (IO and AD), noting mandatory and optional fields as well as all pull down menus, help, & validation information already identified.
- ✓ **AI 3: Pratt** to respond to **Kelvin Chan** in Hong Kong regarding the local site-source multiplier direction that the committee is developing for future implementation. (Note: Email sent on 5/9/2016)
- ✓ **AI 4: Pratt** to follow up with **Vanita Gupta and her staff** on the questions/clarifications on the marketing plan from **Godfrey**. (Note: Follow up meeting held in May 2016)

¹ All votes are recorded as yes-no-abstain.

- ✓ **AI 5: bEQ Leadership** to develop a plan to meet with various committees (e.g., GGAC, ExCom, TC 7.6, Student Activities) in St Louis.
- ✓ **AI 6: Lilas Pratt to engage the ASHRAE IT department to review the draft specification for online portal.** (Note: Copy of Specification sent to IT on 6/7/2016.)
- **AI 7: Hugh Crowther** to write the first draft of the vision for bEQ for use in the online portal specification, work statement, and RFP documents
- ✓ **AI 8: Michael Brandemuehl** to reach out to **Jean Lupinacci** via email regarding the online portal. (Note: Email sent on 5/24/16)
- **AI 9: Lilas Pratt/bEQ Leadership** to add review of the target finder inputs developed by **Dennis Knight** to the agenda in St Louis.
- ✓ **AI 10: Lilas Pratt** to request meeting space in St Louis for the RP-1771 PMS at 11:30a on Saturday. (Note: email sent to Judy Marshall on 5/9/16)
- ✓ **AI 11: Lilas Pratt** to request permission to send the Executive Summary from the GGAC Planning meeting to the bEQ Committee. (Note: Email sent to GGAC leadership on 5/9/16, Summary sent to bEQ Committee on 5/23/16)

January 24, 2016 Orlando Winter Meeting:

- **AI 2: Dan Nall** to follow up with AIA codes and standards staff person to increase awareness of bEQ within AIA. (On-going)
- **AI 3: Methodology Subcommittee** to explore the DOE Asset Score and report back to the full committee. (On Today's Agenda)
- **AI 4: Methodology Subcommittee** to develop a functional specification for an on-line data entry system. (On Today's Agenda)

December 4-5, 2015 Atlanta Interim Meeting:

- **AI 7: Pratt** to set up Basecamp account for bEQ committee. (On-going)

June 29, 2014 Seattle Annual Meeting

- **AI 1: Eley** to lead an effort to document the bEQ In Operation process and methodology. (On Hold)

Meeting Notes

Friday, May 6, 2016 – 9:00am-5:00pm

1. Call to Order – **Meeting Convened at 9:15am EDT (Quorum established – 6 voting members)**
 - a. ASHRAE Code of Ethics (www.ashrae.org/codeofethics)
 - b. [Committee Structure & Roster](#) – Information Item
 - c. [Committee Purpose and Scope](#) – Information Item
2. Opening Remarks (Brandemuehl)
 - a. Introductions were made by the participants
 - b. Review of Agenda – No changes
3. Old Business
 - a. Approval of meeting minutes – Jan 24, 2016 Orlando Meeting

Motion 1: Larry Markel moved and Nate Boyd seconded the meeting minutes from the January 24, 2016 meeting in Orlando be approved.

Vote: Motion passes 5-0-0, CNV

b. Review of [Action Items](#)

4. Subcommittee Reports

a. Methodology (Eley)

- See Methodology Flip Charts ([Attachment A](#))
- The subcommittee discussed the source-site multipliers for imported and exported electricity and agreed that these should both use the same multipliers.
- It was suggested that bEQ lite be taken off table for now. The subcommittee sees this as preliminary information to the full submittal process.
- The online portal will provide two procedures for developing the bEQ baseline/median EUI: the current ENERGY STAR (ES) methodology or the Standard 100 methodology currently in the workbooks. The plan is to use the Architecture 2030 API for the ES procedure. The Standard 100 pathway will follow what is currently done in the workbooks for all non-ES qualified buildings.
- We may develop some sort of scale translator so that once a bEQ score has been developed, a building can get a rough estimate of other ratings (such as ES, BOMA 360, DOE Asset Score, etc).
- An option being planned is to incorporate alternative baseline generator (ABG) capability that would allow for additional “ratings” or scores beyond the standard bEQ rating/score using different baseline median EUIs and/or databases customized to specific local needs. These would not be developed until have a “client” has been identified, but the intent is to develop the framework for them in the portal that allows them to be added later.
- Another program building module would generate the candidate building EUI that then gets compared to all the baselines including the standard bEQ median EUI.
- The specification details various user levels including Visitor, Registered User, Subscriber (fee), Licensee (relates to the alternative baseline generator), bEQ Editors, and the Web Master.
- The intent is to enable data exchange between formats using Building Sync (NREL) as referenced by Standard 211P. A lot of auditing software already uses this, and it is compliant with ES and the DOE Asset Score. It provides a common format for exchanging data.
- Another required task is to identify the required and optional fields in bEQ and then map them to Building Sync.
- Another issue to be addressed is management of data and access on the site.

AI 1: Pratt to update the workbooks to correct kBTU conversion factors for electricity and to use the site-source multipliers from the DOE ZEB definition.

AI 2: Pratt to make a list of all fields in each rating workbook (IO and AD), noting mandatory and optional fields as well as all pull down menus, help, & validation information already identified.

AI 3: Pratt to respond to Kelvin Chan in Hong Kong regarding the local site-source multiplier direction that the committee is developing for future implementation. (Note: Email sent on 5/9/2016)

b. Marketing (Market)

- See Marketing Action Item Spreadsheet ([Attachment B](#))
- The subcommittee agreed that ASHRAE staff will provide input on what clarifications are needed from Godfrey ([Attachment C](#)).
- Once the feedback is received from staff, that will be forwarded to Godfrey for their responses and clarifications which will allow the committee to accept and close out the final stage of the marketing plan project.
- It is hoped that this will create a statement of work and will clarify what all is their \$25K branding step.
- The branding work is expected to be accomplished in one to two months.
- Nate had put together what he thought some of the action items should be.
- The subcommittee explored the idea of merging the bEQ and ASHRAE websites.
- There is an international component to all of this that needs to be addressed.

5. Conclusions/Wrap-up Discussion (New Ideas)

- One suggestion was to send the on-line portal specifications out to prospective bidders ahead of the July 1 date if it could be finalized by then. The documentation would need to specify that the project is contingent on funding being approved.
- The target is to have a specification for the committee to vote on the specification draft on the June 8, 2016 monthly call.
- Another suggestion was to engage Nick Long or Michael Deru to develop the specification. One question raised was whether the committee would need additional expertise to evaluate the bids? The committee agreed that it makes sense to engage ASHRAE IT staff on this.
- Suggestions for distributing the RFP when ready: post it on ASHRAE webpage, get bidder suggestions from ASHRAE staff, generate as much interest as possible, send an email to the MTG-BIM.
- The specification needs to be clear on what kind of hand off is expected at the end of the project and what kind of support is expected initially or long term.
- There also needs to be a non-disclosure clause in the RFP due to nature of the information.

6. Recess – **Meeting Recessed at 5:15pm EDT**

Saturday, May 7, 2015 – 8:00am-2:00pm

7. Reconvene – **Meeting Reconvened at 8:10am (Quorum Established – 5 voting members)**

- a. Arrangements for Transportation to Airport were discussed.

8. Full Committee Discussion

a. Marketing strategies

- The committee reviewed the expectations on Godfrey moving forward as discussed in the previous day's meeting.

- The intent is to pursue the branding part of the marketing plan first, utilizing Godfrey for that work with the money that is already in the bEQ budget for FY 2016-17.
- Once the clarifications from ASHRAE staff have been responded to by Godfrey, the bEQ Committee can sign off on and close out the marketing plan project.
- Once that has been done, a work statement/proposal will be solicited from Godfrey for the branding piece of the plan.

AI 4: Pratt to follow up with Vanita Gupta and her staff on the questions/clarifications on the marketing plan from Godfrey. (Note: Follow up meeting held in May 2016)

- b. International strategies
 - Discussion deferred.
- c. GGAC opportunities
 - When inquiries on bEQ are received from members, DC staff, or GGAC members, there is not a systematic way of dealing with those requests, questions, or opportunities. It would be helpful to have an opportunity to sit down with GGAC and evaluate the quality of these ideas.
 - The committee needs to get on the GGAC agenda for St Louis to let them know what is being planned.

AI 5: bEQ Leadership to develop a plan to meet with various committees (e.g., GGAC, ExCom, TC 7.6, Student Activities) in St Louis.

- d. Educational products and services
 - Michael Brandemuehl noted that educational offerings are part of incoming ASHRAE President Tim Wentz's Presidential theme.
 - A Presidential Ad-hoc is being formed to flesh out the university course that he developed and make it available to student chapters. This is seen as a way to get bEQ into student curricula through student branches, their advisors, and the professionals in the university community.
 - Michael Brandemuehl will chair the Ad-hoc which will be populated by PDC, student activities, and bEQ representatives. Tim McGinn will be on the committee.
 - The course will be using bEQ as a mechanism to get energy auditing into the conversation. It will also look to include commissioning and company representatives through the local chapters. It is likely that the faculty advisor will need access to technical/subject matter experts that can advise them. This expertise could come from the chapters.
 - Mr. Brandemuehl asked Mr. Wentz to expand the charge a little bit beyond just benchmarking and auditing to include exploration of how this model could be used for other course type activities.
 - This becomes another marketing opportunity for bEQ, certification, and other ASHRAE offerings.
 - Since it could be considered a competing activity to the student design competition, it will be important to not cannibalize that effort. In fact, this could

be tied into the student design competition with the As Designed rating and the modeling aspect.

- ASHRAE now have a videographer on staff who can help with the video modules for this course and others.
- The experience of the courses first offering at the University of Nebraska experience would make a great case study for bEQ.

e. Online portal

- Hugh Crowther noted that the online portal is the secret sauce the committee has been looking for.
- It was noted that the Godfrey branding work needs to inform the website and the on-line portal work.
- A statement of the strategic goals of the website application is needed: what is it for? What is the vision of the online portal? What do I want this to do in general terms?
- Other needed elements include wireframe documents, module descriptions, and procedures for future modifications.
- A requirement will be added that the contractor use a well defined content management program like Drupal. Another suggestion was to request an agile approach (interactive).
- One question was how to handle the oversight of the project and the management of the committee's time for this project. An oversight group should be established with ASHRAE IT and Web Team representatives along with technical resources from the committee and practitioners. The ability of ASHRAE to be agile during the process is going to be key.

AI 6: Lilas Pratt to engage the ASHRAE IT department to review the draft specification for online portal. (Note: Copy of Specification sent to IT on 6/7/2016.)

AI 7: Hugh Crowther to write the first draft of the vision for bEQ for use in the online portal specification, work statement, and RFP documents

f. EPA implementation

- How to implement this decision to realign with EPA will have implications on the web portal. Issues include:
 - EPA is going to update all scores in 2018 to use the latest CBECS data from 2012. The committee has already agreed to stay with 2003 CBECS and use the ARCH 2030 API to achieve that.
 - Lots of inputs are used to get the baseline EUI from ENERGY STAR. The portal will need to specify these and provide instructions for how those inputs should be determined. The target finder inputs will need to be translated into standardized inputs for the As Designed rating.
- The committee may want to start the conversation with EPA regarding an electronic connection between bEQ and ENERGY STAR.

AI 8: Michael Brandemuehl to reach out to Jean Lupinacci via email regarding the online portal.
(Note: Email sent on 5/24/16)

AI 9: Lilas Pratt/bEQ Leadership to add review of the target finder inputs developed by Dennis Knight to the agenda in St Louis.

- g. Actions on Std 211P (1st PPR)
 - There has been no formal interaction to date, but there really needs to be a formal liaison between these two efforts. Bruce Hunn is on the SPC and has agreed to serve as a liaison to bEQ. Jim Kelsey is the chair of the SPC.
 - This would give the bEQ Committee two official liaisons: SPC 211 (Bruce Hunn) and SPC 202 (Ross Montgomery).

Motion 2: Bohanon moved, Hugh seconded that Bruce Hunn be accepted as the bEQ liaison from SPC 211P.

Vote: Motion passes 4-0-0, CNV

- h. Research Update – RP-1771
 - The contract documents have been finalized and the first payment has been made to contractor which is the University of Miami. The first meeting between the PMS and the contractor will be in St Louis.
 - The PMS members are: Michael Brandemuehl (Chair), Charles Eley, Dan Nall, Michael Deru, Dru Crawley, David Eldridge, and Terry Sharp.
 - There will be a standing slot added to the agenda moving forward for a report on this project.
- i. bEQ submission update
 - As of May 5, 2016, there have been:
 - 56 submissions (4 As Designed, 52 In Operation)
 - 37 Awarded Labels
 - 1 Denied Label
- j. 2016-17 FY Budget Planning ([Attachment D](#))
 - Monies for the Godfrey branding work would be covered by the Marketing line item currently in the budget.
 - The online portal would be considered a capital project, so it comes out of a different bucket than expenses.

AI 10: Lilas Pratt to request meeting space in St Louis for the RP-1771 PMS at 11:30a on Saturday. (Note: email sent to Judy Marshall on 5/9/16)

AI 11: Lilas Pratt to request permission to send the Executive Summary from the GGAC Planning meeting to the bEQ Committee. (Note: Email sent to GGAC leadership on 5/9/16, Summary sent to bEQ Committee on 5/23/16)

- 9. Update on External Activities
 - a. USGBC – LEED Alternative Path
 - The committee is waiting on a response from USGBC.
 - b. EPA – Data Exchange

- Communication with Jean Lupinacci will be initiated.
- c. NYSERDA
- The project is continuing but there is frustration that NYSERDA is not taking advantage of previous work and experience already completed.
 - They have had trouble identifying what they want to do and the stated completion date is September 1, 2016. They may not be able to finish anything by that date.
 - It is also unclear what building types they work will apply to.
- d. Other state and municipal reporting requirements
- Other than the City of Orlando, Seattle and Salt Lake City seem to be the most active of the various jurisdictions interested in bEQ.
- e. Malaysia bEQ Opportunities
- It was suggested that the committee reach out to Tim Wentz about educational opportunities.

10. bEQ Rating – Letter Grades

- Hoy Bohanon encouraged the committee to remove the letter grades from the rating and label. His concern is that the letter grades are not compatible with other building ratings (e.g., health, class A office space, etc.)
- He also encouraged the committee to update the label descriptions. The initial suggestion was that the bottom three descriptions change to: Average, Below Average, Needs Improvement. Another alternative was: Average, Opportunity for Improvement, Significant Improvement Opportunities.

Motion 3: Hoy Bohanon moved and Larry Markel seconded that the letter grades be removed from the bEQ label.

Discussion:

- Mr. Crowther spoke in favor of the motion and proposed an action item.
- Hywel Davies could not see a reason to keep the letter grades.
- It was noted that now seemed a good time to make the adjustment. This would also provide opportunities to reach out to previous award submissions.
- One suggestion was that any changes to the label needed to highlight that the program was rated by ASHRAE.

Vote: Motion passes 4-0-0, CNV

11. Methodology changes

- Charles Eley recapped changes that were discussed during the Methodology Subcommittee meeting on the previous day. He had sent an email recapping those discussion to the committee (see background information below). The first three items in that email are mostly editorial changes to the workbooks.
- Item #4 is a big change that will need additional discussion how to implement. Even if not implement initially, it can announced as a future planned enhancement.

Motion 4: Charles Eley moved and Hugh Crowther seconded that changes 1 through 3 from Charles Eley's 5/6/2016 email (see background below) be made to the workbooks.

Background from Charles Eley's email of 5/6/2016:

We made several decisions today at the methodology subcommittee that I want to record.

1. Use the same source-site multiplier for both delivered electricity and exported electricity. Right now, we are using 1.0 for exported energy and this should be changed to 3.14 (the same as for delivered energy).
2. Use the source-site multipliers that are published in the DOE common definition for ZNE (zero net energy) buildings. These are almost the same as what we have but are off by 0.01.
3. Treat energy that is used to charge EVs (electric vehicles) that provide off-site transportation services as exported energy. Subtract this from the delivered energy.
4. For local site-source multipliers:
 - Require that be based on the data compiled by LBNL and published as part of their flow charts. See <https://flowcharts.llnl.gov/commodities/energy>.
 - Precalculate what the values will be for all the countries listed by LBNL.
 - The same source-site multipliers shall be used for both the candidate building and the baseline building.
5. We will not support a LITE version of bEQ. Instead we will just consider this to be preliminary information before the verification process.

Vote: Motion passes 4-0-0, CNV

12. Conclusions / Wrap-up Discussions

- a. Recommendations
- b. Review of Action Items to be assigned

13. Adjourn – **Meeting Adjourned at 12:00pm**

bEQ Committee Structure – FY 2015-2016

bEQ Committee Members (voting): Michael Brandemuehl (Chair), Hoy Bohanon (Vice-chair), Hugh Crowther (Members Council Representative), Larry Markel (Tech Council Representative), Tim McGinn (Pub-Ed Council Representative), Nate Boyd (Member-at-Large), Harry Misuriello (Member-at-Large), Dan Nall (Member-at-Large)

bEQ Consultants/Others (non-voting): Hywel Davies, Charles Eley, Jaap Hogeling, Benjamin Skelton, Jim Vallort (Coordinating Officer)

Marketing Subcommittee: Larry Markel (chair), Nate Boyd, Hugh Crowther, Hywel Davies, Tim McGinn, Benjamin Skelton

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

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 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.

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bEQ Action Item List

January 24, 2016 Orlando Winter Meeting:

- ✓ **AI 1: bEQ Committee** to send **Nate Boyd** suggestions on city of Orlando programs and workshops on rating and disclosure programs. **Closed**
- **AI 2: Dan Nall** to follow up with AIA codes and standards staff person to increase awareness of bEQ within AIA. (On-going)
- **AI 3: Methodology Subcommittee** to explore the DOE Asset Score and report back to the full committee. (On Today's Agenda)
- **AI 4: Methodology Subcommittee** to develop a functional specification for an on-line data entry system. (On Today's Agenda)
- ✓ **AI 5: Brandemuehl** to coordinate with the BPA Ad-hoc committee.

January 4, 2016 Conference Call

- ✓ **AI 2: Methodology Subcommittee** to try to get more information on how to deal with the DOE Energy Asset Score in relation to bEQ. **Closed (Duplicate of AI 3 above)**

December 4-5, 2015 Atlanta Interim Meeting:

- ✓ **AI 4: Pratt** to send committee responses to questioners on green power, Malaysia, and outdoor lighting **Complete**
- **AI 7: Pratt** to set up Basecamp account for bEQ committee. (On-going)

January 25, 2015 Chicago Winter Meeting:

- ✓ **AI 8: Brandemuehl** to work with **Krishnan Gowri** on his request to incorporate bEQ into the rapid capture for energy modeling project.

June 29, 2014 Seattle Annual Meeting

- **AI 1: Eley** to lead an effort to document the bEQ In Operation process and methodology. (On Hold)

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Attachment A: Methodology Subcommittee Flip Charts

ARCH 2020 API (for E* and ASHRAE 90.1)

BUILDING SYNC XML

- Core info
- City and building energy

QUESTIONS

- 1) Weather pre-processor
- 2) Bldg Sync compliant

API (SUA 100 BLD) (not directly in E*)

INPUTS

- Bldg Type
- Climate Zone

OUTPUT

- SOURCE EUI

GENERATES BEQ Building

BUILDING SYNC XML

- Ref. 211 (Energy Admin)
- Doc/Workflow NREL
- BEDES COMPLIANT
- BEDES
- Compliant with DOE Asset Sync
- Compliant with E*
- NICK LONG

DATA EXCHANGE

PROB 2020 → **BEQ** → **ASST 2016** → **E***

TIPS:

- 1) Use E* Bldg fields to support for various versions of BEQ and to maintain compatibility with E* & AS

VERSIONS OF BEQ (LITE?)

LITE:

- No credentials required (ASST, BEQ)
- No BEQ surveys
- No Rating
- NO Documentation (Info only)
- Save their data in BEQ
- NO E.E. Measures

POSTURE AS THE TABLE

Preliminary Information

ALTERNATIVE BASE LINE GENERATORS (Alternative APIs)

- BFD LEHL
- Self Generated BEQs
- Other countries
- Projects from your portfolio
- Projects for owners or other bldg.
- To be generated from other
- candidate bldg.
- E* cases only

LIKENESS

THE MOST

DATA TRANSLATION/SUPPORT

NO EUI CURRENTLY SUPPORTED (help)

BEQ FIELDS (handwritten) → **BUILDING SYNC FIELDS**

1 → ②
2 → ③
3 → ④
4 → ⑤
5 → ⑥
6 → ⑦
7 → ⑧
8 → ⑨
9 → ⑩

CANDIDATE BLDG. PROGRAM

- Mixed Use
- Utility Dist.
- Source site rating

REAR SCALE TRANSLATIONS

BEQ	E*	ASHRAE	TOL	POINT	ETC.
200					
150	55	2			
140		4			
75	75	8			
50	100	10			
25					
ZONE					

CASEWORK OR STANDARD METHODS

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Attachment B: Marketing Subcommittee Action List

First draft: Building EQ Marketing Committee Action Items	May-16	Jun-16	Jul-16
bEQ Marketing Subcommittee to create 2016-17 marketing plan			
ASHRAE Staff to clarify and finalize list of strategic questions for Godfrey to allow development of marketing Toolkit	Staff will develop, bEQ review & submit to Godfrey	Godfrey delivers concept documents for branding toolkit	Implement marketing toolkit for currently available bEQ programs
Identify ASHRAE TC's cognizant over Standards/Guidelines that should align with the bEQ tool	Assign liasons to TCs, SPCs, GPCs, SSPCs, etc. Compile list of correlations, discuss collaborative efforts	Align bEQ forms (portal) and I/O with Std 202,211,214, Guideline 0,0.2,14, Handbook Chapters, Special Publications	Develop informative annexes for above listed standards/guidelines
Coordinate with GGAC for marketing outreach			Provide new marketing material to GGAC
Coordinate with Educational Committees to market bEQ	How can bEQ help those committees achieve their goals		
Identify ASHRAE strategic initiatives that align or should align with bEQ	Assign liason to task MTG.IAST* (or other?) to		
Document success stories	Poll providers/recipients		
Identify marketing path to ASHRAE members			
Identify marketing path to "clients" of the bEQ tool			
Identify presentations, talking points, website, press releases, videos, etc.	Staff to assess current usage of bEQ marketing materials		
Marketing subcommittee to help format portal output			
ASHRAE BOD meeting in Thailand	Announce something for that region at that meeting - make this part of CRC Student activities angle		
	*Impact of ASHRAE Standards and Technology		

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Attachment C: Marketing Staff Feedback on Godfrey Marketing Plan

Questions for Godfrey on the Marketing Plan:

- 1) ASHRAE has been somewhat unsuccessfully marketing to their members (with the hope that they will then take that information to the target audience of building owners) for some time. How does the intent of the last bullet (on the brand toolkit) under the Plan/Branding differ from what has already been done in the past?
- 2) The marketing plan seems somewhat independent from the concepts that were approved in Phase 2. How do those concepts tie into the marketing plan? Or is that what would be accomplished in the Branding phase of the plan?
- 3) What all would be included in the branding phase of the plan. Would that toolkit include suggested copy, graphics, and taglines?
- 4) Who owns the copyright on the concepts that were developed and approved in Phase 2 of this project?

Feedback from ASHRAE Marketing Staff on the Godfrey Marketing Plan:

- 1) The value that Godfrey brings to the marketing process is their knowledge of the industry and of the end user/targeted audience (building owners).
- 2) The highest value item in the marketing plan is the first item: the branding information and toolkit.
- 3) Their recommendation would be to initially engage Godfrey to execute the branding information and toolkit only. They emphasized that the branding information and toolkit should be closely tied to the concept and that there should be through “fleshing out” and vetting of those concepts.
- 4) Once the branding information is received, much of what is in the marketing plan could be executed internally by the ASHRAE Marketing staff; however, there are some areas where further engaging Godfrey would make sense (such as the targeted media webcast item) and be helpful.
- 5) The branding information could be developed while the on-line web portal is being developed.
- 6) The execution of the remainder of marketing plan should be timed to coincide with the launch of the online web portal.

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Attachment D: Current bEQ Budget Planning Information

bEQ Committee Budget Planning - FY 2016-17						PROPOSAL UPDATE 1/11/2015
Budget Line Items	Previous Actual FY 14-15 ¹	Current Budget (FY 15-16)	Current Actual (7/15-11/15)	Proposed Budget (FY 16-17)	Proposed ForeCast (FY 17-18)	Notes
Revenues/Income						
Submission Income	\$ -	\$ -	\$ -	\$ -	\$ 15,000.00	No revenue is expected during free submission offer
Expenditures						
Salaries and Benefits						
Salaries	72,900.00	92,000.00	29,000.00	94,700.00	98,500.00	
Payroll Taxes and Benefits	20,300.00	24,300.00	8,600.00	28,200.00	27,600.00	
Total	\$ 93,200.00	\$ 116,300.00	\$ 37,600.00	\$ 122,900.00	\$ 126,100.00	
Promotion						
Brochures						
Workshops/Webinars/ Univ Course						
Marketing Plan Implementation ²						
Total	\$ 2,400.00	\$ 26,000.00	\$ 100.00	\$ 26,000.00	\$ 26,000.00	
Committee Travel (Transportation only)						
Winter, Annual Meetings				7,000.00	8,000.00	
Interim Meeting (2 days)				3,500.00	4,000.00	
Committee Presentation Travel				1,800.00	1,800.00	
Total	\$ 10,300.00	\$ 12,000.00	\$ 2,000.00	\$ 12,300.00	\$ 13,800.00	
Conference Calls	\$ 800.00	\$ 1,500.00	\$ 200.00	\$ 1,000.00	\$ 1,000.00	
Development Costs						
Pilot Programs						
Development Costs for future application						
Total	\$ -	\$ 15,600.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	
Outside Services						
TBD						
Total	\$ 1,200.00	\$ 10,400.00	\$ -	\$ 10,000.00	\$ 10,000.00	
TOTAL REVENUES	\$ -	\$ -	\$ -	\$ -	\$ 15,000.00	
TOTAL EXPENDITURES	\$ 107,900.00	\$ 181,800.00	\$ 54,900.00	\$ 187,200.00	\$ 191,900.00	
NET TOTALS	\$ (107,900.00)	\$ (181,800.00)	\$ (54,900.00)	\$ (187,200.00)	\$ (176,900.00)	
Other Items to be considered:						
Marketing Plan Implementation ²				\$100,000	\$100,000	Estimated costs spread out over two years.
On-line Data Entry & Database ³				\$62,000	\$62,000	Depreciation from \$188K expected capital cost
Total				\$162,000	\$162,000	
¹ \$35,500 in Opportunity funds were spent in FY 14-15 for the Godfrey Marketing Plan phase 1 work. The second payment of \$15,000 came from the Development costs line item.						
² Marketing Plan Implementation Breakdown						
Trade Publication Ads				\$75,000		
Website redesign				\$25,000		
Rebranding (Logo redesign & registration)				\$15,000		
Rebranding (Label & documentation redesign)				\$20,000		
Brochures (develop copy, art, design, & printing)				\$20,000		
Brochure mailing costs				\$10,000		
Social media marketing				\$10,000		
Media and Association Relations				\$25,000		
			Total	\$200,000		
³ On-Line Data Entry & Database Breakdown						
Design (4 weeks)				\$38,000		
Development (12 weeks)				\$98,000		
Implementation (3 weeks)				\$32,000		
QA & Deployment (2 weeks)				\$20,000		
			Total	\$188,000		

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