



MINUTES
TRAINING AND EDUCATION COMMITTEE (TEC)
2022 Annual Meeting
June 26, 2022
Toronto, ON Canada

Members Present

Keith Reihl, TEC Chair
Jim Vallort, TEC VC Planning
Jesse Fisher, TEC VC Operations
Jason Alfonso
Tim Ashby (Incoming member)
Michael Langton
Kozen Law (Incoming)
Adeeba Mehboob (Incoming member)
Cheng Wee Leong
David Meredith
Jim Piscopo (Incoming member)
Terry Schroeder
Andrew Sneed

Staff Present

Tim Kline
Karen Murray (Staff Liaison)
David Soltis

Action Items

<u>No.</u>	<u>Page</u>	<u>Responsible</u>	<u>Action</u>
1	2	Staff Liaison	Share June financial report.
2	2	Staff Liaison	Include required break-even numbers on the attendance reports.
3	3	Staff Liaison	Include conference attendance in the course reports.
4	3	Staff Liaison	Investigate a survey of individuals that registered for past meetings and didn't register for Toronto.
5	4	eLearning Staff	Review registrant data to determine courses users.
6	5	Staff Liaison	Ballot committee approval of upcoming fall online courses.
7	5	TEC Chair/ Staff Liaison	Establish dates for committee orientation.
8	5	TEC Chair/ Staff Liaison	Establish upcoming committee meeting dates.

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1. Call to Order

Mr. Reihl called the meeting to order at 1:00pm.

2. ASHRAE Code of Ethics Commitment

Mr. Reihl advised everyone present that the meeting would be held in compliance with the ASHRAE Code of Ethics and Core Values.

The committee was encouraged to focus on empathy and assume positive intent during discussions and interactions.

3. Introduction of Members and Visitors

Committee members, guests and staff introduced themselves.

4. Review Agenda

No changes noted.

5. Approve Minutes of the January 12, 2022 Meeting

Mr. Langford moved and Mr. Vallort seconded approval of Minutes from the January 12, 2022 committee meeting. Motion passed unanimously (CNV). Minutes posted on PDC page, ASHRAE Website.

6. Financial Report

Ms. Murray referenced the May 2022 financials noting overall revenue and expenses. In-company and instructor-led course revenues are high; eLearning revenue is close to budget; while revenue from HVAC Design training, conference courses, and Self-Directed Learning is comparatively low.

Action 1: Staff Liaison to share June financials.

Action 2: Staff Liaison to include required break-even numbers on the attendance reports.

7. Staff Reports

7.1 ASHRAE Learning Institute

Ms. Murray reviewed year-end course registrations. She reported a record number of registrants for the virtual Level I training in early June which significantly boosted overall registration and revenues. She also noted that course registrations for the current conference are lower than expected.

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Summary of ALI Course Registrations (July 1, 2021 – June 30, 2022)

	Winter	Annual	Online	In-Company	Chapter	Industry	HVAC I	HVAC II	GTC	TOTAL*
2021-2022	492	76	852 [†]	678	444	0	598	405	36	3,581
Las Vegas/Toronto	\$100,966	\$18,863	\$169,833	\$254,192	\$29,400	\$0	\$581,597	\$250,641	\$11,727	\$1,417,219
2020-2021	0	0	3,482 [‡]	1,022	400	1,008	373	82	1,782	8,149
Virtual/Virtual	\$0	\$0	\$190,291	\$113,929	\$7,524	\$32,328	\$360,863	\$50,706	\$114,667	\$870,308
2019-20	1,138	0	7,661 [§]	665	200	42	312	250	339	10,607
Orlando/Virtual	\$230,081	\$0	\$172,401	\$239,050	\$4,960	\$21,639	\$321,406	\$170,808	\$115,941	\$1,276,286
2018-19	746	212	260	735	600	453	582	330	730	4,648
Atlanta/Kansas City	\$132,433	\$44,628	\$61,365	\$155,328	\$16,390	\$43,863	\$542,576	\$212,291	\$172,659	\$1,381,533
2017-18	838	173	417	1,813	400	124	565	441	154	4,925
Chicago/Houston										\$0
2016-17	1,161	231	449	882	405	51	680	383		4,242
Vegas/Long Beach										\$0

* Does not include eLearning or SDL registrants.

† Includes 247 registered for a free online webinar.

‡ Includes 2,584 registered for free online webinars.

§ Includes 6,909 registered for free online webinars.

In-person HVAC Design Training venues were added back to the schedule in March 2021, and registrations are slowly increasing. The 2022-23 schedule targets one in-person Level I & Level II (combo), one virtual Level I, and one virtual Level II training each month. Registration for the in-person training is capped at 60 and the virtual training is capped at 45.

2021-22 Quarterly HVAC Design Training Revenue and Registrations

	Revenue	Total Regs	Member	NonMbr	Combo F2F	Virtual Level I	Virtual Level II
Jul-Sep 2021	133,413	165	97	68	0	4	3
Oct-Dec 2021	133,228	175	97	78	0	4	4
Jan-Mar 2022	152,676	187	118	69	1	3	3
Apr-Jun 2022	413,956	475	680	461	5	3	3
Total	833,273	1,002	992	676	6	14	13

Action 3: Ms. Murray to include conference attendance in the course attendance reports.

Action 4: Ms. Murray to investigate a survey of individuals that registered for past meetings and didn't register for Toronto.

7.1 ASHRAE eLearning

Mr. Soltis announced that a new, experienced staff member recently joined the eLearning team.

He also reported a new sales partnership with ESCO Group (<https://www.escogroup.org/>) offering eLearning courses to higher education.

Mr. Soltis then presented a PPT summarizing eLearning sales. (See Appendix A.)

Action 5: eLearning asked to review and report registrant data such as member grade, location, individual or company registration, etc. to know where the registrants are coming from.

8. Chair's Report

Mr. Reihl addressed the challenge of the new workforce dynamics and emphasized that a focus has and must be maintained on the quality and integrity of ASHRAE content.

9. 2021-22 MBOs

Updates included in Appendix B.

10. Open Action Items

Updates included in Appendix C.

11. Subcommittee Reports

11.1 Planning Subcommittee

11.2 Operations Subcommittee

12. Old Business

12.1 SDL Product Discussion

The committee discussed the value of the SDLs, and an overhaul is being evaluated. ASPE's program was suggested as a model to review. However, because review and revision of existing courses will be included in the 2022-23 MBOs, the currently open action item is closed. (See Appendix C.)

12.2 Proposed Course Status

12.2.1 Building Decarbonization (TFBD)

The new Introduction to Building Decarbonization course took place yesterday at the Annual Meeting here in Toronto. The two additional two courses, Fundamentals of Decarbonization Design Systems and Equipment Applications, and Operation of Buildings with Decarbonization as a Metric were postponed and removed from the Annual Meeting schedule.

12.1.2 Designing Residential Ventilation Systems to Meet ASHRAE Standard 62.2 (RBC)

The deadline for receipt of the final version of the course was extended. The course is expected to be complete in 2022.

12.1.3 Request for PDHs (TAC)

Awaiting a proposal from the Technical Activities Committee.

13. New Business

13.1 ASHRAE Simplified Rules of Order

The new, simplified rules are effective July 1, 2022.

13.1 Upcoming Fall Online Courses

Email ballot will be sent to committee.

Action 6: Ms. Murray to ballot committee approval of all online courses.

13.2 Subcommittee Assignments

Planning	Operations
Terry Schroeder	Jesse Fisher
Jason Alphonso	Tim Ashby
Adeeba Mehboob	Kozen Law
Jim Piscopo	Kimberly Pierson
Ashley Weekly	Tahir Raza
	Shan Ahmed Siddiqui*

*added post-meeting

13.3 New Member Orientation

New member/leadership meeting will be set-up.

Action 7: Chair/Staff Liaison to establish dates for committee orientation.

13.4 Recognition of Outgoing Committee Members

14. Open Committee Discussion

15. Next Meeting

Doodle poll expected for meeting between chairs and subcommittee kick-off meetings.

Action 8: Chair/Staff Liaison to establish meeting dates.

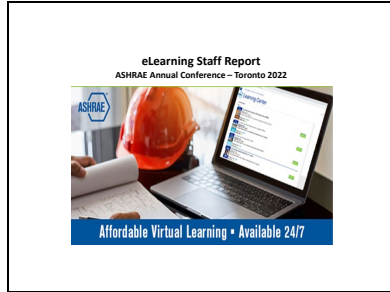
16. Adjourn

The meeting was adjourned at 5:00 p.m.

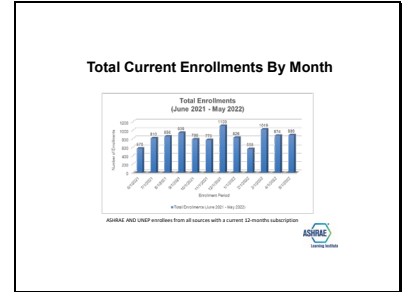
APPENDIX A – eLEARNING REPORT

eLearning Staff Report
 ASHRAE Annual Conference – Toronto 2022

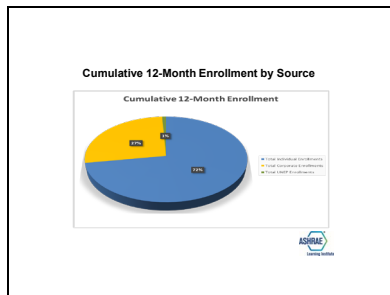
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Slide 2



Slide 3



Slide 4



Slide 5

eLearning Member Benefit	
Period	July to May 2022
eLearning chosen as Member Benefit	3199 as of May
Total Actual Value	\$159,950 as of May

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Course Updates Project	
Fully Updated	8
Awaiting Development	5
Under Development	3
Total	16

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New Courses		
Essentials of DOAS	Complete	July 2021
Solar Decathlon Building Science Education Training	Complete	January 2022
Energy Conservation & Efficiency	Content Dev.	TBD



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ESCO-ASHRAE Partnership

- ❑ eLearning has partnered with ESCO Group (<https://www.esco.org>)
- ❑ Partnership will expand ASHRAE's training into Higher Education Market
- ❑ Launched – May 1, 2022



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Thank you



APPENDIX B – 2021-22 MBOs

Training & Education Committee

MBOs for Society Year 2021-22

Chair: Keith Reihl Date: July 16, 2021

Planning Subcommittee Chair Jim Vallort

Operations Subcommittee Chair Jesse Fisher

Objective	SP	Complete by	Fiscal Impact	Responsible Party	Comment/ Status
1. Review new strategic plan for items that apply to TEC and develop a plan to implement 2 ideas from the review. Implement 1 idea in the fall and 1 in the spring.			None	Planning Subcommittee	List 2 ideas and implement timeline
2. Develop Dashboard for QUICK LOOK analytics for TEC		1-1-22	None	Reihl/Staff	TEC dashboard Dashboard will be created once the new channels have been finalized.
3. Develop/Modify HVAC 101 courses to prepare for CHD exam. Look at BCxP, BEMP, BEAP.			TBD	Planning Subcommittee	Back to instructors. What topics does your course cover? In progress with the instructors (staff) taking the lead.
4. Develop Financial Model for course evaluation				Operations Subcommittee	Draft expected data needs. Per course needs Data collection has been an issue. Staff is currently using a model for each training occurrence that ensures we breakeven.
Additional Recommendations for Strategic Planning: Not currently.					

**Training & Education Committee
 Subcommittee MBOs for Society Year 2021-22**

Chair: Keith Reihl Date: July 16, 2021

Planning Subcommittee Chair Jim Vallort

Operations Subcommittee Chair Jesse Fisher

Objective	SP	Complete by	Fiscal Impact	Responsible Party	Comment/ Status
1. Develop topics and RFPs for an additional (3) practical applications course			None	Planning Subcommittee	Closed as not complete.
2. Review SDLs and issue RFPs for the ones that need updating on prescribed schedule			None	Operations Subcommittee	Combined into a 22-23 MBO
3. Review existing courses and sunset those that have not been used in 5 years or recommend updates			None	Operations Subcommittee	Combined into a 22-23 MBO
4. Every course reviewed by TEC Liaison prior to presentation– Quality check			None	Planning Subcommittee	Complete.
5. Develop marketing plan for TEC courses/branding. Work with ASHRAE marketing to understand and improve			TBD	Operations Subcommittee	Continuous – 1 conf. call early fall and 1 conf. call early spring

APPENDIX C – Open Action Items

PDC Meeting June 11, 2020 (Virtual)

<u>No.</u>	<u>Page</u>	<u>Responsible</u>	<u>Action</u>
1	2	Staff Liaison	Follow-up & determine need and resources for complete SDL updates. Action delayed 2020-21 due to financial constraints. In progress again with new budget. Will discuss at annual meeting. Action closed. This item is indirectly included in the 2022-23 MBOs to establish a comprehensive review policy determine the need to renew, refresh or sunset all ASHRAE learning courses.